

**CABINET: DYDD IAU, 18 EBRILL 2019 at 2.00 PM**

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Cynhelir cyfarfod Cabinet yn Ystafell Bwyllgor 4, Neuadd y Sir ddydd iau 18 Ebrill 2019 am 2.00 pm

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**A G E N D A**

- 1 Cofnodion y cyfarfod Cabinet a gynhaliwyd ar 21 Mawrth 2019 (*Tudalennau 3 - 8*)

**Diwylliant a Hamdden**

- 2 Astudiaeth Ecosystem Gerddoriaeth (*Tudalennau 9 - 144*)  
3 Caearu Canmlwyddiant (*Tudalennau 145 - 148*)

**Addysg, Cyflogaeth a Sgiliau**

- 4 Darpariaeth ysgol newydd i wasanaethu rhannau o Greigiau / Sain Ffagan, Radur / Pentre-poeth a'r Tylgoed (*Tudalennau 149 - 214*)

**Tai a Chymunedau**

- 5 Ymateb i adroddiad Pwyllgor Craffu Plant a Phobl Ifanc a Chymuned a Oedolion o'r enw Atal Pobl Ifanc rhag Ymgymryd â Delio Cyffuriau (*Tudalennau 215 - 232*)

**Buddsoddi a Datblygu**

- 6 Ymateb i Adroddiad Craffu ar Economi a Diwylliant o'r enw 'Gweithdai'r Cyngor a Safleoedd Arloesi' (*Tudalennau 233 - 240*)  
7 Strategaeth Economaidd (*Tudalennau 241 - 364*)

**PAUL ORDERS**  
Chief Executive

Mae'r dudalen hon yn wag yn fwriadol

**CARDIFF COUNCIL  
CYNGOR CAERDYDD**

**MINUTES**



CABINET MEETING: 21 MARCH 2019

Cabinet Members Present: Councillor Huw Thomas (Leader)

Councillor Peter Bradbury

Councillor Susan Elsmore

Councillor Russell Goodway

Councillor Graham Hinchey

Councillor Sarah Merry

Councillor Michael Michael

Councillor Lynda Thorne

Councillor Chris Weaver

Councillor Caro Wild

Observers: Councillor Joe Boyle

Councillor Keith Parry

Councillor Adrian Robson

Also: Councillor Henshaw (Min no 95)

Officers: Paul Orders, Chief Executive  
Chris Lee, Section 151 Officer  
Davina Fiore, Monitoring Officer  
Joanne Watkins, Cabinet Office

**94 MINUTES OF CABINET MEETING HELD ON 21 FEBRUARY 2019**

**RESOLVED:** that the minutes of the meeting held on 21 February be approved

**95 TO RECEIVE THE REPORT OF THE ECONOMY & CULTURE SCRUTINY COMMITTEE ENTITLED 'EVENTS IN CARDIFF'**

On behalf of the Economy and Culture Scrutiny Committee, Councillor Henshaw presented the Scrutiny report entitled 'Events in Cardiff'. The report contained 27 key findings and 12 recommendations for the Cabinet to consider.

**RESOLVED:** that the report of Economy and Culture Scrutiny Committee entitled 'Events in Cardiff' be received and a response be provided by June 2019

## 96 PUBLIC SPACE PROTECTION ORDERS - DOG CONTROL

The Cabinet considered a report outlining proposals for the introduction of a Public Space Protection Order for Dog controls following a six week consultation in Autumn 2018. It was proposed that a balanced set of controls be introduced that would permit dog owners to enjoy Cardiff's open spaces along with those whose enjoyment of the same spaces could be detrimentally affected by the actions of irresponsible dog owners. The introduction of such controls would allow Enforcement Officers to serve Fixed Penalty Notices for specified antisocial behaviour.

**RESOLVED:** that

1. the introduction of a Public Space Protection Order for Dog Controls under Section 59 of the Anti-Social Behaviour, Crime and Policing Act 2014 be approved to include:
  - The prohibition of dog fouling in all public spaces owned and/or maintained by the Council
  - The requirement for a dog owner to have a means of clearing dog fouling.
  - The exclusion of dogs in all enclosed playgrounds and schools, which are owned and / or maintained by Cardiff Council
  - The requirement that dogs are kept on a lead within all cemeteries owned and / or maintained by Cardiff Council
  - A requirement allowing authorised officers to give a direction that a dog (s) be put and kept on a lead if necessary
  - The fixed penalty notice charge for a breach of a Public Spaces Protection Order for dog controls, as set out above, is set at £100.
  - The dog controls will be exempt for persons who have a disability that affects the person's mobility, manual dexterity, physical co-ordination or ability to lift, carry or otherwise move everyday objects, in respect of a dog trained by a registered charity and upon which the person relies for assistance
2. the new policy for Public Space Protection Orders be approved

## 97 SCHOOL ADMISSION ARRANGEMENTS 2020/21

A report outlining the proposed School Admission arrangements for 2019/20 was received. The proposed arrangements had been subject to a consultation process and the three responses received were outlined within the Cabinet report.

**RESOLVED:** that the Council's draft School Admission Arrangements 2019/2020 as set out in the Admission Policy 2019/2020 be agreed.

98 **SCHOOL ORGANISATION PLANNING: THE PROVISION OF ENGLISH-MEDIUM PRIMARY SCHOOL PLACES IN THE LLANRUMNEY AREA**

The Cabinet considered a report outlining a potential solution to reduce the supply of surplus places in the Llanrumney area and improve outcomes for pupils. It was proposed that Glan Yr Afon Primary school be reconfigured to be a one form of entry primary school and seek a federation with another Cardiff primary school. It was noted that the report and option proposed needed to take account of proposals regarding the St Ederyn's development in the Old St Mellons and Pontprennau ward.

**RESOLVED:** that

1. It be noted that the process of federation is to be pursued by Glan Yr Afon Primary School with another Cardiff primary school (to be determined) as part of a wider strategic solution to both reduce surplus places in Llanrumney and to improve pupil outcomes at Glan Yr Afon Primary School.
2. Agreement be given to Officers exploring appropriate capital investment sources routes to consolidate and co-locate Early Years services delivered in the Llanrumney area onto the Glan Yr Afon site

99 **NEW SCHOOL PROVISION TO SERVE PARTS OF PONTPRENNAU AND OLD ST MELLONS**

The Cabinet received a report outlining proposals for the St Mellons Church in Wales Primary School to transfer to the new school site on the new housing development at St Edeyrn's (Local Development Plan Strategic Site G) and expand to 210 places and extend its age range from 4-11 to 3-11 by incorporating a nursery for 48 part time places.

**RESOLVED:** that

1. the proposal for St Mellons Church in Wales Primary School to transfer to the new school site on the new housing development at St Edeyrn's (Local Development Plan Strategic Site G), expand from 105 places to 210 places and extend its age range from 4-11 to 3-11 by incorporating a nursery for 48 part time places be noted
2. it be noted that the statutory consultation process is to be undertaken by the school governing body, and instruct officers to provide all reasonable assistance in this regard.
3. agreement, in principle, be given to the provision of the new school site on the new housing development at St Edeyrn's, subject to appropriate terms being agreed, with advice from the Section 151 Officer and Director of Governance and Legal Services; and

4. the Director of Education & Lifelong Learning be authorised to formally respond on behalf of the Council to the public consultation issued by the school governing body in due course.

100 **21ST CENTURY SCHOOLS BAND B FUNDING**

Cabinet considered a report outlining a proposal to enter into discussions with the Welsh Government regarding participation in the Mutual Investment Model (MIM) funding route for two schemes within Cardiff's 21<sup>st</sup> Century Schools Band B programme. It was reported that the two schemes that would meet the criteria for inclusion as a MIM schemes were Cathays Highs School and Willows High School.

**RESOLVED:** that a dual funding model strategy be pursued to fund the 21<sup>st</sup> Century Schools Programme to include the MIM route for the delivery of our proposed Band B schemes at Cathays and Willows (including 3FE primary).

101 **PAY POLICY STATEMENT 2019/20**

*Senior Officers (Chief Executive, Monitoring Officer and Section 151 Officer) declared personal interests in this matter and left the meeting during consideration of the item.*

The Council had a statutory requirement under the Localism Act 2011 to prepare a pay policy statement annually. Cabinet therefore considered the Pay Policy for 2019/20 prior to consideration at Council. The policy statement provided a framework to ensure that employees are rewarded fairly and objectively without discrimination. In line with the Council's commitment to fairness and transparency the pay policy statement also contained the Council's gender pay gap report. An amendment to appendix 1 was circulated at the Cabinet meeting.

**RESOLVED:** that the attached Pay Policy Statement (2019/20) be approved for consideration by Council

102 **CARDIFF COUNCIL ENERGY (ELECTRICITY AND GAS) PROCUREMENT - PURCHASING STRATEGY FOR 2020-2021**

Cabinet considered approving a minor change to the way in which the Council purchases energy (electricity and gas) supply for the period 2020/21 which would allow a continuation of the supply through the Crown Commercial Services (CCS) framework agreement, which is managed by the National Procurement Services. The contracted value is £9million per annum

**RESOLVED:** that

1. an extension of the Council's energy (electricity and gas) supply arrangements with Crown Commercial Services and the National Procurement Services until March 2021 be approved

2. the Council opt into the ten month advance purchasing arrangements for the 2020/21 supply arrangements,

**103 OLDER PERSONS HOUSING STRATEGY 2018 - 2023**

The Older Person's Housing Strategy for 2019-2023 was considered by Cabinet. The strategy set out steps required to achieve a suitable supply of different accommodation types to enable older people to live independently. It also set out the services and support that are currently in place and the changes that will be needed to meet the needs of the aging population and address wider health and social care priorities.

It was also proposed that amendments be made to the Cardiff Housing Allocation Scheme as this would help to ensure that the needs of older people were met.

**RESOLVED:** that

1. the Cardiff Older Persons' Housing Strategy 2019-2023 as set out at Appendix 1 to the report be agreed
2. the proposed changes to the Cardiff Housing Allocation Scheme as set out at paragraph 28 of the report be agreed.

**104 HOUSING REVENUE ACCOUNT (HRA) BUSINESS PLAN 2019/20**

Cabinet considered the Housing Revenue Account Business Plan for 2019-20. The plan outlined Cardiff's purpose, vision and objectives as a social landlord and set out how these objectives would be achieved together with the plan resource and financial requirements.

**RESOLVED:** that the HRA Business Plan 2019-2020 be approved.

**105 CIVIL PARKING ENFORCEMENT AND MOVING TRAFFIC OFFENCES - CHALLENGES, REPRESENTATIONS AND APPEALS POLICY**

Cabinet considered a policy for challenges, representation and appeals policy associated with civil parking enforcement and moving traffic offences. The policy would ensure that the Council's processes for pursuing outstanding penalties were efficient, effective and easy to understand.

**RESOLVED:** that

1. the new policy (attached as Appendix A to the report) for considering Challenges, Representations and Appeals associated with Civil Parking enforcement and Moving Traffic Offences be approved.
2. Authority be delegated to the Assistant Director Street Scene in consultation with the Cabinet Member for Strategic Planning & Transport to update the policy, from time to time, relating to any changes in legislation, related case law and good practice .

106 **IMPROVING PUBLIC TRANSPORT - RESPONSE TO WELSH GOVERNMENT WHITE PAPER CONSULTATION**

The Cabinet considered the draft response to the Welsh Government White Paper 'Improving Public Transport'. The Welsh Government White Paper set out proposals to legislate for reforming the planning and delivery of local bus services and licencing of taxis and private hire vehicles and Appendix A to the Cabinet report set out the Council's response.

**RESOLVED:** that

1. the content of the Welsh Government's White Paper-Improving Public Transport be noted
2. the response to Welsh Government's White Paper-Improving Public Transport (attached as Appendix A to the report) be approved for submission to the Welsh Government by 27<sup>th</sup> March 2019.

107 **AIR QUALITY FEASIBILITY STUDY OUTLINE BUSINESS CASE- WELSH GOVERNMENT DIRECTION**

The Cabinet received the Clean Air Feasibility Study Outline Business Case which set out the preferred option to demonstrate the steps the Council would undertake to ensure compliance with the legal direction to achieve compliance with the NO<sub>2</sub> legal limits in the shortest possible time.

An addendum to the report was circulated at the Cabinet meeting which related to the consultation on the plan together with an amended recommendation 2.

**RESOLVED:** that

1. the Clean Air Feasibility Study Outline Business Case Report produced by the Council which recommends that the Council's preferred option to achieve compliance in the shortest possible time, **is a package of measures, rather than a Charging Clean Air Zone** be approved.
2. public consultation be undertaken to inform key stakeholders, businesses and the wider public on the Council's preferred option being a package of measures which will be developed into a Full Business Case, and authority be delegated to the Director of Planning Transport and Environment, in consultation with the Cabinet Member for Strategic Planning & Transport, to approve the required consultation documentation.
3. It be noted that the package of measures will be further assessed and developed into a Full Business Case which will be brought to Cabinet for approval prior to submitting to Welsh Government no later than the **30<sup>th</sup> June 2019**, to comply with the requirements of a Final Plan as per the legal direction

**CARDIFF COUNCIL  
CYNGOR CAERDYDD**



**CABINET MEETING: 18 APRIL 2019**

**MUSIC ECOSYSTEM STUDY**

**CULTURE AND LEISURE (COUNCILLOR PETER BRADBURY)**

**AGENDA ITEM: 2**

**Reason for this Report**

1. To allow Cabinet to consider the Sound Diplomacy *Music City Report - Informing a Music Strategy for Cardiff: Music Ecosystem Study and Strategic Recommendations*; agree to develop options for a Music Board for Cardiff as well as developing a Music Strategy Work Programme.

**Background**

2. Capital Ambition sets out the intention for Cardiff to make the most of its cultural assets. It recognises the city's "*cultural offer is an area of competitive advantage and it's cultural and leisure infrastructure is recognised by its citizens as amongst the best in Europe*". This approach recognises and builds on the success of the past two decades where culture and sport have been inventively used to transform the city.
3. The Welsh capital is also firmly established as one of the UK's creative powerhouses, with one of the largest creative sectors outside London. Within Cardiff, the creative economy sector generates over £1bn of GVA for the city's economy each year and employs around 15,000 people, around a third of the sector in Wales. It is therefore appropriate that creativity remains at the heart of Cardiff's regeneration agenda.
4. In terms of its music output, Cardiff is also a leading UK city. Its small and medium sized festivals are internationally renowned, with world-class facilities, a leading orchestra and a number of artists, management companies and promoters. This is in the context of the UK's long standing position as one of the largest music markets in the world, behind only the US, Japan and Germany in 2017. In 2016, music contributed around £4.4 billion to the UK and supported over 142,000 jobs.
5. The UK's live music sector grew by 14% in 2016, and its job market grew 13% during the same period, whilst 30.9 million people attended live shows - 27 million of whom were at concerts and 3.8 million at festivals. The live sector made up a quarter of the total music industry GVA and

20% of the total employment force. Music tourism sustained 47,445 full time jobs whilst music tourism in Wales generated a £115 million spend on concerts and festivals.

6. Cardiff is clearly well positioned to succeed, with an excellent cultural infrastructure and the talent to support a world-class cultural and creative sector. Cardiff is responsible for approximately 30% of the production and 41% of the jobs generated by the core of the Welsh music sector. It generated an output of £153 million, and added £104 million value (GVA) to the local economy in 2016. To make the most of Cardiff's potential, however, there is a need to assess, review, measure and analyse the strengths and deficiencies of Cardiff's cultural assets and infrastructure.
7. To progress this work, Sound Diplomacy - a global leader of the Music Cities movement - have analysed Cardiff's music ecosystem in its entirety in order to identify the most effective strategies for development. The research covers the economy, infrastructure, tourism, education and the built environment. It also seeks to establish the factors which make Cardiff a culturally robust city it is and to set out how to maximise its role as a Music City.

### **Sound Diplomacy Music City Report - Informing a Music Strategy for Cardiff: Music Ecosystem Study and Strategic Recommendations**

8. As one of the fastest-growing cities in the UK, Cardiff has an opportunity to establish itself as a leader in the Music Cities movement, a standard of urban development that champions and promotes music as a tool for growth.
9. Sound Diplomacy make clear that Cardiff already has a thriving music ecosystem, offering live music opportunities that range from local pubs and community venues to national concert halls and major stadiums. Sound Diplomacy also recognise that music is an important component of city's identity and history. While this is still true today, the Sound Diplomacy report makes clear that the music industry would benefit from being aligned with a wider approach to city development. This is important in ensuring that music can continue to support the city's economy, but also in ensuring that the city works to support and champion its musicians and music professionals.
10. The Sound Diplomacy Report therefore analysed Cardiff's music ecosystem to identify the most effective way to use music to promote the city and ensure that the city supports musicians and music professionals. This research considered a series of issues that have the potential to support the local music industry, generate economic impact and improve the quality of life of those who live in, visit or choose to study in the city. These include:
  - **Governance and Leadership:** Strengthening the engagement between the music industry and policy makers

- **Licensing & Police:** Consider if any improvements can be made to the approach to licensing to ensure all relevant parties involved and due regard had to cultural value as well as prioritising safety
- **Spaces and Places:** Supporting musicians with accessible, affordable and adequate facilities to rehearse, record and perform in
- **Planning:** Ensuring music and culture are treated as a core priority, alongside other land uses, in regeneration policies
- **Transport** — Taking the needs of artists, creative businesses and those accessing the arts are taken into account when shaping transport policy
- **Education:** Promoting music education and ensuring it is treated with the same priorities as other subjects since music education, at the earliest age, supports cognitive development, promotes socialisation and engages young minds in ways other subjects do not.
- **Employment & Skills:** Connecting the music industry with the development, growth and success of the city.
- **Tourism & Branding** — Ensuring music is taken seriously as a tool for encouraging tourism given that a thriving music and culture scene is often a priority to attracting investment, jobs and skills.

## **Approach, Methodology and Engagement**

11. The development of the Report included a series of roundtables, interviews and industry surveys to provide a primary source of evidence and opinions of people working in or alongside the music industry. These findings were cross-referenced against national data and adopted policy, and also considered in an international context through comparisons with cities similarity in size and structure to Cardiff.
12. The economic impact of Cardiff's music industry was measured using existing research by the UK Office for National Statistics (ONS) and PRS for Music as well as a survey conducted by Sound Diplomacy. Music industry subsectors were chosen using the UK Standard Classification of Economic Activities 2007 (SIC 2007). These official statistics formed the basis of the direct economic impact figures. Employment figures were determined using the Business Register and Employment Survey (NOMIS) 2016, while incomes were derived from the Annual Survey of Hours and Earning (ASHE) 2016. Indirect and induced economic impacts were found through the input-output matrix and its multipliers, cross-referenced against statistics by the ONS and Cardiff University.

## **Next Steps: Music Board and Work Programme**

13. One of the key recommendations of the Report is the establishment of a Music Board, to empower music stakeholders to represent and champion Cardiff as a music-friendly city on the local, national and international level. The report also makes a series of recommendations about the remit and composition of the Board. As a consequence, Cabinet is recommended to approve work to develop options for a Music Board. This will include a proposed terms of reference and resourcing options which will be brought to a future Cabinet meeting for consideration.
14. It is further proposed that the Council develop a Music Strategy Work Programme to progress the recommendations of the Sound Diplomacy Report, which will also be brought to Cabinet for consideration. Should a Music Board be established, this could potentially represent the most appropriate delivery body for overseeing the implementation of the Report recommendations.

### **Scrutiny Consideration**

15. The Economy & Culture Scrutiny Committee considered this item on 9 April 2019. Their comments are set out in the letter from the Chair attached at Appendix 2.

### **Reasons for Recommendations**

16. To enable Cabinet to move forward with proposals for establishing Cardiff as a Music City

### **Legal Implications**

17. Sound Diplomacy Music City Report - Informing a Music Strategy for Cardiff: Music Ecosystem Study and Strategic Recommendations ('the Music Report'), is submitted to members for the purpose of noting. The recommendations providing that a future report will be submitted to Cabinet to provide a detailed response to the Music Report .The Music Report touches on a number of council functions and roles (planning, licensing, education, transport). Accordingly, when considering the recommendations set out in the Music Report, careful consideration should be given, amongst other matters, to the legal framework and polices that govern the Council functions and roles referred to ( such as planning and licensing) , to consider if the recommendations can be achieved within legal constraints , if desired . This would include identifying what may be regarded as material considerations, when considering such functions. The Music Report also refers to the involvement of different parties in various decision-making processes. To this end, regard will need to be had to the Council's Constitution and how and by whom decisions can be made (whether required by law or as chosen by the Council).

18. One of the recommendations referred to relates to the establishment of a Music Board. In considering this matter regard will need to be had as to the proposed role and responsibilities of the board, its membership, its terms of reference generally and how the same will be resourced /funded
19. Whilst in the present report the decision is to note the Music Report, the future proposed report on this subject will need to address both well-being and Equality issues , including considering the requirements to carry out Equality Impact Assessments

#### Well Being of Future Generations (Wales) Act 2015

20. The Well-Being of Future Generations (Wales) Act 2015 ('the Act') places a 'well-being duty' on public bodies aimed at achieving 7 national well-being goals for Wales - a Wales that is prosperous, resilient, healthier, more equal, has cohesive communities, a vibrant culture and thriving Welsh language, and is globally responsible. In discharging its duties under the Act, the Council has set and published well-being objectives designed to maximise its contribution to achieving the national well-being goals. The well-being objectives are set out in Cardiff's Corporate Plan: When exercising its functions, the Council is required to take all reasonable steps to meet its well-being objectives. This means that the decision makers should consider how the proposed decision will contribute towards meeting the well-being objectives and must be satisfied that all reasonable steps have been taken to meet those objectives.
21. The well-being duty also requires the Council to act in accordance with a 'sustainable development principle'. This principle requires the Council to act in a way which seeks to ensure that the needs of the present are met without compromising the ability of future generations to meet their own needs. Put simply, this means that Council decision makers must take account of the impact of their decisions on people living their lives in Wales in the future. In doing so, the Council must:
  - Look to the long term
  - Focus on prevention by understanding the root causes of problems
  - Deliver an integrated approach to achieving the 7 national well-being goals
  - Work in collaboration with others to find shared sustainable solutions
  - Involve people from all sections of the community in the decisions which affect them
22. The decision maker must be satisfied that the proposed decision accords with the principles above; and due regard must be given to the Statutory Guidance issued by the Welsh Ministers, which is accessible using the link below:  
<http://gov.wales/topics/people-and-communities/people/future-generations-act/statutory-guidance/?lang=en> .

## Equality Duty

23. The Council has to satisfy its public sector duties under the Equalities Act 2010 (including specific Welsh public sector duties) – the Public Sector Equality Duties (PSED). These duties require the Council to have due regard to the need to (1) eliminate unlawful discrimination, (2) advance equality of opportunity and (3) foster good relations on the basis of ‘protected characteristics’. The ‘Protected characteristics’ are:
- Age
  - Gender reassignment
  - Sex
  - Race – including ethnic or national origin, colour or nationality
  - Disability Pregnancy and maternity
  - Marriage and civil partnership
  - Sexual orientation
  - Religion or belief – including lack of belief.

## Financial Implications

24. The report contains a set of priority actions and recommendations for consideration by Cabinet which will be followed by a further report providing a detailed response to the recommendations. The future report will consider the budgetary / cost impact of any decisions arising from the recommendations. The costs associated in preparing a response and any other ancillary matters will be contained within the directorate budgetary allocation for 2019/20.

## **RECOMMENDATIONS**

Cabinet is recommended to:

1. Note the contents of the Sound Diplomacy Music Strategy Report: Music Ecosystem Study and Strategic Recommendations (attached Appendix 1)
2. Agree that a future report be brought to Cabinet to
  - i. Provide a detailed response to the Music Ecosystem Study and Strategic Recommendations (attached Appendix 1).
  - ii. Establish a Music Board, taking into consideration the recommendations of the Sound Diplomacy Music Strategy Report (attached Appendix 1) and including detail of the governance arrangements and the Board’s Terms of Reference.

<b>SENIOR RESPONSIBLE OFFICER</b>	<b>NEIL HANRATTY</b> Director Economic Development
	12 April 2019

*The following Appendices are attached:*

Appendix 1: Sound Diplomacy Music Strategy Report: Music Ecosystem Study  
and Strategic Recommendations

Appendix 2: Letter from Chair of Economy & Culture Scrutiny Committee

Mae'r dudalen hon yn wag yn fwriadol



SOUND  
DIPLOMACY

# CARDIFF

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## MUSIC ECOSYSTEM STUDY AND STRATEGIC RECOMMENDATIONS

**Executive Summary**

# ABOUT THE PROJECT

Cardiff is the fastest-growing city in the UK and looking to establish itself as a leader in the Music Cities movement, a standard of urban development which champions and promotes music as a tool for growth rather than a by-product of it.

Cardiff already has a thriving music ecosystem, an amalgamation of live music opportunities from local pubs to concert halls, stadium shows and everything in between. Music is woven into the city's identity and history, with a world class classical music offer and a springboard for Welsh bands to boost their careers.

In order to maintain and develop this, the city's music industry would benefit from being aligned with wider city strategy surrounding broader economic and population growth. It is important to not only maintain lines of communication between policy makers and industry, but also to adopt a collaborative approach that ensures the city works to support and champion its musicians and music professionals.

This project analyses Cardiff's music ecosystem in its entirety in order to identify the most effective strategies for development. This research is divided into several sections – including economy, infrastructure, tourism, education and the built environment. It aims to establish what makes Cardiff the culturally robust city it is and to set out how to maximise its role as a Music City.

The format of the full report is separated into the following sections:

## CONTEXT

Gives an overview of the current state of the UK's music industry, and Cardiff's place within it.

## CARDIFF'S MUSIC ECOSYSTEM

Provides a comprehensive snapshot of the current state of the city's music ecosystem, based on extensive research in a number of key areas. These areas are: an economic impact of Cardiff's music ecosystem; findings from Sound Diplomacy's mapping of Cardiff's music ecosystem; and key findings on the current state of things from sectors including governance and leadership; licensing; education; planning; funding; transport; employment and skills; tourism and branding; spaces and places; and assets and threats.

## STRATEGIC RECOMMENDATIONS

This section is constituted of 12 recommendations addressing the following areas. Governance and Leadership; Spaces and Places; Education; Artist Development; Professional Development; Audience Engagement; and Music Marketing. Each recommendation comes with 1 or more suggested Priority Action and/or Next Step, as well as a case study from around the world showing best practice.

Front & Back Cover Image courtesy Tafwyl Festival

# METHODOLOGY

Sound Diplomacy developed a unique 4-pronged methodological approach to deliver a comprehensive assessment of Cardiff's music ecosystem:

## STEP 1: ECOLOGICAL IMPACT ASSESSMENT

We completed comprehensive desk research and literature review, and delivered an in-depth regulatory assessment to gain an understanding of current policy and regulations.

## STEP 2: STAKEHOLDER ENGAGEMENT

The survey and industry interviews acted as an integral source of context. Over 1000 individuals engaged with the Cardiff Music Strategy survey and their responses were successfully analysed. We also conducted a series of roundtables and personal interviews with over 100 stakeholders throughout the process.

## STEP 3: QUANTITATIVE RESEARCH

Analysis of official statistics, primary data developed by Sound Diplomacy and results from the survey enabled the creation of an in-depth study of the economic impact of Cardiff's music ecosystem.

## STEP 4: ANALYSIS OF FINDINGS AND RECOMMENDATIONS

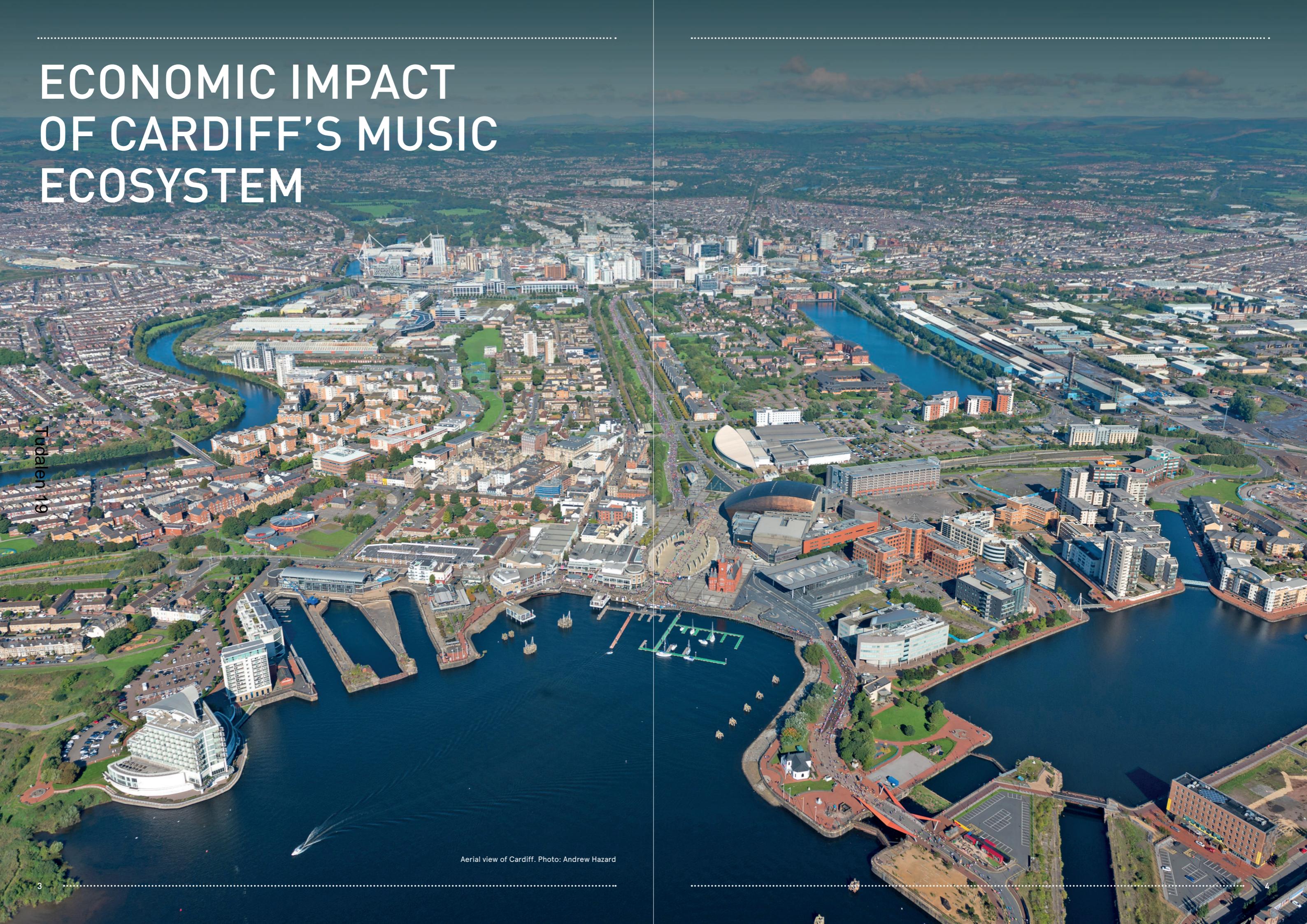
A comprehensive plan for the development of Cardiff's music ecosystem based on the analytical work previously completed.



Hub Festival. Photo: Jonathan Baker

# ECONOMIC IMPACT OF CARDIFF'S MUSIC ECOSYSTEM

Tudalen 19



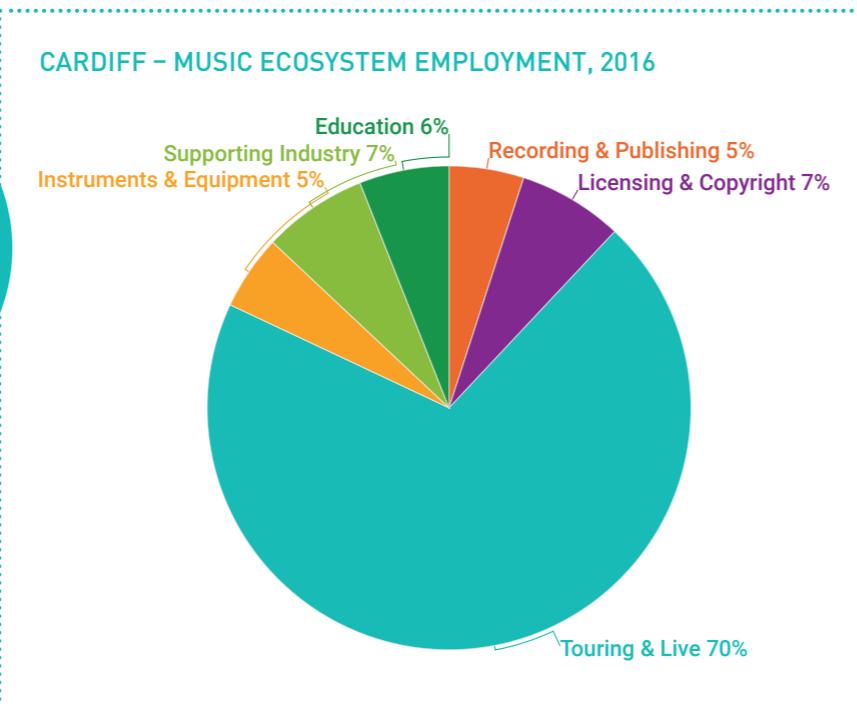
Aerial view of Cardiff. Photo: Andrew Hazard

# EMPLOYMENT AND ECONOMIC IMPACT

Tudalen 20

## EMPLOYMENT

We found that 58% of the jobs generated directly by the music sector are full-time (840) and 42% part-time (600).



## INCOME/ WAGES

Average annual income of artists and creative agents in the music sector is £18,000<sup>1</sup>, with a varied source of income and not necessarily all from music, while technical and management music sector workers<sup>2</sup> earn on average £27,500, an average difference of 44%<sup>3</sup>.

The total number of jobs generated and supported by the music sector in the city was 2,495, for a total income of £75.1 million.

<sup>1</sup> Slightly below the national salary average for music creators of £20,504 (UK Music's Measuring Music 2018 report, p12)

<sup>2</sup> Technical and management music sector workers: teaching and music education professionals, audiovisual broadcasting operators, audio engineers, event promoters.

<sup>3</sup> These estimates are based on the Annual Survey of Hours and Earnings (ASHE) and the survey carried out by Sound Diplomacy

Top: Kizzy Crawford and Sinfonia Cymru. Photo: Warren Orchard  
Bottom: Darkhouse Family, Sŵn. Photo: Hugh Russell

## TURNOVER

The results show that Cardiff's music ecosystem is responsible for approximately 30% of the production and 41% of the jobs generated by the core of the Welsh music sector.



	OUTPUT MILLION £	GVA MILLION £	WAGES MILLION £	EMPLOYEES
Direct impact	70,2	36,9	24,5	1440
Indirect impact	33,0	24,3	17,0	326
Induced Impact	50,0	43,3	33,6	729
Total	153,2	104,5	75,1	2,495



## Total output 153,2 MIO GBP

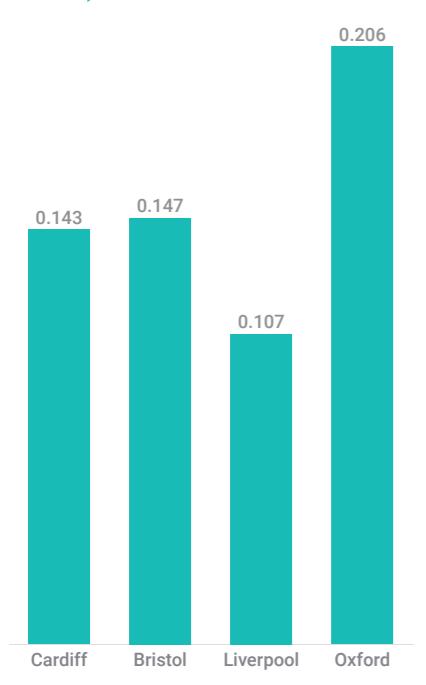
Using Standard Industrial Classification (SIC) codes, we found that live music and touring generated the highest output of the city's music ecosystem, producing 65% of the total income (£45.6 million), and creating 70% of the total number jobs.

## COMPARISON WITH OTHER CITIES

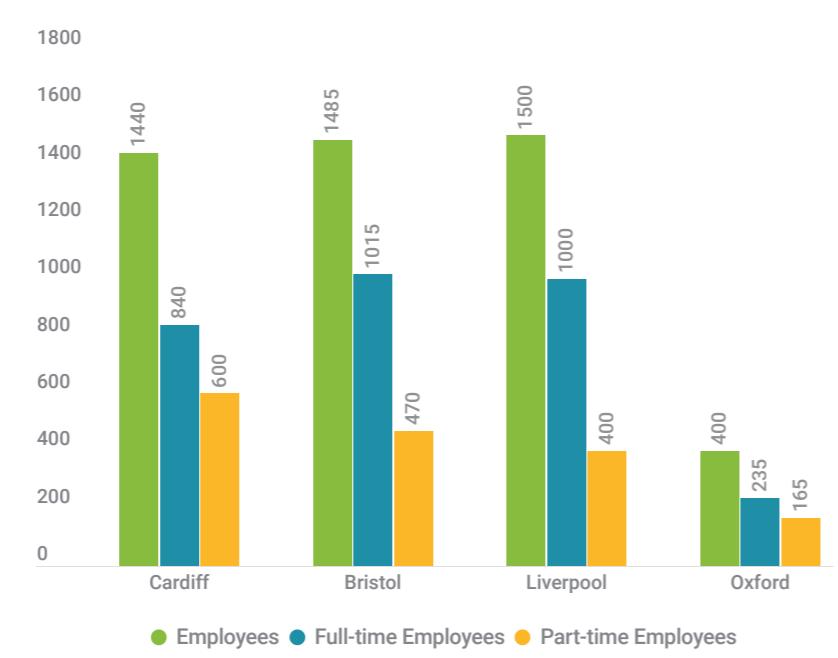
The number of employees working in the music sector in Cardiff is similar to those of Bristol (1,485) and Liverpool (1,500), and much greater than Oxford (400). However, we found that Cardiff generates 4.3 jobs in the music sector for every 1,000 residents, while Bristol, Liverpool, and Oxford only generate 2.7<sup>4</sup>.

Tudalen 21

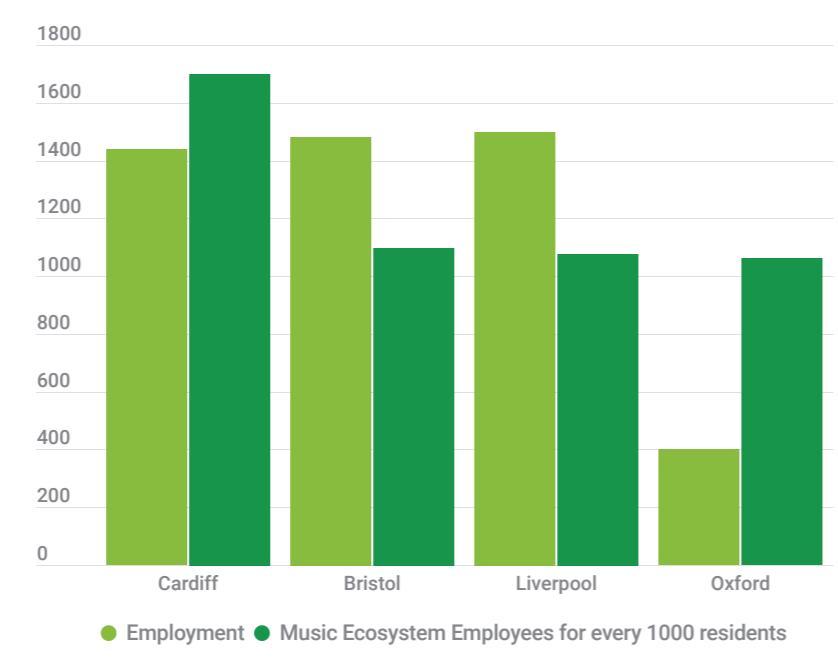
### MUSIC VENUES PER 1,000 RESIDENTS



### COMPARATOR CITIES – EMPLOYMENT, 2016



### COMPARATOR CITIES – EMPLOYMENT, 2016

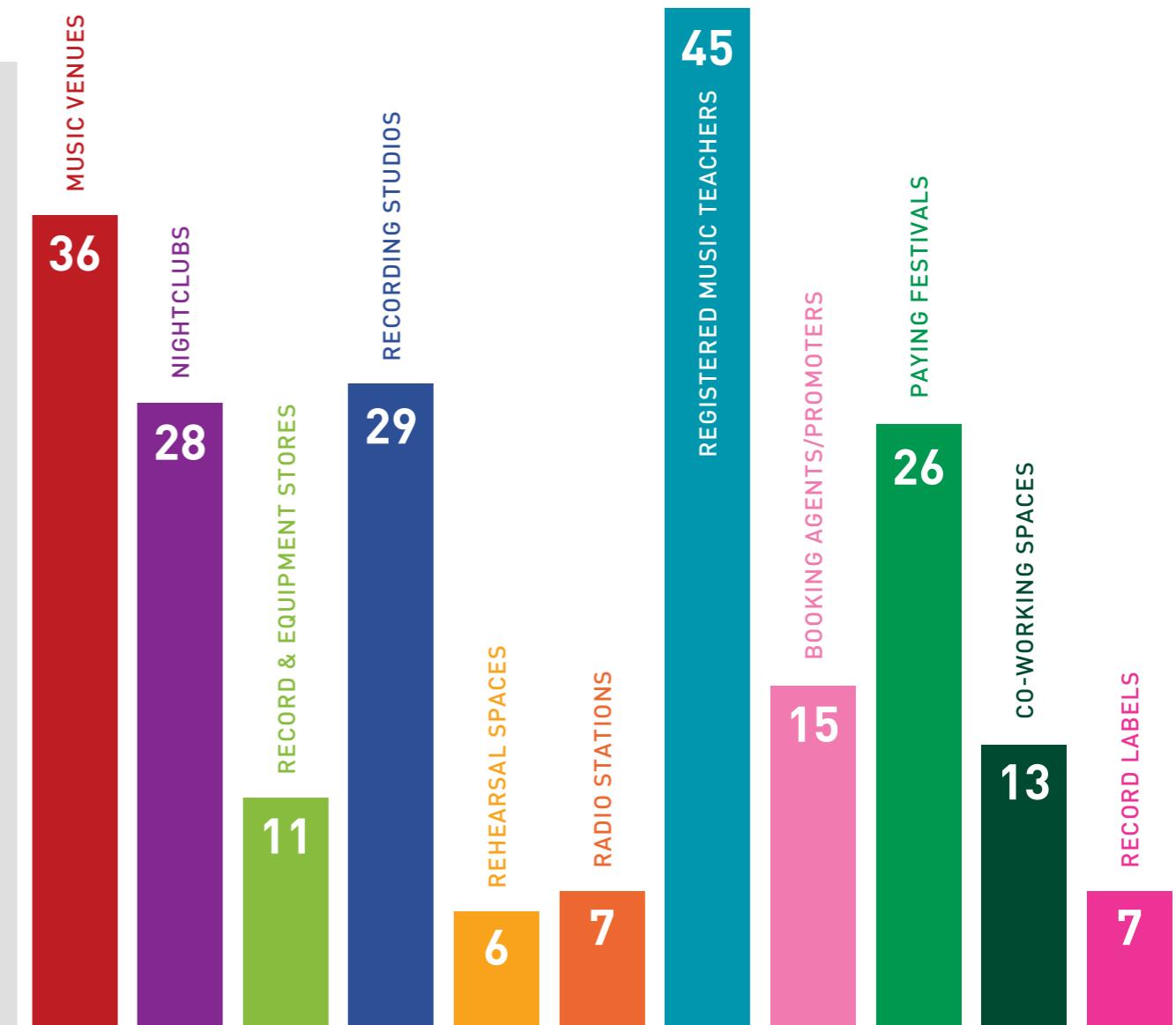


4 Demographic information obtained from the United Kingdom CENSUS 2011

# MAPPING CARDIFF'S MUSIC INDUSTRY

Using Sound Diplomacy's unique tools, we mapped Cardiff's music industry, from venues to businesses and other music assets. There are 36 music venues, 28 nightclubs, 11 record/equipment stores, 29 recording studios, 6 rehearsal spaces, 7 radio stations, 45 registered music teachers, 15 booking agents/promoters, 26 paying festivals, 13 co-working spaces and 7 record labels<sup>5</sup>.

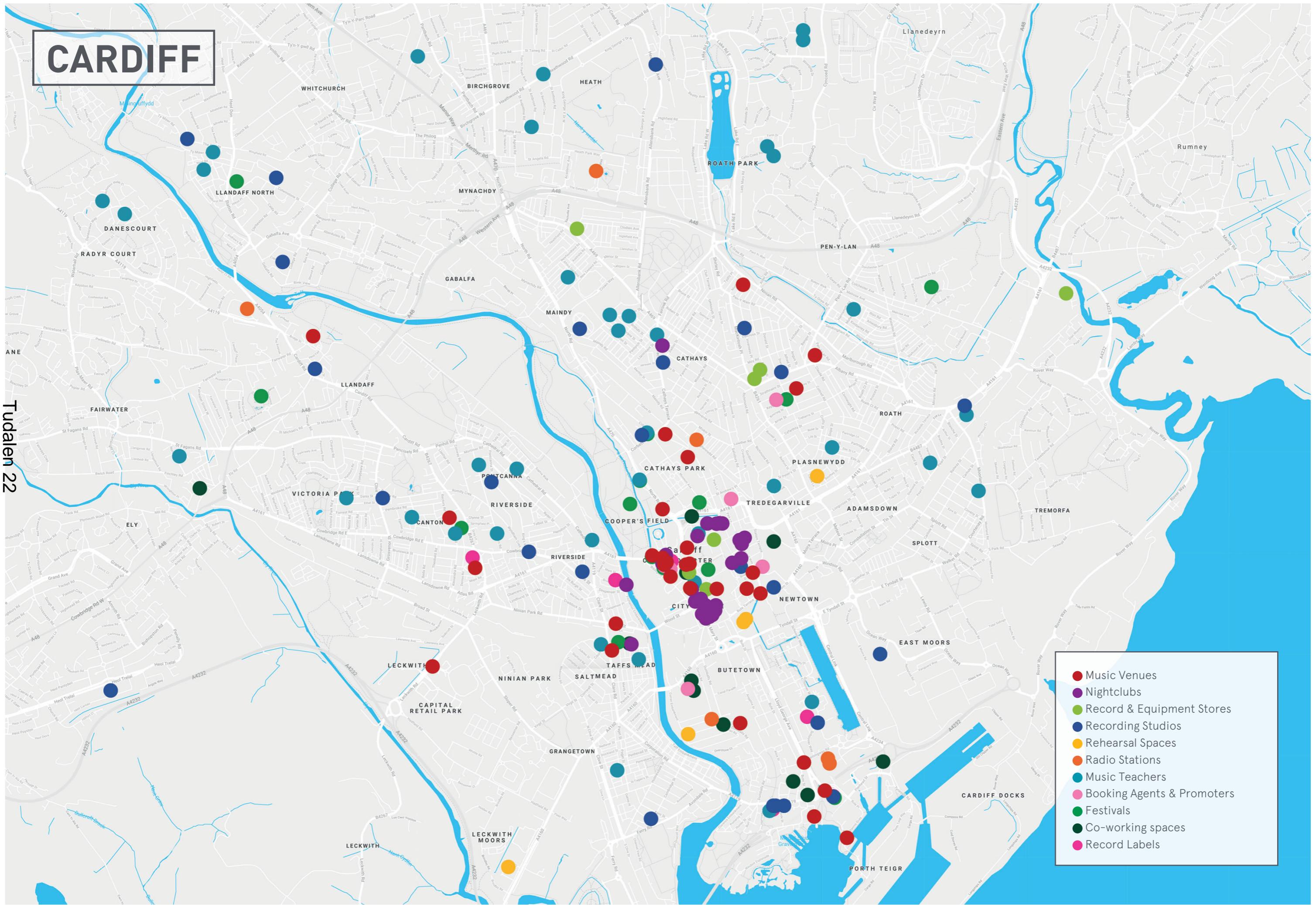
## CARDIFF'S MUSIC INFRASTRUCTURE



5 Mapping information is correct as of July 10, 2018, when the data was researched. Subsequent analysis, such as venues per capita and economic outputs, was calculated using this data.

# CARDIFF

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# KEY FINDINGS



St Davids Hall. Image courtesy St Davids Hall

# KEY FINDINGS

## GOVERNANCE & LEADERSHIP

There is no government affiliated music office. There is a Public Service Board, a collective of night-time economy (NTE) services working towards improving conditions for nightlife and the music industry, although music is never explicitly represented or addressed. FOR Cardiff is one of the biggest champions of night-time safety and investment, but music is not part of its core remit. However, it does support it relatively at its discretion.



GRL TLK, Swn. Photo: Simon Ayre

## LICENSING & POLICE

Many of the noise-related terms in Cardiff's licensing regulations are 'suggestions' or 'guides'. There is no financial assistance available for venues needing to improve soundproofing measures to appease noise complaints.

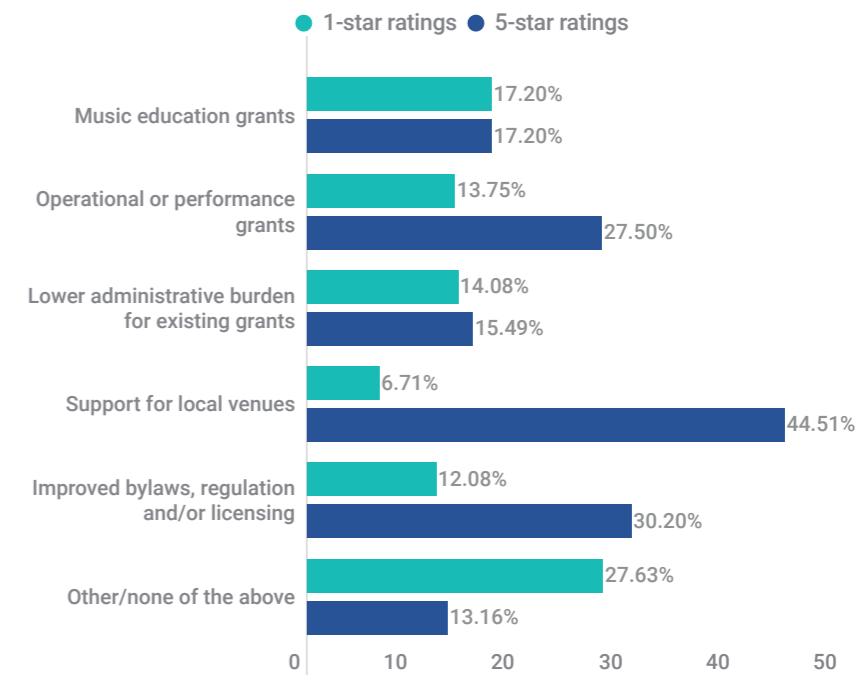
Licenses frequently restrict premises access for certain ages, or limit the hours during which music can be played. Multi-use spaces can also be assigned a single-use class to make it easier to determine licensing terms, even if the use of the venue changes during the evening (i.e. a restaurant which turns into a club at night may have to adhere to restaurant regulations at all times). Many prospective licensees are left in the dark during their application processes, as there is no specific framework in place, nor a list of expectations by which they can prepare their paperwork and business plans.

## FUNDING

Core funding is currently predominantly allocated for the classical music sector, which receives generous support compared to other areas such as music education or contemporary genres. This is not surprising given the high costs associated with classical music – it also often receives financial support from private donors and patrons, something not commonly found in other music genres.

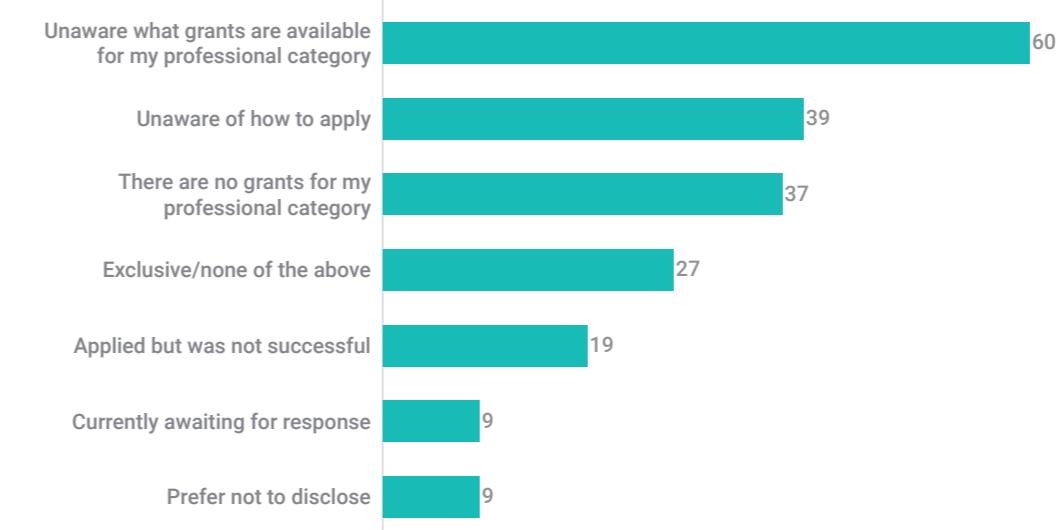
According to recent Arts Council Wales (ACW) statistics, the average % of all national large grants awarded to Cardiff was 27.2% in 2017/2018 (increasing to 37.2% for small grants of under £5K)<sup>6</sup>. There are opportunities to expand the allocated funding for music industry development and Welsh Government schemes to develop a specific strand for Welsh music export activities in collaboration with Wales Arts International.

### RATING OF AREAS TO BENEFIT FROM INCREASED INSTITUTIONAL SUPPORT



6 See Arts Council of Wales (2019)

### REASONS FROM RESPONDENTS WHO HAVE NEVER RECEIVED ANY GRANTS



## SPACES & PLACES

There are some gaps in the venue ladder in the city, which leaves gaps as artists progress through the different levels of their career. Evidence suggests there is a need for **more dedicated, well-equipped venues** that are at a capacity somewhere between bars (which use music as a supplementary product), small clubs and arenas. **Survey respondents suggested a mid-sized venue of approximately 2,000 capacity would be optimal.** Additional survey comments noted a lack of venues in suburban areas.

A lack of diversity of events and venues is a significant issue noted by many survey respondents, particularly in terms of cultural and gender diversity. **Genres such as hip-hop, rap, grime, RnB, jazz, world music and electronic genres are under-represented**, both in terms of events and performers. Accessibility at venues, and a lack of step-free access on public transport, creates **an overall hostile environment for people with mobility restrictions who want to attend events**.



Reuel Elijah, Sŵn. Image courtesy Horizons/Gorwelion (BBC Wales & Arts Council of Wales)

## PLANNING

There are no policies that refer explicitly to music venues in Cardiff's Local Development Plan, and the word 'music' is not referenced.

District Centres prioritise small retail or grocery stores over leisure and entertainment facilities (the LDP states shopping should make up 75% of district centre use)<sup>7</sup>.

There is a tax relief scheme for the creative industries, but the only music-related use is for important orchestral venues, such as concert halls<sup>8</sup>. Recognition of a venue as a national heritage site is often reserved for large elite institutions, such as classical music. There are a few other informally recognised sites, such as Clwb Ifor Bach's surrounding land being purchased to protect and allow for expansion with the help of Cardiff Council and the Arts Council of Wales (ACW).

## TRANSPORT

Long-distance train services end much earlier than Welsh services (trains to London end at 9.30pm, 9pm on Saturdays, while services to Swansea end before 2am, and before 1am on Fridays and just after midnight on Saturdays).

City trains only run until 10.30pm (11.30pm weekends) and many stations aren't accessible for people with disabilities (which also makes it difficult to transport instruments via public transport). There are only 4 night bus routes to suburban areas from the city centre, **leaving large areas unserviced**. Additionally, 2 of these night buses only run Thursdays-Saturdays.

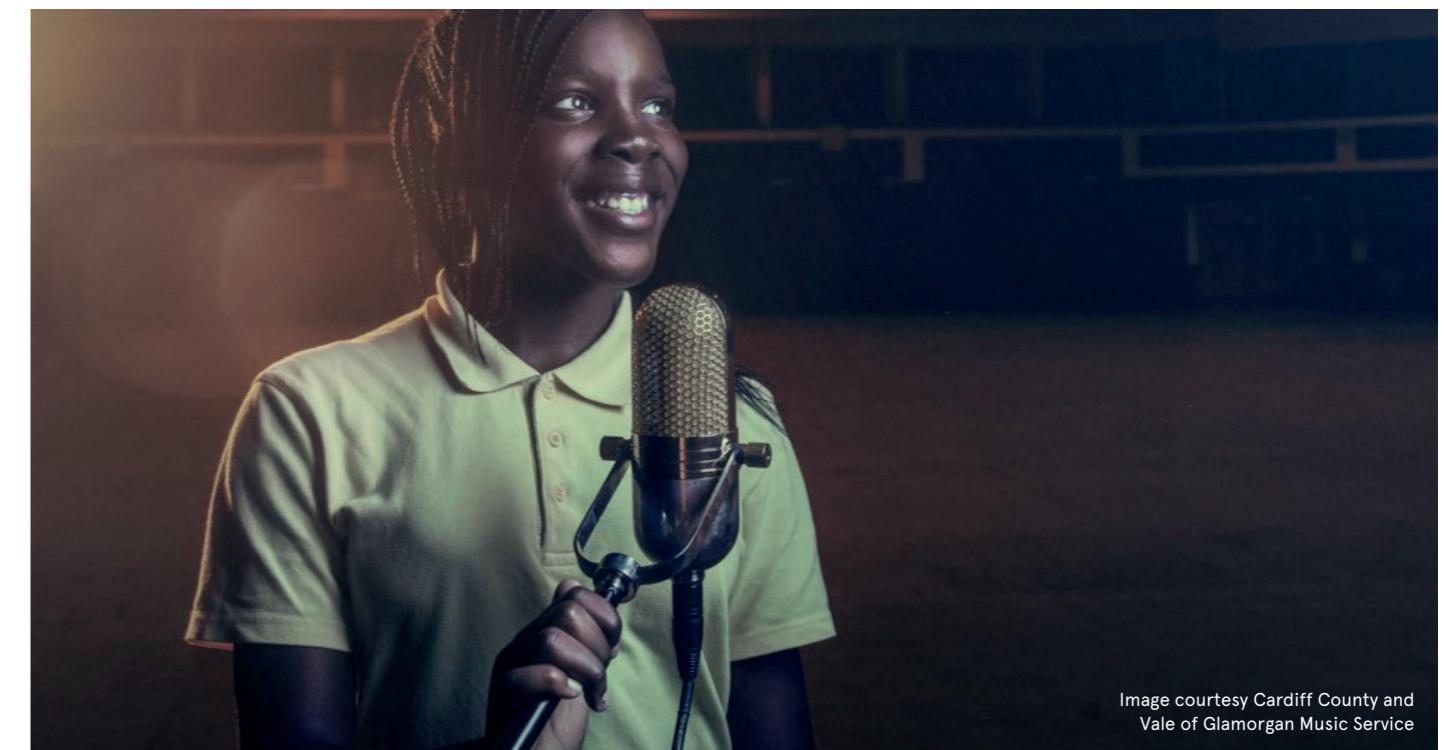


Image courtesy Cardiff County and Vale of Glamorgan Music Service

## EDUCATION

The availability of high quality music industry education was rated poorly and there are limited options for individuals to access training that is linked to industry-demanded skills, whether it's an introduction course to music production/mixing software such as Ableton; playing a particular instrument; or beginning a traineeship in a recording studio.

**Around 56% of artists and 42% of professionals surveyed are self-trained** in both the music and music industry fields, while only about 20% studied music-related topics at university.

<sup>7</sup> Cardiff Council (2006), pg. 181

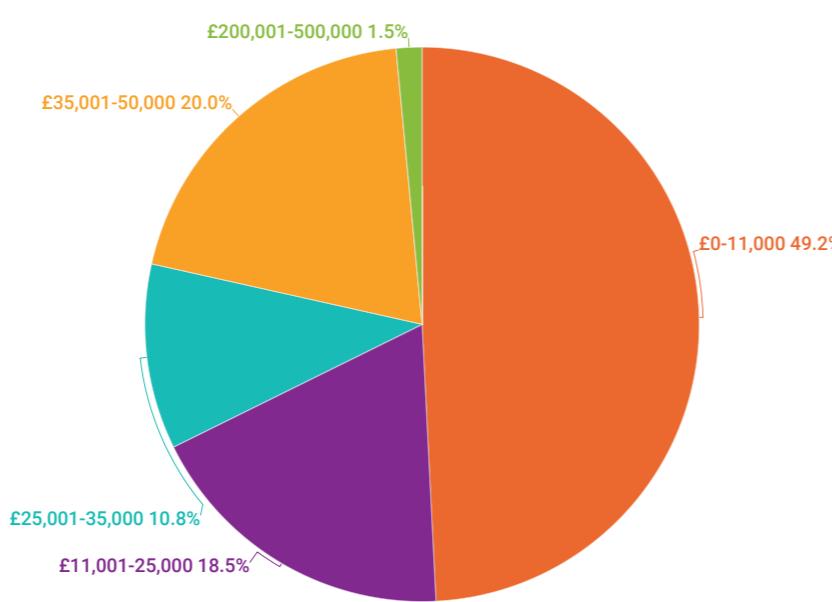
<sup>8</sup> UK Government (2018)

## EMPLOYMENT & SKILLS

Survey insights into local artists' working patterns show that **71% work 20 hours or less in the music industry**, with 87.4% earning between £0 and £10,000 per year. Many will supplement this income with day jobs in other industries, hindering the progress of their careers.

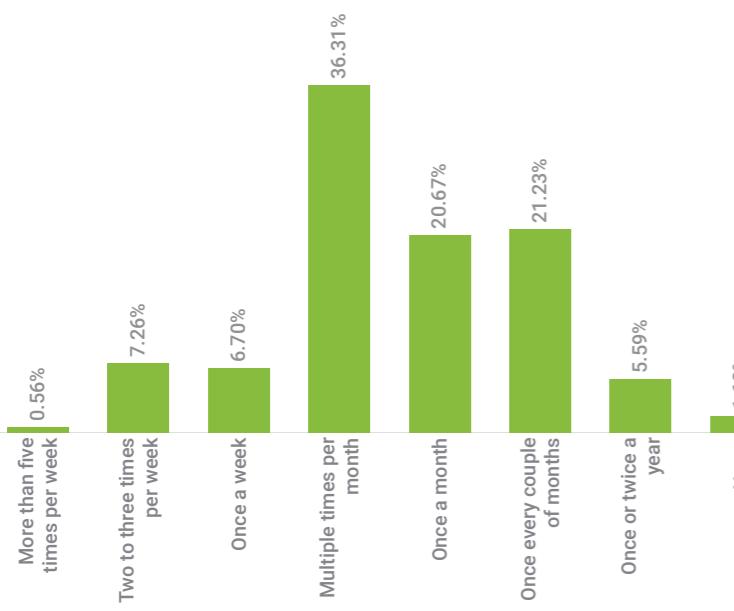
There is no singular directory aggregating Cardiff's music business, professionals and resources. Compiling contact details and creating a base for the network will help bring Cardiff's music industry together.

MUSIC-RELATED INCOME OF 'PROFESSIONAL' AND 'OTHER' RESPONDENTS



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FREQUENCY OF ATTENDING LIVE MUSIC RELATED EVENTS IN CARDIFF



## TOURISM & BRANDING

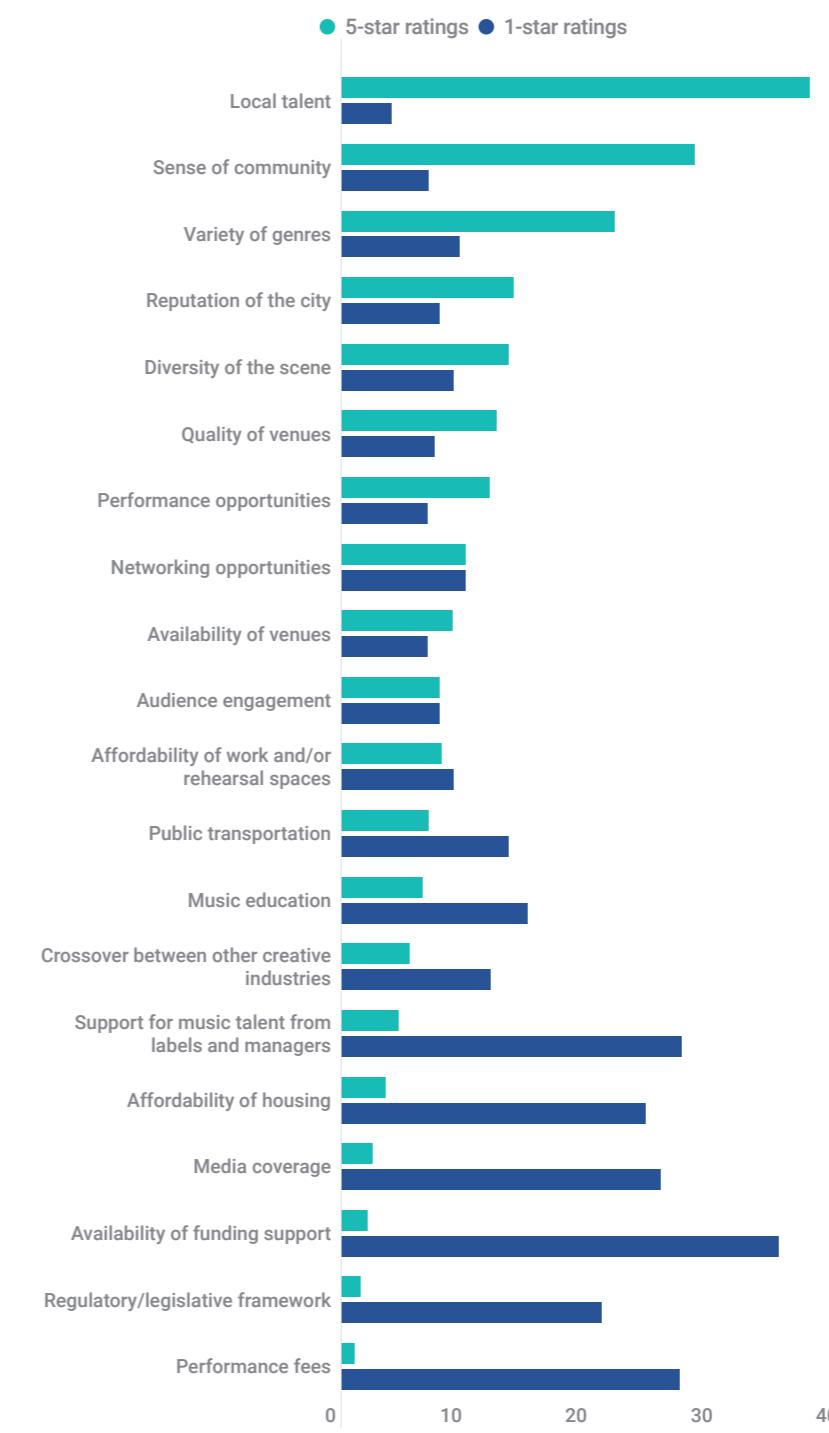
Wales has long been known as "The Land of Song". In 2017, the country generated **£115 million through music**, £55 million of which was made through live concerts and £61 million made through music festivals, and the number of music-related jobs grew by 18%.

75% of those surveyed attended at least one music event per month with 96% of those saying they attended events featuring local and up-and-coming artists.

## ASSETS & THREATS

Overall, the results show that Cardiff music industry professionals believe the city offers a thriving music scene with many events and good audience turnout. However, there is room for improvement. In theory, there is strong support for up-and-coming artists and a good network of professionals to help create events, although this is not effectively galvanized or communicated to those who would use it. There is a need to develop music business skills. **Funding opportunities are scarce**, and those that exist are not communicated sufficiently, leaving musicians often unaware of what opportunities exists.

OVERVIEW OF HIGHEST AND LOWEST RATED ASSETS IN CARDIFF'S MUSIC ECOSYSTEM



# STRATEGIC RECOMMENDATIONS



Welsh National Opera. Photo: Clive Barda/ArenaPAL

## STRATEGIC RECOMMENDATIONS

Each recommendation is explained and mapped out in the complete study. Below is a concise summary of our core findings.

### GOVERNANCE & LEADERSHIP

#### MUSIC OFFICE RECOMMENDATION 1

WORK PRAGMATICALLY WITH ALL STAKEHOLDERS TO UNLOCK THE POTENTIAL OF CARDIFF'S MUSIC ECOSYSTEM

#### PRIORITY ACTION

1.1 Appoint a Music Officer

#### NEXT STEPS & FURTHER ACTIONS

- 1.2 Build and maintain a business directory of the local music ecosystem
- 1.3 Develop a platform to communicate between local residents and music events.

#### MUSIC BOARD RECOMMENDATION 2

EMPOWER MUSIC STAKEHOLDERS TO REPRESENT AND CHAMPION CARDIFF AS A MUSIC-FRIENDLY CITY ON THE LOCAL, NATIONAL AND INTERNATIONAL LEVEL

#### PRIORITY ACTION

2.1 Establish a Music Board

#### NEXT STEPS & FURTHER ACTIONS

- 2.2 Create a Cardiff Music Board Professional Organisations Sub-group
- 2.3 Create a Cardiff Music Board Venues Sub-group
- 2.4 Strengthen and further develop inter-city collaborations.

#### MUSIC-FRIENDLY LICENSING & POLICIES RECOMMENDATION 3

REVIEW EXISTING LICENSING ARRANGEMENTS TO PROMOTE A 'MUSIC-FRIENDLY' CITY

#### PRIORITY ACTION

- 3.1 Streamline permits and licenses required for music activity
- 3.2 Reassess security requirements for venues and events
- 3.3 Improve access to live music events for under-age audiences
- 3.4 Introduce Musician Loading zones for venues in city centre

#### NEXT STEPS & FURTHER ACTIONS

- 3.5 Create a voluntary busking guidance for Cardiff that reflects residents, businesses and musicians needs.

#### GRANTS & FUNDING RECOMMENDATION 4

ECONOMICALLY SUPPORT DIVERSITY IN THE CITY'S MUSIC ECOSYSTEM

#### PRIORITY ACTION

- 4.1 Enable a collaboration framework for funding partnerships
- 4.2 Communicate all existing funding opportunities for the Cardiff music sector in a clear, accessible channel

#### NEXT STEPS & FURTHER ACTIONS

- 4.3 Support music venues, event producers and organisations to improve their company conditions by signposting to helpful organisations.

## SPACES & PLACES

ALLOCATE SPACES FOR MUSICIANS AND INDUSTRY PROFESSIONALS  
**RECOMMENDATION 5**

INCREASE AFFORDABLE MUSIC SPACES AND PLACES AVAILABLE TO ARTISTS AND MUSIC PROFESSIONALS IN CARDIFF

### PRIORITY ACTION

5.1 Develop a Community Music Hub

### NEXT STEPS & FURTHER ACTIONS

5.2 Provide a framework to facilitate temporary leases for local music and cultural organisations in non-traditional spaces.

PLANNING, TRANSPORT, PLACEMAKING  
**RECOMMENDATION 6**

MAXIMISE EXISTING PLANNING TOOLS IN CARDIFF TO PROMOTE A 'MUSIC FRIENDLY' CITY

### PRIORITY ACTION

6.1 Consistently implement Planning Policy Wales 10 and apply the 'Agent of Change' principle in Cardiff

### NEXT STEPS & FURTHER ACTIONS

6.2 Develop a placemaking strategy and masterplan for Castle Quarter which highlights its unique position within Cardiff's music scene

6.3 Engage with the local music sector in the new Cardiff Arena development

6.4 Work with partners to support improved evening and night time public transport accessibility.

## EDUCATION

ACCESS TO MUSIC EDUCATION AT ALL LEVELS AND AGES  
**RECOMMENDATION 7**

BUILD PARTNERSHIPS TO ENABLE A COLLABORATIVE PROVISION OF MUSIC EDUCATION IN CARDIFF

### PRIORITY ACTION

7.1 Create a Map of Musical Opportunities and the relevant pathways to inform participants on how best to plan their musical journey

7.2 Develop a vision for a Universal Music Education Offer for all Young people in Cardiff

### NEXT STEPS & FURTHER ACTIONS

7.3 Introduce music workshops aimed at primary and secondary school students.



On Record, Cardiff Contemporary Festival. Photo: Noel Dacey

## PROFESSIONAL DEVELOPMENT

PROVIDE PROFESSIONAL DEVELOPMENT OPPORTUNITIES FOR THE LOCAL SECTOR  
**RECOMMENDATION 9**

SUPPORT INDUSTRY PROFESSIONALS TO DEVELOP THEIR CAREER, NETWORK AND SKILLS IN CARDIFF

### PRIORITY ACTION

9.1 Organise music business workshops and conferences in partnership with UK organisations and professionals

### NEXT STEPS & FURTHER ACTIONS

9.2 Assess the creation of a Cardiff music business incubation programme.

## ARTIST DEVELOPMENT

PROVIDE ARTIST DEVELOPMENT OPPORTUNITIES FOR LOCAL ARTISTS  
**RECOMMENDATION 8**

CHAMPION ACCESS TO ARTIST DEVELOPMENT OPPORTUNITIES IN CARDIFF REGARDLESS OF AGE, SKILLS LEVEL AND GENRES OF WORK

### PRIORITY ACTION

8.1 Create a 'Fair Play' charter of ethics and certificate for venues

8.2 Create a platform for performance development

### NEXT STEPS & FURTHER ACTIONS

8.3 Create a cross-genre international artist showcase and signature event.



Tibet, Sŵn. Image courtesy Horizons/Gorwelion (BBC Wales & Arts Council of Wales)



On Record, Cardiff Contemporary Festival.  
Image courtesy Freya Dooley & Cinzia Mutigli

## AUDIENCE ENGAGEMENT

### RECOMMENDATION 10

#### EXPAND MUSIC ACTIVITIES IN CARDIFF

##### PRIORITY ACTION

- 10.1 Advocate for increased daytime and community music programming
- 10.2 Create a gig listing platform online that is inclusive and representative of the wider music scene in Cardiff

##### NEXT STEPS & FURTHER ACTIONS

- 10.3 Re-establishing St David's Hall as a world class concert hall.



## MUSIC MARKETING

### MUSIC CITY BRAND BUILDING RECOMMENDATION 11

#### BRING MUSIC STAKEHOLDERS TOGETHER TO BUILD THE CARDIFF 'MUSIC CITY' BRAND

##### PRIORITY ACTION

- 11.1 Define the roles of Visit Cardiff, the Music Office and other stakeholders in the promotion of the city through music

##### NEXT STEPS & FURTHER ACTIONS

- 11.2 Ally strategically with international platforms and tastemakers to promote Cardiff's alternative and underground scenes.

### MUSIC TOURISM ACTIVITIES RECOMMENDATION 12

#### CREATE A CARDIFF 'MUSIC CITY' TOURISM MARKETING STRATEGY

##### PRIORITY ACTION

- 12.1 Create a Cardiff 'Music City' communication plan for both online and offline strategy

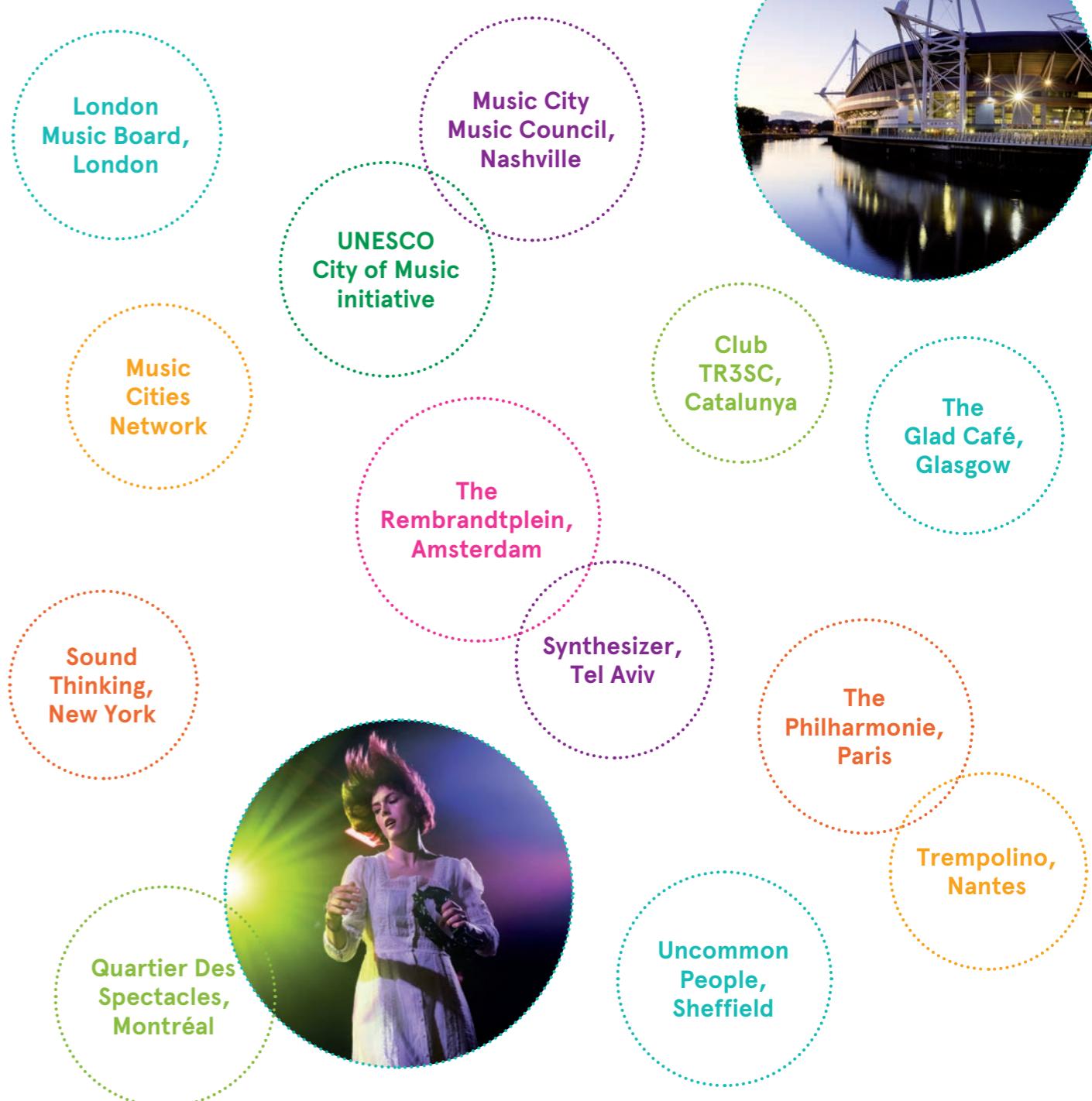
##### NEXT STEPS & FURTHER ACTIONS

- 12.2 Create options to engage with music tourists before and after their arrival
- 12.3 Create a music heritage tour
- 12.4 Bid to host key international music industry events
- 12.5 Explore a partnership with Bristol's Colston Hall.

## CASE STUDIES AND BEST PRACTICE

Top: Principality Stadium. Photo: VisitCardiff  
Bottom: Gwenno, Sŵn. Photo: Simon Ayre

The strategic recommendations found in the full report contain case studies from around the world, highlighting instances of best practice and next steps following implementation. These include:



## CONCLUSIONS

This study has delivered an appraisal of Cardiff's music ecosystem, and a path to harness, foster and develop it. Strengths, weaknesses, opportunities and challenges have been identified and analysed. Cardiff can proudly say it is one of the cities in the world that has invested in and developed a set of strategic recommendations to measure, value and develop the important role its music ecosystem plays in the local economy.

From this point forward, Cardiff Council, partner stakeholders and organisations will be responsible for creating and upholding policy, regulation and support that will prioritise and foster the city's music ecosystem. This will make Cardiff a city admired for it internationally. Bridging the gap between public and private sector will facilitate creatives, businesses

and communities to develop an attractive music offer that residents and visitors will want to engage in. Working together towards a safe, inclusive and sustainable music ecosystem will require hard work and commitment from all sides, but we are positive that it will bring a number of benefits to Cardiff and its residents.



Image courtesy Clwb Ifor Bach

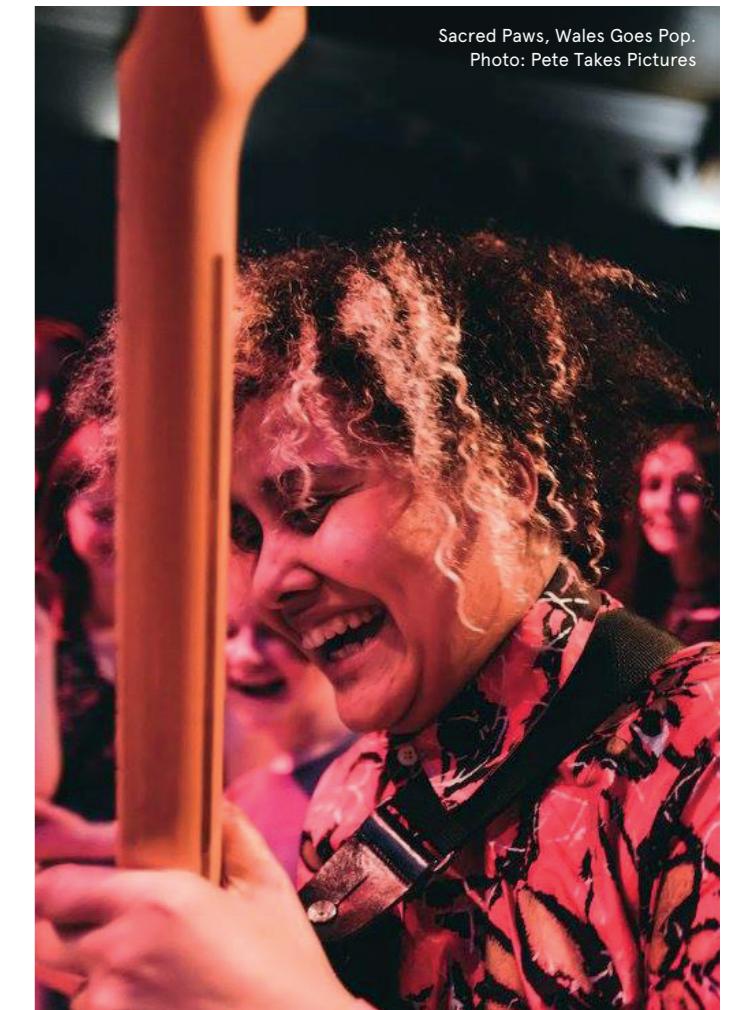
## ABOUT THE AUTHORS



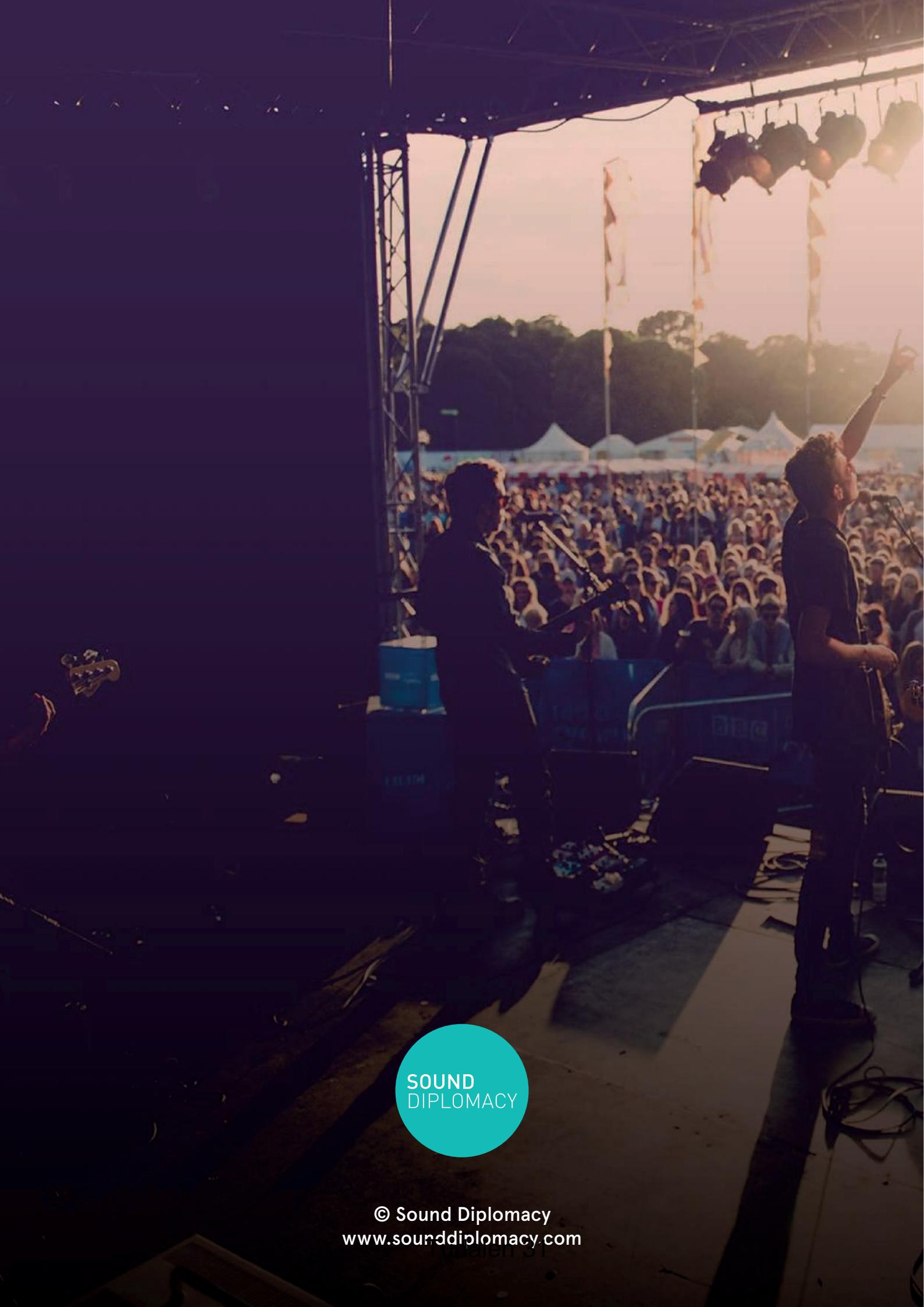
Sound Diplomacy is trusted worldwide to create and deliver strategies that increase the value of music and night time economy ecosystems.

## ACKNOWLEDGEMENTS

Sound Diplomacy would like to thank every individual that worked with us, took an interest in the report, responded to the survey, attended a roundtable and shared information. Your participation and input has been invaluable and the work could not have been done without it.



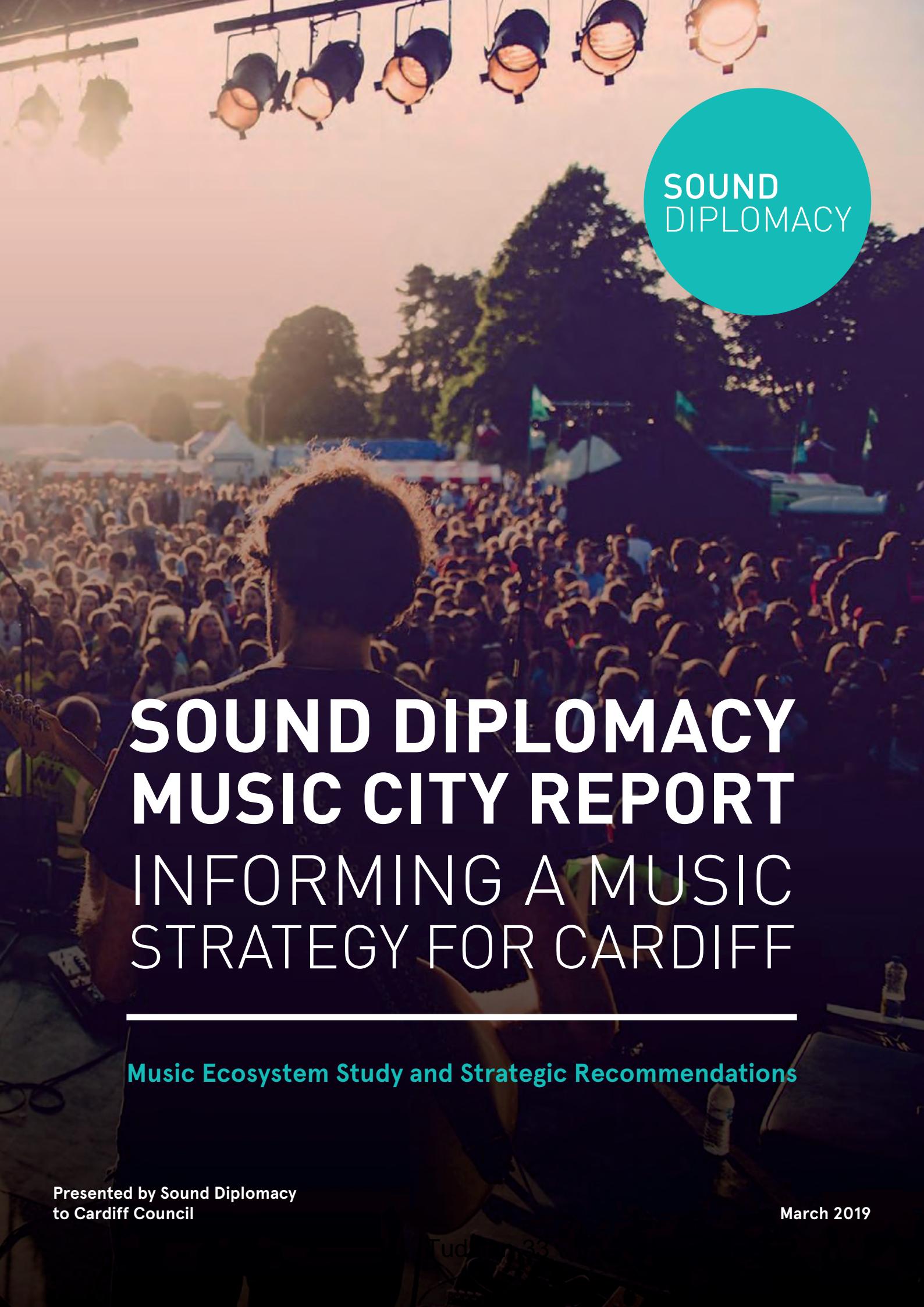
Sacred Paws, Wales Goes Pop.  
Photo: Pete Takes Pictures



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Mae'r dudalen hon yn wag yn fwriadol

A photograph of a large outdoor music festival. In the foreground, the back of a person's head is visible, wearing a straw hat. The crowd extends into the distance under a hazy sky. Stage lights hang from above, and a large green tree stands prominently in the background.

**SOUND  
DIPLOMACY**

# **SOUND DIPLOMACY MUSIC CITY REPORT INFORMING A MUSIC STRATEGY FOR CARDIFF**

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**Music Ecosystem Study and Strategic Recommendations**

Presented by Sound Diplomacy  
to Cardiff Council

March 2019

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Cover Image courtesy Tafwyl Festival

# 1. INTRODUCTION

As both the capital of Wales and its largest city, Cardiff — a multilingual city in a bilingual nation — acts as a nerve centre for Welsh culture as well as domestic and international tourism. The city is the fastest-growing in the UK proportionately, so infrastructures must be put in place or updated in order to foster and support the growth of these sectors.

It can be easy to forget that 'culture' is not an industry, but rather a tapestry of different sectors and economies, each of which carries its own political and infrastructure needs. Cardiff is the first city in the UK to incorporate music urbanism into its city structure, from planning and licensing to social wellbeing and tourism. Music urbanism sees the value that music brings to a city and integrates it across all government departments, rather than reducing it to simply education or as a marketing tool for tourism.

In keeping with this, each department in the City Council must look at music and ask itself how it can best support the local music industry and how it can incorporate music within its own strategies in order to maximise its effects and improve the standard of living within the city. In order to be used effectively, music must be a primary consideration rather than an afterthought. Questions that help define and explore the value of music across each department are:

- **Governance and Leadership** – How strong are the lines of communication between the music industry and policy makers, if they exist at all? Is there a board, and, if so, are there a variety of sectors represented on it? Is there a dedicated council member for music or cultural industries?
- **Licensing & Police** – Consider if any improvements can be made to the approach to licensing to ensure all relevant parties involved and due regard had to cultural value as well as prioritising safety.
- **Spaces and Places** – Do musicians have accessible, affordable and adequate facilities to rehearse, record and perform in? Are there a variety of different capacity music venues? Is there diversity in genre and demographic representation?
- **Planning** – Are music and culture treated as a core priority, alongside other land uses, in regeneration policies? Are cultural and musical provisions being built into new schemes, or are they left to be added as an afterthought?

- **Transport** - Is transport policy taking into account the needs of artists and creative businesses? Is there a sufficient evening and night time economy transport policy that allows for the arts to be showcased and for those enjoying them to be able to travel home safely afterwards?
- **Education** - Is music education being treated with the same priorities as other subjects? Music education, at the earliest age, supports cognitive development, promotes socialisation and engages young minds in ways other subjects do not. Is there an understanding that a city's future business-people and citizens will benefit from musical engagement?
- **Employment & Skills** - How is the music industry involved in the development, growth and success of the city? Is it creating jobs, supporting artistic development and engaging citizens? Is there a policy to develop this?
- **Tourism & Branding** - Is music taken seriously as a potential tool to encourage tourism, support soft-power mechanisms and improve the desirability of the city? A thriving music and culture scene is often a priority to attracting investment, jobs and skills. Is there enough focus on this?

Each of these categories are represented in the key findings outlined below, which have been developed through the earlier regulatory assessment, a series of local roundtables with interviews and a survey issued to Cardiff's music industry professionals. The findings have formed the basis for the recommendations in this report, Cardiff's unique resource to make it a leader in music urbanism.

## 1.1 About the project

**Cardiff is the fastest-growing city in the UK and looking to establish itself as a leader in the Music Cities movement, a standard of urban development which champions and promotes music as a tool for growth rather than a by-product of it.**

Cardiff already has a thriving music ecosystem, an amalgamation of live music opportunities from local pubs to concert halls, stadium shows and everything in between. Music is woven into the city's identity and history, with a world class classical music offer and a springboard for Welsh bands to boost their careers. While this is still true today, the city's music industry would benefit from being aligned with wider city strategy surrounding broader economic and population growth. It is important to not only maintain lines of communication between policy makers and industry, but also to adopt a collaborative approach that ensures the city works to support and champion its musicians and music professionals.

This project analyses Cardiff's music ecosystem in its entirety in order to identify the most effective strategies for development. This research is divided into several sections — including economy, infrastructure, tourism, education and the built environment. It aims to establish what makes Cardiff the culturally robust city it is and to set out how to maximise its role as a Music City.

## 1.2 Methodology

This project began with a series of roundtables, interviews and an industry survey. These provide primary sources for statistics and the experiences and opinions of people working in or alongside the music industry. These findings are cross-referenced with research, which collates relevant newspaper articles and city policy, such as the Cardiff Local Development Plan, Supplementary Planning Guidance, Section 106 laws, and alcohol and noise regulations. The findings are then mirrored in a series of international comparisons with cities chosen for their similarity in size and structure to Cardiff. It is from these findings that our recommendations have been made.

The economic impact of Cardiff's music industry was measured using existing research by the UK Office for National Statistics (ONS) and PRS for Music as well as a survey conducted by Sound Diplomacy. Music industry subsectors were chosen using the UK Standard Classification of Economic Activities 2007 (SIC 2007). These official statistics formed the basis of any direct economic impact figures. Employment figures were determined using the Business Register and Employment Survey (NOMIS) 2016, while incomes were derived from the Annual Survey of Hours and Earning (ASHE) 2016. Indirect and induced economic

impacts were found through the input-output matrix and its multipliers, cross-referenced against statistics by the ONS and Cardiff University.

## 1.3 About the authors

Sound Diplomacy is the leading global advisor on Music Cities and market development. As strategists for cities, developers, large private sector organisations and governments, Sound Diplomacy provides cutting edge research and market expertise in increasing the value of the music business economy at a state, city and regional level through development plans. In addition, we are experts in music tech strategies, from trade missions to market development, research and consulting.

Sound Diplomacy works in both the public and private sectors, currently working in 20 different countries for a number of governments (local, regional and national), property developers, music and music-tech conferences, economic development agencies, arts councils, chambers of commerce, universities, export offices, festivals, brands and record labels.

## 2. CONTEXT

### 2.1 Global context

The UK has long been one of the largest music markets in the world, behind only the US, Japan and Germany in 2017.<sup>1</sup> Music contributed £4.4 billion in GVA to the UK and supported over 142,000 jobs in 2016,<sup>2</sup> showing overall industry growth across all fields since 2012. This includes a 5% growth in the music recording sector, its first growth in five years. The growth in recorded music revenues was led by streaming, which provides an incomparable opportunity to build audiences both in rural areas and abroad.

The UK's live music sector grew 14% in 2016, and its job market grew 13% during the same period.<sup>3</sup> 30.9 million people attended live shows, 27 million of whom were at concerts and 3.8 million at festivals. The live sector made up a quarter of the total music industry GVA and 20% of the total employment force.<sup>4</sup> Music tourism sustained 47,445 full time jobs, up 18% from the year before<sup>5</sup>. In 2017, Wales saw 379,000 music tourists spend £115 million (direct and indirect) on concerts and festivals.<sup>6</sup> Although concerts received higher attendance figures, festival audiences spent more overall, bringing £39 million directly into the economy at popular events such as the Green Man Festival and Festival No. 6.

The effect of the 'Brexit' negotiations are still to be fully determined, although the live industry is expected to be one of the sectors most affected by leaving the European Union. This is particularly true for grassroots and smaller-level foreign artists embarking on their first UK tours, as the amount of bureaucracy involved at the border is expected to increase. However, it also presents the opportunity for UK artists to focus on new markets to export their music to.

### 2.2 Cardiff's place in the UK's music industry

Cardiff has long been the hub of the Welsh music industry, a launch pad from which many bands have gone on to achieve international success. Super Furry Animals, Catatonia, High

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<sup>1</sup> IFPI (2018)

<sup>2</sup> UK Music (2017a)

<sup>3</sup> Ibid.

<sup>4</sup> Ibid.

<sup>5</sup> Ibid.

<sup>6</sup> UK Music (2017b)

Contrast, The Stereophonics and the Manic Street Preachers are among many who honed their craft in the city's venues.

With regards to Classical Music, Cardiff is one of the UK's leading cities, both in infrastructure and provision. There are two world class resident orchestras, the BBC National Orchestra of Wales and the Welsh National Opera Orchestra, and also the Cardiff Philharmonic and Sinfonia Cymru. In terms of infrastructure, The National Concert Hall of Wales (St David's Hall) is widely recognised as being one of the top ten concert halls in the world for acoustics, and Hoddinott Hall is both a concert hall and state-of the art recording studio, also with world class acoustics. Complimenting this offer is the Conservatoire at the Royal Welsh College of Music and Drama and the Doris Stoutzker concert hall.

Wales is known as 'the Land of Song' and has an international reputation for Choirs and Choral activity, and Cardiff is at the epicentre of it, with the BBC National Chorus of Wales, Cardiff Polyphonic Choir, Cantemus Cor Caerdydd and Cardiff Ardwyn Singers all based in the city. Cardiff also hosts the international competition BBC Cardiff Singer of the World and the Festival Of Voice.

Cardiff offers a range of venues from grassroots to stadium. Recent stadium tours include the likes of Beyonce & Jay-Z, The Rolling Stones, Ed Sheeran, Coldplay and Robbie Williams, while Florence + the Machine, Jason Derulo, and George Ezra have all played the Motorpoint Arena in the last year. However, the proximity to Bristol is a challenge, as many national and international acts play there instead of Cardiff.

There is a hive of music activity around Womanby Street, particularly focusing on the rock and indie genres, an area of contemporary music Cardiff specialises in. Womanby Street is a blend of bars and smaller venues including local favourite Clwb Ifor Bach. It is the kind of bustling alleyway that could only have developed organically over years. However, like many of its counterparts across the UK, it is continuously at risk from unsympathetic redevelopment and has already seen some of the city's favourite venues close their doors.

This trend is not unusual, nor is it unique to Cardiff. This report will establish the basis for ensuring that Cardiff's music scene is protected and its individuality is nurtured and championed for years to come.

## 3. CARDIFF'S MUSIC ECOSYSTEM

### 3.1 Cardiff's music economic impact

Cardiff is responsible for approximately 30% of the production and 41% of the jobs generated by the core of the Welsh music sector. It generated an output of £153.2 million, and added value £104.5 million (GVA) to the local economy in 2016. The total number of jobs generated and supported by the music sector in the city was 2,500; the total income of these jobs was £75 million.

#### DIRECT IMPACT

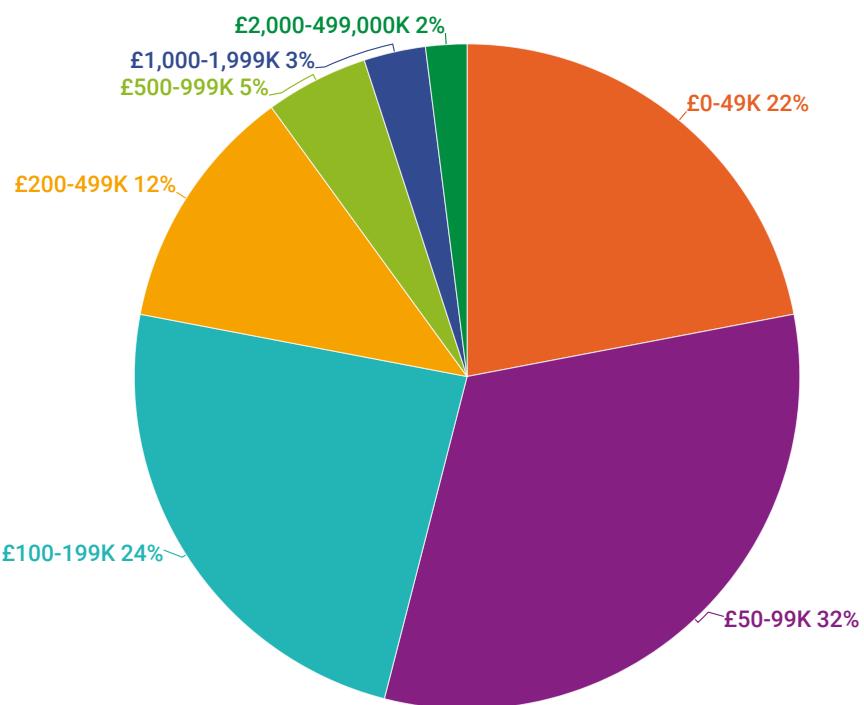
The direct impact reflects the economic value of the core of the music ecosystem within the local economy using four standard economic variables: output, GVA, employment, and wages. In 2016, 200 enterprises, of which 15 were non-profit, made up Cardiff's music ecosystem. These businesses produced an output of £70 million, and an estimated GVA of £37 million. They were responsible for 1,440 employees, which represents 41% of the sectoral employment in Wales.

Annual business turnover breaks down as follows: 22% generated £0-£49,000, 32% generated £50,000-£99,000, and 24% £100,000-£199,000. In other words, 78% of the enterprises are in the three lowest turnover categories defined by the survey (Graphic 1).



Aerial view of Cardiff. Photo: Andrew Hazard

## GRAPHIC 1: CARDIFF – MUSIC ENTERPRISES TURNOVER, 2016

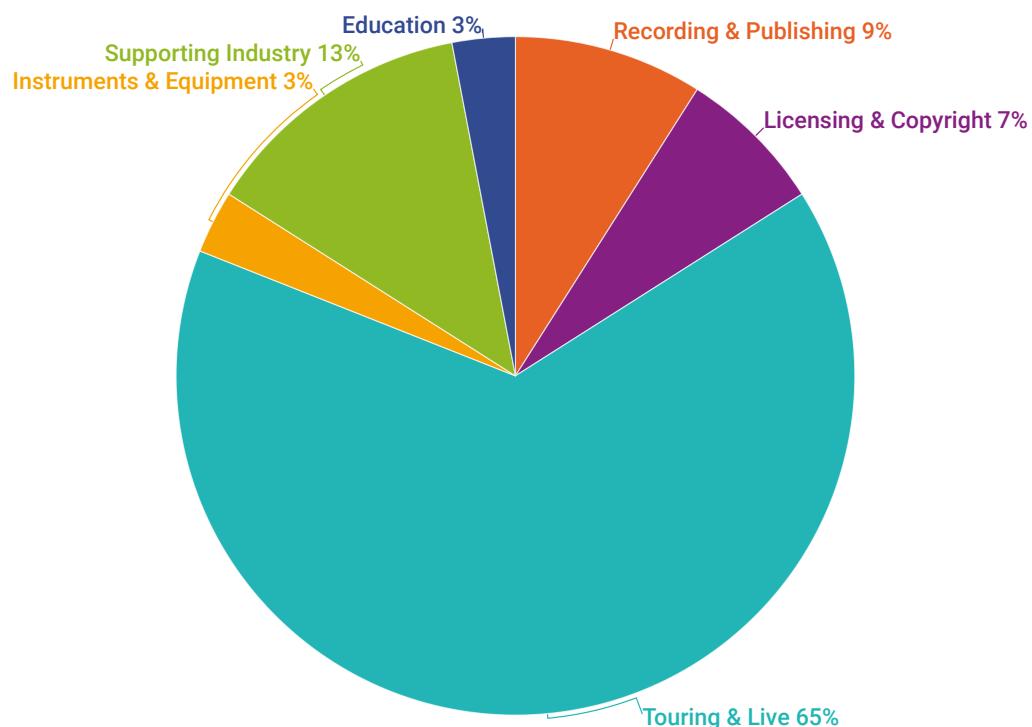


Using Standard Industrial Classification (SIC) codes, we found that live music and touring generate the highest output of the music ecosystem in the city, producing 65% of the total income (£45.6 million) and creating 70% of the jobs. Following that are the supporting industries (13% value) and recording and publishing (9%).



GRL TLK, Sŵn. Photo: Simon Ayre

**GRAPHIC 2: CARDIFF – MUSIC ECOSYSTEM OUTPUT, 2016**



## DIRECT EMPLOYMENT

We found that 58% of the jobs generated directly by the music sector are full-time (840) and 42% part-time (600). Additionally, 63% of the jobs generated are related to artistic and creative activities<sup>7</sup>, while the remaining 37% is associated with commercial, technical and management support<sup>8</sup>.

Average annual income of artists and creative agents in the music sector is £18,000<sup>9</sup>, with a varied source of income and not necessarily all from music, while technical and management music sector workers<sup>10</sup> earn on average £27,500, an average difference of 44%. These estimates are based on the Annual Survey of Hours and Earnings (ASHE) and the survey carried out by Sound Diplomacy.

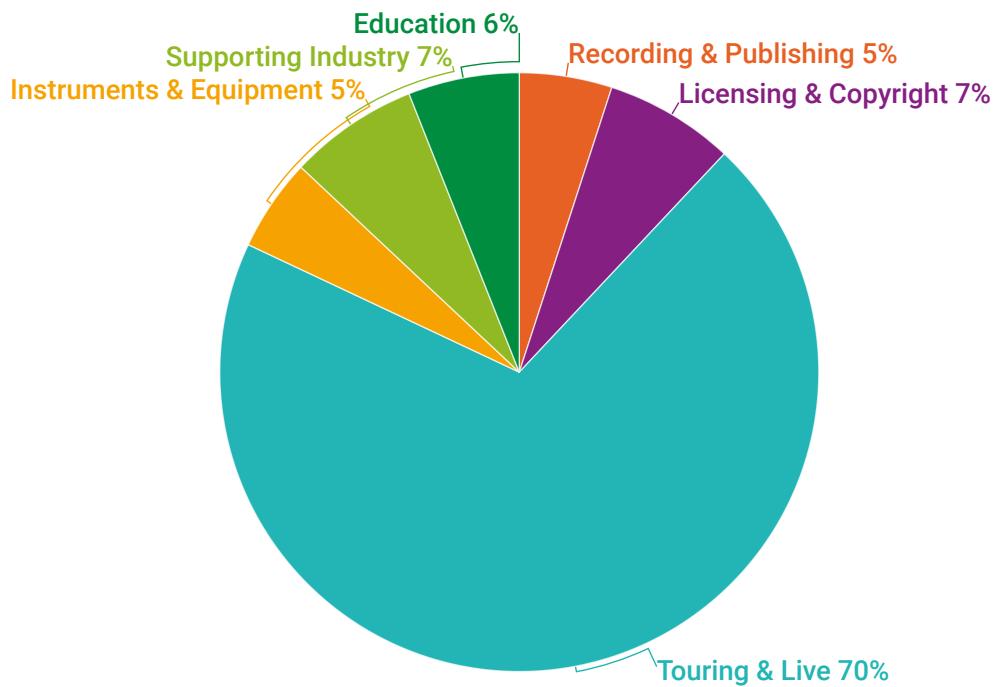
<sup>7</sup> Artistic and creative activities are those that are involved in the processes of creation and production within the music ecosystem, whether for live music or recorded music, for example musicians, authors, photographers, designers, among others.

<sup>8</sup> Commercial, technical and management support are those that are related to the distribution and retail of goods and operational and support services within the music ecosystem.

<sup>9</sup> Slightly below the national salary average for music creators of £20,504 (UK Music's *Measuring Music 2018* report, p12)

<sup>10</sup> Technical and management music sector workers: teaching and music education professionals, audiovisual broadcasting operators, audio engineers, event promoters.

### GRAPHIC 3: CARDIFF – MUSIC ECOSYSTEM EMPLOYMENT, 2016

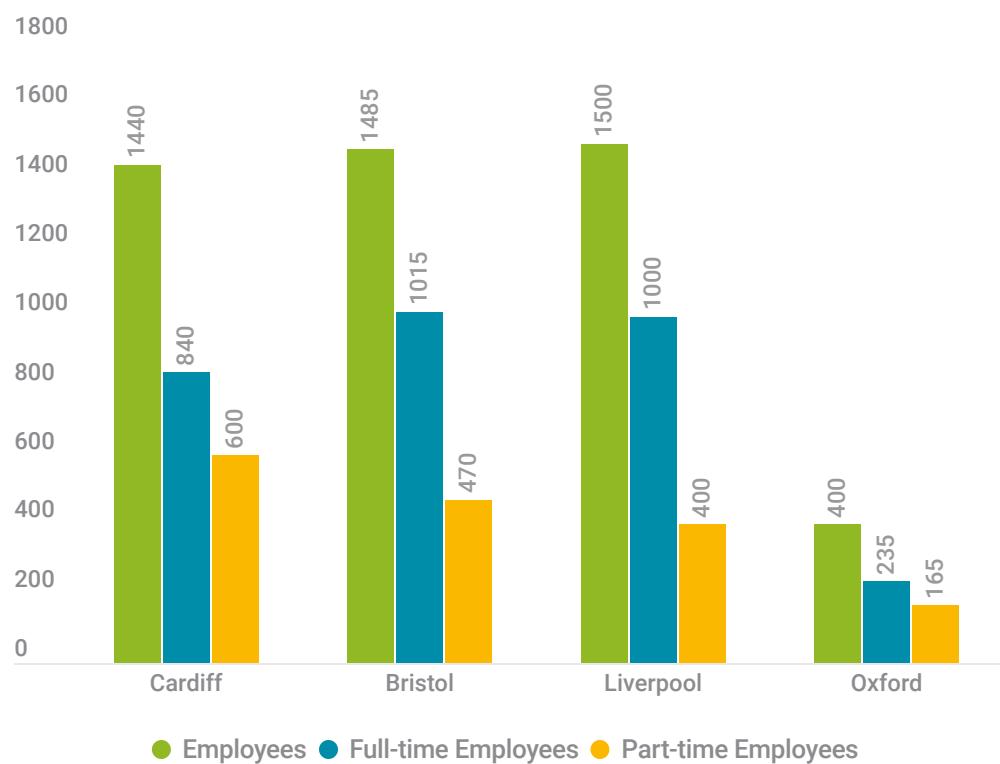


The number of employees working in the music sector in Cardiff is similar to those of Bristol (1,485) and Liverpool (1,500), and much greater than Oxford (400). However, we found that Cardiff generates 4.3 jobs in the music sector for every 1,000 residents, while Bristol, Liverpool, and Oxford only generate 2.7 (Graphic 5)<sup>11</sup>. This highlights the city's focus on the development of the music ecosystem compared to other cities.

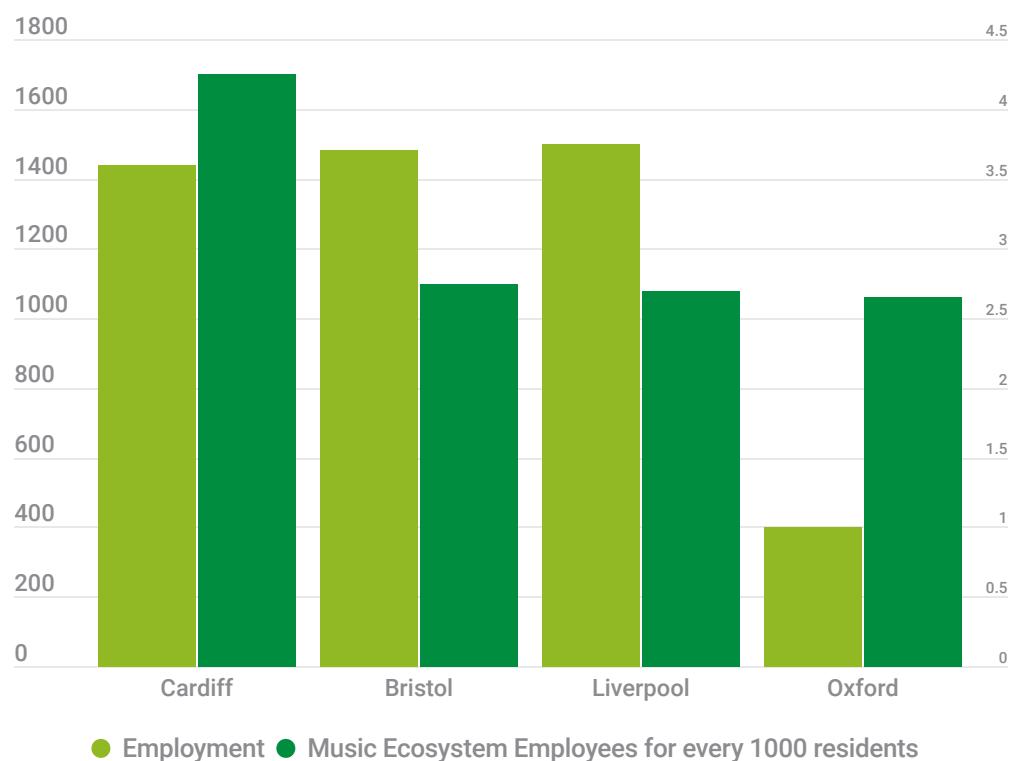
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<sup>11</sup> Demographic information obtained from the United Kingdom CENSUS 2011

#### GRAPHIC 4: COMPARATOR CITIES – EMPLOYMENT, 2016

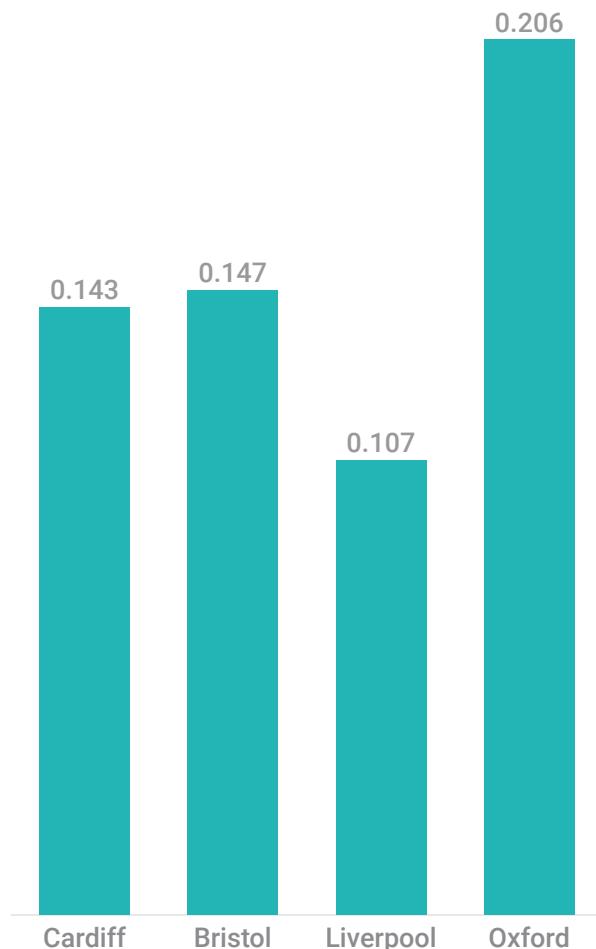


#### GRAPHIC 5: COMPARATOR CITIES – EMPLOYMENT, 2016



Cardiff has similar numbers of venues per 1,000 residents as Bristol, more than Liverpool and less than Oxford (Graphic 6).

#### GRAPHIC 6: COMPARATOR CITIES – MUSIC VENUES FOR EVERY 1000 RESIDENTS



#### Direct impact

Output: £70.23 million  
GVA: £36.94 million  
Wages: £24.5 million  
Employees: 1,440

#### INDIRECT IMPACT AND INDUCED IMPACT

Indirect economic impact is calculated by looking at the changes in the values of output, GVA, employment, and wages driven by suppliers of the music ecosystem. To do this, we

include measurement of economic exchanges with suppliers that don't necessarily belong to the music ecosystem, such as advertising, video production, and even legal services, communication and transportation.

### Indirect impact

Output: £32.97 million  
GVA: £24.27 million  
Wages: £17.01 million  
Employees: 326

The induced economic impact is the economic value (output, compensation and employment) derived by "the spending of workers whose earnings are affected by a final-demand change, often called the household-spending effect"<sup>12</sup>. In other words, this impact is derived from the spending of workers whose wages are supported directly and indirectly by the music ecosystem in Cardiff. This includes, for example, the money spent by music ecosystem employees on food, entertainment, transportation, etc.

### Induced impact

Output: £49.95 million  
GVA: £43.32 million  
Wages: £33.58 million  
Employees: 729

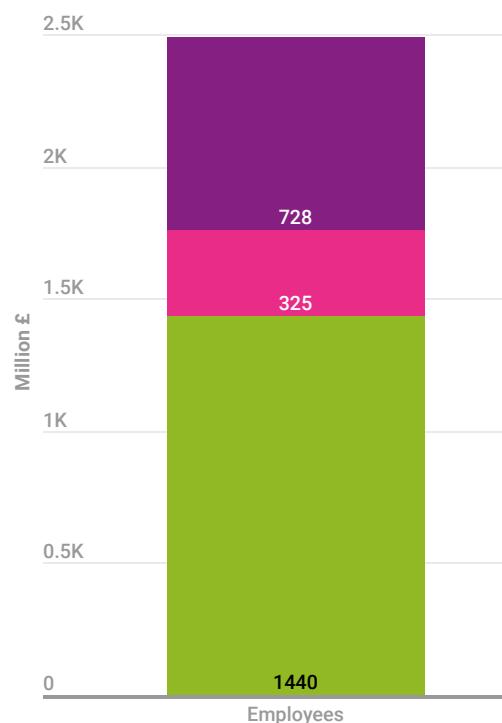
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<sup>12</sup> RIMS II: An essential tool for regional developers and planners, page 53.

**GRAPHIC 7: CARDIFF - TOTAL MUSIC ECOSYSTEM ECONOMIC IMPACT, 2016**

	OUTPUT MILLION £	GVA MILLION £	WAGES MILLION £	EMPLOYEES
<b>Direct impact</b>	70,2	36,9	24,5	1440
<b>Indirect impact</b>	33,0	24,3	17,0	326
<b>Induced Impact</b>	50,0	43,3	33,6	729
<b>Total</b>	<b>153,2</b>	<b>104,5</b>	<b>75</b>	<b>2494</b>

**GRAPHIC 8: CARDIFF – TOTAL MUSIC ECOSYSTEM EMPLOYEES, 2016**



## 3.2 Mapping Cardiff's industry

Using Sound Diplomacy's unique tools, we mapped Cardiff's music industry, from venues to businesses and other music assets. There are 36 music venues, 28 nightclubs, 11 record/equipment stores, 29 recording studios, 6 rehearsal spaces, 7 radio stations, 45

registered music teachers, 15 booking agents/promoters, 26 paying festivals, 13 co-working spaces and 7 record labels<sup>13</sup>.

These statistics, when compared with Bristol and Liverpool, two cities of comparable populations (Bristol has 535,907 people and Liverpool has 552,267), show a city keeping up with its competitors. Cardiff has 0.143 venues per 1,000 residents, just behind Bristol, which has 0.147. Liverpool only has 0.107 venues per 1,000 residents.<sup>14</sup> Cardiff also boasts 29 recording studios compared to Bristol's 9 and Liverpool's 13.

The city's nightclubs and music venues are clustered in or around the Central Cardiff area, and most retail points are located on or around St. Mary Street. Recording studios and rehearsal spaces are more evenly distributed.

Cardiff University's main Music Building has over two dozen practice rooms, three ensemble rooms and four electro-acoustic studios, including a main recording studio fully equipped to industry standard. The University of South Wales has recently invested in its ATRiuM facilities, and boasts 9 music and sound studios, with associated control rooms, and 16 acoustically protected multimedia practice rooms. This includes the Gus Dudgeon suite, home to original mixing desk that Elton John recorded *Rocket Man* on, and where Dudgeon produced David Bowie's *A Space Oddity*. Adding to this, the 2011 development of The Royal Welsh College of Music and Drama's new buildings, to compliment existing facilities located in the Anthony Hopkins Centre and the Raymond Edwards Building, include the 400 capacity Dora Stoutzker concert hall and four state-of-the-art full-sized, double height rehearsal studios.

While there are a few co-working spaces in suburban areas, most are clustered in Central Cardiff and the Bay Area, which is in line with the city's vision of the Bay Area becoming a creative hub.

A 90-day calendar snapshot of Cardiff shows 161 gigs listed on Songkick<sup>15</sup>. In the same dates, Liverpool had 415 shows. Bristol had the busiest calendar by far, with 740 gigs. While the 'business' and 'creation' sides of the industry look more active in Cardiff, the performance sector falls behind cities of similar size – this could be for a number of factors, including but not restricted to: more weekday, afternoon and evening gigs in Bristol and Liverpool; more venues (although Cardiff has a competitive venue per capita

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<sup>13</sup> Mapping information identified in Cardiff as of July 10, 2018.

<sup>14</sup> Information obtained via economic impact analysis.

<sup>15</sup> Songkick is a worldwide platform that helps users organise and track their favorite bands, get concert alerts, and buy tickets. Their API is the biggest live music database in the world. The period of 90 days was calculated as those dates on the Songkick calendar between 27.8.2018 and 27.11.2018.

ratio, it is still a smaller city than the other two); misleading data (there simply could be less Songkick activity in Cardiff).

## 3.3 Key findings

### GOVERNANCE & LEADERSHIP

There is no government affiliated music office. There is a Public Service Board, a collective of night time economy (NTE) services working towards improving conditions for nightlife and the music industry, although music is never explicitly represented or addressed. FOR Cardiff is one of the biggest champions of night time safety and investment, but music is not part of its core remit. However, it does support it actively at its discretion.

The music strategy recommendations in this document bridges a gap between the public and the private sectors, that together make up the city's music ecosystem. One of the main aims of the report is to create a 'Music Board' for Cardiff that includes high level personnel from the council, alongside key members of the private sector music ecosystem. This will not only bring the public and the private realms together, but will also lead on to the development of music in the city and, in doing so, will open up space for debate and communication between the different stakeholders.

### LICENSING & POLICE

Many of the noise-related terms in Cardiff's licensing regulations are 'suggestions' or 'guides', such as ceasing activity at 9pm or consulting with neighbours before building a venue. Statutory nuisances are monitored over three site visits, but are also ultimately left to the attending officer to determine if a venue/noise source is imposing on neighbours. This creates problems with inconsistent enforcement, which can be influenced by an individual officer's definition of 'loud', their personal experience with the venue, or even their mood that evening.

Furthermore, venues' premise category is unspecified in many regulatory frameworks, such as the Cumulative Impact Policy (CIP). As a result, the CIP would place existing and future music spaces at risk in the city centre area due to the cumulative effect that licensed premises have on the amount of crime and disorder in the area, whether they are responsible for it or not.

There is no financial assistance available for venues needing to improve soundproofing to appease noise complaints. This has caused some venues to close, and is an issue which could be considered under Agent of Change (AoC Bill) principles.

Only 2% of all noise complaints between 2016–2018 were made against commercial or industrial properties. Many noise complaints registered with the city do not specify the source (i.e. commercial noise, construction, residential radios, public disturbance on the pavement, etc.), which makes it difficult to look back at complaints and find problem areas or trends to address.

Licenses frequently restrict premises access for certain ages, or limit the hours during which music can be played. Multi-use spaces can also be assigned a single use class to make it easier to determine licensing terms, even if the use of the venue changes during the evening (i.e. a restaurant which turns into a club at night may have to adhere to restaurant regulations at all times). Many prospective licensees are left in the dark during their application processes, as there is no specific framework in place, nor a list of expectations by which they can prepare their paperwork and business plans. By creating a clear list of fees, necessary permits and an estimated timeline, venue owners will find the application process much easier to navigate, and the city will find it much easier to enforce regulations.

While the Traffic Light System is a good means of enforcing license terms, there needs to be transparency in the process. Having spoken to a few venues about this, evidence suggests that they are not aware of whether or not they are being monitored, where they currently stand in the system (Green, Orange or Red), or what they can do to achieve a ‘Green’ status. They are only notified of the existence and implementation of the system once they have been given a ‘Red’ status.

Much of Cardiff’s venue policing is reliant on data sharing, which creates problems in that police can only recognise problem ‘areas’ rather than individual venues. They are under pressure to clamp down on venues within red zones, which is unfair on the venues that do not have a history of offences. Safety measures outside venues (or those issues not directly related to licensing, such as sexual harassment) are often overlooked in policy and are primarily carried out by Cardiff Street Pastors or FOR Cardiff. Overall, our survey respondents said they felt safety was one of the strongest features of Cardiff’s music scene, on average rating their experience 4.1 out of 5.

## FUNDING

On one hand, the funding of large events in Wales demonstrates a will to invest in developing a profile in the national music and cultural sectors. On the other, core funding is currently predominantly allocated for the classical music sector, which receives generous support compared to other areas such as music education or contemporary genres. This is not surprising given the high costs associated with classical music, although it often receives financial support from private donors and patrons, something not commonly found in other music genres. Cardiff excels in classical music, with many

orchestras based in the city, including BBC National Orchestra of Wales, Orchestra of the Welsh National Opera, Cardiff Philharmonic and Sinfonia Cymru.

Private funding opportunities available in Cardiff — such as the Development Bank of Wales or the Central Cardiff Enterprise Zone (as well as more generic national companies, of which there are many (e.g. the Start Up Loans Company) — do not have specific support for enterprises in the music sector or the creative industries, which are traditionally challenged by access to conventional private funds such as bank loans.

The Development Bank supports businesses across Wales, and Central Cardiff Enterprise Zone's 'funding' usually translates into the offer of business rate relief. It is worth noting that despite a large concentration of creative industry in the area, The Enterprise Zone does not provide any specific assistance to them.

Respondents to our survey highlighted a lack of sufficient information about the availability of grants for their activities. Indeed, only 10% received one, while the remaining 90% said they didn't because they were not aware of the opportunity or what the steps were needed to access it. It is important to note here that the council has no capacity to deliver grants, but better signposting could be implemented.

Many who received funding for their music activities said it came from the Arts Council of Wales (ACW). According to recent ACW statistics, the average % of all national large grants awarded to Cardiff was 27.2% in 2017/2018 (increasing to 37.2% for small grants of under £5K).<sup>16</sup> There are opportunities to expand the allocated funding for music industry development and Welsh Government schemes to develop a specific strand for Welsh music export activities in collaboration with Wales Arts International.

The BBC Wales' Launchpad Fund provides grants for artists from which a number of Cardiff musicians have benefitted from in the past, but is also part funded by the ACW. The Welsh Government and ACW are now working with PRS Foundation to support more access to Momentum Funding via the PRS Foundation, and Help Musicians UK are currently undertaking research to establish what their presence in Wales may look like, and how they might support artists in Wales.

There are opportunities for developing partnerships with existing funding organisations to create further opportunities for Welsh music industry artists and organisations. Some examples are Tŷ Cerdd (currently focused on non-profit classical music organisations and promotion of Welsh composers), PRS Foundation, British Phonographic Industry, Help Musicians UK and National Lottery Funding – People and Places grants.

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<sup>16</sup> See Arts Council of Wales (2019)

## SPACES & PLACES

Cardiff has 5 large-scale venues (7,500+ capacity), although only Motorpoint Arena regularly hosts concerts (and feedback from the survey suggests that Motorpoint needs to improve its acoustics). The Principality Stadium and Cardiff City Stadium occasionally host concerts, but overall most venues of this size cater to sports games. Cardiff is looking to build a 15,000+ capacity multi-purpose arena. It is considered a priority by both city and national governments.

There are some gaps in the venue ladder in the city, which leaves gaps as artists progress through the different levels of their career. Evidence suggests there is a need for more dedicated, well-equipped venues that are at a capacity somewhere between bars (which use music as a supplementary product), small clubs and arenas. Survey respondents suggested a mid-sized venue of approximately 2,000 capacity would be optimal. Additional survey comments noted a lack of venues in suburban areas.

A lack of diverse events and venues is a significant issue noted by many survey respondents, particularly in terms of cultural and gender diversity. The survey figures suggest a demand for more non-indie genres and DJs who play music from a wider field (a move beyond a focus on playing drum and bass was mentioned). Genres such as hip-hop, rap, grime, RnB, jazz, world music and electronic genres are under-represented, both in terms of events and performers. A closer working relationship with the city's licensing teams would help ensure diversity in the sector and better understanding of genres and their audience.

Accessibility at venues, and a lack of step-free access on public transport, creates an overall hostile environment for people with mobility restrictions who want to attend events.

Cardiff is working to group media and creative industries, as the city recognises the long-term benefits of growth in research and networks found in clustering industries. The main areas of clustering in Cardiff are Central Square and Cardiff Bay.

## PLANNING

Cardiff's planning strategy is presented in the Local Development Plan (LDP), which was adopted in 2016 and runs until 2026, although could be subject to review before this date. It focuses on 8 Detailed Policy areas for development in addition to a set of Key Policies.

There are no policies that refer explicitly to music venues in the LDP, and unlike some cities' Local Plans, the word 'music' is not referenced. That is not to say that there are not several policies to promote and protect music infrastructure, but there is little direct

reference. In the absence of specific policies referring to music venues, each application will be judged on its merits on a wide-range of policies depending on its circumstances. Some of the policies which may apply are referred to below.

In addition, the LDP states support for developing world class 'leisure, culture and sporting facilities' and states the need for community and leisure facilities within strategic housing sites to be developed in the coming years.

Section 106 guidance is a key tool in ensuring developments deliver wider social benefits, focused on residential growth and associated facilities, such as schools, transportation and public spaces. Music venues are not referenced directly and leisure is not specifically considered beyond community facilities. It should also be noted however that community facilities are notable beneficiaries of s106 monies, and are a key provider of spaces for music learning or development.

District Centres prioritise small retail or grocery stores over leisure and entertainment facilities (the LDP states shopping should make up 75% of district centre use)<sup>17</sup>. The social and community benefits of a well-insulated and secure music venue must be recognised in order for it to be a consideration within planning guidance.

The economic growth aspects of the LDP is focused on creating new employment opportunities, land to build them on or expanding both existing opportunities and land. By 2026, Cardiff wants to add 40,000 new jobs (to the 2006 figures). In the Central and Bay areas, office space is prioritised, particularly for those catering to research and development fields.

Leisure and entertainment sites are less actively promoted. They are not prioritised in any use classes, and while supported in the LDP, there is less policy depth that relates to leisure facilities and no specific references to music venue infrastructure. Venues, rehearsal spaces, recording studios and other music-related uses are categorised as Class D2 (assembly and leisure) or Sui Generis (general use). Such uses are only actively promoted in the Central Shopping Area, City Centre, Cardiff Bay waterfront and district/local centres. There is a positive focus on leisure developments in the Central and Bay business area. It is worth noting that use classes are determined by the Welsh Government, and as such can't be set by a local authority. As with any other type of application, the applicant will need to demonstrate how their proposal addresses the relevant policies.

The Agent of Change principle was included in the Welsh Government's Planning Policy Wales 10 (2018) which provides country-wide planning guidance and states the following:

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<sup>17</sup> TAKE Cardiff Council (2006), pg. 181

*“The agent of change principle will be a guiding principle for supporting the evening economy and the development of uses sensitive to the soundscapes experienced in busy commercial centres.”* It is too early to assess how Cardiff Council could utilise this guidance to enhance music provision in the city, but it does offer a clear opportunity.

The Welsh Government recently produced the Soundscape Action Plan 2018-2023, but only as a consideration for new developments. It is not sufficiently tied to licensing, which is cause for concern if any future complaints involve premises that existed before the new policies were drafted.

There is a tax relief scheme for the creative industries, but the only music-related use is for important orchestral venues, such as concert halls<sup>18</sup>. Recognition of a venue as a national heritage site is often reserved for large elite institutions, such as classical music halls. There are a few other informally recognised sites, such as Clwb Ifor Bach's surrounding land being purchased to protect and allow for expansion with the help of Cardiff Council and the Arts Council of Wales (ACW).

A summary of the planning legislation in Cardiff might conclude that music venues are valued, but that this is not stated explicitly, and are not ranked above other development types or cultural assets. Specific Supplementary Planning Guidance that brings together disparate policy references into a single place may benefit the city going forward, and allow it to best exploit the opportunities that the Agent for Change principle provides. This may be something that should be considered as part of any LDP review process.

## TRANSPORT

Long-distance train services end much earlier than Welsh services (trains to London end at 9.30pm, 9pm on Saturdays, while services to Swansea end before 2am, and before 1am on Fridays and just after midnight on Saturdays). This creates a barrier to attendance because some audiences will not want to pay for overnight accommodation or will find it off-putting if they can't make the journey home immediately after the show.

City trains only run until 10.30pm (11.30pm weekends) and many stations aren't accessible for people with disabilities (which also makes it difficult to transport instruments via public transport). There are only 4 night bus routes to suburban areas from the city centre, leaving large areas unserviced. Additionally, 2 of these night buses only run Thursday-Saturday. This is a barrier for people who want to spend an evening in the city, as they have to consider the potentially prohibitive cost of taking a taxi home. The lack of night-

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<sup>18</sup> UK Government (2018)

time transport also adds to congestion rates as audiences leave large-scale venues (stadiums or Motorpoint Arena).

The pedestrianisation of streets makes it difficult to access venues for artists who need to transport equipment to and from their gigs. Loading/unloading equipment is challenging at smaller venues, and musicians have in the past been fined for parking in the area. Increased transport (plus increased reliability of transport with the proposed Rapid Transit Corridors) will ease congestion and make outer suburbs more accessible, meaning suburban residents may stay longer in city centre and central residents may travel to the suburbs for leisure.

## EDUCATION

The Cardiff County and Vale of Glamorgan Music Service helps students engage in music activities during school hours in 166 participating schools. Although this service provides valuable opportunities for music learning to many students, course fees hinder its accessibility (from £57-£218 per term, donated instruments can be borrowed). This is an acknowledged problem. Recommendations have been made by the National Assembly for Wales for a more organised and centralised approach towards accessible learning for all students<sup>19</sup>. Without measures in place to ensure that all students are able to access instrumental lessons, many will miss out on key opportunities. Portfolio organisations of the Arts Council of Wales also invest in music traineeship and educational programmes, mainly classical music and opera.

There are a number of higher and private education options to study music in different forms in Cardiff. Cardiff University has a School of Music, offering undergraduate and postgraduate courses in performance, composition, musicology, ethnomusicology and popular music<sup>20</sup>. The Royal Welsh College of Music and Drama provides lessons and courses in instruments, composition, conducting, stage and event management, arts management, and design for performance<sup>21</sup>. Cardiff Metropolitan University offers teaching qualifications in PGCE Secondary Music. There are also musical instrument classes at Chapter Arts Centre<sup>22</sup>, as well as classes in music theory and group workshops at the International Music School<sup>23</sup>.

The University of South Wales offers a BA (Hons) in Music Business, the only course of its kind in the city. The university also offers the only MA in songwriting in Wales. There is no workshop or informal training programme for budding music business professionals in the

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<sup>19</sup> National Assembly for Wales (2018)

<sup>20</sup> Cardiff University (2018)

<sup>21</sup> Royal Welsh College of Music & Drama (2018)

<sup>22</sup> Cardiff Music School (2018)

<sup>23</sup> International Music School Cardiff (2018)

city looking for focused training, nor is there assistance for artists needing to expand skills without taking the long and often expensive route of a degree (This has not always been the case – The Welsh Music Foundation used to do training in Cardiff prior to closure due to funding cuts<sup>24</sup>).

Our survey results show that 56% of artists and 42% of professionals are self-trained, while only 20% have degrees related to their fields. Business skills are often the hardest for professionals to teach themselves, but are required for those who may be pursuing music performance over an academic path.

On a national level, Welsh Government recently confirmed £3m for improving music services in schools across Wales over the next two years. The fund aims to increase access and opportunities for children and young people in Wales to learn new instruments and study music. It builds on initiatives such as Anthem<sup>25</sup> and will offer opportunities to ensure the provision of high quality, universal access to musical education for all students. £1.5million will be spent in 2018/19, with a further £1.5 million allocated for music services next year. National Youth Arts Wales has received £100,000 to continue their music services, including youth ensembles. Other than this, the Pupil Development Grant is the only financial assistance enabling lower-income children to obtain supplies for after-school activities, although music is not directly alluded to. Access to tertiary education is supported by the Advanced Study Music Scholarships from the Arts Council of Wales.

## EMPLOYMENT & SKILLS

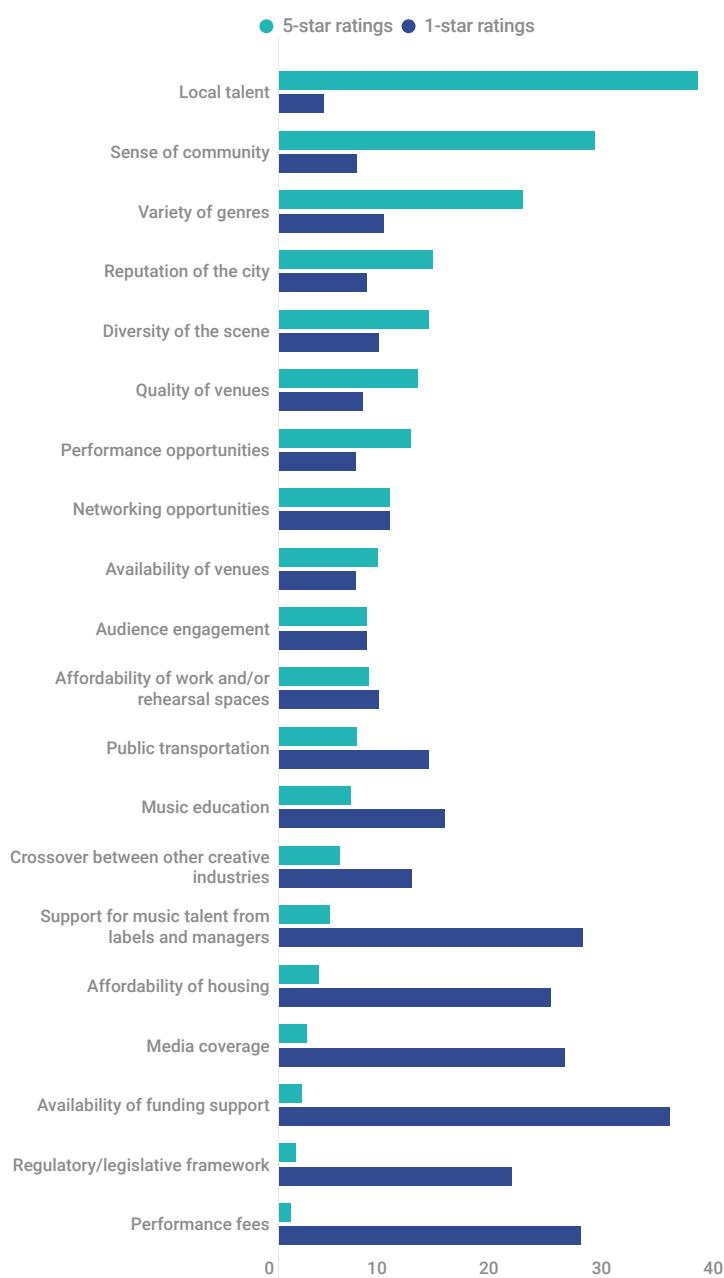
Our survey results showed that the most common roles in the industry are Live Music Promoter (14.7%), Music Venue (8.6%), Music Journalist/Writer (7.2%) and Music Festival (5.4%). Although we provided 26 different categories to choose from, many other different roles were indicated, showing the diversity and breadth of Cardiff's music ecosystem.

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<sup>24</sup> BBC, Welsh Music Foundation (2014)

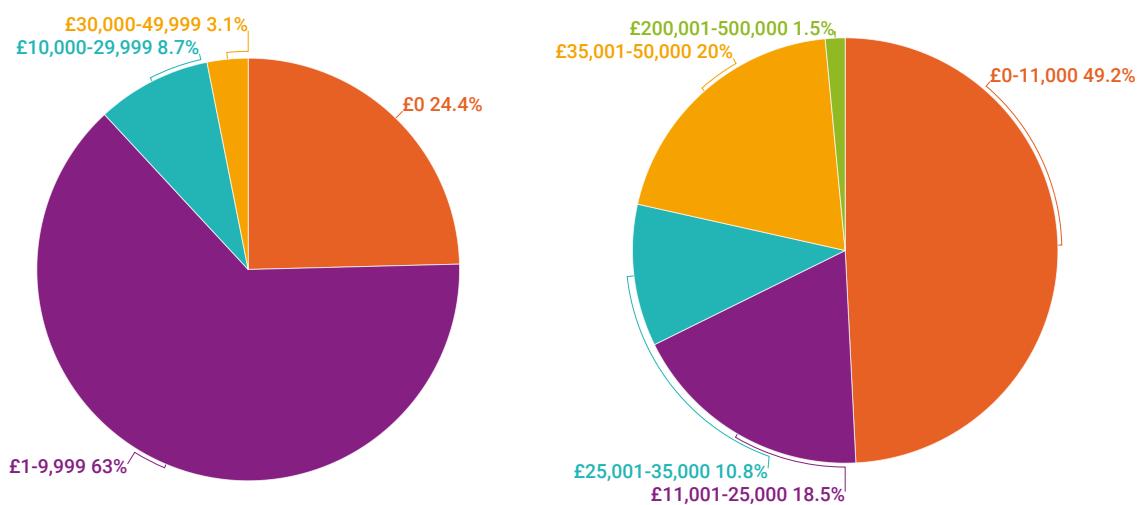
<sup>25</sup> <http://www.arts.wales/139279>

**FIGURE 1. MUSIC ECOSYSTEM ROLES COVERED BY 'PROFESSIONAL', 'MUSIC COMPANY' AND 'OTHER' RESPONDENTS**



The music industry is dominated by commercial enterprises; 24% of surveyed companies consider themselves non-profit or charitable. Only 10% of these businesses' income is from local artists. This translates to artists struggling to make a liveable profit from their craft. Insights into local artists' working patterns show that 71% of them work 20 hours or less in the music industry, with 87.4% of them earning between £0 and £10,000 per year. Many will supplement this income with day jobs, which pulls time and energy away from progressing in their careers.

**FIGURE 2. MUSIC-RELATED INCOME FROM 'ARTIST' 'PROFESSIONAL' AND 'OTHER' RESPONDENTS IN THE LAST 12 MONTHS**



There is no singular directory aggregating Cardiff's music business, professionals and resources. This can leave many industry players in the dark, particularly DIY artists who may not have the skills or knowledge needed to progress their careers after a certain point. Compiling contact details and creating a base for the network will help bring Cardiff's music industry together. Roundtable discussion held during this project reflected this view, citing the former Directory of Welsh Music Businesses, run by the Welsh Music Foundation, as a valuable resource. Currently, the city's music industry is fragmented, which makes it difficult to move forward with a cohesive vision.

## TOURISM & BRANDING

Wales has long been known as "The Land of Song".

According to the *Wish You Were Here 2017 Report of Contribution of Music Tourism to the UK's Economy*, Wales generated £115 million through music, £55 million of which was made

through live concerts and £61 million made through music festivals.<sup>26</sup> Among the music attractions were the Green Man Festival, Festival No 6, and Sŵn. In 2017, the number of music-related jobs grew by 18% to 1,908.<sup>27</sup> Music tourism and activities have been prime sources of revenue for Wales as a whole, and subsequently for Cardiff too – in fact Cardiff has gone to great lengths to promote its Welsh musical heritage. Welsh Government is also delivering a Wales wide initiative called Dydd Miwsig Cymru to promote Welsh Language Music, with a special focus on a Welsh Language music day each year.

Currently, local venues tend to be visited by people from Cardiff or its surrounding area, while festivals attract more international audiences and larger turnouts. Our survey found a total of 1,706 shows across Cardiff's venues in the preceding year (approximately 4.6 each night). This produced a potential capacity of 10,258, but only 58% of this was filled. Cardiff's venues have a great potential to expand not only attendance levels, but also the number of events, as shown in the findings in Section 3.1.

Live music is still considered a favourite pastime of Cardiff's audience members, with 75% of those surveyed attending at least one music event per month and 96% of these often attending events featuring local and up-and-coming artists. However, the fact the venues are on average just over half full shows that there is still work to be done around audience development, marketing and promotion.

Cardiff's proximity to Bristol means it is in constant competition for audiences. In particular, the city struggles to attract national tours and underage gigs<sup>28</sup>. There is an opportunity for Cardiff to reassert its place as a music destination while Bristol's Colston Hall undergoes refurbishment until 2020. This strategy worked for Cardiff in the past, when the brief closure of Wembley Stadium allowed the Millennium Stadium to provide an alternative venue to attract artists, promoters and events.

Unsurprisingly, digital channels such as social media are the most favoured means of raising awareness of gigs, although 45% of promoters still rely on word of mouth. A large section of Cardiff's industry uses non-digital means of promotion, as well. There is currently no single, comprehensive source for artists, professionals or fans to access information about live music events. Although dedicated volunteers across the city have designed maps, produced gig guides, fanzines and podcasts and run any number of social media sites to support the music scene — a cross genre listings website would make things accessible for both residents and visitors wishing to see a show or discover new music locally.

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<sup>26</sup> UK Music (2017b)

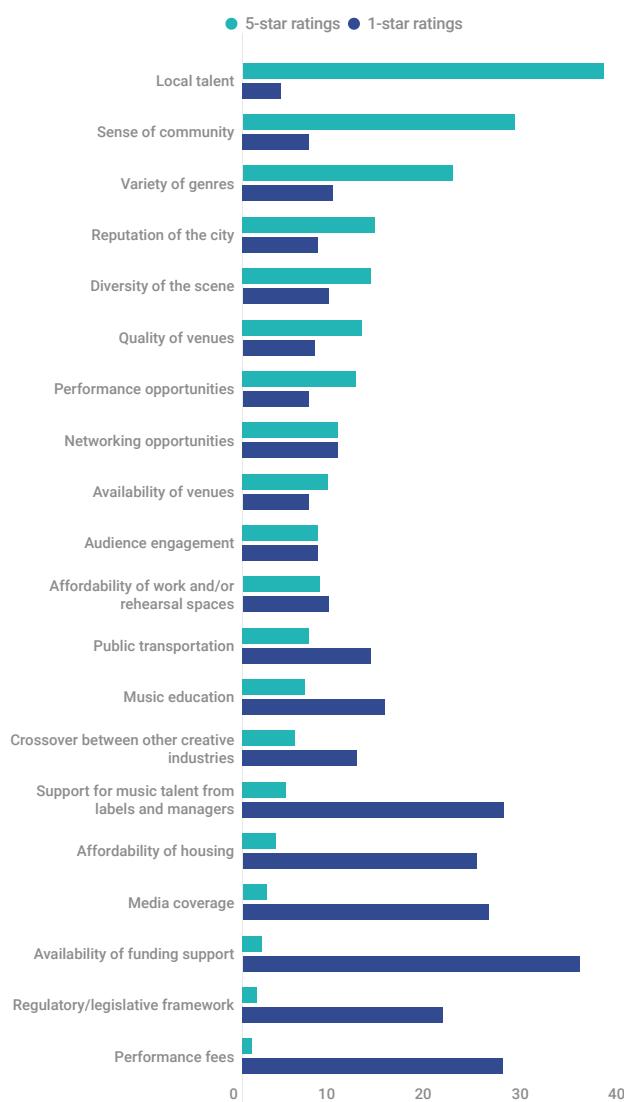
<sup>27</sup> Ibid.

<sup>28</sup> Anecdotally, we have also been told that Bristol has much more advantageous licensing conditions in which to stage underage gigs.

## ASSETS AND THREATS

The survey completed by Cardiff's musicians and music professionals sought their views of the city's music industry as a whole. Respondents were asked to rate a variety of assets in Cardiff's music ecosystem. The average scores range from 2 stars (for performance fees) to 3.9 stars for local talent. The results indicate that while there doesn't appear to be any severe shortcomings, there are also no outstanding results.

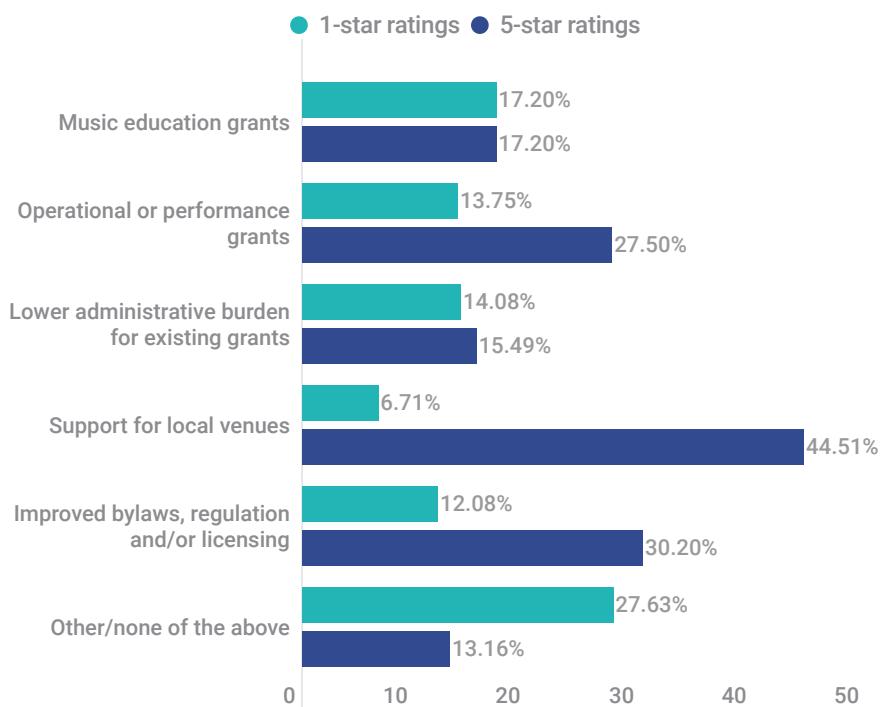
**FIGURE 3. OVERVIEW OF 5-STAR AND 1-STAR RATED ASSETS IN CARDIFF'S MUSIC ECOSYSTEM**



Overall, the results show that Cardiff music industry professionals believe the city offers a thriving music scene with many events and good audience turnout. However, there is room for improvement. In theory, there is strong support for up-and-coming artists and a good

network of professionals to help create events, although this is not effectively galvanized or communicated to those who would use it. There is a need to develop music business skills. Funding opportunities are scarce, and those that exist are not communicated sufficiently, leaving musicians often unaware of what opportunities exist.

**FIGURE 4. RATING OF AREAS TO BENEFIT FROM INCREASED INSTITUTIONAL SUPPORT**



A good music tourism strategy would help build an international audience and broaden demographics.

Professionals would also like to see incentives for companies to promote salaried employment and ensure the livelihood of those working in the industry. This was suggested for both creatives and businesses whose interests overlap with them — such as bars and clubs. Interviewees and respondents suggested some measures such as reducing business rates for all music and cultural venues, increasing the number of (paid) gigs in mixed-use and unusual places, encouraging pubs to programme original content and educating musicians on how to negotiate a fair pay (the Musician's Union Fair Play scheme is leading the way in this sector), among others. Cardiff has a great network of people, but it is fragmented; bringing the different parts together would galvanise and strengthen the industry, spurring growth.

Industry respondents ranked financial threats as representing the biggest concern, whether in the form of gentrification pricing artists out of the city, rise in ticket prices

discouraging new audiences, or the lack of sufficient funding and cultural budget at a government level. The fragmentation of the network is also a concern.

## 4. STRATEGIC RECOMMENDATIONS

### GOVERNANCE AND LEADERSHIP

#### MUSIC OFFICE

##### RECOMMENDATION 1: WORK PRAGMATICALLY WITH ALL STAKEHOLDERS TO UNLOCK THE POTENTIAL OF CARDIFF'S MUSIC ECOSYSTEM

**Initiator:** Economic Development / Culture, Venues, Tourism & Events

**Background:** Cardiff's music ecosystem needs a dedicated driving force. A Music Officer is the minimum asset required for a City's Music Office and will mainly be responsible for overseeing the implementation of the recommendations found in this report.

While many of the following recommendations in this report are relatively low cost, they will require commitment and a lot of work. The appointment of a Cardiff Music Officer would show commitment and resource from the council to deliver these recommendations. The Music Officer will be a mediator who works with all stakeholders to unlock the potential of the music ecosystem and champion its social and economic benefits. There is a gap between the public and the private sectors in Cardiff's music ecosystem. In addition, the scene itself is quite insular and fragmented, with little communication between different stakeholders. A centralised, objective, driving force in the shape of a Music Officer would pull people together.

The officer should sit within the Economic Development and Culture departments and work closely with other relevant officers and departments (Transport, Infrastructure, Planning, Licensing etc), including the Cardiff Music Board and other music organisations in Cardiff.

#### Goals:

- Lead the dialogue between industry and policymakers
- Connect different sectors (within government and the overall economy) with music
- Become the first point of contact for the music sector when addressing public institutions

- Provide the music sector with easier access to resources and support from the council and other bodies, and guidance on how to navigate the council's bureaucratic processes
- Oversee and reinforce the implementation of a music strategy
- Ensure music is being integrated into as many city policies and development strategies as possible
- Advocate for, and build relationships that can benefit the ecosystem
- Undertake targeted research to better understand audience behaviour in Cardiff
- Align Cardiff's music industry with other creative and entertainment industries – film, broadcasting, theatre, fashion, food, tourism and beyond – so that all can mutually benefit from each other and work together to promote Cardiff locally, nationally and internationally.

## PRIORITY ACTIONS:

### 1.1 Appoint a Music Officer

As noted above, appointing a Music Officer is the primary recommendation in this report. The role itself requires experience of both the music industry and municipal sectors, as well as a deep knowledge of Cardiff's music scene and experience from further afield. The role will require extensive marketing and managerial knowhow, and the ability to bring people together and generate a proactive attitude.

Some of the initiatives Cardiff's Music Office could spearhead are:

- Develop a bilingual micro-site as Cardiff's digital 'music industry information hub', including an 'about' page, contact information, FAQs, links to relevant council or external resources and organisations and direct links to apply and check the status of permits and council-related bureaucracy.
- Act as Secretariat of the Cardiff Music Board — organising the meetings and subgroups, circulating relevant materials, taking minutes, etc.
- Ensure music is being integrated into every council department, via monthly advisory meetings, updates, etc
- Assist/lead bids for large-scale music and music industry events such as BBC Amplify, Music Venues Day, Music Cities Convention. In partnership with stakeholders such as the Welsh Government Major Events Unit, where applicable
- Establish a data protocol to guide an all-genre audience development strategy for Cardiff, in collaboration with the existing Audience Insight project led by Arts Council Wales
- Explore a UNESCO 'City of Music' status
- Promote safe music spaces in line with other initiatives around the UK

- Create and maintain a Cardiff Music Directory
- Lead on the development of Musician Parking Loading Zones
- Offer a ‘Music at Risk’ support service to struggling venues
- Establish a bank of hours with specialists to coordinate one-to-one appointments
- Coordinate workshops and lectures
- Programme quarterly music industry socials to connect music industry professionals
- Work with UK and international artist and professional development organisations to open an office in Cardiff
- Comply with Welsh Language Standards.

The Music Office would work closely with Womanby Street, to continue to promote the street as a music destination and a marker of Cardiff’s ambition as a Music City. A Public Private Partnership (PPP) could help resource the Music Office, and may help to deliver some of the suggested actions and projects.

#### **THE PARTNERSHIP MODEL OF NASHVILLE’S MUSIC CITY MUSIC COUNCIL**

The Music City Music Council (MC<sup>2</sup>) is an association of business directors whose goal it is to develop strategies to increase the awareness and development of Nashville’s reputation as a Music City. This office was formed in 2009 as a partnership between the Mayor’s Office, the Nashville Area Chamber of Commerce and the Nashville Convention & Visitors Corp. In the beginning, the Music Council’s formation achieved the symbolic accomplishment of bridging the gap between Music Row and the courthouse. Prior to this office, the music industry and local government didn’t know how to interact with each other.

The organisation focuses on expanding music-related businesses or facilitating their relocation to Nashville. The office is also working to bring televised music shows and music-related awards shows across all genres to the city and is recruiting music-related events and conventions to Nashville. Since its inception, the all-volunteer body has assisted in multiple economic development successes to attract entertainment-related jobs to the city, including Sony/ATV’s expansion to downtown and Eventbrite’s expansion into Nashville.<sup>29</sup>

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<sup>29</sup> Metropolitan Government of Nashville and Davidson County, Tennessee (2018)

## NEXT STEPS:

### 1.2 Build and maintain a business directory of the local music ecosystem

Evidence suggests the former Welsh Music Foundation's Directory of Welsh Music Businesses was a valuable resource amongst Cardiff's music business community. Cardiff's Music Office should develop a directory of the city's music ecosystem stakeholders. This open-source database needs to include contact information and should be regularly promoted and updated so it includes new entries and reflects changes within the sector. It should also include a cultural infrastructure map outlining the specifications, capacities and programming capabilities of venues in Cardiff, so that stakeholders outside the city can find relevant information and book spaces easily.

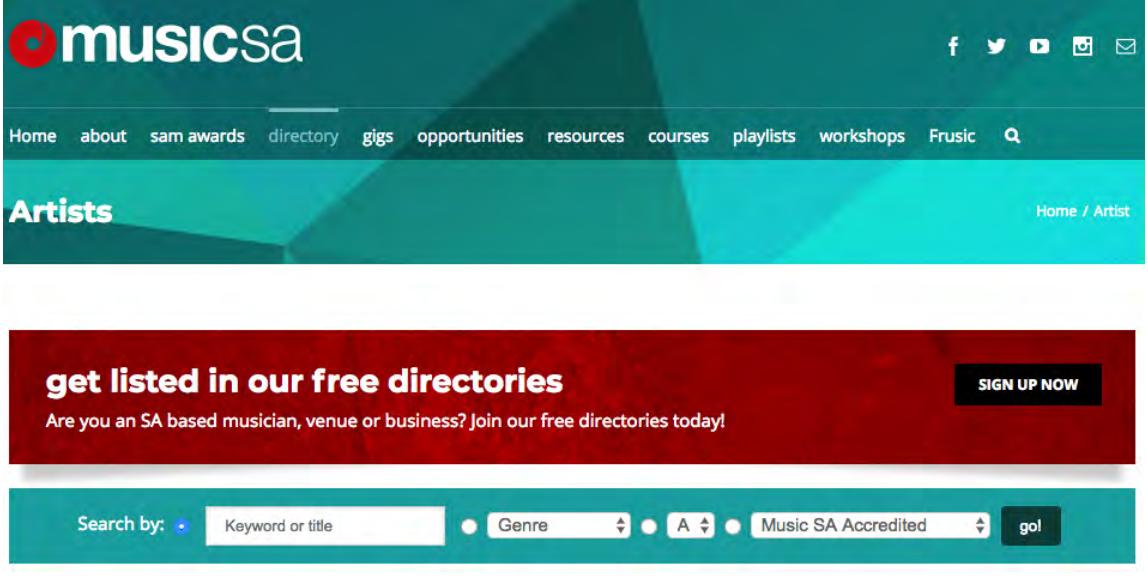
A structured approach and a unified digital database should be the starting point. This will allow transparent communication, keep different stakeholders up to date with anything related to the Music Office, policy updates, new funding opportunities, networking events, workshops, etc. This database will also help inform other research procedures, such as a satellite account, and improve communication within the sector.



Reuel Elijah, Swn. Image courtesy Horizons/Gorwelion (BBC Wales & Arts Council of Wales)

## MUSIC SA'S DIRECTORY

Music SA's<sup>30</sup> website has a one-stop online database of South Australia-based artists, music business professionals and venues. The listing process is free and straightforward, with users providing their details online and a Music SA marketing manager overseeing the process. Listed professionals also get access to special editorial space and promo discounts.

A screenshot of the Music SA website. At the top, there is a navigation bar with links for Home, about, sam awards, directory, gigs, opportunities, resources, courses, playlists, workshops, Frusic, and a search icon. Below the navigation bar, the word "Artists" is prominently displayed. In the center, there is a red banner with the text "get listed in our free directories" and "SIGN UP NOW". Below the banner, there is a search bar with the placeholder "Search by: Keyword or title" and dropdown menus for "Genre", "A", and "Music SA Accredited".

The screenshot shows the Music SA website's homepage with a focus on the "Artists" section. The interface is clean with a green header and a red promotional box for signing up to the directory. The search functionality is clearly visible at the bottom of the page.

## FURTHER ACTIONS:

### 1.3 Develop a platform to communicate between local residents and music events

The city, through the Music Office, should act as a proactive mediator, engaging in community meetings for residents and venue owners/event promoters in high-activity areas to enable them to work together on sensible solutions and inform residents on city-approved events. A website or online platform should inform people about outdoor events that are happening in the city and provide them with information about curfews, noise limits and offer an opportunity to give feedback.

In the long-run, this platform can be developed to give residents the chance to register support or complaints, automating the process and giving real-time statistics to the city. The platform should leverage collaborations with existing strategies and programmes in Cardiff, such as the FOR Cardiff Night Marshals.

<sup>30</sup> Music SA (2018)

### 'FESTIVAL APPROACH' OF THE REMBRANDTPLEIN, AMSTERDAM

The Rembrandtplein is a bar-filled square in central Amsterdam. The mayor's office worked with the police and the hospitality industry at the square to set up a 3-year pilot project to reduce violence and nightly noise<sup>31</sup>. As part of a series of 'experiments' in the area, facilities on the square have been adapted, new rules for behaviour of patrons have been implemented, and civil 'square hosts' have been appointed around the transport hubs in the busy nightlife districts. The City of Amsterdam has also developed an app that allows people to report antisocial behaviour to nearby community officers.<sup>32</sup>

## MUSIC BOARD

### RECOMMENDATION 2: EMPOWER MUSIC STAKEHOLDERS TO REPRESENT AND CHAMPION CARDIFF AS A MUSIC-FRIENDLY CITY ON THE LOCAL, NATIONAL AND INTERNATIONAL LEVEL

**Initiator:** Music Office, Cultural Office / Economic Development Department

**Background:** Creu Cymru exists to bring together arts centres and theatres in Wales, but there's no existing network or forum through which music venues or music professional organisations meet in Cardiff (or in Wales). The take-home from the Cardiff Music Roundtables, and work done by Independent Venue Week in Wales (funded in 2018 and 2019 by Arts Council Wales), demonstrated how valuable facilitated opportunities were for these venues to meet to discuss their work, trends, issues and ideas.

#### Goals:

- Create a leading representative body formed by a wide range of people with proven leadership ability and influence within the music ecosystem (i.e. the music sector and surrounding sectors such as economics, law enforcement, planning, education, health, environment, tourism, etc) taking care of music matters in the city
- Have an advisory board to help establish, promote and maintain the city as a music-friendly city

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<sup>31</sup> Nacht Burgemeester Amsterdam (2018)

<sup>32</sup> Clift (2016)

- Connect with other cities to share best practice, and for information and talent exchange
- Advocate for the sustainability of the music sector in the city, including the affordability of living and working spaces
- Support the development of music activity in the city
- Collaborate with South Wales Police and the Public Service Board to maintain a safe music ecosystem
- Lobby the Welsh Government to increase support for the music sector (eg artist and organisation grants, business support, tax schemes for popular music).

## PRIORITY ACTIONS:

### 2.1 Establish a Music Board

A music board acts as a platform that enables better communication between a city's governing body and its music ecosystem. Often these two worlds don't have open channels of communication and speak different languages, so when they do come into contact with one another, it is often in difficult and accusatory circumstances.

A music board enables people from these and other sectors, to come together in a friendlier, more inclusive way, working toward shared goals. Communication is more open, so meetings also become good sounding boards and give the opportunity to hear issues before they become problematic.

Having said this, the Cardiff Music Board will require a work programme that is publically defendable. It will also be helpful to identify some early 'easy wins' that will provide momentum and excitement about the board's possibilities. The London Music Board has been successful thanks to early investment by the council, and a clear set of objectives that were published online.

- The Cardiff Music Board will require a work programme
- Set up an initial board of 15-18 members
- Insist on a 50/50 gender split, 15% BAME representation and Welsh Language speakers
- Host the first meeting at City Hall, but also host subsequent ones in different venues around the city
- 12 month memberships are recommended to begin with some tenures extensions to ensure continuity of business.

Prospective members have to agree to the Terms of Reference and declare any conflict of interest before being accepted onto the board. Depending on their area of expertise, they

may be asked to carry out actions within a deadline through the course of their membership. They also have to sign a member agreement that outlines their commitment. The setup includes a chair, a secretariat, and the members. Different working groups should be set up to focus on relevant topics. The working groups can be temporary to meet specific needs. The board would be coordinated by the Music Office. Guests and observers can be invited on meeting by meeting basis, either to present on a topic (guest), or to sit in on a meeting (observer).

### LONDON MUSIC BOARD

The London Music Board<sup>33</sup> was created in response to a need for the development of grassroots venues, and the implementation of recommendations noted in the Mayor of London's 2015 Rescue Plan for Grassroots Music Venues. The Board meets 4 times per year and is expected to support and advise on research and guidance, to network, attend events, host roundtables and champion music as part of a drive to increase tourism in the city. Formed of 21 members, the expert board has a clear strategy and has set goals to work towards in order to benefit the local grassroots music scene.

## NEXT STEPS:

### 2.2 Create a Cardiff Music Board Professional Organisations Sub-group

This Cardiff Music Board Sub-group would exist to bring together expertise on behalf of professional music organisations and promoters, to network and share information that would support the work of the Music Board. In time, the group might choose to formalise as its own consortium so it can lead and deliver on projects specific to professional organisations, while also providing expertise and support to the Cardiff Music Board.

### 2.3 Create a Cardiff Music Board Venues Sub-group

The Cardiff Music Board Venues sub-group would exist to bring together Cardiff music venues to network and share information. This group may work to maximize opportunities and reduce any negative impact of stadium or council events. The results from this can feed directly into the Cardiff Music Board, and vice versa, so meetings should be set at intervals that allow time for the information to be processed. Just as with the Professional Organisations Sub-group, the group might choose to eventually formalise as its own consortium so it can lead and deliver on projects specific to venues.

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<sup>33</sup> Mayor of London (2017)

Regarding 2.2 and 2.3, evidence we gathered at roundtables and in consultation suggests just how much people and organisations want to be able to gather in such a setting, but there is no system in place to take the initiative. Some of the positive outcomes from these meetings could include: Scheduling and clash-avoidance; working together for bigger impact; sharing priorities or campaigns as organisations; joint lobbying; audience development; and leveraging more resource and efficiency.

## FURTHER ACTIONS:

### 2.4 Strengthen and further develop inter-city collaborations

Joining an existing Music City network such as UNESCO Creative Cities or the Music Cities Network will strengthen and amplify the benefits of implementing a music-friendly strategy. Existing sister city partnerships could also be leveraged through music to strengthen the cultural connection between Cardiff and other cities.

Additional options for collaboration with existing music cities include developing a 'Music City Sisterhood' to share best practices in policy and encourage artist exchange (similar to Austin-Toronto's Music City Alliance) and developing a city-led music industry exchange network, such as the Music Cities Network's Residency Programme.

#### LEVERAGING OPPORTUNITIES WITH SISTER CITIES: STUTTGART AND NANTES

Germany, France and the UK are the three biggest music markets in Europe, and widening the collaboration between Cardiff's German sister city Stuttgart, and Nantes in France would be beneficial for their music ecosystems.

##### **Stuttgart**

Stuttgart has an active music scene and an operating music office: Popbüro Stuttgart, a non-profit organisation that supports artists and businesses within the region. It provides studio equipment, helps with tour buses, consults on music industry matters and connects the scene within Stuttgart and internationally. It also supports bands with small grants for tours abroad.

##### **Nantes**

Nantes not only installed one of the first night mayors in France, it also has an outstanding music hub. Funded by a coalition of public and private organisations, Trempolino is deeply rooted in the community. It is structured as a 'music campus'

within the publicly-funded creative hub Les Fabriques Laboratoire(s) Artistique(s)<sup>34</sup>. Trempolino is considered a ‘project for projects’ and its organisation is made up of 29 staff, 8 specialist music teachers and 16 advisory members. It also engages around 80 freelancers to deliver workshops, and provides learning opportunities for over 50 interns and trainees simultaneously.

The music hub is conceived as a grassroots community and research centre, therefore its services and artistic programming is aimed at music fans, musicians and music professionals from all ages and backgrounds. Membership is required (€5 annual fee) to book the rehearsing and recording facilities, while the exhibition and performing space is available to any organisation. Provision of financial support is available if it is needed for delivering content at the venue. Most of the services and support provided through the Music Office comes from the Pays de la Loire region, including the available grants, financial support and distribution networks.

As Cardiff is twinned with Stuttgart and Nantes, the existing partnerships could be strengthened through artist exchanges and festivals that collaborate by booking each other’s bands. The cities could develop residencies for artists as well as business exchange programmes.

#### MUSIC CITIES NETWORK<sup>35</sup>

Music Cities Network is a public/private network dedicated to improving communication and cooperation, sharing research and knowledge, exploring policy and advocacy, and networking. It is used by policy makers, city leaders and all other Music City stakeholders. It has a structured, tiered membership. Its top tier, ‘Regular City Members’, costs roughly EUR 5000 to join and currently includes the cities of Aarhus, Berlin, Hamburg, Groningen, Nantes and Sydney.

In addition to its regular membership services, Music Cities Network also offers:

- Residency Programme
- Presentations and showcases at industry events
- Audience development programme
- Women in Music Index

<sup>34</sup> Les Fabriques (2018)

<sup>35</sup> City of Austin (2017)

## LIVERPOOL UNESCO CITY OF MUSIC

Liverpool's music heritage is one of its biggest touristic assets, and its music tourists spent £135 million (direct and indirect) in 2016<sup>36</sup>. The city was designated a UNESCO City of Music in 2015, which allows it to use creativity and music to create a sense of place, grow the visitor economy, and to reposition the city's image, among other goals. For these reasons, music has a predominant role in its Visitor Economy Strategy<sup>37</sup>, and tourism has a predominant presence in its City of Music Strategy<sup>38</sup>, although none of them include specific recommendations to capitalise either assets.

Liverpool uses its Beatles legacy with exhibitions such as The Beatles Story, The Beatles Magical Mystery Tour and tours of some of the artists' childhood homes. There is also a Beatles-themed hotel, Hard Days Night Hotel, which boasts a range of artwork and Beatles-based decoration. Additionally, the British Music Experience launched in March 2017, celebrating the best of British music heritage. It boasts a range of memorabilia and exhibits from the Spice Girls to Freddie Mercury, as well as interactive parts such as instruments that can be played.

The official tourism website for Liverpool, visitliverpool.com<sup>39</sup>, lists music separately from Arts and Culture under "Things to Do", which is a clear indicator of the importance of music to its tourism sector. The site highlights the Philharmonic Hall. Both the general music site and the Philharmonic Hall site list music attractions and events, including general information, and prices and dates when necessary (and links to buy tickets). The website also offers a search engine, "What's On" that outlines things to do in Liverpool and can be filtered by type, including music as a filter.

The City of Liverpool, through Culture Liverpool, organises events such as Liverpool International Music Festival and the Mersey River Festival. Culture Liverpool's website<sup>40</sup> also offers a wide overview of events, and they can also be filtered by type. On the national level, Heritage Great Britain contribute to the city's branding and tourism by promoting and sponsoring events, as well as through marketing campaigns.

<sup>36</sup> UK Music (2017) *Wish You Were Here 2017: Contribution of Live Music to the UK Economy*, p. 39.  
[https://www.ukmusic.org/assets/general/Report\\_WYWH\\_17.pdf](https://www.ukmusic.org/assets/general/Report_WYWH_17.pdf)

<sup>37</sup> Liverpool City Region Local Enterprise Partnership (2015) "Visitor Economy. Strategy and Destination Management Plan" online at <https://www.liverpoollep.org/wp-content/uploads/2015/06/wpid-lcr-dmp-2015-2025.pdf> accessed 11-7-2018

<sup>38</sup> BOP Consulting (2018) "Developing a Liverpool City of Music Strategy" online at <http://bop.co.uk/assets/others/Developing-Liverpool-Music-strategy-February-2018-1.pdf> accessed 11-7-2018

<sup>39</sup> Visit Liverpool [Website] online at <https://www.visitliverpool.com/>

<sup>40</sup> Culture Liverpool [Website] online at <https://www.cultureliverpool.co.uk/>

## MUSIC-FRIENDLY LICENSING & POLICIES

### RECOMMENDATION 3: REVIEW EXISTING LICENSING ARRANGEMENTS TO PROMOTE A 'MUSIC-FRIENDLY' CITY

**Initiator:** Music Office (Music Officer/Chair of the Board) / Economic Development Department

**Background:** Cardiff Council's Licensing Policy runs until 2021. It was created through consultation with many partners, although the music sector was not involved in the conversation. The licensing and enforcement for premises in Cardiff lack a specific regulatory framework, as is the case with music venues and nightclubs. The uncertainty this absence creates for owners and promoters is aggravated by the intensive bureaucratic process surrounding premises and events licences. Furthermore, the music venues premise category is unspecified in many regulatory frameworks, such as the Cumulative Impact Policy. There is a perception among venue owners and promoters that certain genres of music/events are policed more strictly than others (eg higher security standards, not receiving events license approvals, etc).

#### Goals:

- Ease and standardise the process used to request the licenses and permits needed for music activities such as outdoor events, opening a venue or starting a music business
- Increase diversity in the music ecosystem
- Develop sensible solutions and partnerships to address anti-social behaviour and nuisance related to licensed premises, including music venues
- Support all-ages access to concerts.

#### PRIORITY ACTIONS:

##### 3.1 Streamline permits and licenses required for music activity

The establishment of a Music Office is one way to make these processes easier, but the development of an online guide or app that streamlines the bureaucratic requirements will make the process clearer and therefore support the work of the Music Office. By making the processes less onerous, music producers and promoters will be encouraged to carry out more music activities.

### 3.2 Reassess security requirements for venues and events

The city, ideally through the Music Office and Music Board, should work with a range of stakeholders — from the government to venue owners, police, the Public Services Board, transport and infrastructure — to identify how to alleviate and standardise security requirements for dedicated live music clubs and events where appropriate. This reassessment should consider reductions for music venues that have a good safety compliance record (i.e. according to the Traffic Light System and other relevant policing measures), as well as those who are burdened by the costs of the security requirements imposed on all licensed establishments. As a start, this reassessment could be approached on a case-by-case basis with promoters and venues, to assess possible solutions for regulations such as the additional capacity limits dependant on adequate fire exits, staff training options, smoke alarms, security staff requirements, CCTV, etc.

A live music and safety stakeholders forum (i.e. a Cardiff Promoters and Police Forum) would promote good practice and frequent communication during the implementation and evaluation of this recommendation, so that challenges faced both by promoters and police can be openly discussed in a safe environment and addressed in a proactive way. For instance, the London Promoter Forum supported by Metropolitan and City Police<sup>41</sup> had a key role in the Met Police's dismissal of the Promotion Event Risk Assessment Form 696<sup>42</sup>, a form that intended a collaborative approach to the management of licensed premises but, in practice, targeted grime, garage and R'n'B acts unfairly<sup>43</sup>.

In the long term, Cardiff should develop a clear guide outlining licencing and safety responsibilities of music venues in particular, similar to the case of the 'Live Music Licence Conditions Matrix' explained below.

#### LIVE MUSIC LICENCE CONDITIONS MATRIX, VICTORIA (AUSTRALIA)

An agreement regarding alcohol licences for live music venues was reached on 6 October, 2010 between representatives of the live music industry, the Victorian Government and the Victorian Commission for Gambling and Liquor Regulation (VCGLR)<sup>44</sup>. The parties involved agreed that "live music does not cause violence", and committed to implementing the Agent of Change principle in 2011 and reviewing the restrictions imposed on live music performance by existing licensing and alcohol regulations. Other measures implemented included a help desk with dedicated

<sup>41</sup> [https://www.facebook.com/events/404142732962526/?active\\_tab=about](https://www.facebook.com/events/404142732962526/?active_tab=about)

<sup>42</sup> London Metropolitan Police (n.d.) "Form 696". Online at <http://democracy.brent.gov.uk/documents/s28414/TEN%20696%20new%20form%20WITH%20696A.pdf>

<sup>43</sup> Mayor of London (2017) "Mayor orders review of Form 696 for music events in the capital". Online at <https://www.london.gov.uk/press-releases/mayoral/mayor-orders-review-of-form-696>

<sup>44</sup> State Government of Victoria (2010)

licensing officers to assist licensees providing live music in navigating the alcohol licensing system and, since 2013, a 'Live Music Licence Conditions Matrix' (the Matrix).

Owners of a live music venue can apply to remove the requirement of crowd controllers and CCTV free of charge, assessed by the Matrix, which sets out standard licence security conditions. Venues providing live music and trading after 1am should submit a management plan to VCGLR complying with their guidelines, which is then provided to the Victoria Police for comment. The management plan takes into account varying conditions, depending on the venue's planning permit, trading hours, capacity and history of compliance.<sup>45</sup>

### 3.3 Improve access to live music events for under-age audiences

One of the key areas that should be reassessed is under-18s access to licensed venues while a live music performance (acoustic or amplified/electronic) is taking place. Due to alcohol licensing restrictions, it is currently difficult to host underage gigs in traditional music venues in Cardiff. Alternative spaces (eg churches, halls, schools) could be used for all-ages concerts with fewer restrictions and licensing issues. These spaces provide a safe, controlled environment for young people to experience live music.

#### ALL-AGES ACCESS TO MUSIC AND ENTERTAINMENT VENUES IN CATALUNYA<sup>46</sup>

Under Catalunya's regulatory framework, owners of licensed premises are responsible for deciding if under-18s (the legal age to consume alcohol) are allowed in their venues. The current policy allows people aged 16 and older to be in premises classified as nightclubs, entertainment venues, dance halls, music venues and music bars as long as live music activities are taking place. Under-16s must be accompanied by a supervising adult and must leave the premises after the show. Requesting IDs for proof of age prior to entering the venue or purchasing alcohol is strictly enforced.

This regulation is overseen by different measures depending on the size (by square metre) of the premises and includes on-site inspections by the authorities, CCTV monitoring, installation of 'person-counting' cameras and infrared cameras or sensors. Although there is not a specific grant or support for music venues to cover security costs, they are eligible for the general grants available to private and community businesses issued by the regional and local authorities.

<sup>45</sup> Victorian Commission for Gambling and Liquor Regulation (2013)

<sup>46</sup> Departament d'Interior, Relacions Institucionals i Participació (2010)

### 3.4 Introduce Musician Loading zones for venues in city centre

Bands need to park close to the venue they're performing at for a short time to load and unload equipment. Evidence from our roundtables suggests that musicians are currently being fined quite regularly as they attempt to park close enough to make the loading and unloading viable. This is hurting them financially, in some cases wiping out the little profit they may be making in the first place. Venues should be able to coordinate with the council to provide access zones for musicians and technicians while loading in and out of venues. This will allow musicians and venues in the city centre to address issues around load in/load out on match and big event days at the Principality Stadium, as roads are blocked off for hours at a time.

#### MUSICIAN LOADING/UNLOADING ZONES, AUSTIN (USA)

The music offices in Austin (ATX Music) collaborated with the Austin Transportation Department to provide Musician Loading/Unloading zones for performers at venues in Downtown Austin. Venue owners can obtain these 30-minute active loading and unloading zones that help to manage traffic in congested downtown areas while increasing safety for performers handling their musical gear. Venues are responsible for requesting, paying for, and keeping track of each permit, which costs US\$25, and also covers a signpost to designate the space.<sup>47</sup>

### 3.5 Create a voluntary busking guidance for Cardiff that reflects residents, businesses and musicians needs

Busking on public land is legal in the United Kingdom. Surveys show that the majority of the public think busking is an asset to a public space. It animates the environment, provides entertainment and makes the area feel safer<sup>48</sup>. To nurture a high-quality thriving street performance scene, we recommend implementing a common-sense Buskers' Code drawn up by all parties: performers, local council, police, residents and businesses. This should form the basis of creating a harmonious positive relationship between performers and their surrounding environment. Busking is not a general nuisance that needs to be controlled. But in some cases, there may be a small minority of performers who fail to follow the code. Existing legislation listed below can be used to address these problem performers.

We do not recommend the introduction of Public Spaces Protection Orders (PSPO) to address excessive levels of noise, nuisance, annoyance, danger or risk of harm or injury caused by street entertainment activities to residents and businesses. These issues can be

<sup>47</sup> City of Austin (2017)

<sup>48</sup> London Street Performance Research, University of Westminster (2016)

dealt with under existing laws, as explained below. Introducing a PSPO is unnecessary and conveys a very negative message regarding street performance. Some cities and boroughs have considered (or have temporarily attempted) the licensing or PSPO route. We have yet to find one that thinks it was the solution to any busking-related issues. This is because it is far too costly and labour intensive to implement and police a regulated scheme on public land. In practice, unlicensed performers still perform on public land even when a licensed scheme is in place, because officers are not present at all times to monitor and enforce it.

Research carried out by Busk in London over 4 years, showed that most busking complaints actually relate to a small handful of performers and complainants. It is more effective to target individual complaints than blanket punish the busking community as a whole. Welcome and encourage new talent to perform on your streets. This will dilute the few problem performers that might exist.

From our experience, introducing licensing does not work. It is extremely hard, time-consuming and costly to regulate. In areas such as the London Borough of Camden, which went down the licensing route, unlicensed buskers continue to play. A preferred policy is to encourage performers to move around and play at a variety of locations. If buskers have to pay to get multiple licenses to allow them to play in different areas, this becomes prohibitive and encourages them to remain in the same place.

We recommend creating a busking taskforce that collaboratively draws up a Buskers' Code that everyone agrees with. In addition, the city should create as many high-quality busking pitches around the city as possible so that there is not too much demand on high footfall areas.

## PLAYING BY THE RULES

### Anti-social behaviour

- If your behaviour is unreasonable and you are having a persistent, detrimental effect on the quality of life of people in the area, you will receive a verbal warning.
- If you carry on, you could be issued with a formal warning letter, followed by a Community Protection Notice under the Anti-social Behaviour, Crime and Policing Act (2014).
- If you breach the notice, you could be fined or have your equipment seized.

### Noise nuisance

- If you use amplification after 9pm you could be charged under the Control of Pollution Act 1974.
- If a sound is causing a persistent, detrimental effect on a person's quality of life, it could constitute a noise nuisance. If you are the cause of this sound and receive complaints you may receive a Noise Abatement Notice under the Environmental Protection Act (1990). If you breach this notice, you could be fined or have your equipment seized. The most common causes of noise complaints are: volume at an unreasonable level; playing the same music repeatedly; not moving regularly.

### Obstruction of the highway

- If you or your audience block people's path you may be causing an obstruction and told to stop. If you carry on you could be charged under the Highways Acts (1980)

### Intimidation or conflict

- If anyone is breaching the peace or intimidating others the police will take action. The person could be charged under the Public Order Act (1986).

### LIVERPOOL: A GUIDE TO BUSKING<sup>49</sup>

In 2015 a best practice guide for busking was produced in Liverpool. Believed to be the first guidance of its kind in the UK, it was developed by the Musicians' Union, the Keep Streets Live Campaign, the Business Improvement District and the city council. Busking is seen as an important part of the city's cultural life and as an asset that adds colour and animation to public places.

The guide is intended for buskers, residents, businesses, police and the local authority. It contains some key recommendations to promote and foster positive relations between users of shared public spaces in the city. It focuses on dialogue, consideration and compromise on all sides (Liverpool City Council et al. 2015:2).

The approach aims to engage the respective parties in a constructive dialogue to resolve any potential conflicts amicably without the need for a formal complaint (Ibid.:3).

Only as a last resort where performers have repeatedly failed to follow the guidance will

<sup>49</sup> Musicians' Union (2015a)

enforcement action be taken (Ibid.:7).

The guide also initiates regular open meetings between buskers in Liverpool to discuss any issues that arise and to maintain positive relationships. It is also possible for buskers to meet regularly with the council to maintain an ongoing dialogue (Ibid.:13).

## GRANTS AND FUNDING

### RECOMMENDATION 4: ECONOMICALLY SUPPORT DIVERSITY IN THE CITY'S MUSIC ECOSYSTEM

**Initiator:** Music Office, Cultural Department / Economic Development Department / Welsh Government Department of Culture, Tourism and Sport

**Background:** In our survey, 'music education grants' received the lowest ranking of priorities that would benefit from government support, and only a small number of the respondents from all categories had previously applied for a grant. At the same time, the sustainability (or lack thereof) of Lottery funds available from Arts Council of Wales (ACW) will impact the music industry funding strands that largely benefit artists and businesses in Cardiff. Many of the career development opportunities in Cardiff are funded by partnerships between ACW, government, public and private organisations, including BBC Wales' Horizons/Launchpad Fund, the Welsh chapters of PRS Foundation's Momentum and Beyond Borders, and the ACW's Portfolio organisations, which overall cover a wide diversity of musical genres and areas of work. These help bridge the accessibility gap for opportunities in the pathways for commercial music overall, although they also maintain the necessary support to the pathways available for formal (classical) education. While still in very early stages of development, Anthem (Music Fund Wales, an endowment fund for young people and music being set up at the moment), could potentially provide new partnerships, funding assistance and strategic interventions to foster opportunities for young people through their music development. The fund is at the capitalisation stage and aims to be fully operative by 2021.

#### Goals:

- Promote transparency and raise awareness of grants
- Maximise the support available to the great diversity of the city's music ecosystem
- Contribute to the growth and sustainability of both the not-for-profit and for-profit music sectors

- Encourage accessibility to the live music ecosystem for underrepresented audience groups, including people with diverse abilities
- Align support for the music ecosystem with the future Welsh Music Endowment Fund (pan-Wales) to expand funding opportunities in Cardiff. The fund will operate for an age range of 3-25
- Weigh opportunities to increase available cultural funding at the local level from contributions of the private sector.

## PRIORITY ACTIONS:

### 4.1 Enable a collaboration framework for funding partnerships

Budget cuts to publicly-funded arts and culture frequently result in underfunded or cancelled projects and limited staff capacity. This major development challenge can be partially overcome by joining forces with other organisations to support the local sector. Cardiff Council (spearheaded by the Music Office) should support its music ecosystem by building on the relationships with key Welsh Government supported institutions such as Arts Council of Wales, Creative Wales (once operative), existing partnerships with Creative Cardiff, and private organisations, via a formal collaboration framework that creates mutually beneficial relationships for the Welsh creative ecosystem in general. The collaboration framework could be established as a cooperation agreement or Public Private Partnership. It should involve regularly scheduled meetings and updates, and a set of clearly defined and aligned long-term goals. Eventually, this partnership framework will lead to leveraged funding and resource relationships through the key mechanisms further proposed in this report, including cultural placemaking and rolling out recommendations from the UK Cultural Cities Enquiry.<sup>50</sup>

### 4.2 Communicate all existing funding opportunities for the Cardiff music sector in a clear, accessible channel

Ideally, this information would be included on the Music Office's website, and news spread through the office's channels and sent to all subscribers in due time. All requirements, deadlines, resolutions and any other relevant information need to be clearly identifiable on the site. The website should be regularly updated, and application processes must be hosted on the same site. Contact information must be easy to find on the website (including a phone number). Resolution motives need to be transparent. The platform should also include information on how to access support and other opportunities

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<https://www.corecities.com/sites/default/files/field/attachment/Cultural%20Cities%20Enquiry%20%5Bweb%5D.pdf>

available abroad as supported by Cardiff Council (eg British Council programmes, city partnerships, etc).

## DIVERSE SUPPORT PROGRAMMES BY MUSICBOARD BERLIN

In 2013, the Berlin Senate set up Musicboard Berlin. Dedicated to the local pop and contemporary music scene, the board offers support to projects that cover both national and international scope. The yearly budget of the Musicboard Berlin is €1.7 million (€250,000 goes towards financing the Berlin Music Commission). There are 5 funding programmes for artists and groups to apply for. In 2017, 48 projects were funded across 2 of the programmes, 19 musicians received support funding, 31 musicians received help from the Scholarship and Residency fund and 12 festivals received funding. That year's funding pool also helped support 183 events<sup>51</sup>.

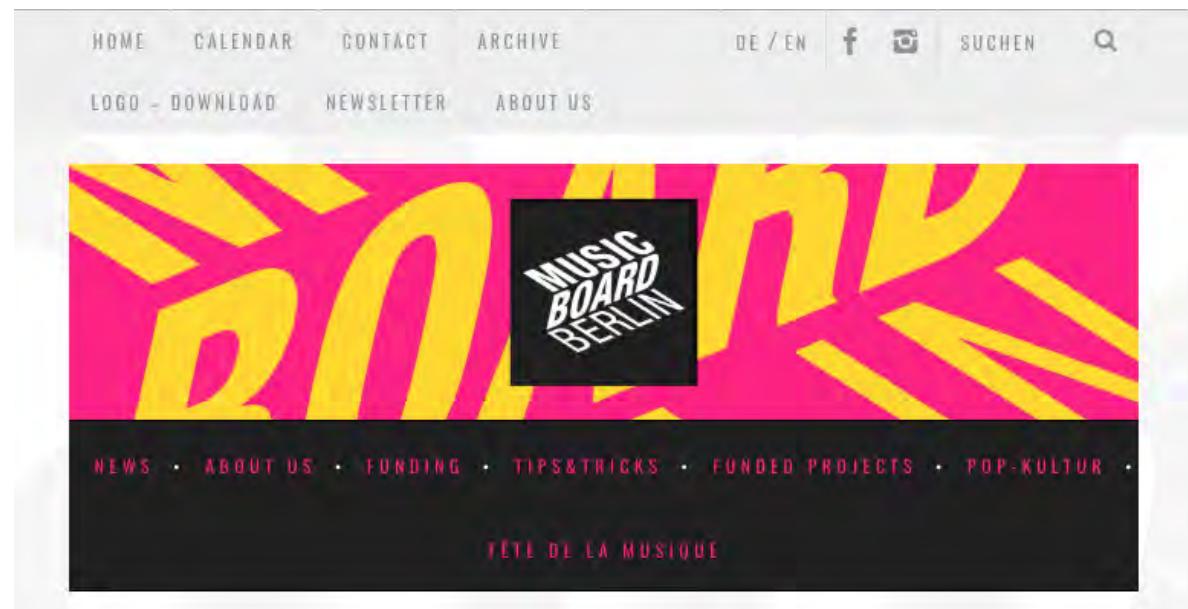


Figure 5. Screen Shot of Musicboard Berlin's Website Header as of 27-8-2018

Career Springboard Berlin and Pop in the Hood funding rounds are twice yearly, Festival Funding and Scholarship and Residencies take place once a year, and Support Funding runs from January–November yearly. Decisions are made by a jury formed of 5 Berlin music industry professionals from a variety of backgrounds. The current jury was appointed in 2018 and will sit on the panel for 3 years. The jury is formed of: a booking and management agent, a radio DJ, journalists and a music and performing arts

<sup>51</sup> Music Board Berlin (2018a)

programmer<sup>52</sup>. The focus of Musicboard Berlin in 2019 will be promoting women in pop culture and strengthening the LGBT and BAME sectors.

- **Career Springboard** – funds projects and programmes aimed at emerging artists
- **Pop in the Hood** – funds projects aimed at live music in local communities
- **Festival Funding** – funds popular music festivals aimed at emerging talent
- **Support funding** – up to €500 per artist/band member towards the costs of touring as a support act of an artist/band. Berlin must be the place of residence/work and the recipient must have the tour and expenses (accommodation, travel, equipment) already calculated<sup>53</sup>
- **Scholarships and Residencies** – funding for a pop-musician/band to develop a new musical project or skill (album or video production, website design, songwriting). Scholarships last 3-6 months and can be between €5,000-10,000. Financial plans must be submitted to justify the amount requested and money is awarded to people who are unable to complete their work without public funding. Residencies in 2019 are available in America, Brazil, Iran, France, Italy, Sri Lanka, India, and Cuba. The Musicboard has arranged a number of partnerships in order to offer residencies abroad, covering flight costs, accommodation, living expenses and some money towards the project. The residency also includes the provision of networks in the local music scene and support in arranging a showcase.<sup>54</sup>

## NEXT STEPS:

### 4.3 Support music venues, event producers and organisations to improve their company conditions by signposting to helpful organisations

Work with funding organisations, donors and other providers to support music venues, event promoters and other music organisations in improving their conditions. Areas should include; sound transfer management, equipment renewal, access, health and safety improvements, diversity, expansion of audience, creation of new positions and staff training. Help to identify grants to meet a wide range of businesses needs. Support needs to be analysed on a case-by-case basis so applicants can benefit from assistance that might be available.

<sup>52</sup> Music Board Berlin (2018b)

<sup>53</sup> Music Board Berlin (2018c)

<sup>54</sup> Music Board Berlin (2018d)

### **BA MUSICA'S OPEN CALL FOR PROJECT FUNDING, BUENOS AIRES (ARGENTINA)**

BA MÚSICA<sup>55</sup> was created by the Government of the City of Buenos Aires to improve the conditions in which live music activities take place in the Argentinian capital. Since 2012, this organisation has provided tools and incentives (including subsidies, tax relief and information sharing) to local musicians and venues.

To be eligible for the support through open call funding, companies, bands or individual musicians must complete a registration process and submit a proposal to obtain a subsidy, tax relief or other type of support. Submissions are accepted annually over two months, after which they are evaluated on an individual basis by a directorate and the Ministry of Culture.

### **CLUB TR3SC, CATALUNYA<sup>56</sup>**

The initiative TR3SC was developed in 2006 as a joint venture of the regional government's Culture and Media Department and the Catalan Corporation of Audiovisual Media. It is a membership-based organisation (currently at 34,000 members) with free and paid plans that provide different access to content and benefits in the network, such as discounts, access to exclusive events and presales, merchandise and its in-house events bulletin and magazine.

The platform benefits the overall cultural ecosystem because it appeals to audiences and cultural producers alike. It provides detailed information on quality programming and accessibility benefits to members, and serves as a promotional channel to encourage cultural consumption in the region. A basic membership costs €34 annually and includes permanent discounts for all advertised events, as well as access to exclusive activities. The club provides a physical card to both paid and free members that can be used to get discounts when booking tickets online or in-person at the participating venues.

<sup>55</sup> Gobierno de Buenos Aires (2018)

<sup>56</sup> TR3SC (2018)

## FUNDING OF ARTS & CULTURE THROUGH TAX INCOME

In 2015, San Francisco enacted an 8% hotel tax, 2.9% of which is allocated to the city's Arts Commission. In 2016, over \$10m of revenue was distributed to arts and cultural organisations.

Berlin developed a similar measure in 2014. Its City Tax amounts to 5% of hotel room prices and is used as a multi-sector fund for the arts. Projects from both individuals and institutions that correspond to Berlin's own self-image as an "open, creative, history-conscious metropolis" are open to apply, and €1.34m is distributed each year.<sup>57</sup>

# SPACES AND PLACES

## ALLOCATE SPACES FOR MUSICIANS AND INDUSTRY PROFESSIONALS

### RECOMMENDATION 5: INCREASE AFFORDABLE MUSIC SPACES AND PLACES AVAILABLE TO ARTISTS AND MUSIC PROFESSIONALS IN CARDIFF

**Initiator:** Music Office / Economic Development Department / Property developers and investors

**Background:** Artists and music professionals, especially at the beginning of their careers, struggle to dedicate the hours needed to perfect their craft and skills, since they mostly complement their income with non-music jobs. 73.2% of survey respondents in the professional group, and those marked as 'Other', work only part-time in the music industry (less than 40 hours/week). Despite there being a range of small and large venues capable of hosting music and cultural events, our data collection and research assessment has determined gaps in the available spaces/venue ladder. Affordability was a particular threat among survey respondents identifying as BAME and non-male individuals. Survey results found that local musicians feel that work/rehearsal spaces are often expensive or unaffordable, and there is a polarisation between respondents who find it easy to network in Cardiff and those who have found it difficult to make connections.

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<sup>57</sup> Berlin Senate Department for Culture and Europe (2017)

## **Goals:**

- Increase the availability of suitable working, rehearsal and performing spaces for professionals in the local music sector
- Allow a place where artists and professionals can meet and collaborate creatively and professionally
- Cluster the music sector to boost economic activity and strengthen the community
- Connect the local music scene with creative and professional opportunities locally, regionally and internationally
- Utilise underused spaces for music activities
- Help music flourish in every area in the city.

## **PRIORITY ACTIONS:**

### **5.1 Develop a Community Music Hub**

To ensure the viability of any music, culture or arts provision, spaces and venues must be affordable and inclusive of the community. A flexible space will drive the viability of the use and will support further investment, long-term job creation and development of skills for local residents. The necessities and capacity of the new music hub and its adjacent venue should be assessed by the Music Office and the Music Board to ensure it is suitable for the needs of the professionals working in the music sector in the city. Ultimately, the centre should act as a professional development hub by providing access to learning, rehearsing, performing and networking opportunities for the music sector. This is particularly important for under-18s and other young musicians, who may find it more challenging to access such spaces, contacts and development opportunities.

The project could be seed funded, owned and operated as a not-for-profit trust. This trust or charity would be tasked to fundraise, build, and then manage Cardiff's music hub. The space could potentially include a venue space to capture income from commercial activity. All profits captured by the venue should be redistributed to the grassroots sector, supporting the creation of new festivals and events, music education, community music projects, artist development and training, recording and management, among other uses.

### THE GLAD CAFE, GLASGOW, UK<sup>58</sup>

The Glad Cafe is a Community Interest Company that currently operates as a non-profit cafe. To be considered a Community Interest Company, the cafe must use profits and assets for public good. The Glad Cafe achieves this by supporting the Glad Foundation and Glad Rags Thrift Shop. The income generated is reinvested into the Glad Foundation which provides free music workshops for locals. The Glad Cafe is also Glad Community Choir's HQ.

The cafe features a 120-capacity music venue behind the café space. The venue supports and is supported by independent and DIY promoters and local musicians.

The venue and cafe receive indirect state support. The business has a 10 year lease that was established with a loan from Social Investment Scotland, a Social Enterprise and not-for-profit provider of business loans to the third sector. Other monies for this project come from grant funding from Arts & Business Scotland, a charity and limited company. This company received Scottish government money and support from Creative Scotland. It is also sponsored by Scotrail.

Along with this public funding, the venue greatly depends on in-kind support from the private sector. For example, the PA system and other equipment is loaned to the cafe by local companies SSK and Create48. The main costs for this venue are staff salaries.<sup>59</sup>

### TREMPOLINO, NANTES, FRANCE<sup>60</sup>

Trempolino in Nantes is another good example of best practice in this sector. More information on it can be found earlier in this report, in section 2.4, *Strengthen and further develop inter-city collaborations*.

## FURTHER ACTIONS:

### 5.2 Provide a framework to facilitate temporary leases for local music and cultural organisations in non-traditional spaces

Such leases would be available to non-profit and charity organisations, as well as commercial organisations, to provide affordable working spaces for the music ecosystem or spaces for producers to organise music events. To be selected, organisations would need to provide evidence of how their activities will engage with and contribute to the

<sup>58</sup> <https://www.thegladcafe.co.uk/>

<sup>59</sup> Behr, Dr. A.(2014)

<sup>60</sup> Trempolino (2018)

community, as well as justify the ways they enhance the diversity and vibrancy of the local music and cultural scene.

### KREATIVE RÄUMEN WIEN, VIENNA<sup>61</sup>

Kreative Räumen Wien is the city's office for 'activating vacant spaces', managed directly by the City of Vienna and 3 other agents: a representative of the cultural industries, a representative of the property industry and a legal advisory company. Kreative Räumen acts as an intermediary by connecting relevant city departments with potential users of vacant spaces and property owners, as well as providing any additional legal advisory services required. The consortium has brought over 400 spaces into use since 1999 and signed cooperation agreements with over 100 different owners and property companies<sup>62</sup>.

Kreative Räumen provides vacant spaces in specific urban development areas in Vienna to local companies and professionals in the creative industries as part of the City's strategic promotion of the local cultural and creative sector. Spaces are used for a variety of purposes and timeframes, including as exhibition spaces, offices, performance spaces and artist workshops, which are determined in advance during the mediation of the City with the interested lessee and lessor.

## PLANNING, TRANSPORT, PLACEMAKING

### RECOMMENDATION 6: MAXIMISE EXISTING PLANNING TOOLS IN CARDIFF TO PROMOTE A 'MUSIC FRIENDLY' CITY

**Initiator:** Music Office / Planning Department / Highways and Licensing

The solution to many of the issues relating to the development of a thriving Music City lie within the planning process. Cardiff Council's Local Development Plan 2006-2026 (LDP) is the main planning document for Cardiff Council, and outlines the authority's policies for managing development over the aforementioned timeframe.

There is limited reference to specific music-related policies within the LDP, as it is considered a use of building, often with more issues applicable to licensing rather than planning matters. In addition, some positive planning policies can have unforeseen

<sup>61</sup> Kreative Räume Wien (2018)

<sup>62</sup> Magistrat der Stadt Wien (2018)

consequences for live music operations — for example, street pedestrianisation can make loading and unloading equipment into venues more complicated.

This can be exacerbated when large events take place at the Principality Stadium. Taxi fares and parking fees can also significantly increase the cost of a night out for audiences, which reportedly keeps many from travelling more frequently to the centre for music shows. This is a consequence of the current transport infrastructure in Cardiff which is a weak area when it comes to supporting a growing evening and night-time economy.

The Planning process is key to delivering many of the aspirations within the report, and can also be influential in terms of conditions imposed on operators, or the development of music infrastructure in new areas and buildings in the city. Involving planning at an early stage will help to mitigate future problems and provide guidance on delivering many of the changes recommended within this report.

### **Goals:**

- Facilitate the development of music activity to serve areas of the city and during extended hours
- Anticipate potential disturbances and develop a good relationship between residents and music spaces
- Establish relationships with the planning department to leverage possible opportunities
- Involve the real estate development sector in the creation of a music-friendly city
- Explore placemaking benefits of encouraging music to happen in non-traditional spaces
- Consider a night-time economy strategy to add clarity to future planning decisions
- Ensure Planning representation on the Cardiff Music Board to ensure deliverability of ambitions is considered.

### **PRIORITY ACTIONS:**

#### **6.1 Consistently implement Planning Policy Wales 10 and apply the 'Agent of Change' principle in Cardiff**

In December 2018, Planning Policy Wales 10 was adopted by the Welsh Government. This outlines policy guidance for local planning authorities in Wales, and should feed into policies across the country.

The Agent of Change principle is a protective policy, now adopted in Wales, to hold new developments accountable for sound attenuation<sup>63</sup>. Its implementation in Cardiff should be assessed to better serve the requirements of cultural operators, including sound attenuation measures when a proposed residential development is within 50 metres of existing live music performance venues. Sound exposure and limits should be defined in areas of risk (i.e. city centre) to hold venues accountable for possible infringements, while making new residents and visitors aware of the noise levels in the area.

The 'Agent of Change' should be triggered automatically when a new planning application is lodged, in order to initiate the sound attenuation assessment. Planning Policy Wales contains several specific references to live music, and numerous references to the importance of cultural institutions, of which live music venues or associated infrastructure such as recording studios, undoubtedly form a part.



Principality Stadium. Photo: VisitCardiff

<sup>63</sup> Beverly Whitrick, Strategic Director at Music Venue Trust (MVT), reassured Sound Diplomacy that the sector is already working on advocacy and campaigning for ensuring that the 'Agent of Change' protects grassroots music venues. She also pointed out that Jon Fox submitted extensive advice on behalf of MVT to the first draft of the Welsh Government's Noise and Soundscape action plan 2018–2023, where Section 4.3 commits Wales to adopting Agent of Change in a manner that explicitly protects grassroots music venues.

## VALLEY SOUND MACHINE, BRISBANE

Brisbane City Council created the Valley Sound Machine<sup>64</sup>, an online tool that gathers samples of expected noise levels from various areas of the Entertainment District. Anyone can listen to two audio samples from an area of their choosing, from two times of day (10am to midnight and midnight to 10am). The user can also customise the samples themselves, with options to add extra sounds from common sources such as traffic, buskers and patrons. Users can also test this decibel level against different types of locations, including on Valley streets and in Valley apartments with different levels of insulation. When the Valley Music Harmony Plan<sup>65</sup> was first published, the primary concern for venues and noise was not resident complaints, but rather the licensing laws that entailed an alcohol license, which came with stringent noise levels past 10pm.



Screen shot of the Valley Sound Machine online tool

The online tool allows the user to hear and view the average decibel level while adjusting the time, precinct, type of sounds, type of insulation of the apartment, and so forth. Further customisable options include checking the sound levels at night inside a low-insulated apartment. The tool will also suggest better insulation materials to help mitigate, where appropriate, against sound.

While not intended as a definitive measurement, the Valley Sound Machine provides some guidance on expected decibel level for residents or businesses intending to move into the area.

## NEXT STEPS:

### 6.2 Develop a placemaking strategy and masterplan for Castle Quarter which highlights it's unique position within Cardiff's music scene

The Music Office and Music Board should consult the music businesses in the area about the development of a branding and placemaking strategy for Castle Quarter. This could be pitched to Cardiff Council and based along the lines of Manchester's Northern Quarter. A pitch should include an Action Plan outlining its economic, cultural and planning potential. The assessment of such branding should determine which promotional tools and channels would be most suitable (eg social media promotion, printed leaflets, bespoke signage) as well as to prepare for mitigating possible conflicts that may arise, such as a review of the limitations on opening hours.

#### QUARTIER DES SPECTACLES, MONTRÉAL

The Quartier des Spectacles is downtown Montreal's primary entertainment and arts district. It boasts over 30 performance venues in an area just over 1km<sup>2</sup>, as well as public spaces for over 40 events per year. The district was designed for music and cultural events, with several projectors bringing surrounding infrastructure to life, lamp posts designed for rigging, illuminated walkways and several other urban design features. Although originally intended to support the Montreal International Jazz Festival, it now serves other cultural events. During the summer, the area is pedestrian-only.

The district can host 50,000 people in its various spaces, and organisations can apply to hold events via the Quartier des Spectacles website, which lists each public space alongside their respective specs. Proposed events must be free to the public and must not act as a sales or promotional platform for commercial entities.<sup>66</sup>

### 6.3 Engage with the local music sector in the new Cardiff Arena development

Cardiff is committed to building the missing piece of the city's music infrastructure, a new 15,000 seater, multi-purpose arena. This new development will attract more International acts to Cardiff and have a positive impact at all levels of the live music ecosystem, from the grassroots venues to our major spaces. The Cardiff Music Office and Music Board will work on ensuring clear channels of communication are established between developers, operators and the existing ecosystem.

<sup>66</sup> Quartier des spectacles Partnership (2017)

## 6.4 Work with partners to support improved evening and night time public transport accessibility

Undergo a consultation with the Music Board and transport officials to determine potential new routes for buses and bicycles, and explore revised timetables for public transport. The improvements would be aligned with the existing transport and mobility strategies in place and could potentially be used to promote a responsible night out in Cardiff as part of a promotional campaign. Some of the key opportunities for improvement that have been noted include:

- Install smart lighting in the parks and mark cycle routes through Bute Park
- Assess viability of new bus timetables/routes
- Assess viability of adding later trains to the timetable
- Lobby transport operators to trial later train services on event weekends or for a gig night once a month
- Ensure Music is a consideration as the South Wales Metro system develops.

### NIGHT NETWORK TRANSIT, MELBOURNE<sup>67</sup>

Since late 2015, Public Transport Victoria has had a comprehensive Night Network connecting suburbs and regional areas in the Australian province, including 24-hour public transport options on weekends<sup>68</sup>. The night transit scheme has proven to be crucial to the development of its night-time economy by providing safe, easy and cheap transport options. The City of Melbourne's Night Network is designed to provide an all-night train, tram, or bus service within one kilometre of the homes of 70% of Melburnians to encourage its use<sup>69</sup>. Free Tram Zones available in the daytime also apply to late night travel, which helps locals and tourists move around the city's core activities district.

The use of the night transit network is also promoted through the recent Explore the Night campaign which shows how specific Night Network routes connect to Melbourne's nightlife, with a focus on live music activities. The campaign includes outdoor and radio advertising, and other promotional activities, as well as artist-curated Up-Late Playlists that can be accessed by scanning Spotify codes in posters around town. Local musician Ecca Vandal produced its musical single.

<sup>67</sup> Public Transport Victoria (2018)

<sup>68</sup> Premier of Victoria (2018)

<sup>69</sup> Transport for Victoria (2018)

## BUILDING AMENDMENT (LIVE MUSIC) REGULATIONS IN AUSTRALIA

The Building Code of Australia (BCA) has a direct impact on live music venue viability, as well as on existing venues providing a live music programme. Under BCA definitions, venues are either classified as Retail Class 6, which groups retail, bars, hotels and restaurants, or Assembly Building Class 9B. If a venue offers live entertainment it is then classed as a 9B (together with buildings such as sports stadiums and airports) and is required to comply with higher safety standards. This is particularly troublesome for smaller venues and those located in older buildings, which are generally more expensive to modernise and bring up to code standard. The extensive building work required for this higher level of compliance can make it impracticable for small venues to host independent small-scale entertainment.<sup>70</sup>

The BCA Classification system was deemed inconsistent, highlighting that there was not a strong evidence for the difference between Class 6 and Class 9B buildings, particularly given improved technological changes to live music performance, and this approach did not accurately reflect the risk (i.e. use, hazard or occupancy)<sup>71</sup>. As a solution, the Building Amendment (Live Music) Regulations 2014 were introduced by the Government of Victoria to amend the Building Regulations 2006 in relation to the classification of Small Live Music Venues under the BCA in the State of Victoria. The Regulations were changed to recognise the provision of live music entertainment as an important part of the use of small Class 6 buildings such as hotels, restaurants, cafes and bars (small live music venues), effectively cancelling their automatic classification as Class 9B buildings.<sup>72</sup>

<sup>70</sup> Government of Western Australia (2015)

<sup>71</sup> SKIP Consulting Pty Ltd. (2015)

<sup>72</sup> Victorian Building Authority (2014)

### **AMSTERDAM'S EXTENDED VENUE CURFEWS<sup>73</sup>**

Amsterdam City Hall has given 24-hour alcohol and operating licenses to 10 venues in the outskirts to relieve pressure on downtown nightlife and tourism. Such venues act now as cultural destinations, while also providing services to the community in the daytime. Venues taking part in the Amsterdam Dance Event also have extended operating hours (closing at 8am instead of 4am), an exception granted in exchange for in-kind contribution from venues, such as street teams.

Longer opening hours have led to staggered dispersal and quieter patronage, rather than club-goers turned out onto the street all at once. Venues and events that receive special licenses are evaluated on an individual basis to ensure that their cultural programming contributes to the attractiveness and diversity of Amsterdam. This requires extensive licensing work but is a long-term solution for the sustainability of tourism as well as the vitality of the city and its nightlife.

### **BUILDING AFFORDABLE ARTIST STUDIOS THROUGH SECTION 106 AGREEMENTS IN HACKNEY, UK<sup>74</sup>**

Section 106 agreements in London are frequently used to secure the delivery of key local infrastructure including schools, affordable homes, public realm enhancement projects or heritage assets, and can also provide for cultural infrastructure. The developer may implement these contributions themselves, or agree to make a payment to the local planning authority, so that delivery of the works is overseen by the council.

Hackney Council's cultural policy identifies how the borough can act as a broker in developments, to ensure that provision is made for affordable appropriate space or as the provider of property. Under the Section 106 agreement, the newly-built mixed-use development of Matchmakers Wharf in Hackney has integrated 49 purpose-built affordable artist studios. The development is by Hackney Wick, an area that has traditionally offered artists' studio space at affordable rents, but which has been coming under pressure due to gentrification. Thus, the new development of market and affordable residential units enables access to the 49 artist studios at lower than market rents on a 999-year lease. The studios were allocated in 2012 with priority given to artists resident in Hackney.

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<sup>73</sup> Diaz (2017)

<sup>74</sup> Mayor of London (2015)

# EDUCATION

## ACCESS TO MUSIC EDUCATION IN ALL LEVELS AND AGES

### RECOMMENDATION 7: BUILD PARTNERSHIPS TO ENABLE A COLLABORATIVE PROVISION OF MUSIC EDUCATION IN CARDIFF

**Initiator:** Music Office / Education Department / Key Music Education Stakeholders

**Background:** The largest provider for Music Education is Cardiff County and the Vale of Glamorgan Music Service. There are three main strands of provision: Instrumental teaching in schools, Music Development projects and Ensemble activities. Over 90% of Cardiff schools give pupils the opportunity to learn an instrument. 87% of this work is delivered by Cardiff Council and the Vale of Glamorgan Music Service, with about 100 staff employed to teach.

The Assisted Instrument scheme enables parents to purchase affordable instruments at reduced cost, and, where there is need, instruments are loaned to pupils who may not be able to afford them. Schools can use the Pupil Deprivation Grant to fund pupils on free school meals. In areas of high deprivation, the Service facilitates Music Development projects, which support inclusive and diverse provision. The Music Service also runs 20 ensembles ranging from orchestras and brass bands to guitar groups and choirs. These ensembles provide over 600 pupils with the opportunity to make music together. Many of these pupils go on to perform with National Youth Arts Wales, in the national ensembles.

Music in the school curriculum is represented in Cardiff by 13 High Schools and 2 post-16 settings offering GCSE courses. In addition, BTEC diplomas in Music/performing arts are on offer in 9 schools, with 2 offering A/AS level courses. Cardiff Council's Youth Service run 5 recording studios, and a partnership with 'The Ministry of Life', which provides a level 2 course in Music Industry Skills. Cardiff and Vale College supports this course, and runs level 3, 4 and 5 music and music tech courses covering all aspects of the Music Industry. Grassroots Studio is another Youth Service initiative aimed at the most vulnerable 16-25 year olds to develop their skills and work towards accreditation. At a degree level, Courses in Classical Music at RWCMD and Cardiff University and Rock and Pop music at the Atrium (University of South Wales) are available. Adult and Community Education provides recreational courses for those engaged in lifelong learning.

This is a wide ranging and well developed music education plan, and in light of the information above, survey respondents demonstrated an overall positive opinion of it, scoring it an average of 3.2 out of 5. However, the availability of high quality music industry education was rated poorly, and whilst instrument learning programmes and group

support are indeed available across Cardiff, there are very limited options for individuals to access training that is linked to industry-demanded skills, whether it's an introduction course to music production/mixing software such as Ableton; playing a particular instrument; or beginning a traineeship in a recording studio. In fact, about 56% of artists and 42% of professionals surveyed are self-trained in both the music and music industry fields, while only about 20% studied music-related topics at university.

Music educators are common roles in the music ecosystem, and those who work in the field appear to be the top-earners in the analysed ecosystem sample – 50% of these respondents earn £35,000-50,000.

#### **Goals:**

- Promote the benefits of music education among schoolchildren and young people
- Ensure there are clear access routes for all, whether they wish to learn, participate or perform in the many roles offered by the music industry
- Provide extracurricular opportunities to develop the skills and knowledge related to professions and roles in the music industry from an early stage, with increased opportunities for young people to participate in Cardiff's musical life
- Retain and develop high quality teachers, facilitators and performers.

#### **PRIORITY ACTIONS:**

##### **7.1 Create a Map of Musical Opportunities and the relevant pathways to inform participants on how best to plan their musical journey**

Whilst there is a lot of music education activity going on in Cardiff, it is difficult for those working within it to see the full picture, as many providers are working in isolation. The music education partnership should gather information, once this has been completed, prepare a menu of opportunities and a map of provision, explaining appropriate pathways to assist participants to achieve their musical goals. There should be an online resource for pupils and parents, putting these opportunities all in one place to disseminate across schools, so that teachers are aware of next steps available to their pupils. This work should also be linked with real life experiences and potential employment using established education-business partnerships in Cardiff, as well as mentorship opportunities, industry awareness open days, and other ways to inform secondary school career advisers on opportunities in the music industry, so that students are engaged to pursue music tertiary studies and traineeships in Cardiff.

## 7.2 Develop a vision for a Universal Music Education Offer for all Young people in Cardiff

Bring together the key stakeholders for music education in Cardiff to create a music education partnership. This group should construct a vision for music education for the city, informed by sharing the best of what is currently on offer and how to enhance and develop this further. This vision should be clearly articulated and ambitious in its scope.

### NEXT STEPS:

## 7.3 Introduce music workshops aimed at primary and secondary school students

Music workshops for young students are an excellent and informal way to introduce children to the diverse world of music, to provide a community of music students, and a good way to invest in much-needed music education in Cardiff. These should be in connection with the current National Assembly for Wales campaign to make instrumental classes free for all children, highlighting the importance of equality in access to music. Music workshops allow students to experiment with a variety of music genres and to try out a variety of new instruments. Singing can be encouraged to develop ear training, as can an introduction to music theory concepts, and musical notation.

It is worth noting, that part of this could be included in ACW's Lead Creative Schools Scheme<sup>75</sup>, which aims to promote new ways of working in schools, providing the opportunity to develop an innovative and bespoke programme of learning designed to improve the quality of teaching and learning.

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<sup>75</sup> Arts Council of Wales (2018)



## SOUND THINKING NYC

This programme is offered from the City University of New York and Creative Arts Team initiative. In general, it provides multiple levels of student commitments all focused on increasing opportunities in the music industry for underrepresented groups, particularly women. During the programme, students are given the chance to visit recording studios, learn about sound design, and network. Participants must be New York City students entering the 11th grade and be accepted via a competitive application process.

The initial programme consists of a 3-week Summer Intensive. All graduates of this phase are given opportunities to participate in industry-related events during their 11th and 12th grades, apply for designated paid summer internships, and apply to free college credit courses during their final year of high school. During the programme, participants receive free metrocards for the three-week period and lunches. All expenses are covered by the Mayor's Office for Media and Entertainment (MOME)<sup>76</sup>.

<sup>76</sup> Ibid.

# ARTIST DEVELOPMENT

## PROVIDE ARTIST DEVELOPMENT OPPORTUNITIES FOR LOCAL ARTISTS

### RECOMMENDATION 8: CHAMPION ACCESS TO ARTIST DEVELOPMENT OPPORTUNITIES IN CARDIFF REGARDLESS OF AGE, SKILLS LEVEL AND GENRES OF WORK

**Initiator:** Music Office / Economic Development Department

**Background:** Overall, critical challenges within the ecosystem are mostly to do with bureaucracy and the availability of support for talent development: performance fees, regulation, funding support and support from media, labels and managers. Artist survey respondents ranked performance fees as the worst asset of Cardiff's music ecosystem, with BAME respondents' ratings even lower than the total average. The majority of artist respondents (71%) work 20 hours or less, with a majority (87.2%) reporting earnings of less than £10,000 from music sources alone per year. Although precarious in salaries, the local scene is vibrant; 'local talent' is the best-rated asset in the ecosystem, and a majority of artist respondents played at least one show in Cardiff (83%) last year. It has also been noted among audiences there is a certain homogeneity in the acts being booked – mostly in rock/indie – and more diversity of genres in the local scene would be appreciated.

#### Goals:

- Promote fair remuneration for artists and a sustainable job economy in the local ecosystem
- Increase access to performing opportunities for artists in all their artistic development stages
- Allow for more development opportunities by artists working in a diversity of music genres
- Create and grow a Cardiff Signature event that nurtures home grown talent.

#### PRIORITY ACTIONS:

##### 8.1 Create a 'Fair Play' charter of ethics and certificate for venues

The Music Office, in collaboration with the Music Board, should work with Musicians' Union and partners to deliver their 'Fair Play' scheme and principles that support local artists, promoters and venues to create fairer deals that help the creatives and the music ecosystem at large. While it would not be a mandatory requirement, it would be more encouraging if organisations such as venues, festivals and promoters eligible to receive

local or provincial grants would need to provide proof of complying with this 'Fair Play' standard, including not having pay-to-play bookings and covering diversity quotas in their programme. This status should be assessed periodically to ensure venues are still compliant and adapting to new booking requirements and standards. Venues with a 'Fair Play' certificate would be able to promote themselves as such in promotional materials, including priority space in Cardiff-led Music City marketing and communication actions.

#### THE MUSICIANS' UNION'S FAIR PLAY VENUE SCHEME<sup>77</sup>

The Musicians' Union advocates and promotes activism against unfair treatment of musicians in the UK. Its advocacy led in 2015 to the Fair Play venue scheme, which aims to "recognise good practice and stamp out the unfair treatment of musicians"<sup>78</sup>.

The guide<sup>79</sup> contains advice for self-promoting artists in areas such as fair co-promotion deals, participating in competitions and showcase events, and submitting applications to perform at festivals. Musicians can submit their positive experiences at venues to get the owners involved in the Fair Play scheme, and after evaluation the venues can include a sticker to display as the badge of their respect for artists.

## 8.2 Create a platform for performance development

Artist showcases and 'Battle of the Bands' type events serve a multitude of purposes. They provide artists an opportunity to hone their public presentation with the added challenge of attentive audiences or competitive lineups. They also act as a marketing device, showcasing the best homegrown talent Cardiff has to offer and allowing artists to perform to audiences who may have originally come to see someone else play.

For competitions which award prizes for best performances, this is an opportunity for artists development in itself. Organisers can work alongside local recording studios and other stakeholders to provide studio time, new artist and band shots, instruments/gear or even a gig at subsequent event, such as a festival slot or support slot for a touring act. While artist showcases may not have a competitive element, those selected for the event could receive coaching as part of their participation, advising them on the marketing and business skills needed for artists looking to build their careers. It is worth noting that the council already runs an annual event called The Big Gig that works in some of these areas. However, the event would benefit from taking on some of the recommendations here.

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<sup>77</sup> Musicians' Union (2015b)

<sup>78</sup> Ibid.

<sup>79</sup> Musicians' Union (2018)

## FReeZA PUSH START BATTLE OF THE BANDS

To highlight local talent diversity, the regional Government of Victoria funds the FReeZA Push Start Battle of the Bands, that awards monetary and in-kind prizes and festival performing slots to finalists.<sup>80</sup> This showcase is open to any style of music, including bands, soloists, hip hop artists, electronic and acoustic acts, and so forth. Young event organisers and promoters also participate through local committees and Youth Councils that host FReeZA Push Start. Whilst this event does not attract large audiences, the performing value for young bands is noted by the participants.

"We've watched over 300 talented artists participate in the competition via their local FReeZA group over the past 12 months and it's really encouraging to see such impressive songwriting and performances from the nine artists who have progressed to the final." — Shane Wickens, Push's Artistic Director

## NEXT STEPS:

### 8.3 Create a cross-genre international artist showcase and signature event

An artist showcase event is a great opportunity to market Cardiff as a city filled with talent, whilst providing artists a platform with which to build international recognition. This could begin with a cultural exchange, as suggested in Recommendation 2.4, utilizing sister city relationships to send Welsh musicians to Stuttgart and Nantes, and vice versa. Over time, the programme could progress to include presentations at festivals such as South by Southwest or The Great Escape. A showcase setting gives artists and their teams the chance to build fan bases and make business connections, and is an excellent opportunity for acts who have reached local headline status and are looking for the next step in their careers.

It is important that potential lineups to a showcase event are carefully chosen to represent the diversity of music Cardiff has to offer. The city should explore the development of a music based signature event, that creates a platform to nurture home grown talent on a shared stage with established musicians.

The British Council Wales recently published their International Showcasing Strategy for the Arts of Wales<sup>81</sup>. The report's findings and recommendations would seem to strongly

<sup>80</sup> Beat (2016)

<sup>81</sup> [https://wales.britishcouncil.org/sites/default/files/international\\_showcasing\\_strategy\\_final-111018\\_v2.pdf](https://wales.britishcouncil.org/sites/default/files/international_showcasing_strategy_final-111018_v2.pdf)

encourage the creation of an artist showcase. We would suggest developing city based showcasing platforms associated with Cardiff music events and festivals.

### CANADIAN BLAST

CIMA is the not-for-profit national trade association representing the English-language, Canadian-owned sector of the music industry. CIMA's membership consists of Canadian-owned companies and representatives of Canadian-owned companies involved in every aspect of the music, sound recording and music-related industries. The experience gained over its 40 years of existence has allowed the organization to effectively use its resources, such as by investing in research and market development on key territories. CIMA develops member-specific activities such as Canadian Blast, the initiative for showcase and B2B events including presentations at international festivals, conferences, trade fairs and independent trade missions. The program focuses on the US, Europe, Asia and Australia as key territories, providing marketing and promotional opportunities for artists and businesses they could not otherwise gain access to. Depending on the market, Canadian Blast participation can be organised by providing a stand during a trade fair, staging a showcase during a festival, organising speed networking or mixing sessions for professionals, providing PR on specialized media and so forth.



Image courtesy Clwb Ifor Bach

# PROFESSIONAL DEVELOPMENT

## PROVIDE PROFESSIONAL DEVELOPMENT OPPORTUNITIES FOR THE LOCAL SECTOR

### RECOMMENDATION 9: SUPPORT INDUSTRY PROFESSIONALS TO DEVELOP THEIR CAREER, NETWORK AND SKILLS IN CARDIFF

**Initiator:** Music Office / Economic Development Department

**Background:** Formal training in the music business is still underdeveloped in Cardiff and what is available is not sufficiently promoted. Arts Council of Wales continues to be a major supporter of professional development opportunities for artists and organisations through its funding programmes, particularly those involved in partnerships with UK organisations such as the BBC or PRS Foundation, as well as the associated Portfolio organisations that reach out to musicians and audiences. However, less than 19% of survey respondents have participated in local music education or music industry education workshops. The Welsh Music Foundation's directory of music businesses and the workshops it organised are quoted as being 'much missed' by artists and professionals in Cardiff, and the sector is still lacking a platform for networking and developing new business relationships. There is an opportunity to help Business to Business and Consumer to Business music services, as the music industry is heavily profit-driven in Cardiff. In fact, 62% of surveyed organizations have a for-profit status, music activities represent 91-100% of total revenue for most music organizations surveyed and only 10% of the total revenue in surveyed organizations derives from work with local artists. These statistics point to various areas of professional development that would be beneficial to local businesses.

#### Goals:

- Develop skill training and networking opportunities on the local level
- Connect local industry professionals at all stages of their careers with UK and international experts, to grow their practical knowledge and development capacity
- Promote access to funding and mentoring opportunities for professionals and businesses struggling to move to the next level
- Grow a sense of community among professionals in the local sector
- Encourage and promote workplace learning opportunities
- Encourage employers to support employees in higher education through allocated study time, and monitoring capacity within the workplace.

## PRIORITY ACTIONS:

### 9.1 Organise music business workshops and conferences in partnership with UK organisations and professionals

In partnership with local and national organisations, the themes for the workshops, consulting sessions and conferences would be identified by running surveys, circulating enquiry forms, or identifying urgent needs through other qualitative means. A programme calendar should be drawn up to deliver the workshops. It was highlighted during the consultation that local promoters have shown an interest in and would benefit from such a programme, targeting skills such as business management and marketing/PR.

As a suggestion, the Music Office should also coordinate access to introductory courses for other council departments to better understand the music industry and live music sector and its idiosyncrasies, perhaps by inviting local stakeholders in the music industry to come and give a talk or a presentation to the council itself.



On Record, Cardiff Contemporary Festival. Photo: Noel Dacey

## **SYNTHESIZER, TEL AVIV**

Synthesizer is an accelerator for musicians built on the traditional business accelerator model. This agency is a non-profit which subsidises almost all of the selected artists' tuition costs through private donations (the chosen artists only have to pay \$300 out of their own pocket).

The organisation selects 12 artists and uses open community spaces for its workshops and mentor meetings. The programme lasts 12 weeks and requires artists to participate fully. Synthesizer offers lectures, professional consultations, personal mentors and workshops covering bureaucratic, managerial and artistic aspects.

In return, and as practice for live performance, Synthesizer participants give free public concerts each month. For the programme's final production artists perform in two showcases hosted in the Bascula arts centre.

The courses offered during the 12 weeks include:

1. The Musician as a Business
2. Defining Your Independent Identity
3. Production Fundamentals and Show Strategy
4. The Secrets of Booking
5. Traditional Media, PR, and Industry Norms
6. Digital Presence and Social Media
7. Community, Networking and Groundwork
8. Legal Rights, Distribution, Royalties, and Sync
9. The Big World: International Careers
10. Time, Team and Resource Management
11. Tips, Ideas and Inspiration
12. Live Sessions and Showcase

To be selected, artists must be unsigned, own or have copies of their recorded materials, and performed in at least one live show.<sup>82</sup>

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<sup>82</sup> Synthesizer (2018)

## NEXT STEPS:

### 9.2 Assess the creation of a Cardiff music business incubation programme

The development of new ideas, products and services in the music industry is being stymied by difficulties in accessing appropriate mentoring, R&D and funding resources. This is particularly true in the case of music start-ups, but also resonates for the majority of the self-employed creative workforce in Cardiff, including musicians. To assist them, a Cardiff music business incubation programme could be tested as an online portfolio and mentorship scheme, evolving into a permanent location after assessing its effectiveness and viability. Businesses should be encouraged to cater to, or work in conjunction with Cardiff's music ecosystem. This initiative could potentially be delivered in partnership with the Enterprise Zone Wales scheme (Central Cardiff).

#### NASHVILLE ENTREPRENEUR CENTER'S PROJECT MUSIC PORTFOLIO<sup>83</sup>

The City of Nashville has grown its credibility and reputation as a Music City over the decades, but it has been in the recent years that it is targeting the growth of its tech sector to develop a strong music tech sector. One of its initiatives in this area has been the Project Music Accelerator, developed by the Nashville Entrepreneur Center. It began in 2015 and evolved into the Project Music Portfolio, supported by the Country Music Association (CMA). The Center also has an Entrepreneur-in-Residence to work hand-in-hand with participants as they validate and mature their businesses<sup>84</sup>.

This year's programme brings music, tech and business leaders together to nurture 13 growth-oriented startups in the music industry. It is intentionally focussed on developing innovation through 'connections, curriculum & community' tailored to each entrepreneur's needs. Although participants do not need to be based in Nashville, the programme involves at least 4 curated events over the course of the year and provides access and connections to advisors and music industry leaders, in exchange for an annual fee of US\$3,900 per year, per company.

<sup>83</sup> Project Music Portfolio (2018)

<sup>84</sup> Project Music Portfolio (2017)

# AUDIENCE ENGAGEMENT

## RECOMMENDATION 10: EXPAND MUSIC ACTIVITIES IN CARDIFF

**Initiator:** Music Office / Economic Development Department

**Background:** Qualitative evidence taken from our survey suggests that live music plays an important role in the daily life of Cardiff's population, with 75% respondents saying they attend a music event once a month or more often. On top of this, it is the scene made up of local, emerging artists that appears to be the most strongly supported, with only 4% of respondents claiming not to be interested in this type of gig.

With traditional, night time venues being the most common way of putting on gigs in Cardiff, affordability of tickets and the lack of night time transport options post-gig are cited as major obstacles to attending more concerts.

The potential regeneration of St David's Hall also presents an excellent opportunity to develop new audiences and expand the number of regular concert goers in the city.<sup>85</sup>

### Goals:

- Bring together Cardiff's communities through music activities and increase social cohesion
- Build and promote Cardiff as a Music City from the ground up by engaging the grassroots industry and audience sectors
- Promote access to music audiences from a wider diversity of backgrounds
- Increase the number of paid gigs and audience exposure for local musicians
- Provide skill development opportunities to young/inexperienced promoters.

### PRIORITY ACTIONS:

#### 10.1 Advocate for increased daytime and community music programming

The UK's Live Music Act allows for music programming to happen outside of traditional music venues. Under this law, most small spaces can put on acoustic or amplified performances, such as museums and galleries, workplaces and schools, churches, and community halls. However, the limitations found in Cardiff's current licensing laws and the current policing of licensed venues and open-air music events, may have created the erroneous perception that music can only happen at night. The Music Officer and Cardiff

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<sup>85</sup> More on St David's Hall in section 10.3 of this report.

Music Board should work together to inform community groups, business organisations and other collectives that increased music programming in alternative settings and hours is not only legal, but encouraged.

A good starting point would be to create a pamphlet listing the minimum legal and technical requirements to book a performer (in terms of licensing requirements as a venue and PA/backline commonly required by artists), as well as a set of best practice examples such as fair remuneration and how to promote an event. The pamphlet could be distributed amongst existing venues and integrated into a larger resource manual for new business owners applying for a license. Cardiff would benefit from an increased variety of daytime, afternoon and evening music activities available to all ages and communities, which would in turn promote its status as a Music City. The UK Government's guide to organising a voluntary event<sup>86</sup>, Attitude is Everything's Access Starts Online<sup>87</sup> and DIY Access Guide<sup>88</sup>, and Making Music's Events Accessibility Checklist<sup>89</sup> all provide useful examples of how such a pamphlet might take shape.

#### BEST PRACTICE GUIDE FOR VENUES, VICTORIA (AUSTRALIA)

Music Victoria and its Live Music Roundtable developed a document with Best Practice Guidelines for live music venues<sup>90</sup>. The guide addresses positive examples in the key areas and issues that may be related to operating a music venue, from sound management and booking to venue security and safety, and includes examples of contracts and agreements as appendices. Throughout the report, laws and regulations applying in Victoria are mentioned alongside best practice approaches as well as links to other organisations supporting the live music ecosystem in key areas including transport, youth, sexual harassment, health and safety, artist associations and so forth.

## 10.2 Create a gig listing platform online that is inclusive and representative of the wider music offer in Cardiff

Music is not currently featured on the landing page of VisitCardiff.com, and it is not easy for visitors to find information on music events or music heritage on the website. An open-source supervised listing platform should be featured on VisitCardiff.com and/or

<sup>86</sup> UK Government (2017)

<sup>87</sup> Attitude is Everything (2018a)

<sup>88</sup> Attitude is Everything (2018b)

<sup>89</sup> Making Music (2015)

<sup>90</sup> Music Victoria (2016)

developed as a separate website to reinforce the importance of music to the city and its tourism sector.

Partnerships with local media and journalists should be leveraged to create a city-wide gig listing platform that is truly diverse and inclusive. It should feature events of all sizes and genres and not only focus on larger events or certain trends. The website can also include a highlights section featuring certain areas, shows and venues that can raise advertising revenue to cover website maintenance costs.

## SANTIAGO WEEK, SANTIAGO DE CHILE

Santiago Week is an online and printed calendar of all events happening in Santiago de Chile created by PortalDisc, the largest Chilean music distribution platform, with the motto "Every week, Santiago is a big festival".

Every Monday, a poster is released with the line-up of all artists performing across the capital, which is distributed through partner organisations, the official website of Santiago Week ([www.santiagoweek.cl](http://www.santiagoweek.cl)), their social networks and e-mail newsletter.

Artists, promoters and venues can upload directly their events, which are reviewed by the Santiago Week staff and incorporated into the relevant week's poster and programme.



## NEXT STEPS:

### 10.3 Re-establishing St David's Hall as a world class concert hall

Evidence presented throughout the music sector suggests that significant investment is needed in St David's Hall. This would entail renovating and refurbishing the hall and building, with the objective of working towards making the concert hall self-sustaining to

secure its future. While encouraging steps have been taken in this direction, St David's Hall must continue to strive for diversity and excellence when planning its programming in order to attract new audiences and business. Evidence suggests that the marketplace for classical music in Cardiff is reaching saturation point. More must be done to encourage new content, and most importantly, new audiences, to these events. A full refurb of St David's Hall, perhaps by reinstating a restaurant, cafe or visual arts space to its current set-up, could provide the catalyst to explore new ideas, and promote it as a key asset in Cardiff's music scene – and an important tourist destination. Cardiff has the infrastructure and talent base to become an international leading city for classical music and a revitalized, re-energized National Concert Hall of Wales should be at the heart of this.

It was anecdotally noted at various times during the qualitative research, that St David's Hall is considered to be an established part of Cardiff's musical heritage, and not part of the national heritage. A change in branding to emphasize the original 'National Concert Hall of Wales' name might help Welsh Government and ACW support it as a national entity and an asset to the whole country's music profile, not just the Capital City's.



St David's Hall. Image courtesy St David's Hall

## THE PARIS PHILHARMONIE

Completed in January 2015, the Philharmonie is a cultural institution in Paris, France, composed of concert halls, exhibition spaces, rehearsal rooms, educational services, restaurant and bars, including a 2,400-seat symphonic concert hall. The cost of construction was €386 million and was shared by the national government (45%), the Ville de Paris (45%), and the Région Île-de-France (10%). The new Paris Philharmonie has been successful in attracting new audience members from all over Paris due to its location in the east and for its diverse programme, which does not focus solely on Western classical music.<sup>91</sup>

Beyond its role as a venue, the theatre has social implications. Its physical location symbolises a sort of social barrier as it straddles the Haussmann boulevards: cultural institutions and wealthy urbanites from the poorer, multicultural suburbs. In efforts to create a more integrated city, there is a new tram line that goes into the suburbs and connects them to once-elusive realms such as the Philharmonie. This physical access is coupled by a pricing policy which sees music events typically charging a flat fee of €12 for adults, €8 for children. This is made possible by the theatre's public subsidies.

Furthermore, this new theatre breaks down barriers using genre and music education. Prior to its construction, French culture was dominated by classical themes which were typically linked to the upper class. The brochure for the opening season of the venue expressed a desire to destroy these barriers, increase education programmes, and bring more diverse programming to the people. While the majority of programming will still be classical, efforts to create a more vibrant character of the theatre will see specially-themed weekends such as New York, David Bowie, science fiction, the human voice, amateur music, etc.<sup>92</sup>

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<sup>91</sup> The New York Times (2014)

<sup>92</sup> Moore (2014)

# MUSIC MARKETING

## MUSIC CITY BRAND BUILDING

### RECOMMENDATION 11: BRING MUSIC STAKEHOLDERS TOGETHER TO BUILD THE CARDIFF MUSIC CITY BRAND

**Initiator:** Music Office / Cardiff Music Board / Tourism Department

**Background:** Cardiff does not currently have music branding distinct from "The Land of Song" tagline associated with Wales. Local music events are highly regarded by local and visiting audiences, who rated safety as the best asset in the survey of Cardiff's music ecosystem. Currently, the scene primarily focuses on the classical, indie and rock genres. Local talent, local music professionals and audiences want to see a greater variety of national and international artist bookings, especially in the modern contemporary and electronic music scenes. The proximity to Bristol and its vibrant music scene is challenging to Cardiff's music businesses, with the loss of national tours and underage gigs to Bristol being the two most common causes of loss of business.

#### Goals:

- Work with the tourism and private sectors to deliver a unified approach to music tourism and include residents in the planning process
- Build on existing local and regional assets to create a music tourism brand and marketing strategy
- Effectively promote the brand of Cardiff as a music-friendly city to residents and visitors
- Support the development of events at local grassroots level, and amongst underground scenes outside the traditional music industry patterns
- Increase demand for and attendance of live music in Cardiff across a variety of genres
- Acknowledge, protect and promote the role of music venues in Cardiff's music history and their impact on the city.

#### PRIORITY ACTIONS:

##### 11.1 Define the roles of Visit Cardiff, the Music Office and other stakeholders in the promotion of the city through music

The development of a music tourism strategy would attract more investment in and recognition of Cardiff's ambition to be a Music City. In partnership with the Cardiff Music

Board, Visit Cardiff and the Tourism team, business organisations such as FOR Cardiff, relevant tourism organisations, including the hotel sector, and city tourism ambassadors, a series of initial roundtables should assess this process to align goals, discuss expectations and see how collaborations can be taken further. This joint approach from the outset would maximise opportunities from the private and public sectors to determine how best to market the city's music and musical heritage offerings.

Case studies on the music tourism/Music City branding strategies for the cities of Hamburg, Germany; Austin, USA; and Aarhus, Denmark are attached as examples in Appendix 2.

#### **'Q-POP': A TOURISM AMBASSADOR CAMPAIGN FOR QUEENSLAND, AUSTRALIA**

The 20th anniversary of Tourism and Events Queensland's "in-market presence" in Korea during 2015-2016 saw a new 6-month promotional campaign titled Q-Pop, involving K-Pop superstar Rain. The Q-Pop campaign featured Rain travelling the state as a "Queensland ambassador" supported by PR activity, social media activation, travel packages and flights to Brisbane. As part of it, Rain also shot a music video for his latest single, showcasing Brisbane's best attractions.<sup>93</sup>

The resultant social media coverage involving the recording and promotion of the video led to almost 20,000 direct bookings directly tracked to the Q-Pop strategy by the designated 16 travel agent partners. The Q-Pop campaign was estimated to cost about AU\$350,000, and it capitalised on the growing importance of the Korean tourist market for Queensland through the campaign, which assisted in almost 70,000 Koreans experiencing Queensland between 2015 and 2016.<sup>94</sup>

The successful campaign was a partnership led by Tourism and Events Queensland (TEQ) with Korean Air, Tourism Australia, Brisbane Airport Corporation, Brisbane Marketing, Gold Coast Tourism and Tourism Tropical North Queensland.

#### **NEXT STEPS:**

##### **11.2 Ally strategically with international platforms and tastemakers to promote Cardiff's alternative and underground scenes**

Organisations such as Sofar Sounds, Mixmag, Cercle and London-based DICE are currently promote emerging artists artists from cities around the globe to the rest of the world online. Boiler Room is one of the most popular platforms for the promotion of

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<sup>93</sup> Atfield (2016)

<sup>94</sup> Ibid.

underground hip-hop, electronic music and emerging DJs that has not yet been in Cardiff. In this context, there is great potential to increase Cardiff's music promotion channels through strategic alliances between the Music Office, local promoters and these existing platforms. These promotional events could be developed as part of exclusive announcements such as an album or single release, paid sponsorships, or as a tie-in event with an existing festival in Cardiff.

### DISCOVERING #URBANANA, ALTERNATIVE TOURISM IN NORTH RHINE-WESTPHALIA<sup>95</sup>

A banana-shaped region is the central point of this tourism branding for the region of North Rhine-Westphalia, joining cities from Cologne, Düsseldorf and the Ruhr to create a fictional metropolis of 10 million inhabitants. Named with the hashtag #Urbanana after its characteristic shape and urban focus of the campaign, the branding developed by NRW Tourism focuses on "undiscovered spaces" worth visiting that are beyond regional well-known tourist attractions, promoting the regional creative industries, events and design. Its website highlights different music traditions and trends in the region in the section The Sound of #Urbanana<sup>96</sup>, in particular its place in the popular music industry.

The Sound of Urbanana focuses on 3 urban centres: Cologne, Düsseldorf and the Ruhr Area. Each has a micro-site featuring extensive sections on the music scene of the different cities, including: Travelogue, a site with interviews and articles, embedded music videos and playlists; Proximity Search, an interactive map of the music venues and spaces in the city; and Pop-Trail, itineraries of themed self-guided walking tours.

## MUSIC TOURISM ACTIVITIES

### RECOMMENDATION 12: CREATE A CARDIFF 'MUSIC CITY' TOURISM MARKETING STRATEGY

**Initiator:** Music Office, Culture Department / Tourism Department

**Background:** Although music venues and festivals generate a roughly equal proportion of the music tourism turnover in Wales, the surveyed sample of the local festival audience has a higher composition of international attendees. Survey results showed that, despite the unsurprising importance given to digital channels and social media, word of mouth is the most frequent promotional option, with over 45% of respondents resorting to it. Non-digital tools are also relevant and used by 31% of the interviewees. Survey results show that

<sup>95</sup> Discovering Urbanana (2018)

<sup>96</sup> NRW Tourism (2018)

concert-goers are mainly from Cardiff or from surrounding towns/cities, with only three venues being aware of the presence of international customers.

Overall, music is not incorporated as a key offering for tourists in Cardiff's official tourism promotion materials, while local concerts get promoted mainly by word of mouth.

### Goals:

- Promote the city through music and encourage more visitors to notable spaces and areas of music activity in Cardiff
- Develop partnerships with regional, national and international organisations to promote Cardiff as a top tourist destination for music
- Identify and promote a variety of significant music elements in Cardiff's music ecosystem including events, artists, venues and historic facts
- Have a strategic overview of programming across the whole of the music sector, including popular and classical music programming
- Embrace artistic diversity and increase the variety of music genres programmed in Cardiff
- Attract a wider audience demographic to music events, including families, students and older people
- Leverage opportunities from programmed events at the stadium through a coordinated plan involving transport infrastructure and parking, busking and small venues.

### PRIORITY ACTIONS:

#### 12.1 Create a Cardiff 'Music City' communication plan for both online and offline strategy

Cardiff should create a narrative around its music and music heritage assets it can sell to locals and visitors. It can do this by developing a music tourism communication plan. This plan should be developed in consultation with industry stakeholders and the hotel sector to ensure room rates are not raised significantly on key calendar dates. Once developed, all tourism information material should include music listing information and event calendars. Staff at tourism information desks should have Cardiff music facts and other useful information, including venue maps and ticket purchase options. The availability of local music for purchase on physical devices (vinyl, USB sticks and other merchandise) at selected tourist information points, and dedicated playlists at online platforms would reinforce the impact of this.

Case studies on the music tourism communication strategies for the cities of Hamburg, Germany; Austin, USA; and Aarhus, Denmark, are attached as examples in Appendix 1.

## DISCOVER PUERTO RICO'S SALSA AND MUSIC TOURISM PROMOTION

The Puerto Rico Tourism Company (CTPR) is the government-owned organisation in charge of tourism matters and regulations in Puerto Rico. It also promotes music tourism through the portal [DiscoverPuertoRico.com](http://DiscoverPuertoRico.com) (currently being redesigned and rebranded as SeePuertoRico.com). A specific section for nightlife highlights the entertainment options available on the island<sup>97</sup>, including salsa clubs and bars/clubs with music, and features an integrated social media feed incorporating photos by people who have tagged nightlife locations in Puerto Rico.

The website also promotes a music tourism product developed by the CTPR, La Ruta de la Salsa (The Salsa Route), a tour through places and spaces in Puerto Rico that have played a significant role in the evolution of salsa. The Ruta de la Salsa can be self-organised by tourists through the locations and information provided on the website<sup>98</sup>, but the page also includes links to dance clubs, informative videos and guided tours available for booking.

See Puerto Rico's Facebook<sup>99</sup> page has over 1,013,500 fans as of August 2018, and represents another key platform for CTPR's promotion using music. World-famous singer Luis Fonsi is an official tourism ambassador for Puerto Rico, for which CTPR has developed video campaigns and tourism marketing materials using the singer's hit Despacito, and images of him. Materials include video advertising, Facebook cover images, sponsored posts on the singer's social media, and social media features.

## NEXT STEPS:

### 12.2 Create options to engage with music tourists before and after their arrival

Music should be an intrinsic part of Cardiff visitors' experience when planning their visit and upon arrival. The Music Officer should work with the Council to integrate music 'made in Cardiff' in city attractions as part of the soundscape, through allocated kiosks or busking spaces, as well as public speakers and advertisement spaces. Cardiff Central Station could welcome passersby and commuters through a bespoke strategy, including

<sup>97</sup> Discover Puerto Rico (2018a)

<sup>98</sup> Discover Puerto Rico (2018b)

<sup>99</sup> SeePuerto Rico (2018)

tablets with information about music activities, a places of interest map, and notes on Cardiff's music heritage. Locally-recorded electronic and classical music can also be suitable for licensing as background music for key tourist areas.

## UNCOMMON PEOPLE, SHEFFIELD

The project ([uncommonpeople.co.uk](http://uncommonpeople.co.uk)) was created by the University of Sheffield and Sensoria Festival to launch a new innovative map of Sheffield's musical heritage.

Uncommon People is an online celebration of the wealth of musical talent in Sheffield. It is a kind of 'family tree' that is regularly updated in an ongoing attempt to capture the sheer breadth and depth of musical activity that goes on in the city. The website offers the possibility to explore the city's rich musical heritage and discover its thriving current scene, as well as inviting users to contribute with stories, anecdotes, footage, photos and music clips. It has a map of locations and venues, a timeline and a family tree, and the ultimate goal of the project is to connect the city streets with the sites where music was physically made, recorded and played. The presence of the map gives potential tourists useful material to build a customised music tour according to their interests and is therefore very relevant in terms of music tourism.

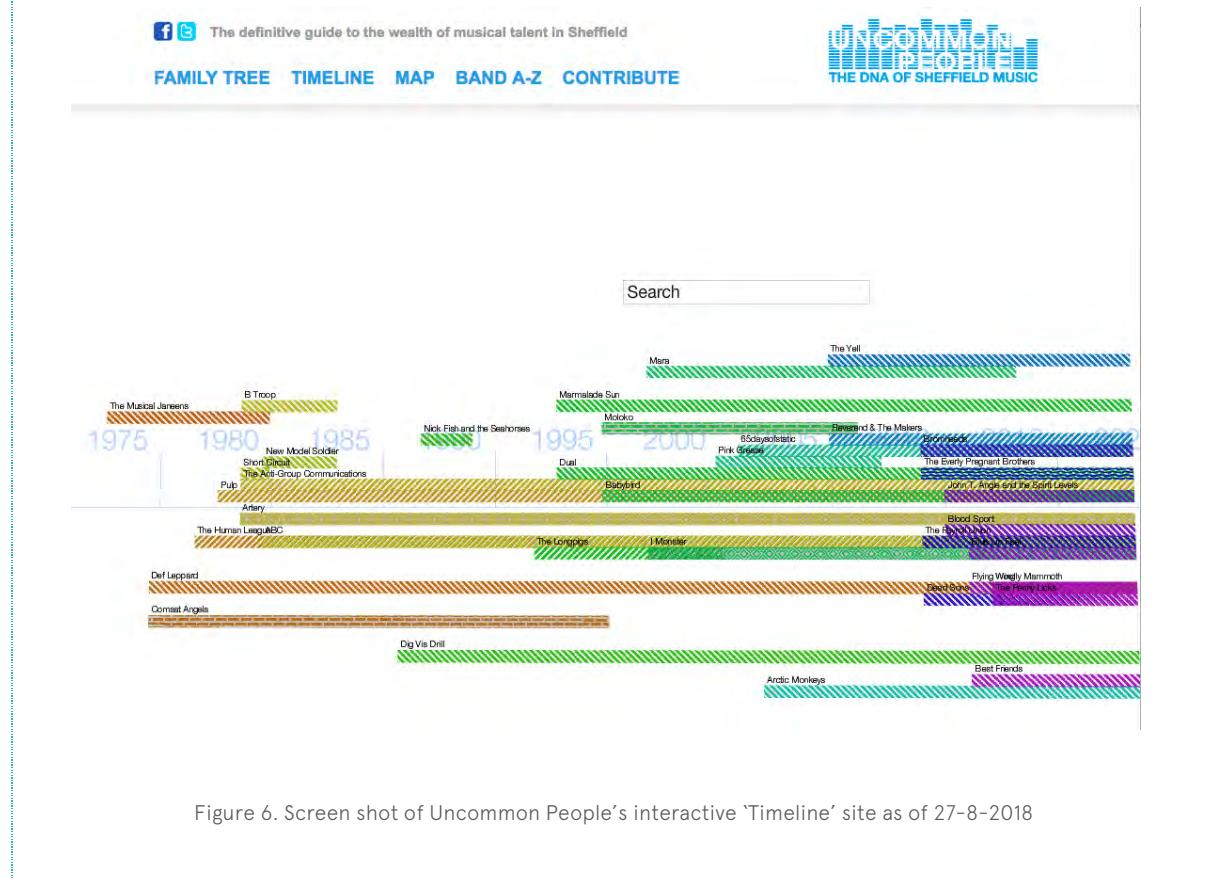


Figure 6. Screen shot of Uncommon People's interactive 'Timeline' site as of 27-8-2018

## 12.3 Create a music heritage tour

A tour would serve to show the uniqueness and historical weight of the city's music heritage and is a tried and tested formula that is proven to be a very attractive product for tourists and music lovers. Special tours could be created to coincide with live music events, special film screenings or exhibitions. The music tour initiative could be expanded into a full Cardiff music heritage guide and repository, by developing a map, a database of historic music spaces, and an archive of all relevant music assets.

### MAGICAL MYSTERY TOUR, LIVERPOOL<sup>100</sup>

The Beatles' enduring legacy has been a crucial asset to developing Liverpool's music tourism offer, as the multitude of tours dedicated to uncovering the band's relationship with the city shows.

Set aboard a fantastically coloured bus, the Magical Mystery Tour is one of the city's most popular music attractions, with well over 2000 Tripadvisor reviews. The two hour tour tells the story of the band's origins, and how they came to conquer the world. The tour includes band members' birthplaces and childhood homes, Penny Lane, St Peter's Church where John and Paul first met, Strawberry Field, schools and colleges plus many more places of interest along the way. The last stop is the Cavern Club, and a ticket to the tour also includes free entry in the evening to the Cavern front stage.



<sup>100</sup> <https://www.visitliverpool.com/things-to-do/beatles-magical-mystery-tour-p172251>

## FURTHER ACTIONS:

### 12.4 Bid to host key international music industry events

Becoming a host city for a well-known international event will have an immediate impact on Cardiff's branding as a Music City, in the local and international music sector, and tourists alike. The Music Office should lead on the bid to host at least one high-profile UK/international music industry event (eg BBC Amplify), and one UK/international celebration of the grassroots sector (eg Music Venues Day, partnership with a showcase festival) that can be used as a twofold opportunity for music export and import in Cardiff.

### 12.5 Explore a partnership with Bristol's Colston Hall

Bristol's Colston Hall is closed for major refurbishment from June 2018 until sometime in 2020. This offers a real opportunity for Cardiff to bring artists, promoters and events into Cardiff who would not normally cross the Severn Bridge — much like the closure of Wembley created an opening for the Millennium Stadium. A cooperative strategy between the Wales Millennium Centre, St. David's Hall and New Theatre venues could reap long term rewards for the venues and for the City.



Sacred Paws, Wales Goes Pop.  
Photo: Pete Takes Pictures

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[https://www.vcglr.vic.gov.au/sites/default/files/uploadLiquor\\_licensing\\_fact\\_sheet\\_-\\_Licence\\_conditions\\_for\\_live\\_music\\_venues.pdf](https://www.vcglr.vic.gov.au/sites/default/files/uploadLiquor_licensing_fact_sheet_-_Licence_conditions_for_live_music_venues.pdf)

# APPENDIX 1

## MUSIC TOURISM & BRANDING CASE STUDIES

### Hamburg

Hamburg is known historically for its contributions to music history and continues to promote its legacy as a pioneering location with its Music City strategy. The government has worked alongside the music industry to create a music tourism strategy and brand in order to promote the creative industries. This includes the promotion of its live music scene and the development of the spectacular Elbphilharmonie.

Hamburg has a music tourism strategy which attracts thousands of visitors every year to the city. As mentioned, live music is part of the core identity of Hamburg and has been promoted as one of its strongest assets. The city has designated budgets for the marketing of the music industry and supports renowned music events such as Rock am Ring, Wacken Open Air, and Reeperbahn, which rate among the top brands globally and enjoy widespread international popularity. Reeperbahn doubles as one of the most important conferences of the music industry, making it the most important festival of its kind in Europe, similar to SXSW. Every year, this festival attracts an average of 30,000 industry professionals and festival goers who contribute significantly to the overall economy of the city.<sup>101</sup>

Perhaps the biggest contributor to the current boom in music tourism is the world-famous Elbphilharmonie.<sup>102</sup> Devised in 2003, and finally completed in 2017, this grand infrastructure has become the crown jewel in Hamburg's beautiful cityscape. Located on the banks of the Elbe river, the impressive building contains three concert halls, a hotel, 45 private apartments, and the publicly accessible Plaza with a 360° panoramic view of the city. In the first year of its existence, the center has welcomed 4 million visitors, making it an instantly popular tourist attraction. Every day the space sees up to 17,000 guests a day who come to attend a concert or walk around the structure. According to a report, the tourist industry grew in Hamburg by 3.7% in 2017 and this is linked directly to the new venue space. Overnight stays by guests from abroad grew 5.15% after increased media attention which has recognised Hamburg as a top tourist destination.<sup>103</sup> The designation as a UNESCO World Cultural Heritage Site has also enhanced Hamburg's image considerably.

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<sup>101</sup> <https://www.hamburg-tourism.de/erleben/>

<sup>102</sup> <https://www.elbphilharmonie.de/en/>

<sup>103</sup> [https://www.elbphilharmonie.de/media/filer\\_public/43/86/4386f78b-fd9a-4137-b929-334ad1bf857e/broschüre\\_elbphilharmonie\\_hamburg\\_eng.pdf](https://www.elbphilharmonie.de/media/filer_public/43/86/4386f78b-fd9a-4137-b929-334ad1bf857e/broschüre_elbphilharmonie_hamburg_eng.pdf)

In addition to the international tourism the centre has attracted, the Elbphilharmonie is also a core staple of the local community. It has become an outreach centre for schools' education programmes, and has provided a cultural space for the refugees Germany has accepted.

The strategy continues into 2018 as state-funded marketing companies have launched three campaigns to promote Hamburg as an attractive travel destination. Of these strategies, one of them is "Hamburg ist live/Musikstadt" (Hamburg is live/Music City).<sup>104</sup> The main goals with this campaign are to portray Hamburg as open, creative and tolerant. Some of the immediate actions taken to support the musical arts in Hamburg include hosting the internet domain, [www.kulturmedien-hh.de](http://www.kulturmedien-hh.de) as the new platform where musicians and music businesses can access marketing opportunities. Some of these opportunities include culture columns, launching KulturSpots, and creating new cultural facilities. There is also access to television and video advertisements on the subway for the creative industry to use either for free, or for a highly subsidised cost of €30 for a minimum period of 4 days, with no production costs.<sup>105</sup>

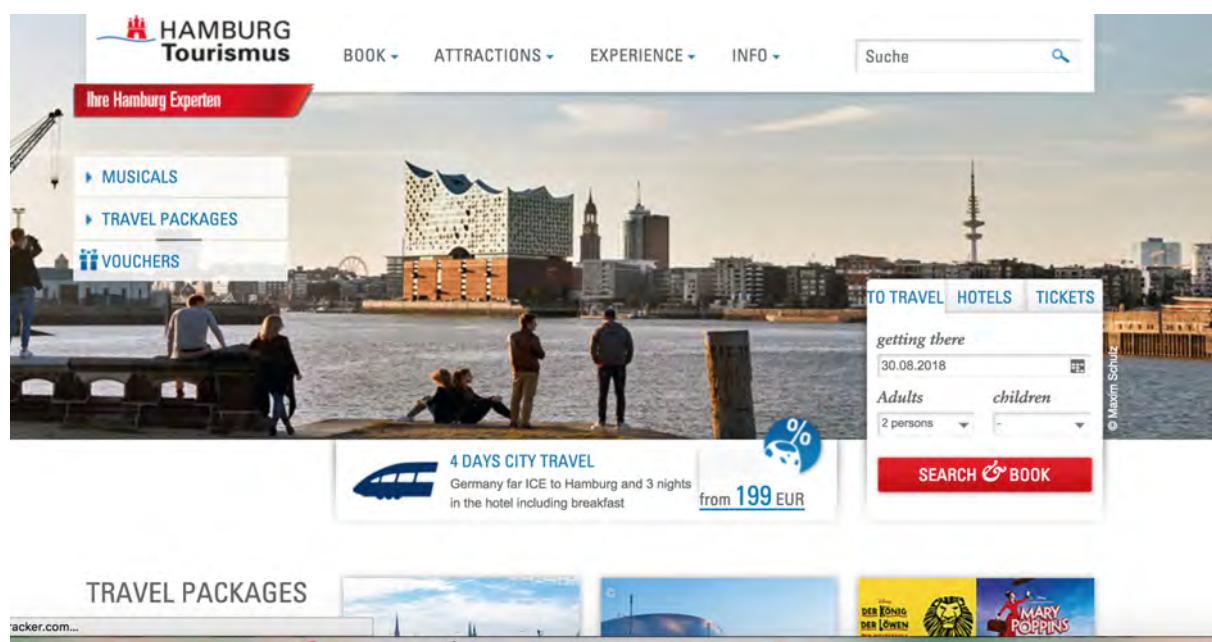


Figure 7. Screen shot of Tourism Hamburg's website as of 23-8-2018 (1)

The website featuring current events in Hamburg is easily understood and direct. The main tourist page has "Musikals" (Musicals) as one of its most identifiable tabs which is helpful

<sup>104</sup> <https://marketing.hamburg.de/music.html>

<sup>105</sup> <https://www.farid-mueller.de/wp-content/uploads/Musikstadt-Hamburg.pdf>

for those who are looking for cultural activities. However, to get to live music outside of theatre there has to be more research via the "Experience" tab which makes navigating on to music somewhat confusing. There is nothing to distinguish the cultural events page from the other directories, but nonetheless the design, colour and layout of the page give it clarity and it offers a wide variety of options for venues to visit. Since cultural events — and music in particular — are often vibrant, there is an opportunity to make the Events page more striking. It could easily feature more images of the kind of events celebrated. A great aspect of the website is the option to search for events during a specific time period and within a certain category, which is very convenient for tourists and residents alike who are looking for choice.

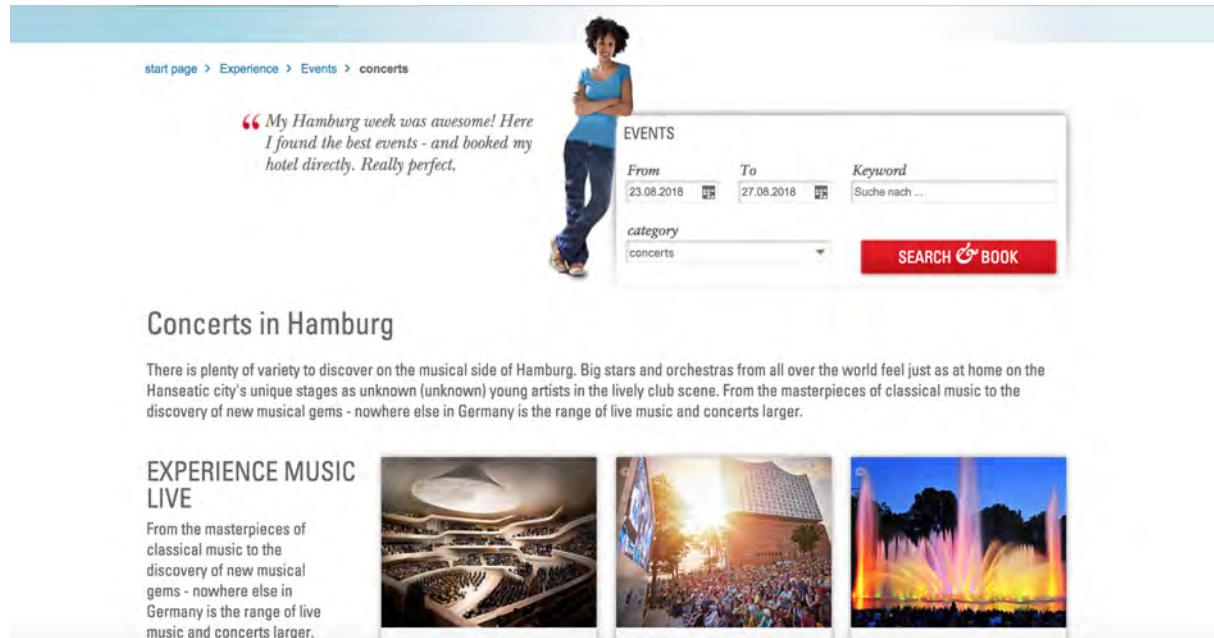


Figure 8. Screen shot of Tourism Hamburg's website as of 23-8-2018 (2)

## Austin

Austin was branded "Live Music Capital of the World" in 1991. It is a registered trademark associated with the city after it was discovered that Austin had more live music venues per capita than anywhere else in the nation. The city has been sponsoring its wide variety of music offerings ever since and the tourism board's website has a specific section dedicated to the local music scene. Thanks to a vibrant offer and successful promotion and brand positioning, in 2014 the city's output for music tourism was US\$1,105.32 million. In order to understand the effects of the actions taken by the city, the government

commissioned the “Austin Music Census” in 2015 using data-driven research to draw these conclusions.<sup>106</sup>

The government’s office for tourism has its own designated “Music Marketing” plan which outlines specific strategies and related tactics in order to execute these goals. They are summarised as follows:<sup>107</sup>

- 1. Increase interest in Austin’s live music scene and continue promotion of brand, the Live Music Capital**
  - a. Increase content on Austin CVB website with more music content such as video, photos, facts, City of Austin music programmes and genre-specific information.
  - b. Augment Marketing Communications Department efforts by hosting journalists to increase editorial coverage of and about Austin music.
  - c. Produce a new compilation CD and download cards of Austin music and a mini guide to Austin’s music scene.
  - d. Create a line of merchandise to promote the Live Music Capital of the World® brand; sell on ACVB’s website as well as at select Austin retail outlets.
- 2. Promote accessibility of Austin music**
  - a. Solicit conventional sales and service businesses to use local music.
  - b. Manage the “Have You Hired a Musician Today?” programme by assisting conventions, trade shows and local businesses with booking recommendations for live music at events.
  - c. Book music for familiarisation, sales, tourism and media events.
- 3. Collaborate with community partners and the City of Austin on music related issues to strengthen the local music community**
  - a. Work with City of Austin staff, Austin Music Commission and Austin-Bergstrom International Airport year round; communicate the activities of the music office and work to execute the goals for the music community.

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<sup>106</sup> [https://www.austintexas.gov/sites/default/files/files/Austin\\_Music\\_Census\\_Interactive\\_PDF\\_53115.pdf](https://www.austintexas.gov/sites/default/files/files/Austin_Music_Census_Interactive_PDF_53115.pdf)

<sup>107</sup> <http://www.austintexas.gov/edims/document.cfm?id=142178>  
<http://www.austintexas.gov/edims/document.cfm?id=239291>

Book all live music for weekly City Council meetings and promote “Live from the Plaza” concert series and airport performances

- b. Work with local music and cultural organisations, such as the Austin Latino Music Association, Health Alliance for Austin Musicians, Women in Music Professional Society, Pro Arts Collective and other cultural arts groups to promote music events that bring visitors to Austin and raise awareness of culturally diverse music
- c. Continue to partner with the local music community in promoting the growth and development of live music clubs, venues, recording studios, record labels and music instrument manufacturers.

#### **4. Raise awareness of Austin as a premier music destination among national and international music industry professionals**

- a. Develop promotional materials to promote Austin music and the services of the Austin Music Office
- b. Establish a presence at high profile industry events via showcases, promotional materials, media receptions, and client events such as: Grammy's, MIDEM, CMJ, Americana Music Festival, New Orleans Jazz and Heritage Festival, Latin Alternative Music Conference, Big Apple Barbecue, Coachella and Mostly Strictly Bluegrass
- c. Collaborate with successful Austin touring acts to promote Austin at national and international shows with banners, Austin-centric gift bags, giveaways, contests, takeaways, announcements from the stage and VIP access for clients and media.

The effects of the large investment in music tourism and the marketing of Austin’s local scene have had positive results. A recent survey showed non-resident visitors to a cultural event spend an average of 120% more per person than local attendees (\$42.87 vs. \$19.52). Further, 8.4 % of the non-residents reported that they spent at least one additional night away from home in Austin as a direct result of attending the cultural event (which increased their average spend to \$212.84 from \$42.87). Furthermore, 69.3% of all non-resident respondents reported that the primary reason for their trip was “specifically to attend this arts/cultural event”, and 31.5 % of the resident cultural attendees reported that they would have traveled to a different community in order to attend a similar cultural experience. Therefore, this report shows the importance of a community to provide a variety of artistic and cultural experiences. If they fail to do so, it will fail to attract the new

dollars of cultural tourists while also losing discretionary spending of its local residents who will travel elsewhere to experience this sort of cultural entertainment.<sup>108</sup>

The tourism website for Austin is very vibrant. The website reflects the spirit and energy of the city it's advertising as it highlights the importance of food and music right away. The website looks more promotional than educational/city-led. "Music" is one of the clearest tabs on the page. The Music page itself is also substantial and exciting with multiple images from Austin showcases, festivals, and venues. It is also a good decision to include options for Music Stores, Insider Deals, and Maps, as users are more likely to spend more time on the page with these advertisements. Lastly, having Austin Spotify and Austin Playlist tabs are valuable because they showcase the local music in Austin in a contemporary and engaging way that the user can follow for longer than a quick online visit. Additionally, discover tools are more relevant than ever, so having a curated playlist option specific to the local scene is going to attract many visitors and make them more excited and engaged with what is happening in ATX.

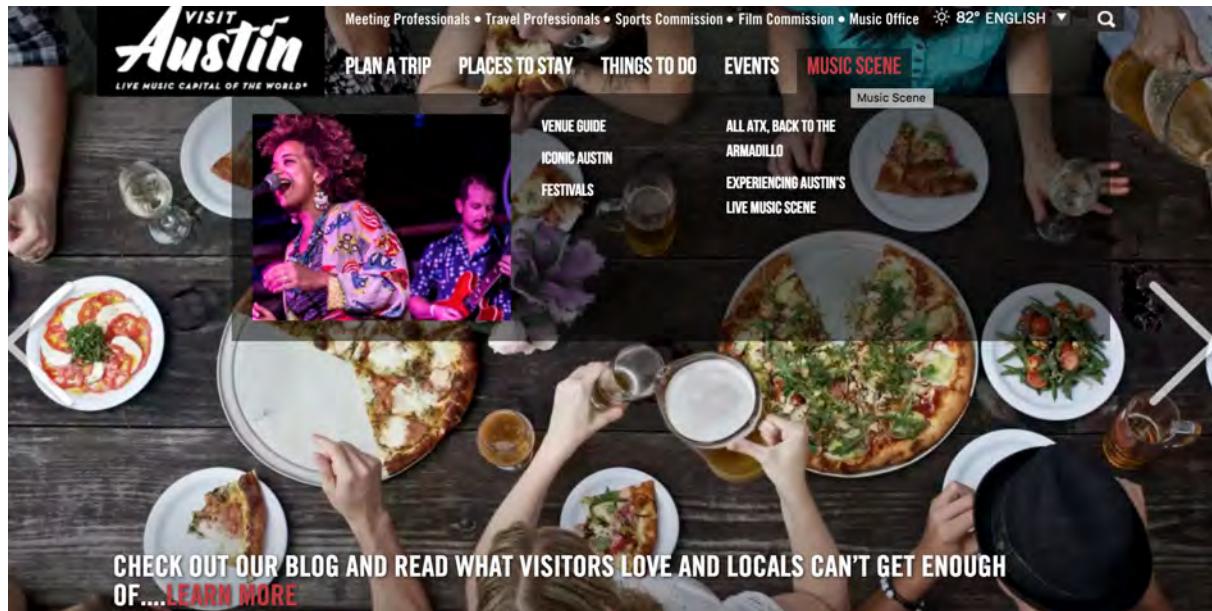


Figure 9. Screen shot of Visit Austin's website as of 23-8-2018 (1)

<sup>108</sup> [https://www.austintexas.gov/sites/default/files/files/CT\\_Plan\\_Final.pdf](https://www.austintexas.gov/sites/default/files/files/CT_Plan_Final.pdf)

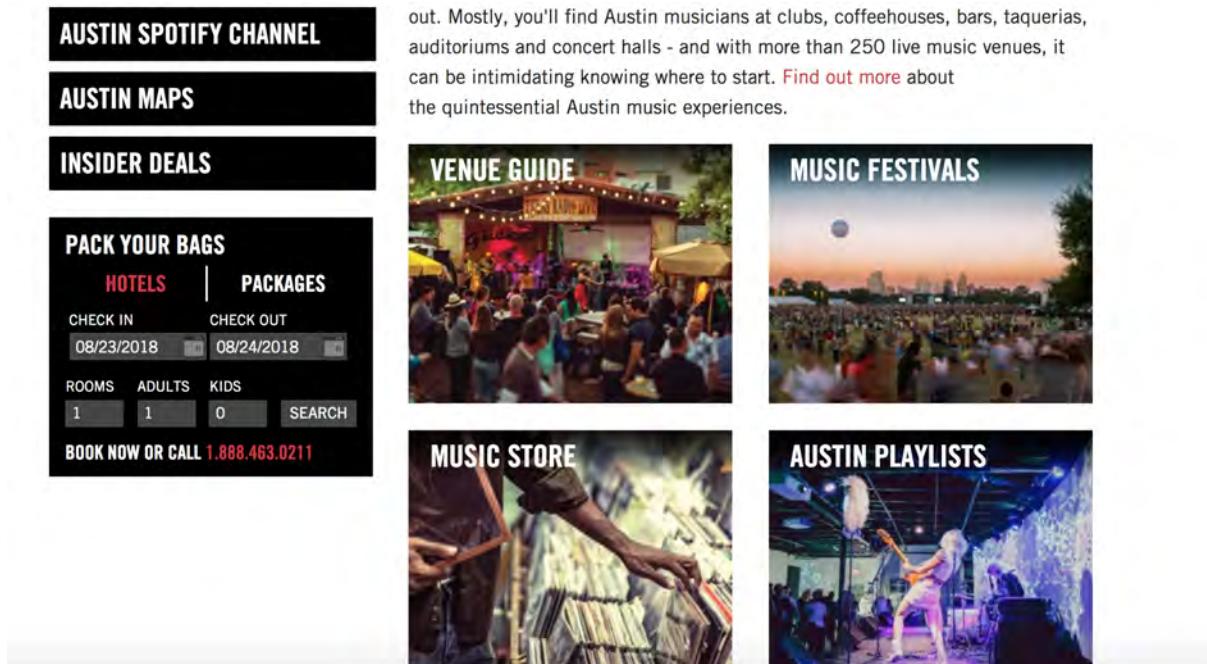


Figure 10. Screen shot of Visit Austin's website as of 23-8-2018 (2)

## Aarhus

Aarhus has been considered a Music City for decades with its position as one of the most important cities for producing and creating talent for the Danish music scene.

Music has always been an important part of the city's cultural DNA, and there's a long tradition of a well-renowned, varied and often trend-setting music scene. That scene is rooted in a wide range of platforms around the city – from the Royal Academy of Music to alternative underground clubs. Countless bands originate from the city's strong musical environment and heritage, representing music in all varieties and genres. In addition there are a number of festivals taking place there and educational platforms exist at a high level along with music community platforms. Crucially, music has been made an important part of the city's cultural policy.

Visit Aarhus, the tourism domain for the city, has multiple directories for showcasing the live music in the city, such as Music on Stages, Free Experiences, and it hosts other pages promoting the local music festivals such as SPOT. SPOT is one of the largest music tourist attractions featuring a 8,000-strong international showcase with 100-200 concerts from several Nordic countries. In addition, the city already has an app, AarhusGuiden, and the Kulturportalen — a website with all the cultural activities taking place including a calendar option to filter events. These sources provide an easy tool for visitors to access information on the events they are travelling to Aarhus for.

PROMUS<sup>109</sup> (Production centre for music, film, stage, literature, arts, dance etc.) receives funding from the state to carry out its initiatives which include funding programmes for different music projects, creating a one stop shop for promoters, and the creation of Aarhus Events – a city event office. This office is specifically important to the branding and promotion of the city in that it attracts, develops and supports large, strategic events with an emphasis on cultural events like music festivals. These efforts by public and private groups are helping the overall economy of Aarhus as shown by the 2,500 musicians, 1,100 employees and a turnover of 1.8 billion kroner.

Lastly, as 2017's European Capital of Culture, Aarhus developed a set of strategies to distinguish itself as a centre for the arts and creative culture. Some of these efforts were focused around the music industry which brought more attention to this area. For example, the city focused on programming more at the Urban Mediaspace to increase international attention to see the designs of leading Scandinavian and international architects while linking these events to other programmes such as festivals and music events. All of these programmes are centred around the campaign's theme of "rethink\_\_". In addition, all efforts were themed and packaged in collaboration with the tourism sector. From these intentional partnerships and promotions the city expects to see a 25% increase in cultural tourism by 2020.<sup>110</sup>

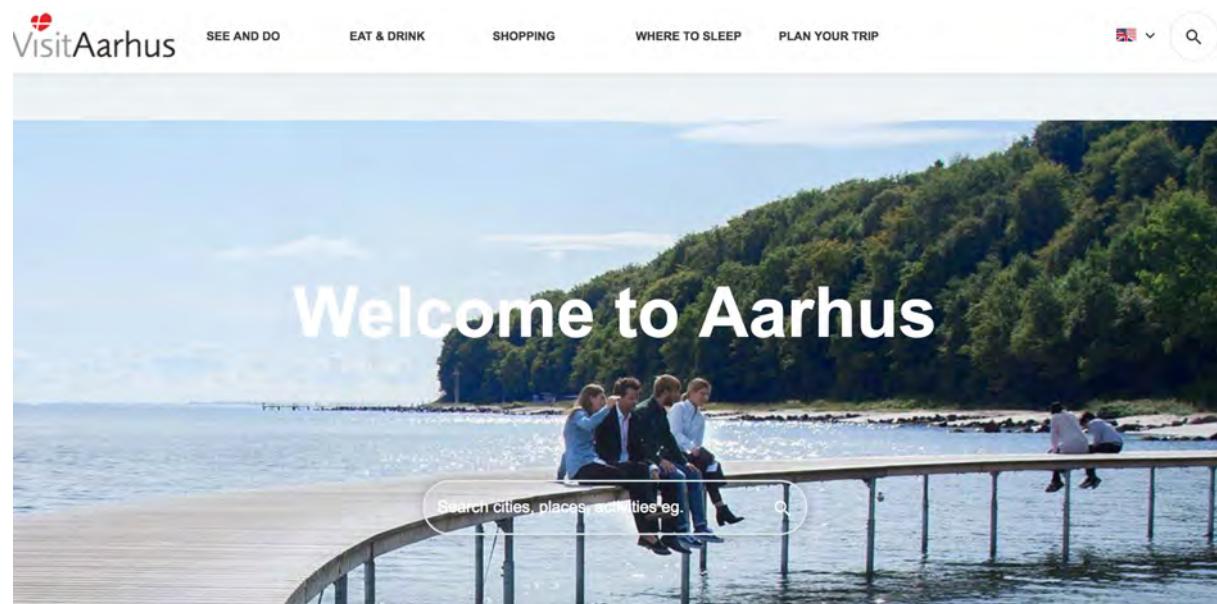


Figure 11. Screen shot of Visit Aarhus' website as of 23-8-2018 (1)

<sup>109</sup> [http://www.promus.dk/files/MusicCityAarhus2015\\_net.pdf](http://www.promus.dk/files/MusicCityAarhus2015_net.pdf)

<sup>110</sup> <http://archive.thedailystar.net/newDesign/news-details.php?nid=268370>

Aarhus has a very clean and contemporary design to its tourist page. The landing page features large, gripping images of the location and the events happening there. There is no immediate culture-grab or music-related tab for users to clearly engage with. Instead, music and other events are found under the drop-bar for "See and Do" and are hidden in a large list of choices for users to navigate. Once the "Music" tab is selected, the main page continues to show all entertainment events, but offers a filter option for music-only. The page shows the images of artist and festivals in a grid fashion which is clear for users and provides them easy navigation once they get this far. Furthermore this page provides the option for users to search events on certain dates which is very convenient and direct.

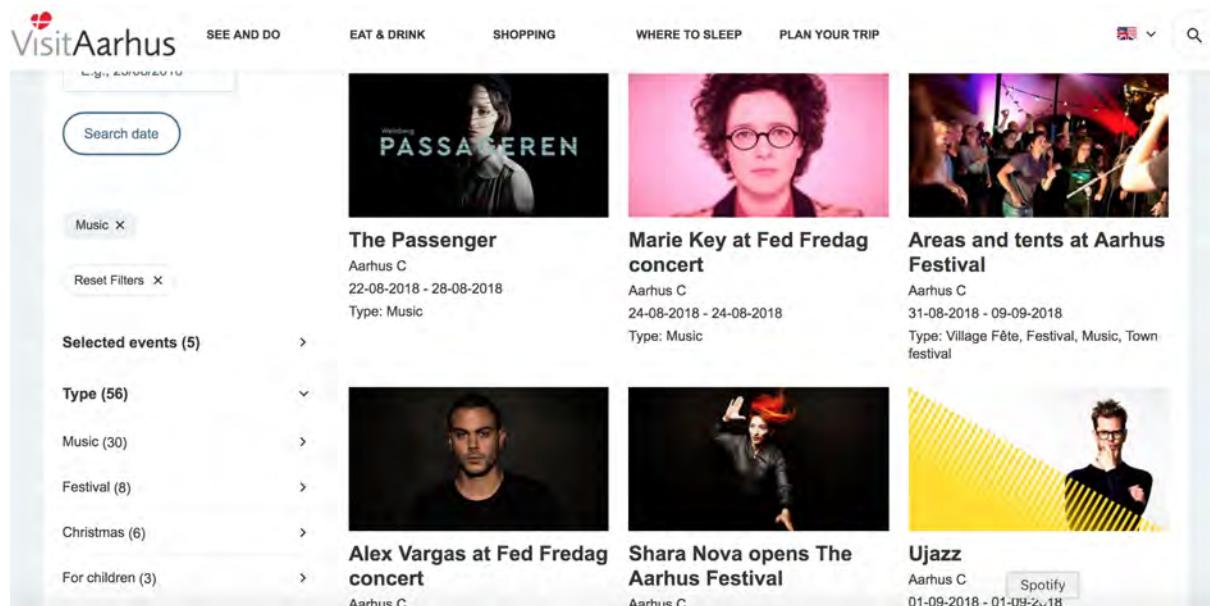


Figure 12. Screen shot of Visit Aarhus' website as of 23-8-2018 (2)

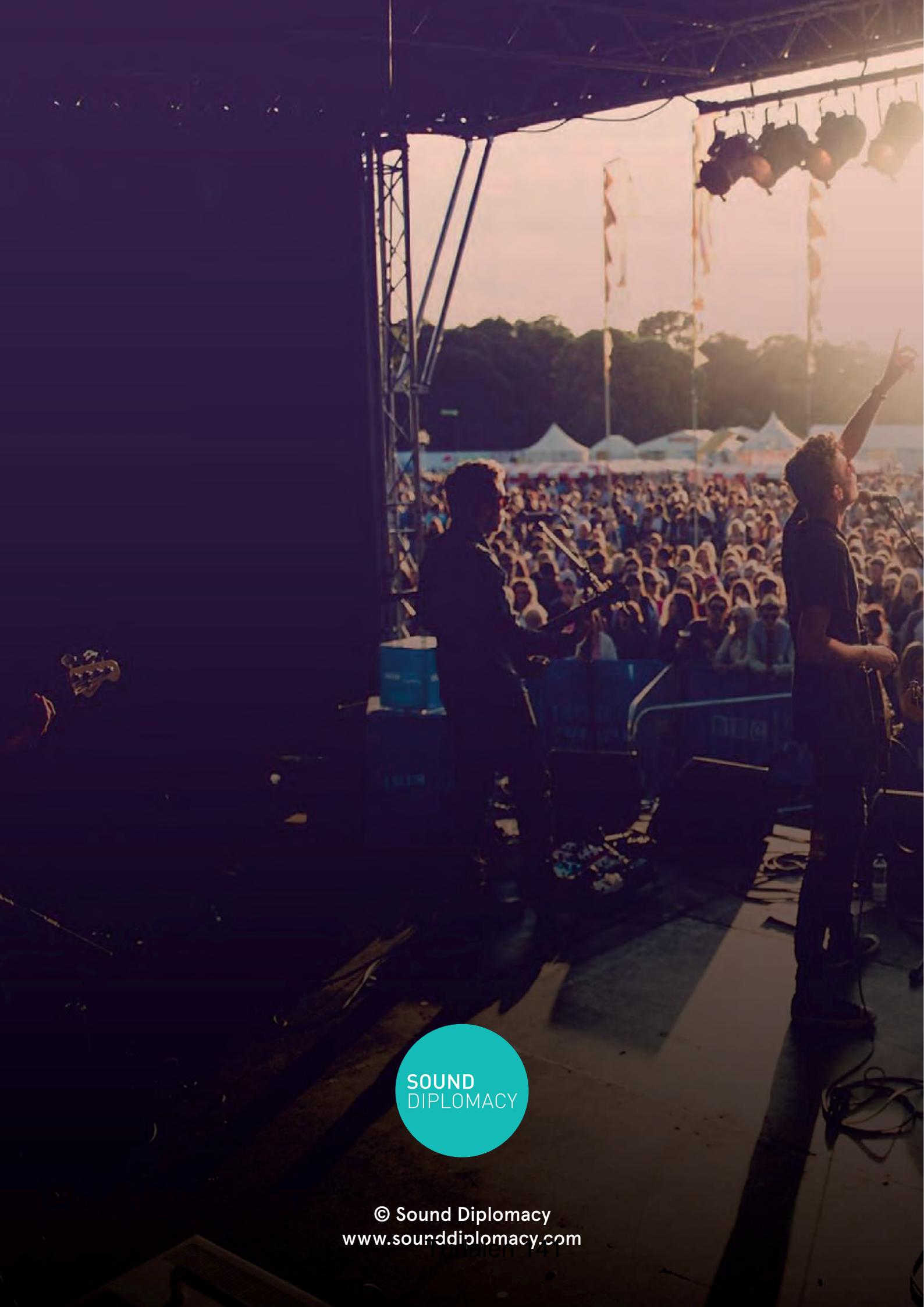
## APPENDIX 2

### UK Standard Industrial Classification (SIC)

18201: Reproduction of sound recording  
32200: Manufacture of musical instruments  
46431: Wholesale of gramophone records, audiotapes, compact discs and videotapes and of the equipment on which these are played  
46439: Wholesale of radio and television goods and of electrical household appliances (other than of gramophone records, audio tapes, compact discs and video tapes and the equipment on which these are played) n.e.c.  
46491: Wholesale of musical instruments  
47430: Retail sale of audio and video equipment in specialised stores  
47591: Retail sale of musical instruments and scores in specialised stores  
47630: Retail sale of music and video recordings in specialised stores  
59200: Sound recording and music publishing activities  
60100: Radio broadcasting  
85520: Cultural education  
90010: Performing arts  
90020: Support activities to performing arts  
90030: Artistic creation  
90040: Operation of arts facilities

#### Categories

Recording and Publishing	46431, 18201, 59200, 47630
Licensing and Copyrights	90030
Touring and Live	90010, 90020, 90040
Instruments & equipment	46491, 32200, 47430, 47591
Supporting industry	60100
Education	85520



SOUND  
DIPLOMACY

© Sound Diplomacy  
[www.souddiplomacy.com](http://www.souddiplomacy.com)

Festival 141

Mae'r dudalen hon yn wag yn fwriadol

My Ref: T: Scrutiny/Correspondence/Cllr NH



County Hall  
Cardiff,  
CF10 4UW  
Tel: (029) 2087 2087

Neuadd y Sir  
Caerdydd,  
CF10 4UW  
Ffôn: (029) 2087 2088

Date: 11 April 2019

Councillor Peter Bradbury  
Cabinet Member, Culture & Leisure  
Cardiff Council  
County Hall  
Cardiff  
CF10 4UW

Dear Councillor Bradbury,

### **Economy & Culture and Environmental Scrutiny Committee: 9 April 2019**

Thank you for attending Committee, along with Neil Hanratty, Jonathan Day and Ruth Cayford, to present a briefing on the results of the work undertaken by Sound Diplomacy.

Members share your view that a Music Strategy for Cardiff will lead to a number of creative and economic benefits for residents, visitors, businesses and those working in Cardiff, as well as across the region.

Members therefore welcome Sound Diplomacy's work, viewing it as a paving report to inform the development of a Music Strategy for Cardiff. We were pleased to hear the range of engagement with stakeholders and that this has helped to surface issues that need addressing to enable Cardiff to achieve the aims of being '*a global leader in the Music Cities movement*' and to embrace '*Music Urbanism as a tool for regeneration, investment and development*'. We were interested to hear the broad themes identified by Sound Diplomacy in their strategic recommendations. Given the level of engagement with stakeholders and the need to maintain this engagement and momentum to enable Cardiff to move forward as a Music City, Members **recommend** that all stakeholders who contributed via Sound Diplomacy engagement events be given the opportunity to comment on the strategic recommendations.

Members are pleased that the proposed scope of strategy is broad, not limited to live music or a particular genre but encompassing all genres and the music ecosystem across the city. A particular concern of committee members is to ensure that music is accessible and inclusive for all young people, not only in terms of being musicians but also in terms of developing pupils' awareness and skills sets so they can benefit from the range of skilled roles that exist across the music economy.

Thank you for explaining that the report to Cabinet on 18 April 2019 will ask Cabinet to note the contents of the Sound Diplomacy report and seek agreement for a further report to Cabinet to establish a partnership Music Board, which will develop a detailed response to the strategic recommendations contained in Sound Diplomacy's report. The membership of the partnership Music Board will be critical to the success of work in this area and Members were pleased to hear that you intend membership to be broad and inclusive, with a number of sub-groups to provide focus on particular aspects. At the meeting, we asked about the resources available to support the Music Board and note the response that existing resources will be sufficient to provide secretariat support.

Members thank you for confirming your wish to bring the proposed Music Strategy for scrutiny; during our 'way forward' Members highlighted that they wish to add value to the development of the Music Strategy and be involved as this progresses, as well as carrying out pre-decision scrutiny of the proposed Strategy. I will be grateful if you could ensure that officers liaise with Scrutiny Service to enable policy development scrutiny to take place at a suitable time.

This letter requires a response, as it contains a recommendation.

Yours sincerely,



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

cc      Members of the Economy & Culture Scrutiny Committee  
Neil Hanratty        Jonathan Day        Ruth Cayford  
Cabinet Support Office

**CARDIFF COUNCIL  
CYNGOR CAERDYDD**

**CABINET MEETING: 18 APRIL 2019**



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**CENTENARY FIELDS**

**CULTURE & LEISURE (COUNCILLOR PETER BRADBURY )**

**AGENDA ITEM: 3**

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**Reason for this Report**

1. To advise Cabinet of any representations or objections received in response to the proposal to dedicate Grange Gardens and Alexandra Gardens as Centenary Fields.

**Background**

2. At its meeting on the 13<sup>th</sup> December 2018, Cabinet considered a proposal to dedicate the sites above under an initiative being promoted by Fields In Trust ( FIT ).
3. The Centenary Fields Initiative calls on all landowners including all local government tiers to secure recreational spaces in perpetuity to honour the memory of the millions of people who lost their lives in World War I 1914 – 1918 and specifically encourages participants to nominate green spaces that contain a war memorial that have some significance to World War I.
4. The report advised that as the Council would be technically disposing of the land under section 123 of the Local Government Act 1972 by entering into a Deed of Dedication for each site, it was required to give public notice of its intentions and to consider any objections before finalising its decision.
5. Following confirmation of the boundaries of each of the sites and in consultation with local ward members, the proposal to enter into a Deed of Dedication in respect of each of the sites was advertised in the Western Mail on the 8 February 2019 and again on the 15<sup>th</sup> February 2019. The closing date for the receipt of objections was the 8th March 2019.

**Issues**

6. The advertisements have generated interest with requests for further information / clarification totalling eighty-six for Alexandra Gardens and

eight for Grange Gardens. No formal representations or objections were received.

7. It is proposed that the deeds be completed by the end of May 2019 and ceremonies are held to mark the installation of the commemorative plaques at each site celebrating the dedications.
8. Post dedication, the Council will continue to be responsible for the management and maintenance of the sites and any buildings located on them, such costs will continue to be met from existing service area budgets. In placing the sites in trust, the Council will be required to seek the consent of FIT in respect of any proposal/development/disposal that does not match the permitted use of the site as stated in the deed.
9. The use of the proposed sites will be continuous and there will be no restrictions of access or use as a consequence of the dedication.

### **Local Member Consultation**

10. Local Ward Members have been consulted on the proposals and are supportive of the dedications.

### **Reason for Recommendations**

11. On the basis of no objections being received to the proposals, Cabinet is requested to give authority to the relevant Officers to complete the dedication of the sites named in this report as Centenary Fields.

### **Financial Implications**

12. The report seeks approval to complete the dedication of the sites named in this report, following public consultation and outlines that any costs associated with the dedication will be met from existing revenue budgets of the directorate. Under the terms of the dedication, the Council will retain the freehold and all maintenance responsibilities of the sites. In addition, the Council will need to seek consent of FIT in respect of any proposal/development/disposal that does not match the permitted use of the site as stated in the deed.

### **Legal Implications**

13. The Council is required to advertise a disposal of public open space land pursuant to section 123 of the Local Government Act 1972 and to consider any objections. The Council has power to dispose of land at an undervalue of up to £2m for wellbeing purposes.

### **RECOMMENDATIONS**

Cabinet is recommended to authorise the Director of Governance and Legal, in consultation with other appropriate service area officers and Fields in Trust, to complete the dedication of the sites named in this report as Centenary Fields.

**SENIOR RESPONSIBLE  
OFFICER**

**Neil Hanratty  
Director Economic Development**

12 April 2019

*The following background paper has been taken into account :*

*Cabinet Report December 2018 – Centenary Fields*

Mae'r dudalen hon yn wag yn fwriadol

**CARDIFF COUNCIL  
CYNGOR CAERDYDD**

**CYFARFOD CABINET: 18 EBRILL 2019**



**DARPARU YSGOLION CYNRADD NEWYDD I WASANAETHU RHANNAU O CREIGIAU/ SAIN FFAGAN, RADUR/ PENTRE-POETH A'R TYLLGOED**

**ADDYSG, CYFLOGAETH A SGILIAU**

**EITEM AGENDA: 4**

**Rheswm dros yr Adroddiad hwn**

1. Er mwyn galluogi'r Cabinet i ystyried argymhelliaid i gynnal ymgynghoriad cyhoeddus ar gynigion i sefydlu ysgol gynradd ffrwd ddeuol dwy ffrwd newydd, wedi ei threfnu fel un ffrwd fynediad Gymraeg ac un ffrwd Saesneg yn bennaf ond â defnydd helaeth o'r Gymraeg, i wasanaethu rhannau o ardaloedd Creigiau/Sain Ffagan, Radur/Pentre-poeth a'r Tyllgoed.
2. I'r Cabinet nodi'r oblygiadau refeniw a'r oblygiadau cyfalaf posib sy'n deillio o ddarparu ysgolion ychwanegol.

**Cefndir**

**Datblygiadau tai newydd yng ngogledd-orllewin Caerdydd**

3. Cynigiwyd nifer o ddatblygiadau tai newydd yng ngogledd orllewin Caerdydd dros y blynnyddoedd diwethaf a fydd yn cynyddu nifer y plant yn yr ardal fydd yn ceisio am lefydd mewn ysgolion, ac a fydd yn cael effaith ar y llefydd fydd ar gael mewn ysgolion.
4. Mae Canllawiau Cynllunio Atodol y Cyngor yn nodi'r amgylchiadau lle gallai'r Cyngor geisio cyfraniadau a106 gan ddatblygwyr tuag at gyfleusterau ysgolion. Er mwyn cael cyfraniadau gan ddatblygwyr, byddai gofyn i'r Cyngor roi dystiolaeth fod unrhyw rwymedigaeth yn cwrdd â'r mein prawf isod:
  - Angenrheidiol i wneud y datblygiad yn dderbyniol mewn termau cynllunio;
  - Yn ymwneud yn uniongyrchol â'r datblygiad; ac
  - Â chysylltiad teg a rhesymol o ran achos a math gyda'r datblygiad
5. Ni fyddai cyfraniadau A106 yn caniatáu i'r Cyngor fuddsoddi mewn ysgolion i ateb anghenion sy'n bodoli eisoes ac a nodwyd. Gellir ceisio cyfraniadau yn unig pan fydd yr ysgolion lleol i'r datblygiad yn parhau yn

llawn, a bod angen ehangu'r ddarpariaeth naill ai trwy ehangu'r ysgolion presennol neu godi ysgolion newydd. Rhaid i gyfraniadau mewn tir, adeiladau neu arian fod yn uniongyrchol gymesur â'r anghenion sy'n deillio o ddatblygiad.

6. Mae Cynllun Seilwaith Addysg y Cyngor, sydd wedi ei gynnwys yn y CDLI a adneuwyd yn 2013, yn amlygu cynigion buddsoddi / datblygu arfaethedig ac yn nodi gofynion seilwaith at y dyfodol ar sail rhagamcanion am lefel a dosbarthiad twf yng Nghaerdydd.
7. Nododd Cynllun Datblygu Lleol (CDLI) 2006 – 2026 Caerdydd safleoedd strategol allweddol i gyflwyno 41,100 o dai newydd yng Nghaerdydd gan gynnwys Safle Strategol C yng Ngogledd Orllewin Caerdydd i ddarparu hyd at 5,000 o anheddua yn ystod cyfnod y CDLI ond a allai fod hyd at gyfanswm o 7,000.
8. Rhoddwyd manylion am ysgolion cynradd newydd i wasanaethu Safle Strategol C yn y Cynllun Datblygu Lleol fel gofyniad polisi o ran y seilwaith hanfodol fyddai ei angen i gynnal y datblygiad.
9. Rhoddodd Pwyllgor Cynllunio'r Cyngor ganiatâd cynllunio amlinellol i adeiladu hyd at 630 o anheddua ar dir i'r gogledd a'r de o safle Heol Llantrisant, cyfnod cyntaf datblygiad Plasdŵr, ym mis Chwefror 2016.
10. Mae cytundeb a.106 a negodwyd gyda datblygwr y safle yn 2016 yn rho'i'r canlynol i'r Cyngor:
  - Safle a neilltuwyd yn y datblygiad ar gyfer ysgol;
  - Ysgol gynradd newydd â dwy ffrwd fynediad iddi
11. Hyd yma, cwblhawyd oddeutu 90 tŷ gyda deiliaid ynddynt yng nghyfnodau cynnar y datblygiad ar ochr ogledol Heol Llantrisant.
12. Ymyst datblygiadau arwyddocaol eraill a gafodd ganiatâd cynllunio yn Safle Strategol C mae:
  - Gogledd orllewin Caerdydd –hyd at 5,970 o anheddua, ac i gynnwys tair ysgol gynradd newydd ac ysgol uwchradd
  - Tir i'r de o Heol Pentre-baen– hyd at 290 o anheddua
  - Fferm Goitre Fach– 260 o anheddua.
13. Mae angen darparu mwy o ysgolion cynradd i wasanaethu'r galw ychwanegol am lefydd o'r safleoedd hyn yn natblygiad Plasdŵr neu gerllaw iddo.

## Materion

### Cynhwysedd presennol/ysgolion sy'n gwasanaethu'r ardaloedd

14. Mae nifer o ysgolion cynradd cyfrwng-Saesneg, cyfrwng-Cymraeg a ffrwd-ddeuol yn gwasanaethu ardaloedd Creigiau/ Sain Ffagan, Radur/ Pentre-poeth a'r Tyllgoed. Yn eu plith mae ysgolion cynradd cyfrwng-Saesneg

Bryn Deri, Danescourt, y Tyllgoed, YGG y Teulu Sanctaidd, YG EyNgh Llandâf, Pentre-baen, Pentyrch, Peter Lea, a Radur; Ysgol Gymraeg Coed y Gof, Ysgol Nant Caerau, ac Ysgol Pencae (cyfrwng-Cymraeg); ac Ysgol Gynradd Gwaelod y Garth ac Ysgol Gynradd Creigiau (ffrwd-ddeuol).

15. Mae map sy'n dangos lleoliad a dalgylchoedd ysgolion cynradd cyfrwng-Saesneg yn Atodiad 2. Mae map sy'n dangos lleoliad a dalgylchoedd, ysgolion cynradd cyfrwng-Cymraeg yn Atodiad 3.

#### **Sefydlu'r galw lleol am lefydd mewn ysgolion cynradd**

16. Dengys rhagamcanion seiliedig ar ddata'r GIG a dderbyniwyd yn 2018, y flwyddyn ddiweddaraf y mae data ar gael ar ei chyfer, na ddisgwylir i nifer y disgyblion o ysgolion cymunedol cyfrwng-Saesneg sy'n dod i ddosbarthiadau Derbyn o'r tai presennol gyrraedd y niferoedd uchaf a dderbyniwyd ym Medi 2015 a 2016.
17. Wrth ystyried y galw tebygol am lefydd ar draws yr ardal, defnyddiwyd nifer o ffactorau yn sail gwybodaeth i fwydo rhagamcanion a rhagolygon, gan gynnwys:
  - Poblogaethau diweddar a hanesyddol y gwyddys sy'n byw ym mhob ardal gan ddefnyddio data'r GIG;
  - Niferoedd diweddar a hanesyddol ar y llyfrau wedi eu cymryd o CYBLD (Cyfrifiad Ysgolion Blynnyddol ar Lefel Disgyblion) ar gyfer ysgolion Caerdydd;
  - Canrannau diweddar a hanesyddol o blant yn mynchu ysgolion cymunedol cyfrwng-Saesneg, ysgolion Cymraeg ac ysgolion ffydd.
18. Caiff rhagolygon eu paratoi ar sail:
  - poblogaethau preswyl presennol;
  - poblogaethau tebygol o'r datblygiadau tai yn y dyfodol sy'n cael eu codi ar hyn o bryd a rhai sy'n cael eu cynnig;
  - y galw tebygol petai patrymau hawlio yn aros yn gyson â'r blynnyddoedd mwyaf diweddar, gan gymhwys o'r tueddiadau hyn i'r poblogaethau perthnasol fydd yn mynd i addysg gynradd yn y blynnyddoedd i ddod;
  - newidiadau i batrymau hawlio a all gynyddu'r galw mewn un math o ddarpariaeth ond lleihau mewn un arall.
19. Mae gwybodaeth lawn am y rhagamcanion a'r rhagolygon a baratowyd yn berthnasol i'r ardal a'r fethodoleg a ddefnyddiwyd i ganfod y galw tebygol yn Atodiad 1.

#### **Crynodeb o ragolygon y galw am lefydd Derbyn**

20. Dengys y gwaith a wnaed i ganfod y galw tebygol am lefydd mewn ysgolion cynradd cyfrwng-Saesneg a chyfrwng-Cymraeg ar draws ardaloedd Creigiau/ Sain Ffagan, Radur/ Pentre-poeth a'r Tyllgoed y rhagwelir y bydd rhyw 46 o lefydd Derbyn dros ben yn ardaloedd Creigiau/

Sain Ffagan, Radur/ Pentre-poeth a'r Tyllgoed, ar sail y tai sydd yno yn awr.

21. Fodd bynnag, mae nifer arwyddocaol o lefydd mewn ysgolion megis Ysgol Gynradd Creigiau ac Ysgol Gynradd Gwaelod y Garth yn cael eu cymryd gan ddisgyblion sy'n byw y tu allan i Gaerdydd. Mae llawer o'r ysgolion hyn wedi'u hynysu yn ddaearyddol oddi wrth y datblygiad tai newydd lle cynigir codi'r ysgol gynradd newydd.
22. O gymharu â'r cyflenwad presennol o lefydd i'r oedran Derbyn ar draws yr ardal ehangach, mae rhagamcanion dalgylchoedd y blynnyddoedd 2019 i 2021 yn dangos:
  - Gyfartaledd o 31 o lefydd dros ben mewn ysgolion cynradd cyfrwng-Saesneg;
  - Gyfartaledd o 4 o lefydd dros ben mewn ysgolion cynradd cyfrwng-Cymraeg.
23. Fodd bynnag, mae lefel gyfredol y llefydd dros ben yn yr ysgolion cynradd cyfrwng-Saesneg agosaf at y datblygiad newydd, gan gynnwys Ysgol Gynradd Radur, Ysgol Gynradd Peter Lea ac Ysgol Gynradd Danescourt yn isel, sef 69 lle (6 % o'r cynhwysedd). Mae lefel gyfredol y llefydd dros ben yn yr ysgolion cynradd cyfrwng-Cymraeg agosaf at y datblygiad newydd, sef Ysgol Gymraeg Coed y Gof ac Ysgol Pencae hefyd yn isel, sef 32 lle (hefyd 6% o'r cynhwysedd).
24. O gymharu â'r cyflenwad presennol o lefydd i'r oedran Derbyn ar draws y dalgylchoedd a wasanaethir gan y pum ysgol hyn, dengys rhagamcanion ar gyfer y blynnyddoedd 2019 i 2021:
  - Gyfartaledd o 31 o lefydd dros ben mewn ysgolion cynradd cyfrwng-Saesneg;
  - Diffyg cyfartalog o 10 lle mewn ysgolion cynradd cyfrwng-Cymraeg.
25. Nid yw hyn yn cynnwys disgyblion o unrhyw rai o'r tai yn natblygiad newydd Plasdŵr. Y rhagamcan ar gyfer gyfnod cyntaf y datblygiad, 630 o anheddu ar dir i'r gogledd a'r de o Heol Llantrisant, yw cyfartaledd o 27 o ddisgyblion am bob grŵp blwyddyn pan fydd y datblygiad wedi ei gwblhau. Y rhagamcan ar gyfer nifer y disgyblion o holl ddatblygiad Plasdŵr yw cyfartaledd o ryw 229 o ddisgyblion i bob grŵp blwyddyn pan fydd y datblygiad wedi ei gwblhau.

### **Ysgol gynradd newydd 2 DdM ar ddatblygiad Plasdŵr**

26. Darperir ysgol newydd gan ddatblygwr y safle fel rhan o'r cytundeb cynllunio gyda'r Cyngor i gwrdd ag anghenion y datblygiad newydd a'r tai a gynlluniwyd ar gyfer y dyfodol. Prif bwrpas darparu'r ysgol newydd yw gwasanaethu disgyblion fyddai'n byw yn y datblygiadau tai newydd - bydd y ddarpariaeth newydd yn angenrheidiol ac yn uniongyrchol gymesur â rhagamcan nifer y disgyblion ddaw o'r datblygiad.

27. Adeg ei sefydlu, ni fyddai cyfnod cyntaf y datblygiad tai yn holol gyflawn. Rhagwelir y bydd cyfnod hwn y datblygiad yn gyflawn a rhywun ym mhob un o'r anheddua rhwng 2022 a 2024.
28. Mae prif ddatblygwr datblygiad Plasdŵr yn bwriadu codi adeilad ysgol newydd dau ddosbarth mynediad mewn un cam i wasanaethu'r datblygiad. Byddai hyn yn rhoi digon o le i nifer y disgylion y disgwyllir iddynt fyw yn y datblygiad ac a fydd angen llefyrdd mewn ysgolion cynradd pan fo'r 630 annedd arfaethedig wedi eu cwblhau.
29. Byddai cynhwysedd ychwanegol yr ysgol dau ddosbarth mynediad yn ddigon i gwrdd ag anghenion y datblygiad. Byddai'r ysgol hefyd yn darparu digon o le dros ben i gwrdd â'r galw a ragamcanwyd am lefydd ysgol o'r 290 annedd a gynlluniwyd ar y safle i'r de o Heol Pentre-baen (cam 2), a rhan o'r galw a ragamcanwyd o safle fwy gogledd orllewin Caerdydd o hyd at 5,000 o anheddua yn y camau olaf.
30. Cyfyngir maint y tir ar gyfer safle'r ysgol gynradd arfaethedig yng nghanol yr ardal i uchafswm o 1.4ha er mwyn cydymffurfio â chyfngiadau PADHI y Weithrediaeth Iechyd a Diogelwch yng nghyswilt prif gyflenwad nwy pwysedd uchel sydd yno eisoes. Mae safle'r ysgol hon yn ddigon mawr ar gyfer ysgol gynradd o ddau ddosbarth mynediad gyda chae chwarae ar y safle.

### **Cymraeg 2050, strategaeth Caerdydd Ddwyeithog a'r Cwricwlwm newydd i Gymru**

31. Cyhoeddodd Llywodraeth Cymru ei strategaeth Cymraeg 2050 yn 2017 sydd yn gosod gweledigaeth o gyrraedd 1 miliwn o siaradwyr Cymraeg erbyn 2050.
32. Erbyn 2050, nod y strategaeth yw i 40 y cant o blant (ym mhob grŵp blwyddyn) fod mewn addysg cyfrwng-Cymraeg (gyda phob un yn dweud y gallant siarad Cymraeg), gyda'r gweddill mewn addysg cyfrwng-Saesneg. O'r rhai mewn addysg cyfrwng-Saesneg, y rhagdybiaeth yw y bydd hanner y rhai sy'n gadael yr ysgol yn dweud y gallant siarad Cymraeg.
33. Mae'r strategaeth yn rhagdybio, yn genedlaethol, y gall 70 y cant o bobl ifanc 15 oed siarad Cymraeg erbyn 2050, sef 40 y cant a ddaw o ysgolion cyfrwng-Cymraeg a 30 y cant a ddaw o ysgolion cyfrwng-Saesneg (h.y., hanner y 60 y cant fydd mewn ysgolion cyfrwng-Saesneg). Nid oes modd cyrraedd targedau Cymraeg 2050 yn unig trwy sefydlu ysgolion cyfrwng-Cymraeg newydd.
34. Mae strategaeth Cymraeg 2050 hefyd yn gosod newidiadau trawsnewidiol sydd yn cynnwys:
  - Gwneud cynnydd buan i ehangu darpariaeth cyfrwng-Cymraeg y blynnyddoedd cynnar i hwyluso pontio diwniad i addysg cyfrwng-Cymraeg.

- Cynyddu cyfran grŵp blwyddyn pob ysgol sy'n derbyn addysg Gymraeg o 22 y cant yn genedlaethol yn 2015/16 i 30 y cant erbyn 2031, ac yna i 40 y cant erbyn 2050
  - Trawsnewid y modd y caiff y Gymraeg ei dysgu i bob dysgwr fel y gall o leiaf 70 y cant o'r dysgwyr hynny ddweud erbyn 2050 y gallant siarad Cymraeg erbyn iddyntadael yr ysgol.
35. Mae strategaeth Cymraeg 2050 yn nodi, er mai addysg drochi Gymraeg yw'r prif ddull o sicrhau y gall plant ddatblygu eu sgiliau Cymraeg a chreu siaradwyr newydd, y dylai pob dysgwr gael y cyfle i fod yn ddwyieithog. Er mwyn cyrraedd y targed o filiwn o siaradwyr, rhaid cynyddu yn sylweddol hefyd nifer y dysgwyr mewn ysgolion cyfrwng-Saesneg sy'n llwyddo i gaffael yr iaith.
36. Nid yw Llywodraeth Cymru wedi gosod targedau ar gyfer pob awdurdod lleol yn strategaeth Cymraeg 2050; nid yw chwaith yn rhoi manylion y newidiadau i'r cwricwlwm na'r newidiadau sefydliadol fyddai'n rhaid eu gweithredu er mwyn cynyddu nifer y siaradwyr Cymraeg rhugl sy'n gadael addysg cyfrwng-Saesneg.
37. Mae Strategaeth Caerdydd Ddwyeithog yn nodi meysydd blaenoriaeth i ganiatáu i deuluoedd, plant a phobl ifanc ddefnyddio'r Gymraeg, sydd yn cynnwys
- Hyrwyddo manteision addysg cyfrwng-Cymraeg i holl gymunedau Caerdydd a gweithredu Cynllun Strategol y Gymraeg mewn Addysg.
  - Gwella darpariaeth a safonau Cymraeg mewn ysgolion cyfrwng-Cymraeg ac ysgolion cyfrwng-Saesneg trwy Gynllun Strategol y Gymraeg mewn Addysg.
  - Hyrwyddo manteision trosglwyddo'r iaith Gymraeg yn y teulu, a rhoi cyfle i blant a phobl ifanc ddod yn oedolion dwyieithog hyderus.
  - Datblygu cyfleoedd i blant a phobl ifanc mewn lleoliadau cyfrwng-Saesneg i gysylltu'n gadarnhaol â'r Gymraeg.
  - Gwella cyfraddau cynnydd rhwng y blynnyddoedd cynnar i addysg ôl-16.
38. Yng Nghaerdydd, mae 81 o ysgolion cynradd cymunedol cyfrwng-Saesneg, 15 o rai Cymraeg a dwy ysgol gynradd ffrwd-ddeuol. Mae tair o'r 15 ysgol gynradd gymunedol cyfrwng-Cymraeg ar safleoedd a rennir gydag ysgolion cynradd cyfrwng-Saesneg, sef Ysgol Gymraeg Coed y Gof, Ysgol Glan Ceubal ac Ysgol Gymraeg Pen y Groes.
39. Mae dogfen Llywodraeth Cymru 'Diffinio ysgolion yn ôl darpariaeth cyfrwng-Cymraeg' (Hydref 2007) yn rhoi cyfres o ddiffiniadau i ddisgrifio natur ieithyddol ysgolion cynradd ac uwchradd yng Nghymru, fel a ganlyn:
- Ysgol gynradd Gymraeg
  - Ysgol gynradd ffrwd-ddeuol
  - Ysgol gynradd drosiannol: cyfrwng Cymraeg gyda chryn ddefnydd o Saesneg

- Ysgol gynradd cyfrwng-Saesneg yn bennaf ond gyda chryn ddefnydd o'r Gymraeg
  - Cyfrwng-Saesneg
40. Yng Nghymru, gall awdurdodau lleol sefydlu ysgolion cynradd newydd sydd yn ateb y diffiniad yn un o'r disgrifiadau hyn. Mae ysgolion cynradd ffrwd ddeuol fel arfer yn cynnwys ffrwd Gymraeg a ffrwd Saesneg. Nid ydynt yn cynnwys ffrwd Gymraeg a ffrwd a ddiffinnir gan unrhyw un o'r categoriâu iaith eraill.
41. Mae nifer o newidiadau arwyddocaol ar y gweill mewn addysg yng Nghymru dros y pum mlynedd nesaf.
42. Mae'r cwricwlwm newydd yng Nghymru yn gosod disgwyliadau newydd i ysgolion a dysgwyr, ac ni fydd yn defnyddio'r term Cymraeg ail iaith. Un cwricwlwm fydd i Gymru, a hwnnw'n gymwys mewn ysgolion Cymraeg, ysgolion cyfrwng-Saesneg a rhai dwyieithog. Bydd y disgwyliadau yng Nghymru i'r sawl sydd yn dysgu Cymraeg mewn ysgolion cyfrwng-Saesneg yn cael eu codi'n raddol wrth i'r carfannau cyntaf ddysgu trwy'r cwricwlwm newydd er mwyn gwireddu'r uchelgais o gael miliwn o siaradwyr Cymraeg erbyn 2050. Mae'r llwybr iaith Gymraeg newydd yn creu disgwyliad, er y bydd dysgwyr yn gwneud cynnydd ar raddfeydd gwahanol mewn ysgolion cyfrwng-Saesneg, cyfrwng-Cymraeg neu ddwyieithog, y bydd pob plentyn yn gallu defnyddio'r Gymraeg.
43. Yn dilyn adolygiad brys o Gynlluniau Strategol y Gymraeg mewn Addysg 2017-20, mae Llywodraeth Cymru yn cynnal adolygiad o'r modelau ieithyddol a ddefnyddir mewn ysgolion yn rhyngwladol, er mwyn caniatâu datblygu categoriâu newydd y gellir eu defnyddio fel sail o wybodaeth i gefnogi cynllunio ysgolion a chwricwlwm yng Nghymru. Fodd bynnag, ar hyn o bryd, ceir cyfyngiadau ar categoriâu ieithyddol yr ysgolion y gellid eu sefydlu.

### **Yr ysgolion y bwriedir eu sefydlu**

44. Yn gyson â dyheadau Strategaeth Ddwyeithog Caerdydd, ac er mwyn ymateb yn gadarnhaol i'r dyhead am nifer uwch o ddinasyddion dwyieithog (rhugl yn y Gymraeg a'r Saesneg), cynigir amrywiad ar y ddarpariaeth ysgol gynradd dwy ffrwd draddodiadol.
45. Er mwyn ateb y galw a ragamcennir ar gyfer llefydd o'r camau presennol, ac i gyfrannu at ateb y galw o gamau datblygiad Plasdŵr yn y dyfodol, mae'r Cyngor yn cynnig sefydlu ysgol gynradd ffrwd ddeuol dau ddosbarth mynediad wedi ei threfnu fel:
- un ffrwd un dosbarth mynediad Cymraeg, gyda 48 o lefydd meithrin rhan-amser,
  - un ffrwd un dosbarth mynediad Saesneg yn bennaf, ond gyda defnydd sylweddol ar y Gymraeg, gyda 48 o lefydd meithrin rhan-amser.

46. Mae sefydlu math newydd o ddarpariaeth yng Nghaerdydd, cyfrwng Saesneg yn bennaf ond sy'n gwneud defnydd sylweddol o'r Gymraeg, yn cynnig cyfle i geisio dulliau arloesol o addysgu'r iaith Gymraeg i ddisgyblion ar ffurf darpariaeth ysgol cyfrwng Saesneg sydd yn y continwwm dwyieithog.
47. Byddai'r sefydliad ffrwd ddeuol sydd wedi ei gynllunio yn galluogi partneriaeth weithio agos rhwng y ffrydiau a thrwy rannu safle ac adnoddau, yn hwyluso trochiad ieithyddol llawn i blant o fewn y ffrwd Gymraeg a hefyd yn galluogi plant o fewn y ffrwd Saesneg yn bennaf i adeiladu caffaeliad iaith mwy cadarn yn y Gymraeg.
48. Gellid cynorthwyo datblygiad sgiliau Cymraeg dysgwyr ar draws y cwricwlwm a thrwy brofiadau allgylsiol a gweithgareddau fel rhan o ymagwedd ysgol gyfan o dan un Corff Llywodraethu.
49. Byddai'r model darpariaeth ysgol hwn mewn sefyllfa dda i ddathlu'r Gymraeg ym mhob agwedd o'r ddarpariaeth, ac yn fodel o ragoriaeth ieithyddol lle bydd y disgyblion yn gadael yn rhugl yn y Gymraeg a'r Saesneg a chyda'r posiblwydd o fod wedi cychwyn ar eu taith i ddysgu trydedd iaith Ewropeaidd cyn mynd ymlaen i addysg uwchradd.

### **Effaith ysgolion newydd ar y ddarpariaeth bresennol o ysgolion cynradd**

50. Tra byddai darparu ysgol dau ddosbarth mynediad yn cynnig llefudd ysgol ychwanegol mewn adeiladau o ansawdd uchel, gallai hyn gael effaith wahaniaethol ar ysgolion lleol eraill.
51. Mae sefydlu ysgolion newydd, yn enwedig mewn adeiladau newydd, o raid yn denu disgyblion o ardaloedd eraill. Gallai hyn gael effaith sylweddol ar y niferoedd mewn ysgolion sy'n bod eisoes. Felly, rhaid rhoi ystyriaeth ofalus i amseru, graddfa a math y ddarpariaeth a sefydlir i osgoi ansefydlogi neu danseilio ysgolion eraill.
52. Yr ysgolion a allai golli disgyblion o ganlyniad uniongyrchol i ddarparu'r ysgolion newydd yw'r rhai sy'n agos at yr ysgolion newydd a gaiff eu darparu.
53. Yr ysgolion cynradd cyfrwng-Saesneg agosaf at yr ysgolion arfaethedig newydd yw Ysgol Gynradd Danescourt, Ysgol Gynradd Peter Lea ac Ysgol Gynradd Radur. Bu niferoedd uchel ym mhob un o'r rhain dros y blynnyddoedd diwethaf, ac mae Ysgolion Cynradd Peter Lea a Danescourt wedi derbyn canran uchel o blant o'r tu allan i'w dalgylch. Er y gall y bwriad i ddarparu'r ysgolion newydd gerllaw effeithio ar yr ysgolion hyn, disgwyli'r mai cyfyngedig fydd yr effaith ar nifer y disgyblion fydd ynddynt.
54. Yr ysgolion cynradd cyfrwng-Cymraeg agosaf at yr ysgolion arfaethedig newydd yw Ysgol Pencae ac Ysgol Gymraeg Coed y Gof. Bu niferoedd uchel iawn yn Ysgol Pencae ers llawer blwyddyn. Mae'r niferoedd a ddewisodd Ysgol Gymraeg Coed y Gof, a nifer y disgyblion a dderbyniwyd i'r ysgol, wedi gostwng yn 2017/18 ac yn 2019. Mae perygl y gall darparu

mwy o lefydd cyfrwng-Cymraeg yn agos at Ysgol Coed y Gof olygu y bydd llai yn mynd i'r ysgol hon.

55. Ar adeg derbyn y disgyblion cyntaf i'r ysgol newydd ym Mhlasdŵr fe allai nifer sylweddol yn fwy o lefydd fod ar gael o fewn adeilad fyddai a lle i 420 o ddisgyblion cynradd a 96 o ddisgyblion meithrin rhan-amser. Byddai sefydlu darpariaeth ysgol newydd mewn unrhyw ardal lle na fyddai'r galw lleol am lefydd yn llenwi'r ysgol yn syth naill ai'n golygu llefydd dros ben yn yr ysgol newydd neu fe allai ddenu disgyblion o ardaloedd eraill i'r ysgol, fyddai'n golygu llefydd dros ben yn rhywle arall.
56. Byddai trefniadau sefydlu ysgolion newydd yng Nghaerdydd fel 'ysgolion cychwyn' fel rheol yn caniatáu derbyn i'r blynnyddoedd Meithrin a Derbyn yn unig pan fyddent yn agor. Ni fyddai disgyblion yn cael eu derbyn i grwpiau Blwyddyn 1-6 adeg agor. Byddai'r ysgol yn tyfu ac yn derbyn disgyblion i'r grwpiau blwyddyn hyn dros gyfnod o saith mlynedd. Mae hyn yn cyfyngu ar effaith darparu ysgol newydd ar yr ysgolion cyfagos ac yn caniatau i ysgol newydd dyfu'n sefydlog.
57. Er y darperir adeiladau'r ysgol newydd i wasanaethu'r datblygiad newydd, nid yw hyn yn atal llefydd rhag cael eu cymryd yn yr ysgol newydd cyn i'r datblygiad gael ei gwblhau. Yn unol â Chod Derbyn i Ysgolion statudol Llywodraeth Cymru, ni all y Cyngor naill ai gyfyngu mynediad i ysgol i'r disgyblion hynny sy'n byw o fewn y dalgylch dynodedig na chadw llefydd mewn ysgol i unrhyw ddisgyblion a all symud i'r ardal wedyn.
58. Mae'n risg anorfod felly na all rhai teuluoedd fydd yn symud i'r tai newydd ar ddatblygiad Plasdŵr wedi Medi 2021 fynychu'r ysgol.
59. Ym mis Tachwedd 2018, yr oedd 25 disgybl o oedran ysgol gynradd (Meithrin – Blwyddyn 6) yn byw ar gyfnod cynnar datblygiad Plasdŵr, i'r gogledd a'r de o Heol Llantrisant. Mae'r disgyblion hyn yn mynchu wyt h o ysgolion cynradd ar hyd a lled y ddinas. Ar yr adeg hon, tri oedd uchafswm nifer y disgyblion oedd yn mynchu ysgol benodol. Cymerodd mwyafrif yr ysgolion hyn dri o ddisgyblion neu lai ar eu llyfrau.
60. Ystyrir felly fod tri dewis posib ar gyfer derbyn disgyblion i'r ysgol gynradd newydd o fis Medi 2021
61. **Dewi 1 – Y Nifer Derbyn i'w weithredu fesul cam; gyda'r Dosbarth Derbyn yn derbyn 30 o ddisgyblion ym mis Medi 2021.** Byddai pob ffrwd yn tyfu fel model 'dosbarth derbyn' traddodiadol, heb **ddim derbyniadau i flynyddoedd 1-6** ym mis Medi 2021.

Gallai gweithredu model dosbarth cychwyn gyfyngu ar yr effaith ar ysgolion eraill, gan na allai plant drosglwyddo o ysgolion eraill i'r grwpiau oedran hyn yn yr ysgol, ond fe allai hefyd olygu fod brodyr a chwiorydd yn methu mynchu'r un ysgol.

Byddai'r model dosbarth cychwyn hwn hefyd yn atal disgyblion ysgol gynradd sy'n byw yn y datblygiad newydd ac a fyddai'n hŷn nac oedran Derbyn ym Medi 2021 rhag cael lle yn yr ysgol gynradd leol. Byddai gofyn

i ddisgyblion lleol hŷn nac oedran Derbyn gymryd llefydd mewn ysgolion yn rhywle arall, ac y mae'n debyg y byddai llawer o'r siwrneiau i'r ysgol gan y sawl sy'n byw ar y datblygiad trwy fodau teithio heb fod yn llesol.

**Dewis 2** - Y cynnydd yn y Nifer Mynediad i'w weithredu gam wrth gam; gyda Derbyn yn cymryd hyd at 30 o ddisgyblion a blynnyddoedd **1-6** yn rhedeg ar Nifer Mynediad is o 15 ym Medi 2021.

Byddai gweithredu trefniadau i alluogi disgyblion i ymrestru ym mhob grwp blwyddyn yn caniatáu i ddisgyblion ysgol gynradd yn byw yn y datblygiad newydd ac a fyddai'n hŷn nac oed Derbyn ym Medi 2021 gael llefydd yn yr ysgol gynradd leol. Gan nad yw nifer y disgyblion sy'n mynchyu ysgolion cynradd eraill yn uwch na thri ym mhob ysgol ar hyn o bryd, ac na ddisgwylir i'r nifer fod yn uchel erbyn Medi 2021, ni fyddai fawr o effaith. Fodd bynnag, dan y dewis hwn, efallai y byddai'r ysgol newydd angen dosbarthiadau oedran cymysg drwyddi draw, a gallai oblygiadau ariannol gweithredu'r model hwn fod yn uchel iawn i'r ysgol.

**Dewis 3** - Y cynnydd yn y Nifer Mynediad i'w weithredu gam wrth gam; gyda Derbyn yn cymryd hyd at 30 o ddisgyblion a blynnyddoedd **1-2** yn rhedeg ar Nifer Mynediad is o 15 ym Medi 2021. Ni fyddid yn derbyn neb i flynyddoedd 3 – 6 ym Medi 2021

Byddai gweithredu trefniadau i alluogi disgyblion i ymrestru mewn nifer cyfyngedig o grwpiau blwyddyn yn caniatáu i ddisgyblion ysgol gynradd sy'n byw yn y datblygiad newydd ac a fyddai rhwng oedran Derbyn a Blwyddyn 2 ym Medi 2021 i gael llefydd yn yr ysgol gynradd leol. Ni fyddai fawr o effaith ar ysgolion eraill, a gallai'r ysgol redeg un dosbarth meithrin, un dosbarth Derbyn ac un dosbarth Blwyddyn 1/2 cymysg adeg ei sefydlu.

62. Ni ystyrir bod agor pob grŵp blwyddyn yn yr ysgol arfaethedig newydd gyda nifer mynediad uwch yn ateb cynaliadwy gan y gallai hyn gael effaith negyddol ar ysgolion eraill yn yr ardal leol. Gallai hyn annog plant o ardaloedd eraill i dderbyn lleoedd yn yr ysgol. Fel y dywed paragraffau 52 a 53, awgryma'r data diweddar am ddewis ysgolion y gallai nifer sylweddol o lefydd ychwanegol mewn darpariaeth cyfrwng-Cymraeg lleol effeithio ar Ysgol Gymraeg Coed y Gof.
63. Ym mhob un o'r dewisiadau uchod, byddai gan yr ysgol adnoddau i gymryd nifer y disgyblion fyddai ar y llyfrau. Byddai angen llai o staff ac y mae hyn yn cyfyngu ar risg ariannol gor-staffio'r ysgol, ac yn lliniaru'r effaith ar ysgolion lleol eraill.
64. Dewis 3, hytrach na dewis 1, fyddai'n cwrdd orau ag anghenion y gymuned y byddai'r ysgol yn ei gwasanaethu. Dan Ddewis 3, byddid yn lliniaru'r effaith posib ar ysgolion eraill ym Medi 2021, o gymharu â Dewis 1, trwy gyfyngu ar nifer y grwpiau blwyddyn gyda llefydd ar gael adeg ei sefydlu.

65. Cynigir felly mai Dewis 3, gyda Derbyn yn cymryd hyd at 30 o ddisgyblion a blynnyddoedd **1-2** yn gweithredu Nifer Mynediad is o 15 ym Medi 2021, ddylai gael ei weithredu.

### Manteision addysgol y cynigion

66. Disgwylir i'r manteision isod ddeillio o'r cynnig hwn:

- Digon o le i ateb y galw a ragamcennir gan y gymuned o ddisgyblion cyfrwng-Saesneg a chyfrwng-Cymraeg yn y datblygiad i'r gogledd a'r de o Heol Llantrisant;
- Trochi'n llawn yn yr iaith i blant yn y ffrwd Gymraeg, a galluogi'r plant yn y ffrwd sydd yn bennaf yn gyfrwng-Saesneg i gael sylfaen fwy cadarn yn yr iaith.
- Cyfrannu'n gadarnhaol at y targedau cenedlaethol yn strategaeth Cymraeg 2050.
- Yn gyson â nodau Strategaeth Ddwylieithog Caerdydd;
- Model newydd o ddarpariaeth ysgol gyda'r potensial i wasanaethau fel model o ragoriaeth ieithyddol sy'n gallu cefnogi arferion newydd mewn ysgolion eraill yng Nghaerdydd;
- Bydd disgyblion yn derbyn eu haddysg mewn adeiladau modern o ansawdd uchel, a hyn yn cefnogi cyflwyno cwricwlwm eang a chytbwys;
- Mae sefydlu ysgol gynradd dau ddosbarth derbyn, yn cynnig mwy o hyblygrwydd a chyfleoedd i ddisgyblion oherwydd bodolaeth sail adnoddau gwell a mwy sicr yn ariannol;
- Disgwylir i sefydlu ysgol gynradd dau ddosbarth derbyn gynnig mwy o sefydlogrwydd ar bob lefel o arweiniad gan gynnwys cynnal casgliad llawn a sefydlog o lywodraethwyr;
- Byddai'r gallu i gyflogi mwy o staff addysgu a staff cymorth yn galluogi'r ysgol i gwmpasu ystod ehangach o arbenigedd cwricwlwm nag mewn ysgolion ar wahân neu lai.

### Dylunio ac adeiladu ysgol newydd

67. Dros y blynnyddoedd diwethaf, mae ysgolion newydd yng Nghaerdydd wedi eu cyllido yn gyfan gwbl gan Gyngor Caerdydd neu wedi eu cyllido'n rhannol gan Gyngor Caerdydd a Llywodraeth Cymru. Mae tendro a chaffael ysgolion newydd wedi ei wneud gan y Cyngor, a phenodwyd contractwyr i godi ysgolion newydd ar ran y Cyngor.
68. Bydd yr ysgol gynradd newydd ar ddatblygiad Plasdŵr yn cael ei chaffael gan y datblygwr a bwriedir cwblhau'r adeiladu yn Haf 2021.
69. Mae'r Cyngor wedi gweithio'n agos gyda datblygwr y tai a'i bartneriaid i gyflwyno gweledigaeth glir a brioff dylunio a fydd yn galluogi contractwyr i ddylunio ysgol fydd yn cwrdd â gofynion y Cyngor.
70. Mabwysiadwyd yr agwedd ddylunio orau ar gyfer dylunio ysgolion cynradd Caerdydd, gan gymhwysu arferion da a gwensi a ddysgwyd o adeiladau newydd a godwyd dros y blynnyddoedd diwethaf, a hyn yn ei dro yn rhoi effeithlonrwydd o ran adnoddau a rhedeg.

71. Mae'r dyluniad yn cefnogi cryfhau rôl ysgolion wrth galon eu cymuned trwy gyd-leoli gwasanaethau cymunedol ar safleoedd ysgolion a gwasanaethau integredig lle bo hynny'n briodol.

### **Oblygiadau i'r ddarpariaeth o ysgolion uwchradd**

72. Mae Cam 1 datblygiad Plasdŵr, lle lleolir yr ysgol newydd, yn gorgyffwrdd â dalgylchoedd Ysgol Uwchradd Cantonian, Ysgol Gyfun Radur ac Ysgol Gyfun Gymraeg Plasmawr. Gwasanaethir y datblygiad hefyd gan Ysgol Gynradd yr Eglwys yng Nghymru Esgob Llandaf ac Ysgol Uwchradd Gatholig Corpus Christi, er bod mynediad i'r ysgolion hyn yn rhoi blaenoriaeth i feini prawf sy'n seiliedig ar ffydd a/neu'n seiliedig ar fynychu ysgol o'r un ffydd.
73. Mae'r galw o'r tu mewn i'r dalgylch am lefydd cyfrwng-Saesneg adeg mynediad i addysg uwchradd yn Ysgol Gyfun Radur yn is na'r Nifer Derbyniadau Cyhoeddedig o 210 lle. Dengys rhagamcanion na fydd y galw o'r tai presennol yn nalgylch Ysgol Gyfun Radur yn uwch na nifer y llefydd fydd ar gael.
74. Mae'r galw o'r tu mewn i'r dalgylch am lefydd cyfrwng-Saesneg adeg mynediad i addysg uwchradd yn Ysgol Uwchradd Cantonian yn is na'r Nifer Derbyniadau Cyhoeddedig presennol o 181 lle. Dengys rhagamcanion na fydd y galw o'r tai presennol yn nalgylch Ysgol Gyfun Cantonian yn uwch na nifer y llefydd fydd ar gael.
75. Mae'r Cyngor yn ymgynghori ar gynigion i ehangu Ysgol Uwchradd Cantonian o chwe i wyth dosbarth mynediad (Nifer Derbyn Cyhoeddedig o 240 o leoedd). Bydd hyn yn rhoi digon o le i gynnwys yr holl ddisgyblion yn y tai presennol yn ei ddal gylch a bydd yn darparu mwy o le i gwrdd â rhan o'r galw dros ben mewn ardaloedd eraill.
76. Gellir cynnwys y galw ychwanegol am lefydd mewn ysgolion uwchradd cyfrwng-Saesneg o gamau cynnar datblygiad Plasdŵr o fewn y ddarpariaeth ysgolion bresennol.
77. Ar sail tueddiadau diweddar, disgwylir i'r galw am lefydd cyfrwng-Cymraeg adeg mynediad i addysg uwchradd yn nalgylch Ysgol Gyfun Gymraeg Plasmawr fod yn fwy na'r 180 lle fydd ar gael yn 2020/21. Rhagamcennir y bydd y galw cyfun ar draws dalgylchoedd y tair ysgol uwchradd cyfrwng-Cymraeg yn fwy na'r cynhwysedd cyffredinol ym Mlwyddyn 7 yn 2021/2022.
78. Caiff cynigion ar wahân eu dwyn gerbron er mwyn sicrhau y bydd digon o lefydd i gwrdd â'r galw am lefydd cyfrwng-Cymraeg yn nalgylch Ysgol Gyfun Gymraeg Plasmawr, ac i gwrdd â'r galw am lefydd cyfrwng-Cymraeg yn nalgylch pob un o'r ysgolion uwchradd Cymraeg.
79. Mae cytundeb a106 ar gyfer datblygiad gogledd orllewin Caerdydd o hyd at 5,970 o dai yn cynnwys cytundeb i ddarparu safle ar gyfer ysgol uwchradd newydd a chyfraniadau ariannol tuag at yr adeiladu. Byddai

cytundebau A106 ar gyfer datblygiadau eraill yn yr ardal, gan gynnwys y tir i'r de o Heol Pentre-baen, Ffwrnais Goitre Fach a Chyffordd 33 hefyd yn darparu cyfraniadau ariannol at ehangu'r ddarpariaeth ysgolion uwchradd cyfrwng-Saesneg a chyfrwng-Cymraeg.

80. Bydd dalgylchoedd yr ysgolion uwchradd cyfrwng-Saesneg a chyfrwng-Cymraeg yn wynebu heriau oni chaiff y ddarpariaeth ei had-drefnu. Gyda'r datblygiadau tai ar raddfa fawr sydd ar y gweill a'r rhai a gynigir yng ngogledd y ddinas bydd galw am lefydd ychwanegol mewn ysgolion uwchradd.
81. Gallai unrhyw gynigion a gaiff eu cyflwyno i ehangu'r ddarpariaeth ysgolion uwchradd i ateb y galw ddaw o dai ychwanegol yn cael effaith ar drefniadaeth a phatrwm ysgolion. Rhoddir cynigion gerbron mewn da bryd i sicrhau bod cyflenwad digonol o lefydd i gwrdd â'r galw ychwanegol am fwy o lefydd mewn ysgolion uwchradd ym mhob cyfrwng iaith a fydd yhn deillio o'r datblygiad tai newydd.
82. Mae swyddogion yn monitro cyfraddau genedigaethau, y niferoedd sy'n dod i dai arfaethedig, a phatrymau mynd i'r ddarpariaeth cyfrwng-Saesneg, cyfrwng-Cymraeg a ffydd yn yr oedrannau cynradd ac uwchradd gyda golwg ar gyflwyno cynlluniau priodol i gwrdd â'r galw ychwanegol.

### **Trefniadau derbyn a dalgylchoedd**

83. Byddai ymgynghori ar drefniadau derbyn i flwyddyn ysgol 2021/2022 yn digwydd rhwng 1 Medi 2019 ac 1 Mawrth 2020 yn unol â gofynion Cod Derbyniadau Llywodraeth Cymru.
84. Nid oes cynlluniau i newid polisi'r Cyngor ar dderbyn plant i ysgolion cymunedol o ganlyniad i'r cynnig hwn. Yn unol â gofynion y Cod Derbyniadau, byddai trefniadau derbyn blwyddyn ysgol 2021/2022 yn destun ymgynghori yn y cyfnod rhwng 1 Medi 2019 ac 1 Mawrth 2020, ac yn cael eu pennu ar 15 Ebrill 2020.
85. Mae gwybodaeth fanwl am drefniadau derbyn yn llyfryn Derbyn i Ysgolion y Cyngor, ac y mae'r wybodaeth hon i'w gweld ar wefan y Cyngor ([www.cardiff.gov.uk](http://www.cardiff.gov.uk)).

### **Ymgynghori ag Aelod(au) Lleol**

86. Ymgynghorwyd ag Aelodau Lleol ar gyfer Creigiau / Sain Ffagan, Radur / Pentre Poeth a'r Tyllgoed ar y cynnig. Mae aelodau wedi cael eu briffio ar yr angen am leoedd ychwanegol i wasanaethu datblygiad Plasdwr, alinio'r cynnig gyda Strategaeth Ddwyeithog y Cyngor a strategaeth Cymraeg 2050 Llywodraeth Cymru, ac effaith posibl darpariaeth ysgol newydd ar ysgolion lleol.

### **Rheswm dros yr Argymhellion**

87. Ymateb i'r galw a ragamcanwyd am lefydd ychwanegol mewn ysgolion Cymraeg a chyfrwng-Saesneg i wasanaethu'r datblygiadau tai newydd yn ardaloedd Creigiau/ Sain Ffagan, Radur/ Pentre-poeth a'r Tyllgoed.

### **Effaith y cynnig ar y Gymraeg**

88. Rhagwelir y bydd effaith gadarnhaol ar yr iaith Gymraeg o ganlyniad i'r cynigion hyn.
89. Mae'r cynigion a amlinellir yn yr adroddiad hwn yn ceisio asio gyda Strategaeth Caerdydd Ddwylieithog ac yn cefnogi'n gryf strategaeth Llywodraeth Cymru ar gyfer yr iaith Gymraeg trwy gyfrannu at y targedau a osodir yn strategaeth Cymraeg 2050.
90. Mae'r Cyngor yn gweithio'n agos ac yn adeiladol gyda phartneriaid ar ei Fforwm Addysg Gymraeg, sy'n cynnwys cynrychiolwyr o addysg feithrin, cynradd, uwchradd a phellach, gofal plant, RhAG a Llywodraeth Cymru. Mae'r Fforwm yn rhoi gwybodaeth gyda chynllunio llefydd cyfrwng-Cymraeg, er mwyn parhau i sbarduno cynllun y Cyngor i gael cynnydd cynaliadwy yn nifer y dysgwyr mewn ysgolion cyfrwng-Cymraeg a'r rhai sy'n dysgu Cymraeg mewn ysgolion cyfrwng-Saesneg.
91. Mae'r Cyngor, a'u partneriaid ar y Fforwm Addysg Gymraeg, wedi ymrwymo i gynyddu nifer y disgyblion sy'n derbyn eu haddysg trwy gyfrwng y Gymraeg, i gwrdd â'r targedau yn CSGA Caerdydd, ac i gwrdd â'r targedau yn strategaeth Cymraeg 2050 Llywodraeth Cymru.
92. Mae'r Cyngor yn monitro cyfraddau genedigaethau, niferoedd sy'n debygol o fod mewn tai y bwriedir eu codi, a phatrymau'r sawl sy'n dewis darpariaeth Gymraeg ar oedrannau cynradd ac uwchradd, gyda golwg ar gyflwyno cynlluniau priodol i gwrdd ag unrhyw gynnydd yn y galw.
93. Rhaid i'r Cyngor wneud yn siŵr fod ehangu'r ddarpariaeth ysgolion yn cael ei ddwyn ymlaen mewn dull strategol ac amserol, nad yw'n peryglu'r ddarpariaeth bresennol. Byddai ehangu'r ddarpariaeth ysgolion cyfrwng-Cymraeg yn sydyn neu yn sylweddol o raid yn cael effaith ar y nifer fyddai'n cymryd llefydd mewn ysgolion eraill, a byddai hyn yn ei dro yn cael effaith ar allu ysgolion i gydbwysyo cyllidebau a denu neu gadw staff.
94. Mae dyheadau'r Cyngor o ran cynyddu nifer y siaradwyr Cymraeg, a Chymraeg 2050 Llywodraeth Cymru, yn golygu newid sylweddol. Mae Cymraeg 2050 yn gosod targedau cenedlaethol o 40% o ddysgwyr yn derbyn eu haddysg mewn ysgolion cyfrwng-Cymraeg, a 30% ymhellach o ddysgwyr sy'n derbyn eu haddysg mewn ysgolion cyfrwng-Saesneg yn dod yn rhugl yn y Gymraeg. Ar hyn o bryd, tua 17% o blant Caerdydd sy'n dod i mewn i addysg gynradd sydd yn cael eu haddysg mewn ysgolion neu ddosbarthiadau Cymraeg.
95. Bwriad y cais hwn yw cynyddu nifer y llefydd sydd ar gael mewn ysgolion cynradd Cymraeg yn yr ardal, ac y mae am weithredu'r newid yn y fath fod fel na fydd fawr o effaith negyddol ar yr ysgolion presennol.

96. Y mae perygl y gall darparu llefydd ychwanegol mewn ysgol gynradd Gymraeg ar safle'r ysgol newydd, o fewn dalgylch Ysgol Gymraeg Coed y Gof ac o fewn dwy filltir i'r ysgol, lesteirio twf Ysgol Gymraeg Coed y Gof. Y bwriad yw lliniaru'r effaith hwn trwy drefniadau derbyn fyddai'n cyfyngu mynediad i ddarpariaeth yr ysgol newydd adeg ei sefydlu.
97. Mae'r cais hwn hefyd am gynyddu nifer y dysgwyr y mae eu rhieni am iddynt gael eu haddysg yn bennaf trwy gyfrwng y Saesneg, fydd mewn sefyllfa dda i ddod yn ddwyieithog ar ddiwedd eu haddysg statudol.
98. Byddai cynnig 210 o lefydd cyfrwng Cymraeg ychwanegol mewn ysgol gynradd ffrwd ddeuol yn golygu y byddai'r gyfran gyffredinol o lefydd ar draws y ddinas yn cynyddu.
99. Mae cynnig 210 o lefydd mewnnfrwd a ddisgrifir fel cyfrwng Saesneg yn Bennaf - ond gyda defnydd helaeth o Gymraeg, o fewn ysgol ffrwd ddeuol o dan un tîm rheoli a strwythur llywodraethiant, yn ceisio cynyddu cyfran gyffredinol y dinasyddion dwyieithog yng Nghaerdydd.

### **Trefniadau Teithio Dysgwyr**

100. Nid oes cynlluniau i newid polisi cludiant plant ysgol y Cyngor.
101. Byddai unrhyw ddisgyblion y byddai'r cynigion yn effeithio arnynt yn cael cynnig yr un gefnogaeth gyda chludiant â'r hyn a ddarperir ledled Caerdydd yn unol â'r un meini prawf sy'n gymwys ar draws Caerdydd.
102. Mae polisi cludiant plant ysgol y Cyngor i'w weld ar wefan y Cyngor [www.cardiff.gov.uk/schooltransport](http://www.cardiff.gov.uk/schooltransport).

### **Effaith ar y gymuned**

103. Mae'r canlynol yn cael eu hystyried pan fydd cais dan sylw: Mannau Agored Cyhoeddus, parciau, sŵn a thagfeydd traffig. Bydd swyddogion yn gweithio gydag ysgolion ac unrhyw grŵp cymunedol i wneud yn siwr y bydd y cynnig yn osgoi unrhyw effeithiau negyddol os oes modd.
104. Un o amcanion allweddol y Cyngor yw galluogi trydydd partiōn i gael mynediad at y cyfleusterau chwaraeon mewn ysgolion, ar sail ariannol gynaliadwy. Nod Llywodraeth Cymru o ran rhannu cyfleusterau mewn ysgol sydd yn canolbwytio ar y gymuned yw:
  - Darparu cyfleoedd i'r gymuned leol a mudiadau chwaraeon i gymryd rhan mewn chwaraeon a gweithgaredd corfforol i wella iechyd a datblygu eu sgiliau, yn enwedig ymysg grwpiau lle mae cyfranogiad yn isel;
  - Gweithredu yn unol â'r agenda chwaraeon yn genedlaethol gan gadw mewn cof strategaethau a fabwysiadwyd yn genedlaethol;
  - Meithrin agweddu cadarnhaol mewn chwaraeon a gweithgaredd corfforol gan bobl ifanc a gostwng cyfradd y rhai sy'n rho'r gorau i gymryd rhan mewn chwaraeon wrth iddynt fynd yn hŷn;

- Cynyddu nifer y bobl o bob oed a gallu sy'n cymryd rhan mewn chwaraeon a gweithgaredd corfforol gan gynnwys pobl ag anableddau;
- Defnyddio'r cyfleusterau i annog ystod, ansawdd a nifer y cysylltiadau rhwng ysgolion a chlybiau chwaraeon a symbolu cystadleuaeth sy'n cynnwys pobl ifanc ac oedolion;
- Darparu mynediad fforddiadwy i'r cyfleusterau a bod yn ariannol hunangynhaliol a chost-niwtral i gychwyn, gan gynhyrchu incwm cynaliadwy i'r ysgol yn y dyfodol.

### **Llesiant Cenedlaethau'r Dyfodol**

105. Yn unol â Deddf Llesiant Cenedlaethau'r Dyfodol, mae'r Cyngor wedi ymrwymo i ddarparu Ysgolion Lleol i Bobl Leol, ynghyd ag annog defnyddio moddau cynaliadwy o deithio i ysgolion, megis cerdded a beicio. Mae pob prosiect ysgol yn cymryd i ystyriaeth faterion teithio allweddol pan fyddant yn cael eu dylunio, ynghyd â'r angen pendant i ddarparu llwybrau mwy diogel i annog cerdded, beicio a moddau teithio llesol eraill i ysgolion.
106. Gyda'r buddsoddiad cyfredol mewn TGCh ar draws y ddinas, gellir cwtogi mwy ar symudiadau myfyrwyr wrth i dechnoleg symudol ddatblygu ymhellach, gan ganiatáu mwy o ddulliau dysgu hyblyg. Mae potensial gan y rhain i arwain at Gynllun Teithio mwy effeithiol a chyfrannu ymhellach at dargedau'r Cyngor i leihau ei allyriadau carbon.
107. Er mwyn gwneud y mwyaf o effaith tymor-hir y buddsoddiad sylweddol hwn, byddai unrhyw ddyluniad a gymerir ymlaen yn y cynnig hwn yn cael ei ddatblygu i sicrhau cyflwyno cyfleusterau modern o safon uchel a all ymateb i anghenion y boblogaeth bresennol o ddisgyblion a chefnogi cyflwyno dulliau addysgu a dysgu effeithiol. Byddent hefyd yn ymgorffori'r hyblygrwydd i ystyried newidiadau yn dibynnu ar anghenion wrth i amser fynd heibio; megis newid mewn demograffeg a niferoedd disgyblion, newidiadau i'r cwricwlwm a newid ym mathau anghenion disgyblion.

### **Oblygiadau ariannol**

108. Mae'r adroddiad hwn yn amlinellu cynnig i sefydlu ysgol ffrwd ddeuol dau ddosbarth mynediad o fewn datblygiad Plasdŵr ac y bydd y datblygiad hwn yn creu oblygiadau refeniw a chyfalaf. O ran refeniw, bydd gofyn ffactora i broses gosod cyllideb flynyddol y Cyngor, yr adnoddau angenrheidiol i gyllido'r ysgolion hyn a'u hadlewyrchu yn y Cynllun Ariannol Tymor Canolig. Wrth i gynhwysedd yr ysgol gynyddu fesul cam, bydd yn angenrheidiol i sicrhau y bydd y twf hwn yn cael ei ychwanegu'n flynyddol i'r gyllideb ysgolion gyffredinol, er mwyn osgoi niweidio'n ariannol yr ysgolion eraill yng Nghaerdydd. Ni ragwelir y bydd unrhyw effaith ar hyn o bryd o ran cludiant ysgol, fodd bynnag bydd gofyn cad golwg ar hyn wrth i'r ysgol dyfu. Yn benodol, gall y pwyslais arfaethedig ar y Gymraeg fod ag oblygiadau o ran addysg drochi Cymraeg yng Nghaerdydd. Felly, gallai oblygiadau ariannol godi pe byddai gofyn i gynyddu cynhwysedd trochi o fewn y ddinas a chludo disgyblion i Uned Drochi'r Gymraeg, yn ôl yr angen.

109. O ran yr oblygiadau cyfalaf, mae angen gwaith pellach er mwyn asesu'n llawn gost debygol adeilad ysgol newydd a'r risg ynghlwm â bod y cyfraniadau s106 yn ddigon i dalu am y datblygiad hwn. Os pennir y bydd y gost yn uwch na'r lefel cyfraniad a gytunwyd, bydd gofyn ystyried yr oblygiadau ariannol a ddeillia o hyn. Os bydd gofyn i'r Cyngor wneud cyfraniad tuag at y gost gyffredinol, bydd angen i hyn gael ei ariannu o fewn yr adnoddau presennol a gymeradwywyd neu eu ffactora i gynlluniau rhaglen Gyfalaf y Cyngor yn y dyfodol. Fodd bynnag, dylid gwneud pob ymdrech er mwyn sicrhau gwerth am arian bod y gofyn am gyfaniad gan y Cyngor yn cael ei gad cyn ised ag y bo modd, os yn bosib. Ar ben hynny, bydd angen asesu cyfrifoldebau perchnogaeth a chynnal parhaus y bydd angen eu hasesu a'u ffactora i gost cyfalaf cyffredinol y cynllun a'r gofynion refeniw parhaus.

#### **Oblygiadau cyfreithiol (gan gynnwys Asesiad Effaith Cydraddoldeb lle bo hynny'n briodol)**

110. Gall unrhyw gynnig i sefydlu ysgol gymunedol gael ei wneud gan awdurdod lleol dan Adran 41 Deddf 2013. Mae Adran 48 Deddf 2013 yn mynnu bod yn rhaid ymgynghori ar gynigion o'r fath, ac yna eu cyhoeddi, yn unol â'r Cod Trefniadaeth Ysgolion (sydd yn cynnwys cymysgedd o ganllawiau statudol y mae'n rhaid i awdurdodau eu cadw mewn cof wrth arfer unrhyw bwerau neu benderfyniad dan y Ddeddf ac union ddarpariaethau y mae'n rhaid i awdurdodau gydymffurfio â hwy).
111. Mae'r Cod Trefniadaeth Ysgolion yn gosod y gwahanol ffactorau y dylid eu hystyried wrth ffurio cynigion, sydd yn cynnwys talu sylw arbennig i effaith y cynigion ar grwpiau bregus gan gynnwys gwella hygyrchedd i ddisgyblion anabl.
112. Mae ysgolion yng Nghymru yn cael eu categorieddio yn ôl eu model o ddarpariaeth Gymraeg, yn unol â diffiniadau a osodwyd yn Nogfen Wybodaeth Llywodraeth Cymru, 'Diffinio ysgolion yn ôl y ddarpariaeth cyfrwng Gymraeg'. Diben categori iaith ysgol yw rhoi gwybodaeth well i rieni a llywodraeth leol a chenedlaethol am y graddau y mae disgyblion yn dysgu drwy gyfrwng y Gymraeg. Mae pum categori ar gyfer Ysgolion Cynradd (a restrir ym mharagraff 39 o'r adroddiad). Un o'r rhain yw 'Dwy Ffrwd': 'Mae dau fath o ddarpariaeth yn bodoli ochr yn ochr yn yr ysgolion hyn. Mae rhieni/disgyblion yn dewis darpariaeth cyfrwng Gymraeg yn bennaf neu ddarpariaeth cyfrwng Saesneg yn bennaf.' Bydd aelodau yn sylwi mai cynnig i sefydlu ysgol gynradd ffrwd ddeuol dau ddosbarth mynediad yw'r cynnig hwn, gydag 1 dosbarth mynediad ar gyfer darpariaeth Gymraeg ac 1 dosbarth mynediad ar gyfer darpariaeth Saesneg sy'n gwneud defnydd sylweddol o'r Gymraeg. Rydym wedi cael arddeall fod swyddogion Llywodraeth Cymru wedi cadarnhau nad oes pryderon ganddynt gyda'r categorieddio 'Ffrwd Ddeuol' arfaethedig.
113. Lle cynigir ysgol newydd, noda'r Cod Trefniadaeth Ysgolion fod yn rhaid i awdurdodau lleol ystyried y 'dystiolaeth o'r angen/galw nawr ac yn y dyfodol yn yr ardal am leoedd ychwanegol, gan gyfeirio at categori iaith, cymeriad crefyddol dynodedig a rhyw disgyblion (h.y. cyd-addysgol/un

rhyw) yr ysgol neu'r ysgol arfaethedig. Dylai'r galw am ddarpariaeth ychwanegol mewn unrhyw fath o ardal gael ei asesu a'i dystiolaethu' (Paragraff 1.4 y Cod).

114. Rhaid gosod y cynigion mewn dogfen ymgynghori, a chynnwys manylion a ragnodir gan y Cod. Rhaid cyhoeddi'r ddogfen ymgynghori fel copi caled ac yn electronig ar wefan yr Awdurdod a chael ei anfon at yr ymgynghoreion statudol, gan ganiatáu o leiaf 42 diwrnod i'r sawl yr ymgynghorwyd â hwy i ymateb (gydag o leiaf 20 o'r rheiny yn ddyddiau ysgol).
115. Mae ymgynghori yn rhoi bod i'r disgwyliad cyfreithlon yr ystyri canlyniad yr ymgynghori o ran pennu'r ffordd ymlaen. Felly mae angen cynnal ymgynghoriad: i. pan fo'r cynigion wrthi'n cael eu ffurfio (heb i'r un penderfyniad gael ei wneud); ii. ar y sail y caiff adborth yr ymgynghoriad ei ystyried yn iawn ac y gallant newid y cynigion; iii. gyda darparu digon o wybodaeth ac amser i hwyluso mynegi barn gan y sawl yr ymgynghorir â hwy a dwys ystyried y farn honno cyn gwneud unrhyw benderfyniad ar y cynigion.
116. Yn dilyn yr ymgynghoriad cyhoeddus, mae gofyn i'r Cyngor gyhoeddi adroddiad ymgynghori, sydd yn gosod ger bron yr holl faterion a godwyd gan y sawl yr ymgynghorwyd â hwy a'i ymateb i'r materion hynny. Bryd hynny, cyflwynir adroddiad pellach i'r Cabinet. Os bydd y Cabinet yn penderfynu bwrw ymlaen â'r cynigion, rhaid iddynt wedyn gyhoeddi hysbysiad statudol am y cynigion ymhen 26 wythnos o ddiwedd y cyfnod ymgynghori (oni fydd Gweinidogion Cymru yn caniatáu estyniad). Wedi cyhoeddi'r hysbysiad am y cynigion statudol, mae cyfnod gwrthwynebu statudol o 28 diwrnod (sydd yn gorfol cynnwys 15 diwrnod ysgol), ac wedi hyn, gall y Cyngor bennu ei gynigion (dan adran 53 Deddf 2013). Os derbynir unrhyw wrthwynebiadau yn ystod y cyfnod gwrthwynebu (ac nad ydynt yn cael eu tynnu'n ôl), rhaid eu hystyried yn gydwybodol, ochr yn ochr â'r dadleuon am y cynigion ac yng ngoleuni'r ffactorau a osodwyd ger bron yn y Cod, pan fydd y Cyngor yn pennu ei gynigion. Rhaid cyhoeddi crynodeb o unrhyw wrthwynebiadau ac ymateb y Cyngor ar yr un pryd ag y mae'r Cyngor yn cyhoeddi ei benderfyniad. Mae pennu cynigion trefniadaeth ysgolion dan adran 53 Deddf 2013 yn swyddogaeth dewis lleol a neilltuwyd i'r Cabinet dan y Cyfansoddiad (Rhan 3, Adran 3). Yn dilyn y penderfyniad, gall cynigion gael eu gweithredu.
117. Os cymerir y cynigion ymlaen, bydd angen pennu'r trefniadau derbyn, wedi ymgynghori, yn unol â'r Cod Derbyniadau Ysgolion a Rheoliadau (Pennu Trefniadau Derby) (Cymru) 2006.
118. Wrth ystyried y cynigion hyn, rhaid i'r Cyngor gadw mewn cof ei ddyletswyddau cydraddoldeb sector cyhoeddus dan Ddeddf Cydraddoldeb 2010 (gan gynnwys dyletswyddau sy'n benodol i'r sector cyhoeddus yng Nghymru). Yn unol â'r dyletswyddau cyfreithiol hyn, rhaid i Gynghorau, wrth wneud penderfyniadau, gadw mewn cof yr angen i (1) ddileu camwahaniaethu anghyfreithlon, (2) hyrwyddo cydraddoldeb cyfle a (3) meithrin cysylltiadau da ar sail nodweddion gwarchodedig. Y

nodweddion gwarchodedig yw: oedran, ailbennu rhywedd, rhyw, hil – gan gynnwys tarddiad ethnig neu genedlaethol, lliw neu genedligrwydd, anabledd, beichiogrwydd a mamolaeth, priodas a phartneriaeth sifil, cyfeiriadedd rhywiol, crefydd neu gred – gan gynnwys diffyg cred. Dylid rhoi ystyriaeth ddyledus i ddeilliannau'r Asesiad Effaith Cydraddoldeb.

119. Rhaid i'r Cyngor hefyd gadw mewn cof Fesur yr Iaith Gymraeg (Cymru) 2011 a Safonau'r Gymraeg ac ystyried effaith ei gynigion ar y Gymraeg.
120. Mae Deddf Llesiant Cenedlaethau'r Dyfodol (Cymru) 2015 yn mynnu bod y Cyngor yn ystyried sut y bydd y cynigion yn cyfrannu at gwrdd â'i amcanion llesiant (a osodir allan yn y Cynllun Corfforaethol). Rhaid i aelodau fod yn fodlon hefyd fod y cynigion yn cydymffurfio ag egwyddor datblygu cynaliadwy, sy'n mynnu bod anghenion y presennol yn cael eu hateb heb beryglu gallu cenedlaethau'r dyfodol i gwrdd â'u hanghenion hwy.
121. Bydd cyngor cyfreithiol pellach yn cael ei gynnig wrth i gynigion gael eu datblygu.

### **Oblygiadau AD**

122. Bydd Gwasanaethau Pobl AD yn gweithio gyda Chorff Llywodraethu Dros Dro'r ysgol newydd er mwyn ystyried a rhoi trefniadau arweinyddiaeth ar waith cyn agor yr ysgol newydd. Mae hyn er mwyn rhoi amser i wneud penderfyniadau o ran trefniadaeth a staffio, fel bo'r ysgol â'r adnoddau priodol ar gyfer agor, yn enwedig o ystyried y cynigion ar gyfer derbyn fesul cam.
123. Bydd gofyn hefyd i'r Corff Llywodraethu Dros Dro i ystyried y polisiau a'r gweithdrefnau AD y byddai'n eu mabwysiadu parthed cyflogi a rheoli staff. Bydd y Cyngor yn argymhell mabwysiadu Llawlyfr AD i Ysgolion sydd wedi ei ddylunio i gynnig polisiau a gweithdrefnau, gwybodaeth a chanllawiau i gyrrf llywodraethu, Penaethiaid a staff, ar agweddau adnoddau dynol a materion cyflogaeth sy'n ymwneud ag ysgolion.
124. Byddai mabwysiadu'r Llawlyfr AD yn llawn yn golygu y byddai unrhyw swyddi staff gweigion yn yr ysgol yn rhoi cyfleoedd i unigolion ar y gofestr adleoli ysgolion, yn unol â Pholisi Adleoli a Dileu Swyddi'r Cyngor ar gyfer ysgolion.

### **Cludiant**

125. Mae Cynllun Datblygu Lleol y Cyngor (2006-2026) yn cynnwys targed o gael 50% o bob siwrne trwy gludiant cynaliadwy. Gall lleihau cyfran y teithiau yn ôl ac ymlaen i'r ysgol mewn ceir a gwneud y mwyaf o gyfleoedd teithio i'r ysgol trwy fodau llesol a chynaliadwy wneud cyfraniad pwysig i gyrraedd y targed hwn a lleihau pwysau ar y rhwydwaith cludiant ar adegau prysur. Bydd cynyddu teithio i'r ysgol trwy fodau cynaliadwy yn cael effaith gadarnhaol ar iechyd a llesiant plant ac yn cefnogi cyflwyno gweithredoedd a deilliannau allweddol dan Nod 5 Strategaeth Dinas sy'n

Dda i Blant y Cyngor (2018), sydd yn ymwneud â sicrhau mynediad at amgylcheddau awyr agored diogel ar gyfer chwarae ffurfiol ac anffurfiol, cerdded, beicio a sgwtera, a theithio llesol i'r ysgol.

126. Mae Cynllun Corfforaethol cyfredol y Cyngor yn cynnwys ymrwymiad i gael pob ysgol yng Nghaerdydd i ddatblygu Cynllun Teithio Llesol. Bydd cynllun o'r fath yn nodi camau gan yr ysgol i gefnogi ac annog teithio llesol i'r ysgol a hefyd unrhyw welliannau i'r seilwaith ar y safle a thu hwnt sydd eu hangen i hwyluso teithiau lleol.
127. Mae darparu ysgolion newydd ac adleoli ysgolion sy'n bod eisoes yn gyfle clir i fynd i'r afael ag ymddygiad teithio yng nghyd-destun lleoliad newydd.
128. Dyluniwyd meistr-gynllun datblygiad Plasdŵr i hwyluso teithiau yn y datblygiad tai a thu hwnt trwy gerdded neu feicio. Mae hyn yn cynnwys darparu rhwydwaith o lwybrau beicio gan gynnwys llwybrau wedi eu gwahanu oddi wrth draffig.
129. Mae'n hanfodol i ddatblygiad yr ysgol newydd gael ei gynllunio a'i ddylunio mewn modd sy'n atal teithio mewn car i'r ysgol newydd ac sy'n gwneud defnydd llawn o'r seilwaith cerdded a beicio sydd yn rhan o'r datblygiad tai er mwyn i'r rhan fwyaf o deithiau i'r ysgol fod trwy fodau llesol.

### Cynllun Teithio Llesol

130. Datblygir Cynllun Teithio Llesol ar y cyd â chynllunio, dylunio a chyflwyno'r ysgol newydd, ac y mae'n debyg y bydd yn amod o'r caniatâd cynllunio.
131. Bydd swyddogion o'r tîm cludiant yn cydweithio'n agos â chydweithwyr o'r timau cynllunio ac addysg i ddatblygu'r Cynllun Teithio Llesol ac i sicrhau ei fod wedi ei deilwra'n llawn i leoliad yr ysgol a'i hanghenion yn y dyfodol. Mae datblygu'r cynllun yn debyg o gynnwys y canlynol
  - Ymwneud yn gynnar â phennaeth yr ysgol, y corff Ilywodraethol a chynghorwyr wardiau i nodi materion allweddol ac atebion posib
  - Ymwneud â rhieni disgyblion gan gynnwys help gyda chynllunio teithio wedi'i bersonoleiddio
  - Nodi seilwaith hanfodol ar safle'r ysgol i gefnogi teithio llesol, megis mannau i gadw beiciau a sgwteri
  - Rhoi manylion cefnogi'r mesurau peirianneg oddi ar y safle i hwyluso cerdded a beicio i'r safle
  - Cefnogaeth gan Dîm Diogelwch Ffyrdd y Cyngor i gyflwyno gweithgareddau sy'n cefnogi teithio llesol gan gynnwys hyfforddiant beicio yn ôl safonau cenedlaethol, Swyddogion Iau Diogelwch y Ffyrdd, Kerbcraft a Streetwise, a gweithio gyda thîm Go Ride Beicio Cymru i gyflwyno sgiliau beicio
  - Annog a chefnogi'r ysgol i weithredu bysus cerdded

132. Ni ddylai unrhyw feysydd parcio ar y safle fynd dros y terfynau a gynhwysir yn y safonau parcio a fabwysiadodd y Cyngor sydd yng Nghanllaw Cynllunio Atodol Rheoli Effeithiau Trafnidiaeth (2018).
133. Gweithredir cyfyngiadau parcio yng nghyffiniau'r safle lle mae angen hyn i atal parcio problemus ac am resymau diogelwch.

### **Asesiad effaith Cydraddoldeb**

134. Cynhaliwyd Asesiad Effaith Cydraddoldeb ar y cynnig hwn. Daeth yr asesiad i'r casgliad na fyddai'r cynnig hwn yn effeithio'n andwyol ar grŵp arbennig mewn cymdeithas (mae manylion yr Asesiad Effaith Cydraddoldeb i'w weld yn Atodiad 4).

### **ARGYMHELLION**

Argymhellir bod y Cabinet yn awdurdodi swyddogion i ymgynghori ar gynnig i sefydlu Ysgol gynradd newydd ffrwd ddeuol dau ddosbarth derbyn wedi ei threfnu fel un ffrwd Gymraeg ac un ffrwd Saesneg yn bennaf ond gyda defnydd helaeth o Gymraeg, y naill a'r llall â 48 o lefydd meithrin rhan-amser, o fis Medi 2021.

Uwch Swyddog Cyfrifol	<b>NICK BATCHELAR</b> <b>ADRODDIAD Y CYFARWYDDWR</b> <b>ADDYSG</b>
	12 Ebrill 2019

*Atodir y canlynol:*

- Atodiad 1: Rhagamcanion a rhagolygon
- Atodiad 2: Dalgylchoedd ysgolion cynradd cyfrwng-Saesneg
- Atodiad 3: Dalgylchoedd ysgolion cynradd cyfrwng-Cymraeg
- Atodiad 4: Asesiad Effaith Cydraddoldeb

Mae'r dudalen hon yn wag yn fwriadol

## **Rhagamcanion a Rhagolygon**

**Canfod y galw lleol am lefydd mewn ysgolion cyfrwng-Saesneg a chyfrwng-Cymraeg yn ardaloedd Creigiau/ Sain Ffagan, Radur/ Pentre-poeth a'r Tyllgoed.**

Er mwyn gweithio allan y galw tebygol am ysgolion cynradd cyfrwng-Saesneg a/neu gyfrwng-Cymraeg newydd yn ardaloedd Creigiau/ Sain Ffagan, Radur/ Pentre-poeth a'r Tyllgoed, defnyddiwyd tueddiadau hanesyddol penodol i ddalgylchoedd yr ysgolion sydd yno eisoes. Mae'r paragraffau a ganlyn yn rhoi manylion am y dalgylchoedd hyn, y data a ddefnyddiwyd a'r fethodoleg a gymhwyswyd.

Mae'r unedau daearyddol sydd fwyaf addas i'w dadansoddi yng nghyswilt y galw diweddar ac yn y dyfodol am lefydd ysgolion cynradd yn yr ardaloedd hyn wedi eu nodi fel yr ysgolion cynradd yn y dalgylchoedd arwahanol hyn : Ysgol Gynradd Bryn Deri, Ysgol Gynradd Creigiau, Ysgol Gynradd Danescourt, Ysgol Gynradd Tyllgoed, Ysgol Gynradd Catholig y Teulu Sanctaidd, Ysgol Gynradd yr Eglwys yng Nghymru Llandaf, Ysgol Gynradd Pentre-baen, Ysgol Gynradd Pentyrch, Ysgol Gynradd Peter Lea, Ysgol Gynradd Radur, Ysgol Gymraeg Coed y Gof, Ysgol Nant Caerau, Ysgol Gynradd Gwaelod y Garth ac Ysgol Pencae.

Atodir map sy'n dangos lleoliad yr ysgolion cynradd cyfrwng-Saesneg a'r ysgolion cynradd ffrwd ddeuol, a'r dalgylchoedd sy'n eu gwasanaethu, fel Atodiad 2. Atodir map sy'n dangos lleoliad yr ysgolion cynradd cyfrwng-Cymraeg, a'r dalgylchoedd sy'n eu gwasanaethu, fel Atodiad 3.

Mae'r galw a ragamcennir yn ystyried y galw cymesur diweddar am lefydd ynghyd â data poblogaeth cyn-ysgol a gaiff ei roi gan y GIG. Mae'r galw rhagolygon yn ystyried y data hwn a ffactorau a geir mewn gwybodaeth gyd-destunol arall.

### **Methodoleg rhagamcanu ar gyfer ysgolion presennol a rhai newydd**

Mae Caerdydd yn defnyddio methodoleg rhagamcanu gadarn sydd yn ystyried data cofrestriadau meddygon teulu y GIG a data cyfrifiadau ysgolion a gyflwynwyd gan holl ysgolion Caerdydd. Gan y gall rhagamcanion ystyried yn unig wybodaeth hanesyddol a chyfredol, mae'r Cyngor hefyd yn nodi tueddiadau mewn rhagamcanion, ac yn dadansoddi data am ddewisiadau am ysgolion a gwybodaeth gyd-destunol arall i gynhyrchu rhagolygon ar sail y ddinas gyfan ac ym mhob ardal.

Seilir y galw a ragwelir am lefydd ar ddatblygiadau tai newydd ar weithio allan faint o blant fydd ar gyfartaledd ym mhob annedd. Mae'r niferoedd cyfartalog hyn, y rhoddir manylion amdanynt yn y Canllawiau Atodol Addysg, yn eu tro yn seiliedig ar y data diweddaraf o'r Cyfrifiad.

Ar hyn o bryd, neilltuir llefydd mewn ysgolion cynradd yng Nghaerdydd fel a ganlyn: oddeutu 64% mewn ysgolion cymunedol cyfrwng-Saesneg, 18% mewn ysgolion cymunedol cyfrwng-Cymraeg ac 18% yn ysgolion yr Eglwys yng Nghymru neu ysgolion Catholig.

## Nifer llefyydd a'r llefydd sy'n cael eu cymryd mewn ysgolion cynradd cyfrwng-Saesneg yn ardaloedd Creigiau/ Sain Ffagan, Radur/ Pentre-poeth a'r Tyllgoed

Mae Tabl 1 yn gosod allan niferoedd y disgylion ar y llyfrau yn yr ysgolion cynradd cyfrwng-Saesneg a ffrwd ddeuol sy'n gwasanaethu ardaloedd Creigiau/ Sain Ffagan, Radur/ Pentre-poeth a'r Tyllgoed, a lefelau'r llefydd dros ben ym mhob ysgol ar Ionawr 2018 (y data diweddaraf i'w ddilysu o gyfrifiadau ysgolion).

**Tabl 1 - Nifer ar y llyfrau a chyfanswm llefydd dros ben - Derbyn i Flwyddyn 6 (CYBLD Ionawr 2018)**

Ysgol Gynradd	R	1	2	3	4	5	6	Cyfanswm	Cynhwysedd	Dros ben	% Dros ben
Bryn Deri	31	30	30	30	29	28	29	207	184	-23	-12.50%
Creigiau (ffrwd ddeuol)	49	54	58	49	53	53	50	366	378	12	3.17%
Danescourt	60	60	57	59	60	49	39	384	420	36	8.57%
Tyllgoed	20	39	37	37	40	30	35	238	283	45	15.90%
Gwaelod y Garth (ffrwd ddeuol)	35	37	38	34	35	34	36	249	237	-12	-5.06%
Teulu Sanctaidd EG	23	15	15	26	19	24	20	142	247	105	42.51%
Llandaf EyNgh	60	60	60	59	60	60	60	419	420	1	0.24%
Pentre-baen	24	30	35	30	26	31	32	208	210	2	0.95%
Pentyrch	23	21	21	25	15	12	17	134	140	6	4.29%
Peter Lea	44	44	38	48	44	47	40	305	320	15	4.69%
Radur	58	59	61	60	60	60	44	402	420	18	4.29%
<b>Cyfanswm</b>	<b>427</b>	<b>449</b>	<b>450</b>	<b>457</b>	<b>441</b>	<b>428</b>	<b>402</b>	<b>3054</b>	<b>3259</b>	<b>205</b>	<b>6.3%</b>

Ar hyn o bryd mae 205 o lefydd dros ben yn yr holl ysgolion cynradd (t6%) yn ardal ehangach Creigiau/ Sain Ffagan, Radur/ Morganstown a Danescourt.

O ystyried yn unig yr ysgolion cyfrwng-Saesneg sydd agosaf at yr ysgol newydd arfaethedig i wasanaethu rhannau o ddatblygiad Plasdŵr (sef Ysgol Gynradd Danescourt, Ysgol Gynradd Peter Lea ac Ysgol Gynradd Radur), ychydig iawn o lefydd dros ben sydd (69) - t6% o'r cynhwysedd cyfan.

**Llef ydd sy'n cael eu cymryd ar hyn o bryd mewn ysgolion cynradd CS a ffrwd ddeuol yn ardaloedd Creigiau/ Sain Ffagan, Radur/ Morganstown a'r Tyllgoed.**

Mae Tabl 2 yn cymharu nifer y disgylion oedd, ym mis Ionawr 2018, yn byw yn y dalgylchoedd sy'n gwasanaethu'r ysgolion cynradd cyfrwng-Saesneg a ffrwd ddeuol, a'r ysgolion yr oeddent yn eu mynychu.

Tabl 2 – Llef ydd sy'n cael eu cymryd mewn ysgolion cynradd cyfrwng-Saesneg a ffrwd ddeuol, yn ôl dalgylch cyfrwng-Saesneg-Derbyn i Flwyddyn 6 (CYBLD Ionawr 2018)												
Dalgylch												
Ysgol a Fynychir	Ysgol Gynradd Bryn Deri	Ysgol Gynradd Creigiau (dalgylch CS)	Ysgol Gynradd Danescourt	Ysgol Gynradd y Tyllgoed	Ysgol Gynradd Gwaelod y Garth (dalgylch CS)	Ysgol Gynradd Gwaelod y Garth (dalgylch CS)	Ysgol Gynradd Pentre-baen	Ysgol Gynradd Pentyrch	Ysgol Gynradd Peter Lea	Ysgol Gynradd Radur	Arall	Cyfanswm
Bryn Deri	163	0	2	1	2	0	2	4	28	5	207	
Creigiau	3	179	0	3	0	4	91	1	10	75	366	
Danescourt	4	2	168	37	2	22	1	85	15	48	384	
Tyllgoed	0	0	0	120	0	34	0	26	1	57	238	
Gwaelod y Garth	14	0	0	3	76	0	19	0	34	103	249	
Teulu Sanctaidd EG	0	0	0	29	0	66	0	29	1	17	142	
Llandaf EyNgh	0	0	11	110	0	10	0	60	3	225	419	
Pentre-baen	0	0	0	27		116	0	12	1	52	208	
Pentyrch	0	1	1	0	5	0	107	2	0	18	134	
Peter Lea	0	0	4	54	1	79	0	134	0	33	305	
Radur	40	2	6	4	3	3	22	2	299	21	402	
Disgyblion o'r dalgylch hwn yn mynychu'r ysgolion hyn	224	184	192	388	89	334	242	355	392	-	2400	
Disgyblion o'r dalgylch hwn yn mynychu ysgolion CS eraill	7	3	2	207	7	28	5	27	14	-	300	
Disgyblion sy'n byw ym mhob dalgylch sy'n mynychu ysgolion cynradd CS	231	187	194	595	96	362	247	382	406	-	2700	

Cyfanswm o 2,700 o ddisgyblion oedran cynradd sy'n byw yn nalgylchoedd yr ysgolion uchod ac sy'n mynchu unrhyw ysgolion neu ddosbarthiadau cynradd cyfrwng-Saesneg yng Nghaerdydd. Mae hyn yn cymharu â nifer y lefydd sydd ar gael mewn ysgolion a dosbarthiadau cynradd cyfrwng-Saesneg o 3,259.

O ystyried yn unig yr ysgolion cyfrwng-Saesneg sydd agosaf at yr ysgol newydd arfaethedig i wasanaethu rhannau o ddatblygiad Plasdŵr (sef Ysgol Gynradd Danescourt , Ysgol Gynradd Peter Lea, ac Ysgol Gynradd Radur), mae 982 o ddisgyblion yn mynchu unrhyw ysgol gynradd gymunedol CS, o gymharu â 1,160 o lefydd sydd ar gael yn yr ysgolion hyn (15% dros ben).

Gall rhieni fynegi blaenoriaeth dewis o unrhyw ysgol, ac yn dibynnu ar y galw lleol, gall eu plant fynychu ysgolion nad ydynt yn lleol i'w cyfeiriad cartref.

### **Nifer llefydd a'r llefydd sy'n cael eu cymryd mewn ysgolion cynradd cyfrwng-Cymraeg yn ardaloedd Creigiau/ Sain Ffagan, Radur/ Morganstown a'r Tyllgoed**

Mae Tabl 3 yn gosod allan niferoedd y disgyblion ar y llyfrau yn yr ysgolion cynradd cyfrwng-Cymraeg a ffrwd ddeuol yn ardaloedd Creigiau/ Sain Ffagan, Radur/ Pentre-poeth a'r Tyllgoed, a lefelau'r llefydd dros ben ym mhob ysgol ar Ionawr 2018 (y data diweddaraf i'w ddilysu o gyfrifiadau ysgolion).

**Tabl 3 – Nifer ar y llyfrau a chyfanswm y llefydd dros ben – Derbyn i Flwyddyn 6 (CYBLD Ionawr 2018)**

Ysgol	R	1	2	3	4	5	6	Cyfanswm	Cynhwysedd	Dros ben	% Dros ben
Creigiau	49	54	58	49	53	53	50	366	378	12	3.17%
Ysgol Coed y Gof	51	54	59	48	45	41	38	336	389	53	13.62 %
Ysgol Nant Caerau	30	31	26	28	29	27	26	197	207	10	4.83%
Gwaelod y Garth	35	37	38	34	35	34	36	249	237	-12	-5.06%
Ysgol Pencae	30	29	29	30	29	30	30	207	186	-21	-11.29 %
<b>Cyfanswm</b>	<b>195</b>	<b>205</b>	<b>210</b>	<b>189</b>	<b>191</b>	<b>185</b>	<b>180</b>	<b>1355</b>	<b>1397</b>	<b>42</b>	<b>3.0%</b>

Ar hyn o bryd, mae 42 o lefydd dros ben yn yr ysgolion cynradd cyfrwng-Cymraeg a ffrwd ddeuol yn yr ardal ehangach hon.

O ystyried yn unig y ddwy ysgol cyfrwng-Cymraeg sydd agosaf at yr ysgol arfaethedig newydd i wasanaethu rhannau o ddatblygiad Plasdŵr (Ysgol Pencae ac Ysgol Coed y Gof), ychydig o lefydd dros ben sydd (32) sef t6% o'r cynhwysedd.

**Llefydd sy'n cael eu cymryd ar hyn o bryd mewn ysgolion cynradd CC a ffrwd ddeuol yn ardaloedd Creigiau/ Sain Ffagan, Radur/ Pentre-poeth a'r Tyllgoed.**

Mae Tabl 4 yn cymharu nifer y disgylion oedd, ym mis Ionawr 2018, yn byw yn y dalgylchoedd sy'n gwasanaethu'r ysgolion cyfrwng-Cymraeg a ffrwd ddeuol, a'r ysgolion yr oeddent yn eu mynychu.

**Tabl 4 – Llefydd sy'n cael eu cymryd mewn ysgolion cynradd cyfrwng-Cymraeg a ffrwd ddeuol, yn ôl dalgylch cyfrwng-Cymraeg – Derbyn i Flwyddyn 6 (CYBLD Ionawr 2018)**

		Dalgylch						
Ysgol a Fynychir	Ysgol Gynradd Creigiau (CC)	Ysgol Gymraeg Coed-y-Gof	Ysgol Gymraeg Nant Caerau	Ysgol Gynradd Gwaelod y Garth (CC)	Ysgol Pencae	Arall	Cyfanswm	
Creigiau	241	51	1	3	1	69	366	
Ysgol Gymraeg Coed-y-Gof	0	278	45	0	1	12	336	
Ysgol Gymraeg Nant Caerau	0	25	161	0	0	11	197	
Ysgol Gynradd Gwaelod y Garth	19	24	0	122	0	84	249	
Ysgol Pencae	0	20	2	0	155	30	207	
Disgyblion o'r dalgylch hwn yn mynychu'r ysgolion hyn	260	398	209	125	157	-	1149	
Disgyblion o'r dalgylch hwn yn mynychu ysgolion CC eraill	3	100	37	3	46	-	189	
Disgyblion sy'n byw ym mhob dalgylch sy'n mynychu ysgolion cynradd CC	263	498	246	128	203	-	1338	

Cyfanswm o 1,338 o ddisgyblion oedran cynradd sy'n byw yn nalgylchoedd yr ysgolion uchod ac sy'n mynychu unrhyw ysgolion neu ddosbarthiadau cynradd cyfrwng-

Cymraeg yng Nghaerdydd. Mae hyn yn cymharu â nifer y lefydd sydd ar gael mewn ysgolion a dosbarthiadau cynradd cyfrwng-Saesneg o 1,397.

O ystyried yn unig y ddwy ysgol cyfrwng-Cymraeg sydd agosaf at yr ysgol arfaethedig newydd i wasanaethu rhannau o ddatblygiad Plasdŵr (Ysgol Pencae ac Ysgol Coed y Gof), mae 701 o ddisgyblion yn mynchyu unrhyw ysgol gynradd cymunedol CC neu ffrwd ddeuol, o gymharu â 575 lle sydd ar gael yn Ysgol Pencae ac Ysgol Coed y Gof (diffyg o 22%).

**Galw diweddar a rhagamcan o'r galw am lefydd mewn ysgolion cynradd cymunedol cyfrwng-Saesneg yn nalgylchoedd ardaloedd Creigiau/ Sain Ffagan, Radur/ Pentre-poeth a'r Tyllgoed.**

Mae Tabl 5 yn gosod allan y galw diweddar a rhagamcan o'r galw am lefydd cyfrwng-Saesneg i fynd i'r flwyddyn Derbyn yn nalgylchoedd ysgolion cynradd cymunedol yn ardaloedd Creigiau/ Sain Ffagan, Radur/ Pentre-poeth a'r Tyllgoed, o'r tai sydd yno eisoes.

Dalgyllch	Nifer Derbyn Cyhoeddiddig	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21
Bryn Deri	30	25	31	36	22	20	21
Creigiau (ffrwd CS)	29	14	12	15	12	20	16
Danescourt	60	23	23	26	28	38	23
Gwaelod y Garth (ffrwd CS)	7	5	2	4	5	5	7
Pentre-baen	30	41	36	49	47	37	35
Pentyrch	20	24	28	28	33	39	31
Peter Lea	45	42	49	36	54	40	49
Radur	60	71	60	52	59	58	53
Cyfanswm	281	245	241	246	259	257	235
Dros ben / Rhagamcan o'r nifer dros ben		36	40	35	22	24	46
		13%	16%	15%	9%	9%	18%

**Galw diweddar a rhagamcan o'r galw am lefydd mewn ysgolion cynradd cymunedol cyfrwng-Cymraeg yn nalgylchoedd ardaloedd Creigiau/ Sain Ffagan, Radur/ Pentre-poeth a'r Tyllgoed.**

Mae Tabl 6 yn gosod allan y galw diweddar a rhagamcan o'r galw am lefydd i fynd i'r flwyddyn Derbyn yn nalgylchoedd ysgolion cynradd cymunedol yn ardaloedd Creigiau/ Sain Ffagan, Radur/ Pentre-poeth a'r Tyllgoed, o'r tai sydd yno eisoes.

Dalgylch	Nifer Derbyn Cyhoeddiddig	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21
Ysgol Gynradd Creigiau (ffrwd CC)	29	16	21	18	21	24	25
Ysgol Gymraeg Coed-y-Gof	60	78	69	69	69	66	62
Ysgol Gymraeg Nant Caerau	30	43	41	32	32	36	31
Ysgol Gynradd Gwaelod y Garth (ffrwd CC)	26	18	18	13	14	13	17
Ysgol Pencae	30	34	27	24	32	38	34
Cyfanswm	175	189	176	156	168	176	159
Dros ben / Rhagamcan o'r nifer dros ben		-14 -8%	-1 -1%	19 11%	7 4%	-1 -1%	6 4%

Mae'r galw diweddar a rhagamcan o'r galw am lefydd mewn ysgolion cymunedol cyfrwng-Saesneg a chyfrwng-Cymraeg ym mhob un o ddalgylchoedd yr ysgolion cynradd yn amrywio, ond ar y cyfan, ni ragwelir y bydd gormod o lefydd dros ben.

Mae'r tabl uchod yn cymryd i ystyriaeth y llefydd a gymerwyd, ac y rhagwelir a gaiff eu cymryd, yn yr ysgolion cynradd cymunedol yng Nghaerdydd a dyma felly uchafswm nifer y disgylion a ragamcenir fyddai am lefydd o'r math hwnnw petai disgylion yn yr ardal yn cymryd llefydd yn nalgylch eu cyfeiriad cartref. Fodd bynnag, fel y gwelir yn nhablau 2 a 4, mae cyfran sylweddol o ddisgylion yn cymryd llefydd mewn mannau eraill, a disgwylir y bydd llawer o'r rhain yn parhau i wneud hynny. Gall disgylion sy'n byw y tu allan i Gaerdydd hefyd gymryd llefydd yn ysgolion Caerdydd, ar yr amod fod digon o lefydd ar gael, a'u bod yn gallu cwrdd â meini prawf mwy o geisiadau na nifer y llefydd sydd ar gael, megis byw yn nes na rhai ymgeiswyr o Gaerdydd.

O'u cymharu â'r cyflenwad presennol o lefydd ar oedran Derbyn, dengys rhagamcanion am y blynnyddoedd 2019 i 2021:

- cyfanred o 22 o lefydd CS dros ben yn 2018/19, yn codi i 46 o lefydd yn 2020/21
- cyfanred o 7 o lefydd CC dros ben yn 2018/19, yn cwympo i 6 o lefydd yn 2020/21

O'u cymharu â'r cyflenwad presennol o lefydd ar oedran Derbyn am y tair ysgol cyfrwng-Saesneg a'r ddwy ysgol cyfrwng-Cymraeg agosaf, dengys rhagfynegiadau am y blynnyddoedd 2019 i 2021:

- cyfanred o 24 o lefydd CS dros ben yn 2018/19, yn codi i 40 o lefydd yn 2020/21
- cyfanred o ddiffyg o 12 o lefydd CC yn 2018/19, yn cwympo i ddiffyg o 6 o lefydd yn 2020/21

**Rhagamcan o nifer y disgyblion fydd yn byw yn y datblygiadau tai sylweddol arfaethedig yn ardaloedd Creigiau/ Sain Ffagan, Radur/ Morganstown a'r Tyllgoed.**

Ym mis Ionawr 2016 mabwysiadodd y Cyngor Gynllun Datblygu Lleol i Gaerdydd. Daeth y CDLI yn weithredol adeg ei fabwysiadu a hwn yn awr yw'r cynllun datblygu a fydd yn sail i benderfyniadau am gynllunio defnydd tir yng Nghaerdydd.

Nododd Cynllun Datblygu Lleol Caerdydd (CDLI) 2006 – 2026 safleoedd strategol allweddol i roi hyd at 41,100 o anheddu newydd yng Nghaerdydd gan gynnwys Safle Strategol C yng ngogledd orllewin Caerdydd er mwyn darparu hyd at 5,000 o anheddu yn ystod cyfnod CDLI ond o bosib hyd at gyfanswm o 7,000.

Rhoddwyd caniatâd cynllunio i nifer o ddatblygiadau tai ar, neu gerllaw Safle Strategol C, ers 2016:

Rhoddodd Pwyllgor Cynllunio'r Cyngor ganiatâd cynllunio amlinellol i godi hyd at 630 o anheddu ar dir i'r gogledd a'r de o safle Heol Llantrisant ym mis Chwefror 2016. Rhagfynegir y bydd 189 o blant oed cynradd yn byw mewn tai ar y datblygiad hwn (27 fesul grŵp blwyddyn).

Rhoddodd Pwyllgor Cynllunio'r Cyngor ganiatâd cynllunio amlinellol i godi hyd at 290 o anheddu ar dir i'r de o Heol Pentre-baen ym mis Rhagfyr 2016. Rhagfynegir y bydd 85 o blant oed cynradd yn byw mewn tai ar y datblygiad hwn (12 fesul grŵp blwyddyn).

Rhoddodd Pwyllgor Cynllunio'r Cyngor ganiatâd cynllunio amlinellol i godi hyd at 5970 o anheddu ar safle gogledd orllewin Caerdydd (Plasdŵr ehangach) ym mis Mawrth 2017. Rhagfynegir y bydd 1254 o blant oed cynradd yn byw mewn tai ar y datblygiad hwn (179 fesul grŵp blwyddyn).

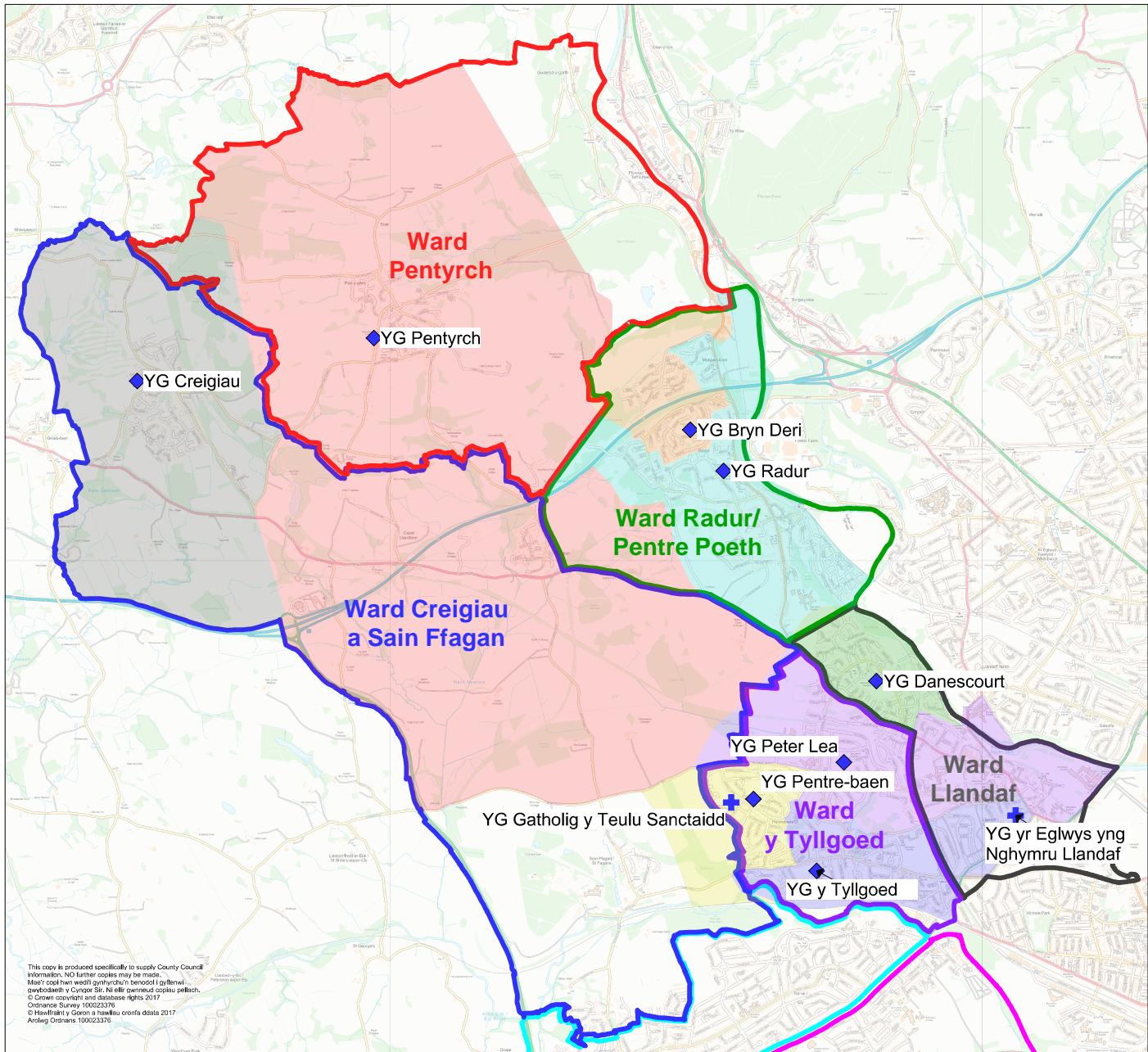
Rhoddodd Pwyllgor Cynllunio'r Cyngor ganiatâd cynllunio amlinellol i godi hyd at 300 o anheddu (a ostyngwyd wedi hynny i 260) ar safle Fferm Goitre Fach ym mis Mawrth 2017. Rhagfynegir y bydd 72 o blant oed cynradd yn byw mewn tai ar y datblygiad hwn (10 fesul grŵp blwyddyn).

Rhoddodd Pwyllgor Cynllunio'r Cyngor ganiatâd cynllunio amlinellol i godi hyd at 1500 annedd ar dir i'r gogledd o Gyffordd 33 ym mis Chwefror 2017. Rhagfynegir y bydd 432 o blant oed cynradd yn byw mewn tai ar y datblygiad hwn (62 fesul grŵp blwyddyn).

Mae cytundebau a106 ar wahân ar gael er mwyn sicrhau bod digon o lefydd mewn ysgolion wedi eu darparu i wasanaethu pob datblygiad.

Mae'r dudalen hon yn wag yn fwriadol

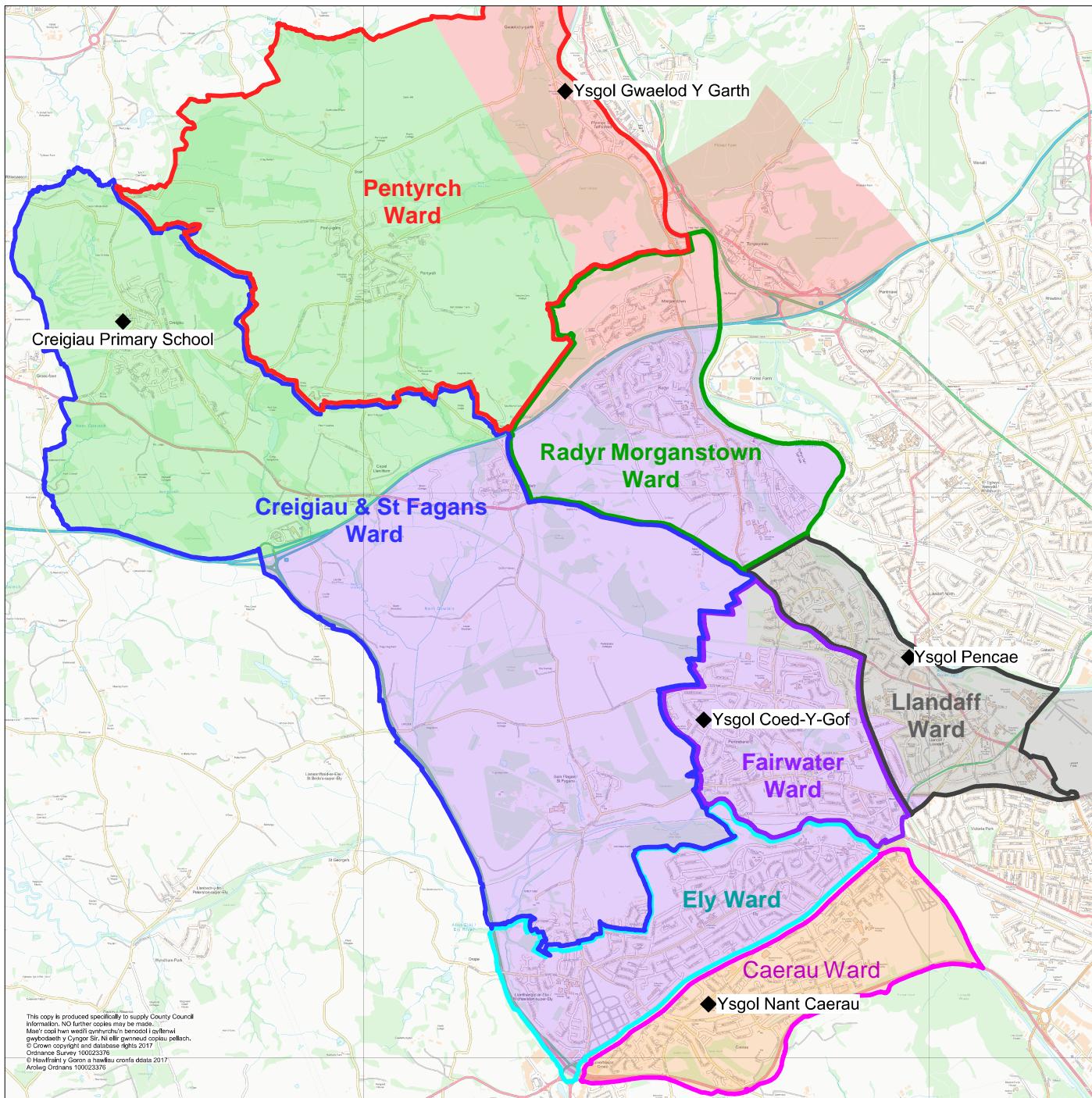
## Dalgylchoedd ysgolion cynradd cyfrwng Saesneg



- |                      |   |
|----------------------|---|
| [Red square]         | Dynodi Dalgylch Ysgol Gynradd Pentyrch    |
| [Yellow square]      | Dynodi Dalgylch Ysgol Gynradd Pentre-baen |
| [Teal square]        | Dynodi Dalgylch Ysgol Gynradd Radur       |
| [Purple square]      | Dynodi Dalgylch Ysgol Gynradd Peter Lea   |
| [Orange square]      | Dynodi Dalgylch Ysgol Gynradd Bryn Deri   |
| [Grey square]        | Dynodi Dalgylch Ysgol Gynradd Creigiau    |
| [Light Green square] | Dynodi Dalgylch Ysgol Gynradd Danescourt  |

Mae'r dudalen hon yn wag yn fwriadol

## Welsh-medium Primary School Catchment Areas



	denotes Ysgol Gwaelod Y Garth Catchment Area
	denotes Criegiau Primary School Catchment Area
	denotes Ysgol Pencae Catchment Area
	denotes Ysgol Coed-Y-Gof Catchment Area
	denotes Ysgol Nant Caerau Catchment Area

Mae'r dudalen hon yn wag yn fwriadol

## Atodiad 4

### Cyngor Caerdydd Canllaw i'r Offeryn Sgrinio Statudol

Os ydych yn datblygu strategaeth, polisi neu weithgaredd sy'n debyg o gael effaith ar bobl, cymunedau neu ddefnydd tir mewn unrhyw ffordd, yna mae nifer o ofynion statudol yn gymwys. Gall methu â chydymffurfio â'r gofynion hyn, neu roi ystyriaeth ddyledus, adael y Cyngor yn agored i her gyfreithiol neu fathau eraill o gerydd.

Er enghraift, bydd hyn yn wir am strategaethau (h.y. Strategaeth Tai neu Strategaeth Chwarae i'r Anabl), polisiau (h.y. Polisi Caffael) neu weithgaredd (h.y. datblygu man chwarae newydd).

Trwy gwblhau'r Offeryn Sgrinio Statudol, byddwch yn gwneud yn siŵr fod holl strategaethau, polisiau a gweithgareddau Cyngor Caerdydd yn cydymffurfio a'r rhwymedigaethau a chyfrifoldebau statudol perthnasol. Lle mae angen ystyried mater yn fanylach, bydd yr Offeryn Sgrinio yn nodi a oes angen asesiad effaith llawn, fel sy'n berthnasol.

Ymyst y prif ofynion statudol y mae angen i strategaethau, polisiau neu weithgareddau eu hadlewyrchu mae:

- [Deddf Cydraddoldeb 2010 - Asesiad Effaith Cydraddoldeb](#)
- [Bil Datblygu Cynaliadwy Llywodraeth Cymru](#)
- [Canllawiau Statudol Llywodraeth Cymru - Cydamcanu Cydymdrechu](#)
- Confensiwn y Cenhedloedd Unedig ar Hawliau'r Plentyn
- [Egwyddorion y Cenhedloedd Unedig](#)
- [Mesur yr Iaith Gymraeg 2011](#)
- [Rhwydwaith Iechyd Cyhoeddus Cymru](#)
- [Deddfwriaeth](#)
- [Asesiad Amgylcheddol Strategol](#)

Mae'r Offeryn Sgrinio Statudol hwn yn gadael i ni gwrdd â holl ofynion yr holl ddarnau hyn o ddeddfwriaeth fel rhan o ddull sgrinio integredig sy'n cymryd dim hwy nac awr fel arfer.

Gellir cwblhau'r Offeryn Sgrinio fel hunanasesiad neu fel rhan o sesiwn wedi'i hwyluso, petai angen mwy o gefnogaeth. Am fwy o wybodaeth neu os ydych angen sesiwn wedi'i hwyluso, cysylltwch â'r Tîm Polisi, Partneriaethau a Chanolbwytio ar y Dinesydd ar 2078 8563 e-bost: [siadavies@caerdydd.gov.uk](mailto:siadavies@caerdydd.gov.uk) Sylwch:

- [Rhaid cyflwyno'r Offeryn Sgrinio wedi'i gwblhau fel atodiad gyda'r adroddiad Cabinet.](#)
- [Cyhoeddir yr offeryn sgrinio wedi'i gwblhau ar y fewnrwyd.](#)

## Offeryn Sgrinio Statudol

<b>Enw'r Strategaeth / Polisi / Gweithgaredd:</b>	<b>Dyddiad Sgrinio:</b>
<b>CYNLLUNIO TREFNIADAETH YSGOLION: DARPARIAETH YSGOLION NEWYDD I WASANAETHU RHANNAU</b>	<b>Mawrth 2019</b>
<b>Maes Gwasanaeth/Adran:</b> Addysg a Dysgu Gydol Oes, Cynllunio Trefniadaeth Ysgolion	<b>Swyddog Arweiniol:</b> Janine Nightingale
<b>Sawl sy'n bresennol:</b> Hunanasesiad	

<b>Beth yw amcanion y Polisi/Strategaeth/Prosiect/Gweithdrefn/ Gwasanaeth/Swyddogaeth</b>	Rhowch wybodaeth gefndir am y Polisi/Strategaeth/Prosiect/Gweithdrefn/Gwasanaeth/Swyddogaeth ac unrhyw ymchwil a wnaed [e.e. data defnyddwyr gwasanaeth yn erbyn ystadegau demograffeg, AEA tebyg a wnaed, etc.]
<b>Tudalen 186</b> Cynnig:	<b>Datblygiadau tai newydd yng ngogledd orllewin Caerdydd</b>  Cynigiwyd nifer o ddatblygiadau tai newydd yng ngogledd orllewin Caerdydd dros y blynnyddoedd diwethaf a fydd yn cynyddu nifer y plant yn yr ardal sy'n chwilio am lefydd mewn ysgolion, ac a gaiff effaith ar y llefydd sydd ar gael mewn ysgolion.  Mae Canllawiau Cynllunio Atodol y Cyngor yn gosod allan yr amgylchiadau lle gallai'r Cyngor geisio cyfraniadau a 106 gan ddatblygwyr tuag at gyfleusterau ysgol. Er mwyn cael cyfraniadau gan ddatblygwyr, byddai gofyn i'r Cyngor ddangos dystiolaeth fod unrhyw oblygiad yn cwrdd â'r meinu prawf canlynol:  <ul style="list-style-type: none"> <li>• Angenrheidiol i wneud y datblygiad yn dderbyniol yn nhermau cynllunio;</li> <li>• Ymwneud yn uniongyrchol â'r datblygiad; ac</li> <li>• Yn ymwneud yn rhesymol a theg o ran graddfa a math â'r datblygiad.</li> </ul>
	2

Ni fyddai cyfraniadau A106 yn caniatáu i'r Cyngor fuddsoddi mewn ysgolion i ddatrys anghenion sy'n bod eisoes. Gellir ceisio cyfraniadau yn unig lle bydd ysgolion sy'n lleol i'r datblygiad yn parhau i fod yn llawn, a bod angen ehangu'r ddarpariaeth naill ai trwy ehangu'r ysgolion presennol neu godi rhai newydd. Rhaid i dir, adeiladau neu gyfraniadau ariannol fod yn uniongyrchol gymesur â'r anghenion sy'n deillio o ddatblygiad.

Mae Cynllun Seilwaith Addysg y Cyngor, sydd wedi ei gynnwys yn y CDLI a adneuwyd yn 2013, yn tynnu sylw at gynigion buddsoddi / datblygu a gynlluniwyd ac yn nodi gofynion twf seilwaith at y dyfodol ar sail lefel a dosbarthiad twf arfaethedig Caerdydd.

Nododd Cynllun Datblygu Lleol (CDLI) Caerdydd 2006 - 2026 safleoedd strategol allweddol i gyflwyno 41,100 o anheddu newydd yng Nghaerdydd gan gynnwys Safle Strategol C yng ngogledd orllewin Caerdydd i ddarparu hyd at 5,000 o anheddu yn ystod cyfnod y CDLI ond o bosib hyd at gyfanswm o 7,000.

Rhoddwyd manylion am ysgolion cynradd newydd i wasanaethu Safle Strategol C yn y Cynllun Datblygu Lleol fel gofyniad polisi am y seilwaith hanfodol fyddai ei angen i gynnal y datblygiad.

Rhoddodd Pwyllgor Cynllunio'r Cyngor ganiatâd cynllunio amlinellol i godi hyd at 630 o anheddu ar dir i'r gogledd a'r de o safle Heol Llantrisant ym mis Chwefror 2016.

Mae cytundeb A106 a drafodwyd gyda datblygwr y safle yn 2016 yn rhoi'r canlynol i'r Cyngor:

- Safle a neilltuwyd yn y datblygiad ar gyfer ysgol;
- Ysgol gynradd newydd dau ddosbarth i bob blwyddyn

Hyd yma, cwblhawyd oddeutu 90 o dai ac y mae pobl yn byw yn dynt ar gyfnod cynnar y datblygiad ar ochr ogledol Heol Llantrisant.

Ymysg datblygiadau arwyddocaol eraill a gafodd ganiatâd cynllunio ar Safle Strategol C mae:

- Gogledd orllewin Caerdydd – hyd at 5,970 o anheddu, ac i gynnwys tair ysgol gynradd newydd ac ysgol uwchradd
- Tir i'r de o Heol Pentre-baen - hyd at 290 o anheddu
- Fferm Goitre Fach – 260 o anheddu.

## Rhan 1: Effaith ar ddeilliannau ac ystyriaeth ddyledus i Ddatblygu Cynaliadwy

Defnyddiwch y raddfa isod wrth ystyried pa gyfraniad mae'r gweithgaredd yn wneud:			
+	Cadarnhaol	Cyfraniad cadarnhaol i'r deilliant	
-	Negyddol	Cyfraniad negyddol i'r deilliant	
ntral	Niwtral	Cyfraniad niwtral i'r deilliant	
Ansicr	Ansicr	Ansicr a wneir unrhyw gyfraniad i'r deilliant ai peidio	

	A yw'r Strategaeth/Polisi/Gweithgaredd wedi ystyried pa effaith a gaiff ar un neu fwy o 7 Deilliont Caerdydd sy'n Canoli ar y Dinesydd?		Ticiwch				Tystiolaeth neu awgrym am wella/lliniaru
			+	-	Ntral	Ansicr	
1.1	<b>Mae pobl yng Nghaerdydd yn iach;</b> <i>Ystyriwch yr effaith bosib ar</i> <ul style="list-style-type: none"><li><i>Hyrwyddo iechyd da, atal ymddygiad niweidiol, hyrwyddo bwyta'n iach/dulliau llesol o fyw etc,</i></li><li><i>Ddinasyyddion bregus ac ardaloedd amddifadedd lluosog</i></li><li><i>Ymdrin ag enghreifftiau o anghydraddoldeb mewn iechyd</i></li></ul>	x					<ul style="list-style-type: none"><li>Gweler 1.2 isod – annog cerdded, beicio a defnyddio cludiant cyhoeddus</li></ul>
1.2	<b>Mae gan bobl yng Nghaerdydd amgylchedd glân, deniadol a chynaliadwy:</b> <i>Ystyriwch yr effaith bosib ar</i> <ul style="list-style-type: none"><li><i>Achosion a chanlyniadau Newid Hinsawdd a chreu dinas garbon-ysgafn</i></li><li><i>Annog cerdded, beicio a defnyddio cludiant cyhoeddus a gwella mynediad at gefn gwlad a mannau agored</i></li></ul>	x					<ul style="list-style-type: none"><li>Byddai'r cynnig hwn yn golygu y byddai plant o'r ardal leol a'r cyffiniau yn mynd i ysgol newydd 2 ddosbarth i bob blwyddyn fyddai'n addas ar gyfer yr 21<sup>ain</sup> ganrif. Bwriedir darparu adeiladau cynaliadwy cost-effeithiol fydd yn lleihau costau refeniw parhaus, a hyn yn ei dro yn gostwng ôl troed carbon y Cyngor yn unol â Strategaeth Lleihau Carbon Caerdydd (Mai 2015).</li><li>Yn unol â Deddf Llesiant Cenedlaethau'r Dyfodol, mae rhaglen Band B Caerdydd wedi ymrwymo i ddarparu Ysgolion Lleol i Blant Lleol, i annog defnyddio moddau cynaliadwy o deithio i ysgolion, megis cerdded a beicio. Mae prosiectau ysgolion yn ystyried materion cludiant pan gânt eu dylunio, a'r angen i ddarparu llwybrau mwy diogel er mwyn annog cerdded i ysgolion</li><li>Hyrwyddo mentrau fel hyfforddiant Kerbcraft, hyfforddiant mewn sgiliau beicio a gweithredu mesurau Teithio Llesol yr awdurdod lleol</li></ul>

Tudalen 189

	A yw'r Strategaeth/Polisi/Gweithgaredd wedi ystyried pa effaith a gaiff ar un neu fwy o 7 Deilliont Caerdydd sy'n Canoli ar y Dinesydd?	Ticiwch				Tystiolaeth neu awgrym am wella/lliniaru
		+	-	Ntrル	Ansic r	
1.3 Tudalen 190	• <i>Lleihau llygrededd amgylcheddol (tir, aer, sŵn a dŵr)</i>	x				- Byddai gweithredu cynllun teithio effeithiol yn lleihau'r angen am gludiant anghynaladwy yn ôl ac ymlaen o ysgolion
	• <i>Defnyddio llai ac annog lleihau gwastraff, aildefnyddio, ailgylchu ac adennill</i>	x				- Bydd cynigion yn cael eu bwrw ymlaen yn unol ag Offeryn Mesur Lles Cymunedol Llywodraeth Cymru sydd yn annog defnyddio llai, lleihau gwastraff ac ailgylchu.
	• <i>Annog bioamrywiaeth</i>			x		- Cynhelir arolygon safle i ganfod lefelau bioamrywiaeth a byddant yn ymchwilio i gyfleoedd i ddatblygu mentrau priodol.
1.4	<b>Mae pobl yng Nghaerdydd yn ddiogel ac yn teimlo'n ddiogel;</b> <i>Ystyriwch yr effaith bosib ar</i> • <i>leihau troseddau, ofn trosedd a chynyddu diogelwch unigolion</i> • <i>ymdrin ag ymddygiad gwrthgymdeithasol</i> • <i>amddiffyn oedolion a phlant bregus yng Nghaerdydd rhag niwed neu gamdriniaeth</i>	x	x	x		- Mae gan bob ysgol yng Nghaerdydd bolisiau i sicrhau diogelu a llesiant staff, plant a phobl ifanc.
1.5	<b>Mae gan Gaerdydd economi fywiog a ffyniannus;</b> <i>Ystyriwch yr effaith bosib ar</i> • <i>Natur gystadleuol economaidd (mentergarwch, mentrau cymdeithasol, enillion cyfartalog, gwella cynhyrchedd)</i> • <i>Helpu'r sawl sydd Heb fod mewn Addysg, Cyflogaeth neu Hyfforddiant</i> • <i>Denu a chadw gweithwyr (cyfleoedd newydd am waith a hyfforddiant, cynyddu gwerth cyflogaeth,)</i> • <i>Hyrwyddo cyfleoedd caffael lleol neu wella gallu cwmniâu lleol i gystadlu</i>	x				- Byddai'r ysgol yn darparu gwaith . -
	<b>Pobl yng Nghaerdydd yn cyrraedd eu llawn botensial;</b> <i>Ystyriwch yr effaith bosib ar</i> • <i>Hyrwyddo a gwella mynediad at ddysgu gydol oes yng Nghaerdydd</i> • <i>Codi lefelau sgiliau a chymwysterau</i> • <i>Rhoi'r cychwyn gorau i blant</i> • <i>Gwella dealltwriaeth o gynaliadwyedd</i>	x				- Mae cynigion y Cyngor am Fand B Rhaglen Ysgolion yr 21ain Ganrif, a strategaeth Caerdydd 2020, yn datgan yn glir y cyswilt rhwng gwella'r amgylchedd ar gyfer dysgu a chodi safonau cyrhaeddiad. - Gyda chryn dipyn o ddarpariaeth chwaraeon a hamdden ehangach wedi ei sefydlu, neu ar fin cael eu datblygu, mewn

	A yw'r Strategaeth/Polisi/Gweithgaredd wedi ystyried pa effaith a gaiff ar un neu fwy o 7 Deilliont Caerdydd sy'n Canoli ar y Dinesydd?	Ticiwch				Tystiolaeth neu awgrym am wella/Iliniaru
		+	-	Ntrn	Ansicr	
Tudalen 1.6	<ul style="list-style-type: none"> <li>• <i>Mynd i'r afael â tlodi plant (tlodi ariannol, tlodi mynediad, tlodi cyfranogi)</i></li> <li>• <i>Confensiwn y Cenhedloedd Unedig ar Hawliau'r Plentyn ac Egwyddorion ar gyfer Pobl Hŷn</i></li> </ul>					<p>llawer ysgol, amcan allweddol yw galluogi trydydd parti i gyrchu'r cyfleusterau chwaraeon mewn ysgolion, ar sail ariannol gynaliadwy. Mae angen datblygu model hyfyw i gymunedau a wasanaethir gan bob ysgol ledled y ddinas allu eu cyrchu.</p> <ul style="list-style-type: none"> <li>- Mae strategaeth Dinas sy'n Dda i Blant Caerdydd yn gosod hawliau a lleisiau plant a phobl ifanc wrth galon polisiau, strategaethau a gwasanaethau Caerdydd; eu dwyn i mewn i wneud penderfyniadau ac ymdrin â'r rhwystrau sy'n cyfyngu ar eu dewisiadau mewn bywyd. O'r herwydd, bydd ymgynghori ar y cynnig yn cynnwys cynrychiolaeth o blith plant a phobl ifanc.</li> <li>- Yn amodol ar ganiatâd, byddai unrhyw waith dylunio at y dyfodol hefyd yn cynnwys cynrychiolaeth o blith plant a phobl ifanc.</li> </ul>
1.6	<b>Mae Caerdydd yn Lle Gwych i Fyw, Gweithio a Chwarae Ystyriwch yr effaith bosib ar</b> <ul style="list-style-type: none"> <li>• <i>Hyrwyddo amrywiaeth ddiwylliannol Caerdydd</i></li> <li>• <i>Annog cyfranogiad a mynediad i bawb at weithgaredd corfforol, hamdden a diwylliant</i></li> <li>• <i>Cyfleoedd chwarae i blant a phobl ifanc</i></li> <li>• <i>Amddiffyn a gwella tirwedd a threftadaeth hanesyddol Caerdydd</i></li> <li>• <i>Hyrwyddo cysylltiadau rhyngwladol y Ddinas</i></li> </ul>	x		x		<ul style="list-style-type: none"> <li>- Gyda chryn dipyn o ddarpariaeth chwaraeon a hamdden ehangach wedi ei sefydlu, neu ar fin cael eu datblygu, mewn llawer ysgol, amcan allweddol yw galluogi trydydd parti i gyrchu'r cyfleusterau chwaraeon mewn ysgolion, ar sail ariannol gynaliadwy. Mae angen datblygu model hyfyw i gymunedau a wasanaethir gan bob ysgol ledled y ddinas allu eu cyrchu.</li> </ul>
1.7	<b>Mae Caerdydd yn gymdeithas deg, gyfiawn a chynhwysol.</b> Ystyriwch yr effaith bosib ar	x		x		<ul style="list-style-type: none"> <li>- Gweler yr Asesiad Effaith Cydraddoldeb isod ac a atodir.</li> <li>- Byddai proses reciwtio'r Cyngor yn sicrhau bod arferion da yn cael eu dilyn, gan gynnwys cymhwysol polisiau'r Cyngor ar gyfle cyfartal.</li> </ul>

	A yw'r Strategaeth/Polisi/Gweithgaredd wedi ystyried pa effaith a gaiff ar un neu fwy o 7 Deilliont Caerdydd sy'n Canoli ar y Dinesydd?	Ticiwch				Tystiolaeth neu awgrym am wella/Iliniaru
		+	-	Ntrル	Ansicr	
Tudalen 1.8	<ul style="list-style-type: none"> <li>Ddileu camwahaniaethu, aflonyddu neu erlid ar gyfer grwpiau cydraddoldeb</li> </ul>					
	<ul style="list-style-type: none"> <li>A ddygwyd y gymuned neu randdeiliaid i mewn i ddatblygu'r strategaeth/polisi/gweithgaredd?</li> <li>Sut yr anogir cyfranogiad gan y dinasyddion (annog gweithredoedd sy'n ystyried gwahanol ffyrdd o ymgynghori, trwy ymwneud dyfnach i gyfranogi llawn o ran datblygu a chyflwyno'r gwasanaeth)?</li> </ul>	X				<ul style="list-style-type: none"> <li>- Yn amodol ar awdurdodi, bydd yr ymgynghoriad cyhoeddus yn ymgysylltu â'r holl randdeiliaid perthnasol.</li> </ul>
	<p><b>ASESIAD EFFAITH CYDRADDOLDEB (Atodir hwn ar dudalen 13)</b> A gaiff y Polisi/Strategaeth/Prosiect effaith fydd yn cael effaith wahaniaethol ar unrhyw rai o'r canlynol:</p>					
1.8	<p><b>Mae'r Cyngor yn cyflwyno deilliannau cadarnhaol i'r ddinas a'i dinasyddion trwy bartneriaethau cryf</b> Ystyriwch yr effaith bosib ar</p> <ul style="list-style-type: none"> <li>Gryfhau partneriaethau gyda busnesau a sectorau gwirfoddol</li> <li>yr agenda gydweithio a'r potensial ar gyfer rhannu gwasanaethau, gweithio ar draws ffiniau, ac arbedion effeithiolrwydd</li> </ul>	X				<p>'Ymrwymiad Caerdydd' yw strategaeth ymgysylltu a chynnydd ieuengtiaid y Cyngor. Mae Ymrwymiad Caerdydd yn gosod sut y bydd y cyngor, ynghyd ag ystod eang o bartneriaid cyhoeddus, preifat a'r trydydd sector, yn gweithio ynghyd i sicrhau cyrchfan gadarnhaol i bob unigolyn ifanc yng Nghaerdydd wedi iddyntadael yr ysgol, mewn cyflogaeth neu addysg bellach a hyfforddiant.</p> <p>Hyd yma, addawodd dros 120 o fusnesau i gefnogi Ymrwymiad Caerdydd a rhoi cyfleoedd i ysgolion a phobl ifanc, gan eu paratoi'n well ar gyfer byd gwaith, a chyfrannu at dwf economaidd y ddinas yn y dyfodol.</p> <p>Mae cynigion Band B Rhaglen Ysgolion yr 21ain Ganrif y Cyngor, a strategaeth Caerdydd 2020, yn datgan yn glir y cyswllt rhwng gwella'r amgylchedd ar gyfer dysgu a chodi safonau cyrhaeddiad.</p> <p>Mae'r Cyngor yn awyddus i helpu gyda datblygu cyfleoedd rhwng ysgolion a busnesau, i helpu i greu cronfa gynaliadwy o ddoniau</p>

	A yw'r Strategaeth/Polisi/Gweithgaredd wedi ystyried pa effaith a gaiff ar un neu fwy o 7 Deilliont Caerdydd sy'n Canoli ar y Dinesydd?	Ticiwch				Tystiolaeth neu awgrym am wella/Iliniaru
		+	-	Ntrル	Ansic r	
						<p>ar gyfer anghenion gweithlu'r dyfodol, a lledaenu sgiliau ar draws y ddinas. Enghraifft o hyn yw'r Bartneriaeth Addysg Greadigol a sefydlwyd rhwng Ysgol Uwchradd Gymunedol Gorllewin Caerdydd a phartneriaid o'r diwydiannau creadigol i roi cyfleoedd i bobl ifanc i adael addysg gyda sgiliau a medrau a bod yn barod ar gyfer gwaith</p> <p>Byddai'r datblygiadau ysgol sylweddol a gynigir yn rhoi cyfle am bartneriaethau cryf gyda busnesau a chyflogwyr o amrywiaeth o sectorau yn economi Caerdydd. Yr ydym yn archwilio cyfleoedd am fwy o bartneriaethau a byddwn yn bwrw ymlaen â'r rhain yn unol â'r blaenoriaethau a osodir allan yn Ymrwymiad Caerdydd</p>

<b>Tudalen 193</b>	<b>CRYNODEB O'R GWERTHUSIAD (amlygu effeithiau cadarnhaol a negyddol y polisi / cynllun / prosiect a asesir, gan ddangos sut y Tmae'n cyfrannu at gynaliadwyedd economaidd, cymdeithasol ac amgylcheddol y ddinas):</b>
	<p><b>Economaidd</b></p> <ul style="list-style-type: none"> <li>- Buddsoddi mewn sefydlu dwy ysgol gynradd un dosbarth i bob blwyddyn, wedi'u ffederalieddio, pob un â 48 o lefydd meithrin rhan-amser, fyddai'n cefnogi cyflwyno cwricwlwm eang a chytbwys.</li> <li>- Byddai'r ysgolion newydd yn rhoi cyfleoedd am waith.</li> </ul> <p><b>Cymdeithasol</b></p> <ul style="list-style-type: none"> <li>- Fe allai fod potensial i'r gymuned ddefnyddio cyfleusterau'r ysgol y tu allan i oriau ysgol.</li> </ul> <p><b>Cynaliadwyedd amgylcheddol</b></p> <ul style="list-style-type: none"> <li>- Byddai'r ysgol yn cael ei dylunio yn y fath fodd fel ag i leihau costau rhedeg ac effaith andwyol ar yr amgylchedd.</li> </ul> <p><b>PA GAMAU A NODWYD NEU NEWIDIADAU A WNAED I'R POLISI / CYNLLUN / PROSIECT O GANLYNIAD I'R GWERTHUSIAD HWN:</b></p> <p>Petai'r cynnig yn mynd rhagddo, cynhelid asesiad effaith cydraddoldeb i nodi hygyrchedd i safle'r ysgol newydd. Byddai'r asesiad effaith cydraddoldeb yn ystyried polisiau megis Deddf Cydraddoldeb 2010, TAN 12: Dylunio 2014 yn ogystal â rheoliadau fel BS8300, Rhan M a Bwletinau Adeiladu perthnasol.</p>

## Rhan 2: Asesiad Amgylcheddol Sgrinio Strategol

		Ydy	Na
2.1	A yw'r cynllun neu raglen yn gosod y fframwaith ar gyfer cydsynio i ddatblygiadau yn y dyfodol?	x	
2.2	A yw'r cynllun neu raglen yn debygol o gael effeithiau amgylcheddol arwyddocaol, cadarnhaol neu negyddol?		x

<b>A oes angen Asesiad Amgylcheddol Sgrinio Strategol Llawn?</b> <ul style="list-style-type: none"> <li>▪ Os mai ydy yw'r atebion i gwestiynau 2.1 a 2.2, yna oes yw'r ateb</li> <li>▪ Os oes angen AAS Sgrinio llawn, yna cysylltwch â'r Uned Datblygu Cynaliadwy i drefnu hyn (manylion isod)</li> </ul>	<b>Oes</b>	<b>Na</b> X Cynhaliwyd AAS (atodir)
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Os oes gennych unrhyw amheuon am eich atebion i'r cwestiynau uchod ynghylch AAS yna mynnwch air â'r Uned Datblygu Cynaliadwy ar 2087 3228  
[Datblygucynaliadwy@caerdydd.gov.uk](mailto:Datblygucynaliadwy@caerdydd.gov.uk)

## Rhan 3: Asesiad Rheoleiddio Cynefinoedd (ARhC)

		Yes	No	Ansicr
3.1	A fydd y cynllun, prosiect neu raglen yn arwain at weithgaredd y gwyddys fydd yn effeithio ar safle Ewropeaidd, megis Aber yr Afon Hafren neu Goedwig Ffawydd Caerdydd?		x	
3.2	A fydd y cynllun, prosiect neu raglen yn llywio datblygiad tuag at ardal sydd yn cynnwys safle Ewropeaidd, megis Aber yr Afon Hafren neu Goedwig Ffawydd Caerdydd neu a allai effeithio ar safle Ewropeaidd?		x	
3.3	A oes angen ARhC llawn?		x	

Bydd manylion y strategaeth yn cael eu hanfon at Ecolegydd y Sir unwaith i'r broses gael ei chwblhau i bennu a oes angen Asesiad Rheoleiddio Cynefinoedd. Am fwy o wybodaeth, ffoniwch 2087 3215 neu e-bostio bioamrywiaeth@caerdydd.gov.uk

## Atodiad 1 – Gofynion Statudol

Efallai y bydd yr Offeryn Sgrinio Effaith yn nodi'r angen i gynnal asesiadau statudol penodol:

- **Asesiad Effaith Cydraddoldeb:** Mae angen yr asesiad hwn dan Ddeddf Cydraddoldeb 2010 a Rheoliadau Cydraddoldeb 2011 Llywodraeth Cymru.
- **Bil Datblygu Cynaliadwy:** Pan ddaw'r Bil i rym, bydd yn mynnu bod datblygu cynaliadwy (DC) yn egwyddor drefniadol ganolog i'r sefydliad. Ystyr hyn yw bod dyletswydd i ystyried DC yn y broses o wneud penderfyniadau strategol.
- **Cydamcanu Cydymdrechu-** Mae Llywodraeth Cymru yn mynnu bod awdurdodau lleol yn cynhyrchu un cynllun integredig i gwrrd â gofynion statudol dan amrywiaeth o ddeddfwriaeth. Rhaid i Gyngor Caerdydd felly ddangos eu cyfraniad tuag at gynllun integredig Caerdydd ei hun; "[Beth sy'n Bwysig](#)".
- **'Confensiwn y Cenhedloedd Unedig ar Hawliau'r Plentyn:** Mae canllawiau Deddf Plant 2004 ar gyfer Cymru yn mynnu bod awdurdodau lleol a'u partneriaid yn cadw mewn cof Gonfensiwn y Cenhedloedd Unedig ar Hawliau'r Plentyn.
- **Egwyddorion y Cenhedloedd Unedig ar gyfer Pobl Hŷn:** Mae'r egwyddorion yn mynnu y dylid ystyried annibyniaeth, cyfranogi, gofal, hunan-gyflawni, ac urddas.

**Mesur yr Iaith Gymraeg 2011:** Mae'r mesur yn gosod allan statws swyddogol i'r iaith Gymraeg, Comisiynydd yr Iaith Gymraeg, a'r rhyddid i siarad Cymraeg.

**Asesiad Effaith Iechyd:** (AEI) sydd yn ystyried polisiau, rhagleni neu brosiectau o ran eu heffeithiau posib ar iechyd poblogaeth

**Asesiad Effaith Amgylcheddol Strategol:** Cyfarwyddeb Ewropeidd yw Asesiad Amgylcheddol Strategol (AAS) ar gyfer cynlluniau, rhagleni a pholisiau sydd ag oblygiadau o ran defnydd tir ac effeithiau amgylcheddol sylweddol.

**Asesiad Rheoliadau Cynefinoedd:** Mae Rheoliadau Cadwraeth (Cynefinoedd Naturiol, &c.) (Diwygiad) 2007 yn rhoi gofyniad i gynnal Asesiad Rheoliadau Cynefinoedd (ARhC) ar gynlluniau defnydd tir.

**Teitl y Polisi/Strategaeth/Prosiect/Gweithdrefn/Gwasanaeth/Swyddogaeth:****Cynnig:**

Sefydlu Ysgol gynradd newydd ffrwd ddeuol dau ddosbarth derbyn wedi ei threfnu fel un ffrwd Gymraeg ac un ffrwd Saesneg yn bennaf ond gyda defnydd helaeth o Gymraeg, y naill a'r llall â 48 o lefydd meithrin rhan-amser, o fis Medi 2021.

**Newydd****Pwy sy'n gyfrifol am ddatblygu a gweithredu'r****Polisi/Strategaeth/Prosiect/Gweithdrefn/Gwasanaeth/Swyddogaeth?**

Enw: Janine Nightingale	Teitl y Swydd:
Tîm Gwasanaeth:	Maes Gwasanaeth: Addysg
Dyddiad Asesu: Mawrth 2019	

- Beth yw amcanion y Polisi/Strategaeth/Prosiect/ Gweithdrefn/ Gwasanaeth/Swyddogaeth?**
- Rhowch wybodaeth gefndir am y Polisi/ Strategaeth / Prosiect / Gweithdrefn / Gwasanaeth / Swyddogaeth ac unrhyw ymchwil a wnaed [e.e. data defnyddwyr gwasanaeth yn erbyn ystadegau demograffeg, AEA tebyg a wnaed, etc.]**

**Ysgol gynradd newydd 2 DdB ar ddatblygiad Plasdŵr**

Darperir ysgol newydd gan ddatblygwr y safle fel rhan o'r cytundeb cynllunio gyda'r Cyngor i gwrrdd ag anghenion y datblygiad newydd a'r tai a gynlluniwyd ar gyfer y dyfodol. Prif bwrrpas darparu'r ysgol newydd yw gwasanaethu disgblion fyddai'n byw

yn y datblygiadau tai newydd - bydd y ddarpariaeth newydd yn angenrheidiol ac yn uniongyrchol gymesur â rhagamcan nifer y disgyblion o'r datblygiad.

Adeg ei sefydlu, ni fyddai cyfnod cyntaf y datblygiad tai yn hollol gyflawn. Rhagwelir y bydd cyfnod hwn y datblygiad yn gyflawn a rhywun ym mhob un o'r anheddu rhwng 2022 a 2024.

Mae datblygwr datblygiad Plasdŵr yn bwriadu codi adeilad ysgol newydd dau ddosbarth i bob blwyddyn mewn un cyfnod i wasanaethu'r datblygiad. Byddai hyn yn rhoi digon o le i nifer y disgyblion y disgwylir iddynt fyw yn y datblygiad ac a fydd angen llefydd mewn ysgolion cynradd pan fo'r 630 annedd arfaethedig wedi eu cwblhau.

Byddai cynhwysedd ychwanegol yr ysgol o 2DBB yn ddigon i gwrdd ag anghenion y datblygiad. Byddai'r ysgol hefyd yn darparu digon o le dros ben i gwrdd â'r galw a ragamcanwyd am lefydd mewn ysgolion o'r 290 annedd a gynlluniwyd ar y safle i'r de o Heol Pentre-baen (cyfnod 2), a rhan o'r galw a ragamcanwyd o safle fwy Gogledd Orllewin Caerdydd o hyd at 5,000 o anheddu.

Cyfyngir maint y tir ar gyfer safle'r ysgol gynradd arfaethedig yng nghanol yr ardal i uchafswm o 1.4ha er mwyn cydymffurfio â chyfngiadau PADHI y Weithrediaeth lechyd a Diogelwch yng nghyswilt prif gyflenwad nwy pwysedd uchel sydd yno eisoes. Mae safle'r ysgol hon yn ddigon mawr ar gyfer ysgol gynradd dau ddosbarth derbyn ynghyd â chae chwarae ar y safle.

### 3 Asesu'r effaith ar y Nodweddion Gwarchodedig

#### 3.1 Oedran

A fydd y Polisi/Strategaeth/Prosiect/Gweithdrefn/Gwasanaeth/Swyddogaeth hwn yn cael **effaith wahaniaethol [cadarnhaol/negyddol]** ar bobl iau/hŷn?

	Bydd	Na	D/G
3 i 11 oed	x		

11 i 18 oed	x		
18 - 65 oed	x		
Dros 65 oed	x		

Rhowch fanylion /canlyniadau'r effaith wahaniaethol, a rhoi tystiolaeth i gefnogi, os oes peth.

### Darpariaeth addysg (3 – 11 oed)

Byddai'r cynnig yn darparu llefydd i ddisgyblion mewn lleoliadau cyfrwng-Saesneg a chyfrwng-Cymraeg i oedrannau 3 – 11

Mae'r ddarpariaeth hon felly yn ddibynnol ar oedran ac felly heb fod yn hygrych i ddisgyblion y tu allan i'r ystod oedran hwn, nac oedolion, naill ai'n lleol neu yn y gymuned ehangach. Yn y cyd-destun hwn, ystyriwyd y canlynol:

- Y gofyn am ddigon o le i gwrdd â'r galw a ragamcanwyd ar gyfer cymuned o ddisgyblion cyfrwng-Saesneg a chyfrwng-Cymraeg yn y datblygiad i'r gogledd a'r de o Heol Llantrisant;
- Ni fyddai cyfraniadau A106 yn caniatáu i'r Cyngor fuddsoddi mewn ysgolion i ddatrys anghenion sy'n bod eisoes. Gellir ceisio cyfraniadau yn unig lle bydd ysgolion sy'n lleol i'r datblygiad yn parhau i fod yn llawn, a bod angen ehangu'r ddarpariaeth naill ai trwy ehangu'r ysgolion presennol neu godi rhai newydd. Rhaid i dir, adeiladau neu gyfraniadau ariannol fod yn uniongyrchol gymesur â'r anghenion sy'n deillio o ddatblygiad.

Pa gam(au) y gallwch gymryd i ymdrin â'r effaith wahaniaethol?

Mae'r cyllid ar gyfer y cynnig hwn wedi ei briodoli ar oblygiadau cynllunio A106. O ganlyniad, nid yw'r arian hwn ar gael i dalu am brosiectau gyda chylch gorchwyl ehangach na chwrdd â gofynion darpariaeth addysgol o ganlyniad i'r datblygiad hwn.

Mae gan y cyngor ddyletswydd statudol i ddarparu llefydd i ddisgyblion i gwrdd ag anghenion pob disgybl yng Nghaerdydd. Fel rhan o'r agwedd strategol hon, rhagwelir galw seiliedig ar y canlynol:

- Poblogaethau diweddar a hanesyddol y gwyddys sy'n byw ym mhob ardal gan ddefnyddio data'r GIG;

- Niferoedd diweddar a hanesyddol ar y llyfrau wedi eu cymryd o CYBLD (Cyfrifiad Ysgolion Blynnyddol ar Lefel Disgyblion) am ysgolion Caerdydd;
- Canrannau diweddar a hanesyddol o blant yn mynchyu ysgolion cymunedol ac ysgolion ffydd cyfrwng-Saesneg a chyfrwng-Cymraeg.

Mae darpariaeth ar gyfer grwpiau oedran nad ydynt yn dod o fewn cwmpas y cynnig hwn wedi ei ystyried fel rhan o weithredu rhaglen Ysgolion yr 21ain Ganrif gan yr awdurdod lleol, sydd yn cynnwys darparu llefydd mewn ysgolion ar bob cyfnod o addysg.

Ystyrir bod y prosiect yn gynnig dilys i gwrdd â nod a ddymunir

**Os nad oes effaith wahaniaethol, esboniwrch y rheswm/rhesymau dros yr asesiad hwn:**

## Anabledd a Mynediad

A fydd y Polisi/Strategaeth/Prosiect/Gweithdrefn/Gwasanaeth/Swyddogaeth hwn yn cael **effaith wahaniaethol [cadarnhaol/negyddol]** ar bobl anabl?

	Bydd	Na	D/G
Nam Clyw		x	
Nam Corfforol		x	
Nam Golwg		x	
Anabledd Dysgu		x	
Salwch neu Gyflwr Iechyd Tymor-hir			x
Iechyd Meddwl			x
Camddefnyddio Sylweddau			x
Arall			x

**Rhowch fanylion /canlyniadau'r effaith wahaniaethol, a rhoi tystiolaeth i gefnogi, os oes peth.**

<b>Pa gam(au) y gallwch gymryd i ymdrin â'r effaith wahaniaethol?</b>
<b>Os nad oes effaith wahaniaethol, esboniwch y rheswm/rhesymau dros yr asesiad hwn:</b>

**Hygyrchedd y lle**

Petai'r cynnig yn mynd rhagddo, byddid yn cynnal asesiad effaith cydraddoldeb i nodi hygyrchedd i safle'r ysgol newydd. Byddai'r asesiad effaith cydraddoldeb yn ystyried polisiau megis Deddf Cydraddoldeb 2010, TAN 12: Dylunio 2014 yn ogystal â rheoliadau fel BS8300, Rhan M a Bwletinau Adeiladu perthnasol.

### 3.3 Ailbennu Rhywedd

A fydd y Polisi/Strategaeth/Prosiect/Gweithdrefn/Gwasanaeth/Swyddogaeth yn cael **effaith wahaniaethol [cadarnhaol/negyddol]** ar bobl drawsryweddol?

	Bydd	Na	D/G
<b>Pobl Drawsryweddol</b> (Pobl sydd yn bwriadu mynd trwy, yn mynd trwy, neu wedi mynd trwy broses [neu ran o broses] i ailbennu eu rhyw trwy newid priodweddu ffisiolegol neu briodweddu eraill eu rhyw)		x	

<b>Rhowch fanylion /canlyniadau'r effaith wahaniaethol, a rhoi tystiolaeth i gefnogi, os oes peth.</b>
<b>Pa gam(au) y gallwch gymryd i ymdrin â'r effaith wahaniaethol?</b>
<b>Os nad oes effaith wahaniaethol, esboniwch y rheswm/rhesymau dros yr asesiad hwn:</b>
Byddid yn defnyddio gweithdrefn y Cyngor i reoli newidiadau staffio sy'n codi o ad-drefnu wrth weithredu unrhyw newidiadau o ganlyniad i'r cynnig hwn. Byddai hyn yn gwneud yn siŵr fod arferion da yn cael eu dilyn, gan gynnwys cymhwysyo polisiau'r Cyngor ar gyfleoedd cyfartal.

Byddai angen i'r cynnig sicrhau cydymffurfio â pholisïau'r Cyngor ar gyfartal.

### 3.4. Priodas a Phartneriaeth Sifil

A fydd y Polisi/Strategaeth/Prosiect/Gweithdrefn/Gwasanaeth/Swyddogaeth yn cael **effaith wahaniaethol [cadarnhaol/negyddol]** ar briodas a phartneriaeth sifil?

	Bydd	Na	D/G
Priodas			X
Partneriaeth Sifil			X

**Rhowch fanylion /canlyniadau'r effaith wahaniaethol, a rhoi tystiolaeth i gefnogi, os oes peth.**

**Pa gam(au) y gallwch gymryd i ymdrin â'r effaith wahaniaethol?**

**Os nad oes effaith wahaniaethol, esboniwrch y rheswm/rhesymau dros yr asesiad hwn:**

D/G

### Beichiogrwydd a Mamolaeth

A fydd y Polisi/Strategaeth/Prosiect/Gweithdrefn/Gwasanaeth/Swyddogaeth yn cael **effaith wahaniaethol [cadarnhaol/negyddol]** ar feichiogrwydd a mamolaeth?

	Bydd	Na	D/G
Beichiogrwydd			
Mamolaeth			D/G

**Rhowch fanylion /canlyniadau'r effaith wahaniaethol, a rhoi tystiolaeth i gefnogi, os oes peth.**

**Pa gam(au) y gallwch gymryd i ymdrin â'r effaith wahaniaethol?**

**Os nad oes effaith wahaniaethol, esboniwrch y rheswm/rhesymau dros yr asesiad hwn:**

## 3.6

Byddid yn defnyddio gweithdrefn y Cyngor ar gyfer sicrhau gofynion staffio i weithredu'r cynnig hwn. Byddai hyn yn gwneud yn siŵr fod arferion da yn cael eu dilyn, gan gynnwys cymhwysos polisiau'r Cyngor ar gyfleoedd cyfartal.

Petai'r cynnig yn mynd rhagddo, byddid yn cynnal asesiad effaith cydraddoldeb i nodi hygyrchedd i safle'r ysgol newydd. Byddai'r asesiad effaith cydraddoldeb yn ystyried polisiau Deddf Cydraddoldeb 2010, TAN 12: Dylunio 2014 yn ogystal â rheoliadau fel BS8300, Rhan M a Bwletinau Adeiladu perthnasol.

## Hil

A fydd y Polisi/Strategaeth/Prosiect//Gweithdrefn/Gwasanaeth/Swyddogaeth yn cael **effaith wahaniaethol [cadarnhaol/negyddol]** ar y grwpiau canlynol?

	Bydd	Na	D/G
Gwyn	x		
Cymysg / Grwpiau Ethnig Lluosog	x		
Asiaidd / Asiaidd Prydeinig	x		
Du / Africanaidd / Caribiaidd / Du Prydeinig	x		
Grwpiau Ethnig Eraill	x		

**Rhowch fanylion /canlyniadau'r effaith wahaniaethol, a rhoi tystiolaeth i gefnogi, os oes peth.**

Byddai'r cynnig yn cael mwy o effaith ar y boblogaeth sy'n agos at y datblygiad nac ar y ddinas yn ei chyfarwydd. Os oes yn y boblogaeth leol hon gymysgedd o hiliau sy'n anghymesur â'r hyn a geir fel rheol ar draws y ddinas, mae posibilrwydd i'r cynnig gael effaith wahaniaethol ar y gymuned hon o gymharu â phoblogaeth ehangach yr awdurdod lleol

**Pa gam(au) y gallwch gymryd i ymdrin â'r effaith wahaniaethol?**

Byddai'r ddarpariaeth arfaethedig yn agored i bob grŵp ethnig a byddai'n rhaid sicrhau cydymffurfio â pholisiau'r Cyngor ar gyfleoedd cyfartal.

**Os nad oes effaith wahaniaethol, esboniwr y rheswm/rhesymau dros yr asesiad hwn:**

## 3.7 Crefydd, Cred neu Ddifyg Cred

A fydd y Polisi/Strategaeth/Prosiect/Gweithdrefn/Gwasanaeth/Swyddogaeth yn cael **effaith wahaniaethol**

**[cadarnhaol/negyddol]** ar bobl o grefyddau, credoau neu ddiffyg credoau gwahanol?

	Bydd	Na	D/G
Bwdistaidd		x	
Cristion		x	
Hindŵ		x	
Dyniaethol		x	
Iddewig		x	
Mwslemaidd		x	
Sîc		x	
Arall		x	

**Rhowch fanylion /canlyniadau'r effaith wahaniaethol, a rhoi tystiolaeth i gefnogi, os oes peth.**

**Pa gam(au) y gallwch gymryd i ymdrin â'r effaith wahaniaethol?**

**Os nad oes effaith wahaniaethol, esboniwch y rheswm/rhesymau dros yr asesiad hwn:**

Y staff uwch mewn ysgol fyddai yn y sefyllfa orau i reoli amrywiaeth o ran cred. (e.e. darparu lle ar gyfer gweddio).

## Rhyw

A fydd y Polisi/Strategaeth/Prosiect/Gweithdrefn/Gwasanaeth/Swyddogaeth yn cael **effaith wahaniaethol [cadarnhaol/negyddol]** ar ddynion a/neu fenywod?

	Bydd	Na	D/G
Dynion		x	
Menywod		x	

**Rhowch fanylion /canlyniadau'r effaith wahaniaethol, a rhoi tystiolaeth i gefnogi, os oes peth.**

**Pa gam(au) y gallwch gymryd i ymdrin â'r effaith wahaniaethol?**

**Os nad oes effaith wahaniaethol, esboniwch y rheswm/rhesymau dros yr asesiad hwn:**

Mae darpariaeth ysgolion a gynhelir yn derbyn disgylion o'r ddau ryw, a byddai hyn yn parhau.

Byddid yn defnyddio gweithdrefn y Cyngor i reoli newidiadau staffio sy'n codi o ad-drefnu wrth weithredu unrhyw newidiadau o ganlyniad i'r cynnig hwn. Byddai hyn yn gwneud yn siŵr fod arferion da yn cael eu dilyn, gan gynnwys cymhwysyo polisiau'r Cyngor ar gyfle cyfartal.

### 3.9 Cyfeiriadedd Rhywiol

A fydd y Polisi/Strategaeth/Prosiect/Gweithdrefn/Gwasanaeth/Swyddogaeth yn cael **effaith wahaniaethol [cadarnhaol/negyddol]** ar y grwpiau isod?

	Bydd	Na	D/G
Deurywiol		x	
Dynion Hoyw		x	
Merched Hoyw		x	
Cyfunrywiol		x	

**Rhowch fanylion /canlyniadau'r effaith wahaniaethol, a rhoi tystiolaeth i gefnogi, os oes peth.**

**Pa gam(au) y gallwch gymryd i ymdrin â'r effaith wahaniaethol?**

**Os nad oes effaith wahaniaethol, esboniwrch y rheswm/rhesymau dros yr asesiad hwn:**

(Ofnau y gall cyfeiriadedd rhywiol effeithio ar gyfleoedd recriwtio)

Mae tystiolaeth a gasglwyd gan y grŵp lobio Stonewall yn honni bod pobl Lesbiaidd, Hoyw a Deurywiol yn debyg o brofi camwahaniaethu wrth recriwtio i waith.

Byddid yn defnyddio gweithdrefn y Cyngor i reoli newidiadau staffio sy'n codi o ad-drefnu wrth weithredu unrhyw newidiadau o ganlyniad i'r cynnig hwn. Byddai hyn yn gwneud yn siŵr fod arferion da yn cael eu dilyn, gan gynnwys cymhwysyo polisiau'r Cyngor ar gyfle cyfartal.

### 3.10 Iaith

A fydd y Polisi/Strategaeth/Prosiect/Gweithdrefn/Gwasanaeth/Swyddogaeth yn cael **effaith wahaniaethol [cadarnhaol/negyddol]** ar yr iaith Gymraeg?

	<b>Bydd</b>	<b>Na</b>	<b>D/G</b>
Y Gymraeg	x		
leithoedd eraill		x	

**Rhowch fanylion /canlyniadau'r effaith wahaniaethol, a rhoi tystiolaeth i gefnogi, os oes peth.**

**Pa gam(au) y gallwch gymryd i ymdrin â'r effaith wahaniaethol?**

**Os nad oes effaith gwahaniaethol, esboniwch y rheswm/rhesymau dros yr asesiad hwn:**

### **Cefnogaeth i'r iaith**

Ni fydd y cynnig yn effeithio'n uniongyrchol ar lefel y gefnogaeth a ddarperir. Mae dyrannu athrawon a chymorthydion fel arfer yn digwydd am gyfnod y flwyddyn academaidd, ond fe all newid trwy gydol y flwyddyn i gwrdd ag amrywiadau yn y galw.

### **Effaith y cynnig ar yr iaith Gymraeg**

Rhagwelir mai cadarnhaol fydd yr effaith ar yr iaith Gymraeg o ganlyniad i'r cynigion hyn.

Mae'r cynigion a amlinellir yn yr adroddiad hwn yn ceisio asio gyda Strategaeth Caerdydd Ddwylieithog ac yn cefnogi'n gryf strategaeth Llywodraeth Cymru ar gyfer yr iaith Gymraeg trwy gyfrannu at y targedau a osodir allan yn strategaeth Cymraeg 2050.

Mae'r Cyngor yn gweithio'n agos ac yn adeiladol gyda phartneriaid ar ei Fforwm Addysg Gymraeg, sy'n cynnwys cynrychiolwyr o addysg feithrin, cynradd, uwchradd a phellach, gofal plant, RhAG a Llywodraeth Cymru. Mae'r Fforwm yn rhoi gwybodaeth gyda chynllunio llefydd cyfrwng-Cymraeg, er mwyn parhau i sbarduno cynllun y Cyngor i gael cynnydd cynaliadwy yn nifer y dysgwyr mewn ysgolion cyfrwng-Cymraeg a'r rhai sy'n dysgu Cymraeg mewn ysgolion cyfrwng-Saesneg.

Mae'r Cyngor, a'u partneriaid ar y Fforwm Addysg Gymraeg, wedi ymrwymo i gynyddu nifer y disgylion sy'n derbyn eu haddysg trwy gyfrwng y Gymraeg, i gwrdd â'r targedau yn CSGA Caerdydd, ac i gwrdd â'r targedau yn strategaeth Cymraeg 2050 Llywodraeth Cymru.

Mae'r Cyngor yn monitro cyfraddau genedigaethau, niferoedd sy'n debygol o fod mewn tai y bwriedir eu codi, a phatrymau'r sawl sy'n dewis darpariaeth cyfrwng-Cymraeg ar oedrannau

cynradd ac uwchradd, gyda golwg ar gyflwyno cynlluniau priodol i gwrdd ag unrhyw gynnydd yn y galw.

Rhaid i'r Cyngor wneud yn siŵr fod ehangu'r ddarpariaeth ysgolion yn cael ei ddwym ymlaen mewn dull strategol ac amserol, nad yw'n peryglu'r ddarpariaeth bresennol. Byddai ehangu'r ddarpariaeth ysgolion cyfrwng-Cymraeg yn sydyn neu yn sylweddol o raid yn cael effaith ar y nifer fyddai'n cymryd llefydd mewn ysgolion eraill, a byddai hyn yn ei dro yn cael effaith ar allu ysgolion i gydbwyso cyllidebau a denu neu gadw staff.

Mae dyheadau'r Cyngor o ran cynyddu nifer y siaradwyr Cymraeg, a Chymraeg 2050 Llywodraeth Cymru, yn golygu newid sylweddol. Mae Cymraeg 2050 yn gosod targedau cenedlaethol o 40% o ddysgwyr yn derbyn eu haddysg mewn ysgolion cyfrwng-Cymraeg, a 30% ymhellach o ddysgwyr sy'n derbyn eu haddysg mewn ysgolion cyfrwng-Saesneg yn dod yn rhugl yn y Gymraeg. Ar hyn o bryd, tua 17% o blant Caerdydd sy'n dod i mewn i addysg gynradd sydd yn cael eu haddysg mewn ysgolion neu ddosbarthiadau cyfrwng-Cymraeg.

Bwriad y cais hwn yw cynyddu nifer y llefydd sydd ar gael mewn ysgolion cynradd cyfrwng-Cymraeg yn yr ardal, ac y mae am weithredu'r newid yn y fath fodd fel na fydd fawr o effaith negyddol ar yr ysgolion presennol.

Y mae perygl y gall darparu llefydd ychwanegol mewn ysgol gynradd cyfrwng-Cymraeg ar safle'r ysgol newydd, o fewn dalgylch Ysgol Gymraeg Coed y Gof ac o fewn dwy filltir i'r ysgol, lesteirio twf Ysgol Gymraeg Coed y Gof. Y bwriad yw lliniaru'r effaith hwn trwy drefniadau derbyn fyddai'n cyfyngu mynediad i ddarpariaeth yr ysgol newydd adeg ei sefydlu.

Mae'r cais hwn hefyd am gynyddu nifer y dysgwyr y mae eu rhieni am iddynt gael eu haddysg yn bennaf trwy gyfrwng y Saesneg, fydd mewn sefyllfa dda i ddod yn ddwyieithog ar ddiwedd eu haddysg statudol.

Byddai darparu 210 o lefydd ychwanegol mewn ysgolion cynradd cyfrwng-Cymraeg yn golygu cynyddu'r gyfrwng gyffredinol o lefydd cyfrwng-Cymraeg yn y ddinas gyfan.

Trwy ddarparu 210 o lefydd mewn ysgol gynradd a ddiffinnir fel un cyfrwng-Saesneg yn bennaf ond gyda chryn ddefnydd o'r Gymraeg, a gefnogir yn agos gan ysgol cyfrwng-Cymraeg ar yr un safle a chydag un strwythur rheoli, y bwriad fydd cynyddu cyfran gyffredinol y dinasyddion dwyieithog yng Nghaerdydd.

Ystyri'r felly y bydd cynnig i sefydlu ysgol gynradd dwy ffrwd yn cefnogi galw cyfrwng Saesneg, galw cyfrwng Cymraeg, ac yn hyrwyddo dwyieithrwydd.

#### 4. Ymgynghori ac Ymwneud

Pa drefniadau a wnaed i ymgynghori/ymgysylltu â'r gwahanol Grwpiau Cydraddoldeb?

Byddai Swyddog Hygyrchedd y Cyngor yn cael cyfle i wneud sylwadau am y cynllun.

#### 5. Crynodeb o Gamau [A restrir yn yr Adrannau uchod]

Grwpiau	Camau
Oedran	Gweler y camau generig cyffredinol isod
Anabledd	
Ailbennu	
Rhywedd	
Priodas a Phartneriaeth	
Sifil	
Beichiogrwydd a Mamolaeth	
Hil	
Crefydd/Cred	
Rhyw	
Cyfeiriadedd	
Rhywiol	
Iaith	
Generig Cyffredinol [cymwys i'r holl grwpiau uchod]	Petai'r cynnig yn mynd rhagddo, byddid yn cynnal asesiad effaith cydraddoldeb i nodi hygyrchedd i safle'r ysgol newydd. Byddai'r asesiad effaith cydraddoldeb yn ystyried polisiau megis Deddf Cydraddoldeb 2010, TAN 12: Dylunio 2014 yn ogystal â rheoliadau fel BS8300, Rhan M a Bwletinau Adeiladu perthnasol.

#### 6. Camau Pellach

Dylai unrhyw argymhellion am gamau y bwriadwch eu cymryd o ganlyniad i'r Asesiad Effaith Cydraddoldeb hwn (a restrir yn y Crynodeb o Gamau) gael eu cynnwys fel rhan o Gynllun Busnes eich Maes Gwasanaeth a gaiff ei fonitro yn rheolaidd.

## 7.

### Awdurdodi

Dylai'r Templed gael ei gwblhau gan Swyddog Arweiniol y Polisi/Strategaeth/Prosiect/Swyddogaeth a nodwyd a'i gymeradwyo gan y Rheolwr priodol ym mhob Maes Gwasanaeth.

Cwblhawyd gan: Rachel Burgess Willis	Dyddiad: Mawrth 2019
Dynodiad: Swyddog Polisi, Cydraddoldeb ac Adroddiadau	
Cymeradwywyd gan:	
Dynodiad:	
Maes Gwasanaeth:	

- 7.1 Wedi cwblhau'r Asesiad hwn, a fyddwch cystal â gwneud yn siwr fod y Ffurflen yn cael ei phostio ar Dudalen eich Cyfarwyddiaeth ar CIS – *Ledled y Cyngor / Systemau Rheoli/Asesiadau Effaith Cydraddoldeb* – fel bod cofnod o bob asesiad a gynhaliwyd yn y Cyngor.  
Am fwy o wybodaeth neu gymorth, cysylltwch â Thîm Canoli ar y Dinesydd ar 029 2087 3059 neu e-bostiwch [citizenfocus@cardiff.gov.uk](mailto:citizenfocus@cardiff.gov.uk)

## Tudalen 20 Defndir

Yn 2008, cynhaliwyd Asesiad Amgylcheddol Strategol (AAS) ôl-weithredol o 21<sup>ain</sup> Ganrif Caerdydd: Fframwaith Strategol ar gyfer Rhaglen Wella Adeiladau Sgol (a gyhoeddwyd yn 2006) ar sail y canllawiau sy'n cefnogi Cyfarwyddeb AAS Ewropeaidd 2001/42/EC.

Sicrhawyd ansawdd yr agwedd ôl-weithredol at asesu gan ymgynghorydd allanol a phennodd eu hadolygiad cydymffurfio annibynnol hwy fod yr adroddiad oedd yn rhoi manylion am asesiad y fframwaith strategol yn cwrdd â'r gofynion allweddol a osodwyd allan ar gyfer adrodd am y broses AAS yn ôl gofynion y Gyfarwyddeb AAS.

Yr asesiad ôl-weithredol yw'r sail ar gyfer asesu cynigion am drefniadaeth ysgolion yn awr ac yn y dyfodol ar lefel strategol.

Petai cynnig yn mynd rhagddo, byddai asesiad amgylcheddol yn cael ei gynnal fel rhan o'r broses o wneud cais cynllunio.

**I ofyn am gopi o asesiad y Fframwaith strategol, cysylltwch â Rachel Willis, 029 2087 3946, RWillis@caerdydd.gov.uk**

Cynnig

**Cyflwr adeiladau ysgolion presennol**

## Ansawdd a Safonau

y:

<b>xx</b>	= anghydnaus iawn; effaith negyddol iawn
<b>x</b>	= anghydnaus; effaith negyddol
<b>✓</b>	= cydnaus; effaith gadarnhaol
<b>✓✓</b>	= cydnaus iawn; effaith gadarnhaol iawn
<b>0</b>	= dim cysylltiadau; effaith niwtral
<b>? a/neu liniaru</b>	= effeithiau ansicr
<b>DDAG</b>	= dim data ar gael

Gweler penawdau'r tablau isod: \* Mae angen cymhariaeth o'r dewis cyntaf a dewis/iadau amgen posib mewn AS/AAS.

Amcan AAS Fudalen 210	Cynnig i sefydlu Ysgol gynradd newydd ffrwd ddeuol dau ddosbarth derbyn wedi ei threfnu fel un ffrwd Gymraeg ac un ffrwd Saesneg yn bennaf ond gyda defnydd helaeth o Gymraeg, y naill a'r llall â 48 o lefydd meithrin rhan-amser, o fis Medi 2021.		Gwneud dim	
	Cyfradd	Sylw/ esboniad o gydnawsedd ag Amcan AAS	Cyfradd	Sylwadau / esboniad o gydnawsedd ag amcan AAS
1. Hyrwyddo economi mwy gwyrdd trwy gyflwyno patrwm cynaliadwy o ysgolion ar draws Caerdydd	✓	Byddai'r cynnig hwn yn golygu y byddai disgylion yn mynchu ysgol newydd, addas at ddibenion yr 21 <sup>ain</sup> Ganrif, mewn adeilad fyddai'n ynni-effeithiol gyda chyfraddau defnydd uchel ac a fyddai o'r herwydd yn defnyddio ynni yn fwy effeithiol.	x	
2. Lleihau allyriadau nwyon tŷ gwydr trwy:  a) Ddylunio adeilad sy'n ynni-effeithiol a chael gwared ag adeiladau dros ben sydd o ansawdd wael b) Hyrwyddo moddau cludiant cynaliadwy	✓  x	a)  Byddai'r cynnig hwn yn golygu y byddai disgylion yn mynchu ysgol newydd, addas at ddibenion yr 21 <sup>ain</sup> Ganrif, mewn adeilad fyddai'n ynni-effeithiol gyda chyfraddau defnydd uchel ac a fyddai o'r herwydd yn defnyddio ynni yn fwy effeithiol.  b)  - Rhoddir pwyslais ar deithio trwy fodau llesol lle bo hyn yn bosib ac ar ddarparu'r cyfleusterau a'r cyfleoedd yn yr ysgol i fyfyrwyr deithio ar droed, ar feic neu ar gludiant cyhoeddus. Mae annog teithio llesol i'r ysgol yn ffordd bwysig iawn o gynyddu lefelau gweithgaredd corfforol mewn plant a mynd i'r afael â phroblem	x	Gweler y sylwadau nesaf ar Amcan 1 AAS uchod

<b>Amcan AAS</b>	<b>Cynnig i sefydlu Ysgol gynradd newydd ffrwd ddeuol dau ddosbarth derbyn wedi ei threfnu fel un ffrwd Gymraeg ac un ffrwd Saesneg yn bennaf ond gyda defnydd helaeth o Gymraeg, y naill a'r llall â 48 o lefydd meithrin rhan-amser, o fis Medi 2021.</b>	Gwneud dim		
	<b>Cyfradd</b>	<b>Sylw/ esboniad o gydnawsedd ag Amcan AAS</b>	<b>Cyfradd</b>	<b>Sylwadau / esboniad o gydnawsedd ag amcan AAS</b>
a systemau cludiant integredig	<p>gynyddol gordewdra mewn plant. Mae lleihau tagfeydd wrth glwyd yr ysgol yn allweddol wrth sicrhau diogelwch disgyblion a lliniaru effeithiau ar y gymdogaeth leol.</p> <ul style="list-style-type: none"> <li>- Nid yw Cyngor Caerdydd ar y cyfan yn cefnogi darparu llefydd i rieni barcio. Y rheswm am hyn yw y byddai darpariaeth o'r fath yn hyrwyddo teithio mewn ceir i'r ysgol, yn cynhyrchu traffig yn lleol, yn cyfrannu at dagfeydd ac yn lleihau diogelwch disgyblion. Yn gyffredinol, darperir cyfleusterau parcio mewn ysgolion ar gyfer y staff yn unig ac i gwrrdd ag anghenion rhedeg yr ysgol.</li> <li>- Byddai rheoli mynediad at safle'r ysgol cyn/yn ystod yr amseroedd y bydd rhieni yn golwng a chodi plant yn helpu gydag iechyd a diogelwch.</li> <li>- Dywed Canllawiau Cynllunio Atodol Caerdydd (Mynediad, Cylchredeg a Safonau Parcio 2010) fod gofyn i bob ysgol newydd neu rai sy'n ehangu ddatblygu Cynllun Teithio i'w gyflwyno gyda chais cynllunio. Cynllun polisi a gweithredu yw Cynllun Teithio i wneud y canlynol: <ul style="list-style-type: none"> <li>○ rheoli cludiant yn effeithiol</li> <li>○ gwella mynediad trwy bob dull o deithio i weithwyr, ymwelwyr, cleifion a myfyrwyr</li> <li>○ annog cludiant cynaliadwy – cerdded, beicio, cludiant cyhoeddus a rhannu car</li> <li>○ lleihau'r defnydd o geir.</li> </ul> </li> <li>- Bwriadwyd Cynllun Teithio Ysgol yn benodol i ymdrin ag anghenion cludiant disgyblion a staff a bydd yn amrywio yn ôl natur yr addysg a ddarperir a dalgylch yr ysgol.</li> </ul> <p>Byddai parthau diogelwch ysgol yn cael eu sefydlu i ymdrin â phryderon iechyd a diogelwch yn deillio o fwy o lif traffig yng nghyffiniau'r ysgol.</p>			

<b>Amcan AAS</b>	<b>Cynnig i sefydlu Ysgol gynradd newydd ffrwd ddeuol dau ddosbarth derbyn wedi ei threfnu fel un ffrwd Gymraeg ac un ffrwd Saesneg yn bennaf ond gyda defnydd helaeth o Gymraeg, y naill a'r llall â 48 o lefydd meithrin rhan-amser, o fis Medi 2021.</b>		Gwneud dim	
	<b>Cyfradd</b>	<b>Sylw/ esboniad o gydnawsedd ag Amcan AAS</b>	<b>Cyfradd</b>	<b>Sylwadau / esboniad o gydnawsedd ag amcan AAS</b>
3. <i>Hyrwyddo iechyd a lles trwy warchod a gwella Mannau Agored Cyhoeddus (MAC) a gwella mynediad at MAC</i>	<b>0</b>	Gan nad yw'r cyhoedd yn cael mynd at y fan agored ar safle ysgol ac o'i chwmpas, unig effaith posib y dewis ar fan agored fyddai colli gwerth amwynder gweledol. Ni ddylai fod unrhyw effaith gan mai adnewyddu ac ail-lunio mannau mewnol yw'r cynllun arfaethedig.	x	Gweler y sylwadau nesaf ar Amcan 1 AAS uchod
4. <i>Lleihau llygred aero, goleuni a sŵn cysylltiedig â datblygu adeiladau a thagfeydd traffig</i>	<b>0</b> <b>0</b>	a) Byddai'r sawl sy'n cyflwyno'r cynllun yn cael eu hannog i lleihau llygred aero, goleuni a sŵn yn ystod unrhyw waith.  b) I leihau tagfeydd a'r llygred cysylltiedig, byddid yn ystyried y canlynol: <ul style="list-style-type: none"><li>▪ Ffurfioli'r drefn o barcio y tu allan i'r ysgol er mwyn peidio ag annog parcio annio gel a helpu gyda gorfodi.</li><li>▪ Bod yr ysgol yn cytuno i Gynllun Teithio fydd yn cynnwys cynlluniau megis y cynllun Parcio'n Ddiogel / Cerdoded yn Ddiogel sydd yn annog rhieni i barcio ymhellach o'r ysgol.</li></ul>	x	Gweler y sylwadau nesaf ar Amcan 1 AAS uchod
5. <i>Gwarchod a gwella bioamrywiaeth, ffllora a ffawna</i>	<b>0</b>	Ni ddylai fod unrhyw effaith gan mai adnewyddu ac ail-lunio mannau mewnol yw'r cynllun arfaethedig.	x	Gweler y sylwadau nesaf ar Amcan 1 AAS uchod
6. <i>Gwarchod a gwella tirwedd (cynefinoedd/mwyn derau gweledol)</i>	<b>0</b>	Ni ddylai fod unrhyw effaith gan mai adnewyddu ac ail-lunio mannau mewnol yw'r cynllun arfaethedig.	x	Gweler y sylwadau nesaf ar Amcan 1 AAS uchod

<b>Amcan AAS</b>	<b>Cynnig i sefydlu Ysgol gynradd newydd ffrwd ddeuol dau ddosbarth derbyn wedi ei threfnu fel un ffrwd Gymraeg ac un ffrwd Saesneg yn bennaf ond gyda defnydd helaeth o Gymraeg, y naill a'r llall â 48 o lefydd meithrin rhan-amser, o fis Medi 2021.</b>		Gwneud dim	
	<b>Cyfradd</b>	<b>Sylw/ esboniad o gydnawsedd ag Amcan AAS</b>	<b>Cyfradd</b>	<b>Sylwadau / esboniad o gydnawsedd ag amcan AAS</b>
7. Cadw adnoddau dŵr a chynyddu effeithlonrwydd dŵr mewn datblygiadau newydd a hyrwyddo systemau draenio trefol cynaliadwy	<b>0</b>	Ni fyddai hwn yng nghwmpas y cynllun gan mai adnewyddu ac ail-lunio mannau mewnol yw'r cynllun arfaethedig.	x	Gweler y sylwadau nesaf ar Amcan 1 AAS uchod
8. <i>Hyrwyddo adfywio trwy gyflwyno ysgolion cynhwysol fydd yn gwella cydraddoldeb cyfle a mynediad i bawb</i>	<b>0</b>	Gwneir hyn trwy wneud i ysgolion ganoli ar y gymuned – agar cyfleusterau i'r cyhoedd, e.e. dosbarthiadau nos.  Petai'r cynnig yn mynd rhagddo, byddid yn cynnal asesiad effaith cydraddoldeb i nodi hygyrchedd i safle'r ysgol newydd. Byddai'r asesiad effaith cydraddoldeb yn ystyried polisiau megis Deddf Cydraddoldeb 2010, TAN 12: Design 2014 yn ogystal â rheoliadau fel BS8300, Rhan M a Bwletinau Adeiladu perthnasol.	x	Gweler y sylwadau nesaf ar Amcan 1 AAS uchod
9. Gwarchod a ugwalla asedau hanesyddol cofrestredig ar safle arfaethedig yr ysgol newydd.	<b>0</b>	Nid oes asedau hanesyddol cofrestredig ar safle arfaethedig yr ysgol newydd.	x	Gweler y sylwadau nesaf ar Amcan 1 AAS uchod

## Casgliad

Aseswyd y cynnig fel un cydnaws â'r amcanion amgylcheddol a ddefnyddiwyd i asesu nod ac egwyddorion 'Ysgolion yr 21<sup>ain</sup> Ganrif: Fframwaith Strategol ar gyfer Rhaglen Wella Adeiladau Ysgol' sydd yn sail i gynigion am drefniadaeth ysgolion.

Lle mae'r asesiad wedi nodi effaith amgylcheddol negyddol posib o ran cynnydd yn swm y traffig (Amcan 4), rhoddir manylion am fesurau i liniaru'r effaith.

Y cynnig yw:

Sefydlu Ysgol gynradd newydd ffrwd ddeuol dau ddosbarth derbyn wedi ei threfnu fel un ffrwd Gymraeg ac un ffrwd Saesneg yn bennaf ond gyda defnydd helaeth o Gymraeg, y naill a'r llall â 48 o lefydd meithrin rhan-amser, o fis Medi 2021.

Mae'r dudalen hon yn wag yn fwriadol

**CARDIFF COUNCIL  
CYNGOR CAERDYDD**

**CABINET MEETING: 18 APRIL 2019**



**RESPONSE TO THE CHILDREN AND YOUNG PEOPLE'S SCRUTINY COMMITTEE AND COMMUNITY AND ADULT SERVICES SCRUTINY COMMITTEE INQUIRY REPORT ENTITLED "PREVENTING YOUNG PEOPLE'S INVOLVEMENT IN DRUG DEALING".**

**HOUSING & COMMUNITIES (COUNCILLOR LYNDA THORNE)**

**AGENDA ITEM: 5**

**Reason for this Report**

1. To respond to the Inquiry Report entitled "Preventing Young People's Involvement in Drug Dealing" undertaken by the Task Group established by the Children and Young People's Scrutiny Committee and the Community and Adult Services Scrutiny Committee.

**Background**

2. A Joint Task and Finish Inquiry considering the issues around preventing young people's involvement in drug dealing took place between October 2017 and May 2018.
3. The Task Group comprised Members from both the Children and Young People Scrutiny Committee, the Community and Adult Services Scrutiny Committee and Ward Members from Butetown and Grangetown.
4. The Task Group heard from approximately 30 witnesses and considered the results of a survey that was completed by 413 people or groups.
5. The Inquiry report was presented to Cabinet in November 2018 and made 19 recommendations supported by associated key findings. The key findings and conclusions from the Inquiry were themed under a number of headings. These were:
  - Culture shift – the "Normalisation" of drugs
  - Impact on Communities
  - Safeguarding Young People( and their families)
  - The role of Agencies
  - Education and awareness raising
  - Crime and Enforcement

6. The recommendations of the Task Group were endorsed by both Scrutiny committees and commended to Cabinet for implementation, in consultation with the community safety board and organisations within the wider Cardiff partnership arrangements.

## **Issues**

7. The recommendations in the report have been shared with partner agencies for consideration and have been discussed at the community safety delivery board.
8. Of the 19 recommendations, 12 have been accepted, 6 accepted in principle and 1 to follow (Recommendation 17). The response to each recommendation is detailed in Appendix 1 with an explanation as to why the recommendation is either accepted, rejected or accepted in principle or in part.

## **Reasons for Recommendations**

9. To enable the Cabinet to respond to the Scrutiny report.

## **Financial Implications**

10. Whilst there are no direct financial implications arising from the report, as and when individual proposals are developed in respect of accepted recommendations, financial advice will need to be taken in order to demonstrate appropriate diligence and affordability and that it is affordable within the parameters set when Council approved the 2019/20 and the medium term revenue and capital budget.

## **Legal Implications**

11. 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) 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.
12. The Council must consult with the police, Police and Crime Commissioner and other relevant bodies before issuing Public Spaces protection Orders.
13. The Council has to satisfy its public sector duties under the Equalities Act 2010 (including specific Welsh public sector duties). Pursuant to these legal duties Councils must in making decisions have due regard to the need to (1) eliminate unlawful discrimination, (2) advance equality of opportunity and (3) foster good relations on the basis of protected characteristics.

14. The Well-Being of Future Generations (Wales) Act 2015 ('the Act') places a 'well-being duty' on public bodies aimed at achieving 7 national well-being goals for Wales - a Wales that is prosperous, resilient, healthier, more equal, has cohesive communities, a vibrant culture and thriving Welsh language, and is globally responsible.
15. The well being duty also requires the Council to act in accordance with a 'sustainable development principle'. This principle requires the Council to act in a way which seeks to ensure that the needs of the present are met without compromising the ability of future generations to meet their own needs. Put simply, this means that Council decision makers must take account of the impact of their decisions on people living their lives in Wales in the future.

### **HR Implications**

16. There are no HR implications arising from this report.

### **RECOMMENDATION**

Cabinet is recommended to agree the response to the Scrutiny Committee report entitled "Preventing Young People's Involvement in Drug Dealing"

<b>SENIOR RESPONSIBLE OFFICER</b>	<b>SARAH McGILL</b> Corporate Director People & Communities
	12 April 2019

*The following appendix is attached:*

Appendix 1 - Response to Recommendations

*The following background papers have been taken into account:*

An Inquiry report of the Children and Young People Scrutiny Committee & Community and Adult Services Scrutiny Committee entitled 'Preventing Young People's Involvement in Drug Dealing' (Nov 2018).

Mae'r dudalen hon yn wag yn fwriadol

**Cabinet Response to Recommendations**

**Impact on Communities**

R1. Improve community engagement and consultation in terms of tackling drug-related crime by replicating the locality based partnership model and strengths based approach model implemented in Butetown, via a sequenced roll-out to other parts of Cardiff.

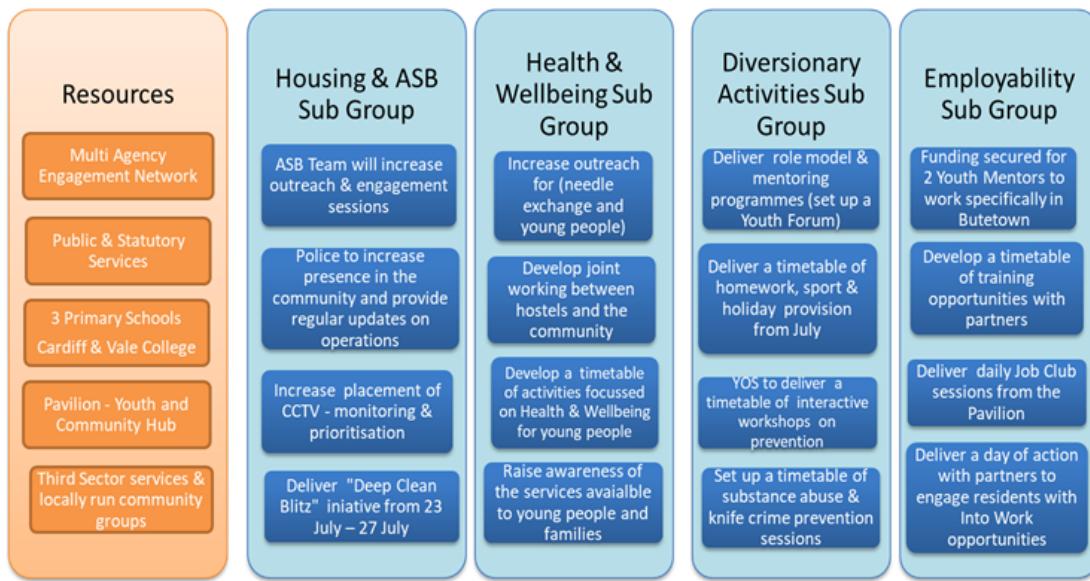
***Supported by Key findings 2-3***

This recommendation is **ACCEPTED**.

**Background:**

Following concerns raised that young people in Butetown were becoming involved in crime and Anti-Social Behaviour (ASB) (specifically drug related), and issues regarding drug use and disposal of needles in local parks, a multiagency workshop was held including representatives from various Council services, Police, health services (statutory and 3<sup>rd</sup> sector), schools, housing associations and Probation. 4 key themes were identified as shown below, together with the resources in the local community and working groups were set up to take forward the actions identified.

**Butetown 2018 – Multi Agency Response to Crime and Anti-Social Behaviour Issues.**



**What has been achieved?**

**Improved diversionary activities and advice**

- The new Youth Hub at the Pavilion now offers a wider range of activities and support for both young people and families. The open access youth activity has

- increased with diversionary programmes during school holidays, Halloween and Bonfire night periods
- Two youth Employment Mentors and a volunteer mentor are based in Pavilion fulltime providing support and advice for career options.
  - A parent's forum now meets regularly to talk about local issues, young people and is used for sharing information.

### **Targeted community safety activity**

- Communication has improved between agencies and joint working initiatives have been delivered on some of the quick wins identified in the earlier workshop.
- 'Hot-spots' have been mapped and target hardening carried out including gating of communal areas of flats, cutting back shrubbery and measures to disrupt criminal activity. A CCTV strategy has been developed.
- Engagement with residents to encourage them to report anti-social and criminal behaviour by increasing outreach and visits by the housing ASB teams worked well alongside visible foot patrols by the Neighbourhood Police Team (NPT). This included targeted surgeries for residents of hotspot areas and warrants conducted at key addresses and feeding this back to the community on social media / PACT meetings etc. to advise what has happened.

### **Could this activity be rolled out across the city?**

#### **Diversionary activities and advice**

The further roll out of Community Inclusion Officers in the Hubs planned for 2019 will help to increase the diversionary activities available for young people.

The officers will work with community organisations and volunteers to extend provision. However to be effective city wide it is recognised that there will need to be further integration of locality based partner activity for young people.

The review of the Council's youth service, currently underway, will assist to ensure that current provision is being co-ordinated as effectively as possible and to identify service gaps or duplication. Once the review is complete a timetabled roll out of diversionary activities and advice will be planned and implemented, taking into account resource levels across the partnership.

#### **Targeted Community Safety Activity**

It is acknowledged by the Community Safety delivery board that partnership activity in this area needs to be more effectively co-ordinated and prioritised.

At a Community safety workshop event held in Butetown in October 2018, partners from across the public and third sectors agreed to prioritise activity across a more focussed number of key themes.

Area Based Working and County Lines/Exploitation were 2 of the 4 key priorities identified for 2019/20 and these priorities were developed at the Community safety delivery board in January 2019 and confirmed by the Community Safety Board at

a meeting on 26<sup>th</sup> March 2019. It was further agreed that a strengths based approach would underpin joint work across all 4 of the prioritised workstreams with a particular focus on:

- Building resilience – helping communities to respond to , withstand and recover from adverse situations and
- Addressing vulnerabilities – identifying those in the community who are subject to harm or are likely to be exposed to harm and taking action at the earliest opportunity.

Any funding requirements that are identified as part of the activity of the work streams will be reported through the Community safety board arrangements and into the Public Service Board as appropriate.

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R2. The Community Safety Board undertake a neighbourhood review to work towards formalising engagement with the community, using the resources of PACT within the new arrangements. This new arrangement should be a two-way communication tool between partners and the community.

### ***Supported by Key findings 4-7; 28***

This recommendation is **ACCEPTED**.

In January 2019, the Community Safety Delivery Board reviewed the current partnership approach to community engagement for the areas of activity that fall with its area of accountability. A new model of engagement has been recommended which is based around the following;

- **Community focused** - Engagement between services and residents is centred around the city's hubs and existing networks.
- **Asset based** - Partner resources are brought together to address issues impacting the community the Hub serves (building on the assets in the community and supporting individuals and organisations to come together to realise and develop their strengths). This will include the better integration of resources and include consideration of the PACT arrangements.
- **Bottom up and top down** - Issues are collated and escalated by community based coordinators (bottom up) and work is commissioned by the Community Safety Board based on what is added value (top down).

Arrangements already in place in Butetown will be used as a model to roll out across Cardiff as per recommendation 1 and a review of resources including the results of new approach to the integration of PACT with will be undertaken as part of this roll-out.

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R3. The volunteer portal already in place to include attracting volunteers to act as community role models and ambassadors in order to advise young people on the dangers of drug-use and involvement with drug-related crime. This voluntary scheme should be suitably funded and involve collaborative working with relevant groups and partners.

***Supported by Key findings 8-11***

This recommendation is **ACCEPTED** in principle.

The collaborative working of volunteers alongside professional advisors is a model that currently works well across all Community hubs. Further work will be undertaken to identify the scale of opportunity presented by schemes that already exist delivered by organisations such as Princes Trust, Gofal and New Link and which offer mentoring and peer support schemes, some specifically for those affected by substance misuse or mental health issues.

In addition we will review the success of the parent's forums and other work being piloted in Butetown and extend where appropriate. In February a Careers Fair themed 'Inspire Our Youth' was held in Butetown Pavilion. Over 380 people attended the event which included a Parents Panel plus Youth Inspired Professional Speakers from a range of professions and the potential to build on such events to develop community role models and ambassadors will be explored.

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R4. For the Council, through its neighbourhood partnerships, explore the use of community facilities by the community – creating a pool of volunteers; offering support and training; and explore funding opportunities, to enable the community to have access to these buildings to run clubs/groups for young people, and give them a place to go outside of normal hours.

***Supported by Key findings 10-11***

This recommendation is **ACCEPTED**.

Several Hubs already offer community groups the opportunity to open the facilities on an out of hours / weekend basis.

For this to take place the building needs to be suitably alarmed so that areas with sensitive information and equipment can be separately locked down. This is already in place in Grangetown, Llandaff North, Ely, St Mellons, Rumney, & Powerhouse Hubs. It is also proposed that the Butetown Youth Hub will also have this facility once refurbished.

Any community groups using the buildings need to have public liability insurance. Help is available for groups to become properly constituted and to apply for small grants.

Encouraging the formation of community groups and helping them to attract volunteers has been included in the role of the new Community Inclusion Officers. With the expansion of this service in 2019 there will be greater focus on developing groups to support young people.

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R5. The Council and its partners review where drug related services are located and commit to thorough community engagement in areas of the city chosen for any proposed location for drug-related services such as needle exchanges. The size of the development should be clearly explained to residents as part of this engagement process.

### ***Supported by Key findings 12-13***

This recommendation is **ACCEPTED** in Principle.

This recommendation has been considered by Health Colleagues who represent the views of the lead agency in this area of work. There was concern expressed that the consultation process should include service users as well as residents with harm reduction for all being a key consideration. The recommendation was accepted in principle and a commitment made in line with Welsh Government directives to consult with communities and appropriate statutory bodies where future drug related services are located. It was agreed that consultation should include the size of the development which should be clearly explained to residents as part of this engagement process.

The Area Planning Board for substance misuse is currently undertaking a wide ranging recommissioning process for regional substance misuse services. As part of this process comprehensive consultation with partners and communities will be undertaken.

It is important that services are recommissioned in a holistic way so as to ensure that existing vital service delivery is not compromised whilst planning for the commissioning of services to address new areas of demand.

Progress in this important area will be reported through the community safety board arrangements.

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## **Safeguarding Young People (and their Families)**

R6. The Council and partners undertake a review of current youth service provision. This should include assessing the function and developing a new model of service delivery that is more effective and fit for purpose. This should include an evaluation of the flexibility of the service and how it can meet the demand. The service could be more sessional based approach, linked up across a range of partners and be available outside of school hours and in the school holidays. There is a need to recognise the crucial role played by youth services in preventing young people's involvement with drugs and drug-related crime and that the Council should be mindful of this factor before future funding decisions are made regarding the service. If the remaining youth centres are to continue to offer young people a place to go, feel safe and be supported, budgets should be protected as much as possible, and considered as an integral part of the development of community-based services and facilities.

### ***Supported by Key findings 14-15***

This recommendation is **ACCEPTED**.

The enquiry considered whether the reduction in youth services was a contributory factor to young people's involvement with drug dealing and concluded that, "the closure of Council-run youth centres had not contributed to an increase in drug related crime". KF14. The report nonetheless acknowledges the key role of youth provision in preventative work and in support for young people at risk of involvement in drug dealing and consumption.

A significant reduction in the youth service core budget over recent years, by two thirds from the 2014 baseline, has unavoidably resulted in changed and reduced provision. The current operating model results from an extensive review in 2014 which drew on practice elsewhere in Wales and the UK. Targeted work was refocussed to achieve closer alignment with schools, and this has undoubtedly played a significant role in securing the marked reduction in young people NEET over this period. It is not the case however that all youth service provision is "education-based" (KF15) as the report suggests.

A key policy of the 2014 review was to sustain, on a significantly reduced budget, open-access, sessional provision. For this reason youth innovation grants (YIGs) were introduced, drawing on practice elsewhere, which sought to leverage increased provision from third sector providers by the issuing of grants to support open access provision for young people to complement the directly delivered provision which

continues to be offered through a reduced number of Council run venues, including Hubs.

A review of the Youth Innovation Grants is in process which will look at the added value they have delivered, the numbers of young people they have reached, where they have worked well, and where they have had limited impact. The recent restructure in the Education Directorate has strengthened alignment of the youth service with other services supporting young people. Outcomes from a review of open access provision and YIGs will inform any further changes required, including the model of open-access sessional provision, and will seek to further strengthen alignment with support for young people including those on the edge of care, those in the youth justice system, and will integrate Council provision with enhanced support for young people's mental health and wellbeing funded through the Health Authority.

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R7. The Council and partners to undertake a review of all streams of "safeguarding" related activity across the City, with a view to developing a model for intervention and prevention for young people vulnerable to drug-related crime. There is a wide range of good practice already in place in relation to child sexual exploitation, FGM, radicalisation, sex work etc. and Members agreed that pooling the expertise and knowledge from these streams would establish the links with current work and assist in developing a specific model for young people caught up in drugs. This will also provide the tools required for engaging the parents/carers and families of these young people.

***Supported by Key findings 7; 15-16***

This recommendation is **ACCEPTED**.

This work is currently underway, based on the good practice models that have been implemented to address CSE and using the same or slightly adapted processes for other forms of exploitation and managing associated risk. This includes work around young people and drug dealing.

An exploitation strategy is being drafted covering Children and Adults (Cardiff and the Vale) which will include all forms of environmental / contextual safeguarding. Subsequently an action plan will be developed for service areas highlighting the implementation and work plan around these issues. We will work closely with colleagues in the Youth Offending Service in this work.

We are keen to develop an ‘Adolescent service’ to work directly with those presenting with potentially high risk issues. This will build on the work that is currently done by Adolescent Resource Centre / Thinksafe! and the 11+ team and complement the preventative work that the Family Advice and Support service will undertake.

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R8. The Council and partners develop a “Well-being Strategy” for young people based on the strengths based approach, and using initiatives such as “Goodies in Hoodies” that had had a positive impact on tackling negative perceptions of young people.

***Supported by Key findings 7; 18-20***

This recommendation is **ACCEPTED** in Principle.

It is recognised there is a range of good practice already in place- including initiatives such as ‘goodies in hoodies’- that contribute to well-being support. Services in education, health, children and adult services and communities are being reviewed to align approaches being taken to children and young people’s wellbeing. This will include an audit of early intervention initiatives, as well as responses to complex or acute needs. Engagement with children and young people, schools and other settings also form part of this audit.

Wellbeing is a priority in the Education Service delivery plan and an integral part of the new Estyn Common Inspection Framework. The Child Friendly Cardiff Strategy is the overarching policy for promoting the wellbeing of young people and targets are being established to integrate the principles of a Children’s Rights Approach into all education plans and strategies.

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R9. The Council and its partners undertake a major review of current arrangements in relation to options available to young people who find themselves excluded from school or on reduced timetables. Schools should play a central role in this review. The review should include drawing on existing examples of good practice already in place in some of Cardiff’s schools. The review should include the identification and implementation of a number of preventative, diversionary methods to help steer young people towards a more positive life path. Sport, art, the opportunity to undertake apprenticeships and training, working within their community should all be considered to help achieve this. The review

should also consider the development of a measurement to monitor and review school practice in relation to this area.

### ***Supported by Key findings 21-24***

This recommendation is **ACCEPTED**.

The concerns expressed are recognised and highlighted in the Schools Annual Performance Report, considered by Cabinet and CYP Scrutiny January 2019. Targets have been set to address these issues. The work is part of the Education Other than at School delivery plan with five priorities

1. Improve practice through the development of access panel and protocols for pupil placement
  2. Improve commissioned provision through clearly defined aims and quality assurance.
  3. Improve local authority provision
  4. Improve processes via work with schools to retain pupils and to track pupil progress to reduce the risk of disengagement
  5. Improve the curriculum offer for learners.
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### **The Role of Agencies**

R10. The Council and its partners ensure the development and implementation of a city-wide strategy on tackling drug-related crime to highlight in particular the dangers posed by the UK-wide increase in “County Lines” activity. Part of this strategy should include a hard-hitting communications campaign involving social media platforms and more traditional advertising measures such as the use of billboards. This should be coordinated with recommendations 15 and 16.

### ***Supported by Key findings 29-31***

This recommendation is **ACCEPTED**.

The Community Safety Board has agreed 4 key priorities for 2019/20, one of which is “County Lines and Exploitation”. The work is to be progressed by a “Task & Finish” Group of key partners. The Board is currently confirming membership of this Task & Finish Group and the development of a Strategy will be explored as part of work going forward.

Communication and awareness raising options will also be considered as part of the work of this Task & Finish Group; and will be based on good practice already in place, as well as campaigns adopted elsewhere.

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R11. The Safer Communities Board ensure that relevant third sector organisations are invited to operational meetings in order to achieve a wide-ranging approach to tackling the issue of drug-related crime. All parties should then be encouraged to promote each other's services and campaigns on their respective communication platforms in order to raise public awareness. Such action would give residents clearer indication of points of contact for reporting incidents of drug-related crime.

***Supported by Key findings 25- 27***

This recommendation is **ACCEPTED**.

Representatives from the Third Sector already sit on the Community Safety Delivery Board, and the Community Safety Manager has been tasked to establish a Community Safety Network with relevant partners, including those from the third sector. Key to the success of the network will be for members to share service updates; campaigns; key messages; best practice; information sharing; and training and funding opportunities. The network will also undertake focussed pieces of work to assist the work of the Boards in areas which may include developing improved communications and awareness raising platforms; and developing a signposting toolkit. Outputs from the network will be fed back to the Community Safety Boards and will play a crucial part of the governance arrangements in relation to community safety. In addition, representatives of the third sector will play a crucial role in the work of the Task & Finish Groups, including the "County Lines and Exploitation" Group outlined in R10 above.

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R12. The Council and its partners develop and implement a system of community based operational meetings to include partners, third sector, parents and community members to share local data and intelligence in order identify hotspots, problem areas and shared solutions to the problem. This could include adopting a similar approach used by the CSE PING meetings.

***Supported by Key finding 28***

This recommendation is **ACCEPTED**.

The PING meetings will evolve to cover other forms of exploitation in due course. All parties acknowledge that this format would work for other forms of exploitation and risk. The implementation of the exploitation strategy and action plans will document the work plan. This will be devised in partnership and it is felt that a launch / pledge from key partners would further commit to joint working in this. We have discussed setting up 'Risk Panels' where such cases can be discussed and monitored.

Discussions with the police have informed us that they are looking into a ‘Risk MARRAC’ meeting format. It is agreed that it is important to have key partners involved in these processes.

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R13. The Council and partners adopt a similar model used by other work areas (such as CSE) to enable them to discuss individual young people in order to assess and address the individual’s needs – including issues raised in recommendations 7 and 9. This should also link with the early help new proposals and the young person’s gateway.

***Supported by Key finding 28***

This recommendation is **ACCEPTED**.

This is also being developed. We use the same MASM (Multi Agency Safeguarding Meeting) to discuss all cases of exploitation. Again, the development of an ‘Adolescent Service’ would help direct services in this area. Using the former ‘Grassroots’ provision in Charles Street as well as the ARC building in Neville street to engage with young people *and* their families would ensure that there was scope to be more centrally available and work with relevant key partners locally.

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R14. Cabinet ensures that plans for a city-wide youth survey to ascertain attitudes to drugs and drug-related crime are fully supported by Cardiff Council and that meaningful results are eventually achieved. Currently, it is proposed that a potential youth survey be commissioned by the Community Safety Partnership, in partnership with Youth Services. Members would wish to strongly encourage that this take place at the earliest possibility.

***Supported by Key finding 32***

This recommendation is **ACCEPTED in Principle**.

The School Health Research Network undertakes a biennial survey of secondary school pupils in Wales which is fed back to local authorities and participating schools. The report contains information on pupils contact with drugs as well as wider issues relating to the well-being of young people.

Further survey and engagement with young people will valuable inform future service provision.

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## **Education and Awareness Raising**

R15. A strategic, coordinated Communications Plan be developed with input from all partners. This should include the coordination of current materials that could be used as part of the programme. The programme should include mechanisms for delivering a large scale campaign across the City, and also more targeted awareness raising and training with recognised vulnerable groups. This should be developed in line with the Strategy recommended in R10 above, and should acknowledge the range of diverse communities across Cardiff. The Communications Plan should also develop targeted programmes for specific areas of Cardiff to address specific challenges faced by that area.

### ***Supported by Key findings 33-37***

This recommendation is **ACCEPTED** in Principle.

Given the wide range of activity that is being developed across the partnership to tackle the issues identified by the task and finish Inquiry it will be necessary to develop communications plans that are integrated to the work actually being undertaken. The approach would ensure the principles and methods identified in recommendations 2 , 5 10,11 and 16 are utilised across a unified implementation plan overseen by the community safety board.

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R16. A programme of campaigns for children and young people be developed by young people and current providers (for example, the St. Giles Trust), to included PSHE teaching materials, social media, development of apps, etc. The wording of all material should be very carefully considered and should include a strong message in informing young people of the consequences of being involved in drug dealing; recognising grooming; where they can go for more advice; and what options are available to them if they find themselves in trouble via drug-related activity. The coordination of budgets from other sources (Public Health Wales, Welsh Government etc) should also be explored as part of developing this campaign.

### ***Supported by Key findings 33-37***

This recommendation is **ACCEPTED** in Principle as above.

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## **Crime and Enforcement**

R17. The Police & Crime Commissioner review the powers that are given to PCSO's.

### ***Supported by Key finding 38***

This recommendation is **NOT ACCEPTED**

This recommendation has been considered by the Police & Crime Commissioner. The powers given to PCSOs are kept under review by the Chief Constable and discussed regularly with the Police and Crime Commissioner but there are no current plans to increase their powers as this could undermine the strengths of the role currently undertaken by the PCSOs.

PCSOs play a key role in the way that South Wales Police approaches Neighbourhood Policing, which is central to the way we police our communities and which is being refreshed as part of an ongoing review at the present time.

A regular plea to the Commissioner by Councillors and by community representatives is to maintain the presence of the PCSOs on the streets and in their communities, and it is precisely because the PCSO does not have the powers of a constable that their presence in the local community is not subject to the same level of abstraction that affects police officers, nor to the same level of churn that is necessary in respect of Police Officers as they develop their career and broaden their experience.

The Chief Constable has strengthened the approach to maintaining continuity in this role in local areas across South Wales. The current review aims to strengthen the role of the PCSO in terms of being a problem solver in and with the local community, having a focus on communication and engagement with the local community, and in terms of empowering the local community and helping it to be safe confident and resilient.

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R18. The Community Safety Board explore options of enforcement routes to tackle anti- social behaviour associated with drug dealing and problematic drug use in order to strengthen current arrangements and ease pressure on the Police. This could include a local, hybrid version of the use of Public Spaces Protection Orders.

### ***Supported by Key findings 39-42***

This recommendation is **ACCEPTED.**

A process for considering the use of PSPOs alongside alternative enforcement routes in response to anti-social behaviour is currently being explored. It is intended that the process would provide a decision record setting out the reasons for a PSPO and the steps taken to consult on, introduce or vary an existing PSPO.

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R19. The Council and partners link with relevant third sector providers to address the issue of “County Lines” activity in the City and links to other drug-related crime, such as knife crime. This should form part of both the strategic and operational elements of work going forward.

***Supported by Key findings 43-46***

This recommendation is **ACCEPTED**.

As already stated in R10, a Task & Finish Group to address issues in relation to County Lines and Exploitation is currently being developed. Critical to the work of this Group will be making links with other related crime, including knife crime. The membership of the Group will include relevant third sector partners to provide strategic, operational and grassroots input.

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**CARDIFF COUNCIL  
CYNGOR CAERDYDD**



**CABINET MEETING: 18 APRIL 2019**

**CABINET RESPONSE TO THE ECONOMY & CULTURE SCRUTINY COMMITTEE REPORT ENTITLED 'COUNCIL WORKSHOPS & INNOVATION PREMISES'**

**INVESTMENT & DEVELOPMENT (COUNCILLOR RUSSELL GOODWAY)**

**AGENDA ITEM:6**

**Reason for this Report**

1. To respond to a report of the Economy & Culture Scrutiny Committee received at Cabinet in January 2019, entitled 'Council Workshops & Innovation Premises'.

**Background**

2. In Autumn 2018 a task group comprising Members of the Economy & Culture Scrutiny Committee was established to investigate the Council's role in the provision of workshop premises and support for encouraging innovation in the Cardiff Economy.

**Issues**

3. The inquiry sought to investigate the Council's role in the provision of business workshop and innovation support. In particular the inquiry looked at:
  - Examining current Council provision – e.g. location, unit size, demand and property condition
  - Examining alternative provision – currently available and planned
  - Identifying whether there are overlaps and/or gaps in provision
  - Examining funding models worldwide, testing transferability
  - Hearing the views of stakeholders with regards to the above
4. The Scrutiny report makes nine recommendations all of which are accepted or partially accepted. The Cabinet response is outlined in Appendix A.

**Reason for Recommendation**

5. To enable the Cabinet to respond to the report published by the Economy & Culture Scrutiny Committee of November 2018 entitled 'Council Workshops & Innovation Premises'.

## **Financial Implications**

6. Appendix A sets out the Cabinet response to the nine recommendations. The Council approved Capital Strategy highlights the use of capital receipts and prioritises the £40 million target for General Fund Capital receipts (net of fees) assumed in the 2018/19 – 2022/23 Capital Programme and indicates that any excess sums over the target are to be considered to be used to reduce the level of debt. The Capital Strategy also highlights that the earmarking of capital receipts can be done where Cabinet approves the receipt to be ring-fenced for specific projects or strategies.
7. Any initiatives which expand the Capital Programme will need to have funding sources identified either through external investment or grants or capital receipts in excess of the £40 million target which was approved in the Council's Budget and Capital strategy.
8. The currently anticipated workshop income for 2018/9 is in the region of £800,000. Any proposed changes to the schedule of charges needs to consider the impact on the income stream and the directorate's overall budgetary allocation. Any shortfall would need to be found from that budgetary allocation.

## **Legal Implications**

9. The Well-Being of Future Generations (Wales) Act 2015 ('the Act') places a 'well-being duty' on public bodies aimed at achieving 7 national well-being goals for Wales - a Wales that is prosperous, resilient, healthier, more equal, has cohesive communities, a vibrant culture and thriving Welsh language, and is globally responsible.
10. In discharging its duties under the Act, the Council has set and published well being objectives designed to maximise its contribution to achieving the national well being goals. The well being objectives are set out in Cardiff's Corporate Plan 2019-22. When exercising its functions, the Council is required to take all reasonable steps to meet its well being objectives. This means that the decision makers should consider how the proposed decision will contribute towards meeting the well being objectives and must be satisfied that all reasonable steps have been taken to meet those objectives.
11. The well being duty also requires the Council to act in accordance with a 'sustainable development principle'. This principle requires the Council to act in a way which seeks to ensure that the needs of the present are met without compromising the ability of future generations to meet their own needs. Put simply, this means that Council decision makers must take account of the impact of their decisions on people living their lives in Wales in the future. In doing so, the Council must:
  - Look to the long term
  - Focus on prevention by understanding the root causes of problems

- Deliver an integrated approach to achieving the 7 national well-being goals
  - Work in collaboration with others to find shared sustainable solutions
  - Involve people from all sections of the community in the decisions which affect them
12. The decision maker must be satisfied that the proposed decision accords with the principles above; and due regard must be given to the Statutory Guidance issued by the Welsh Ministers, which is accessible using the link below:  
<http://gov.wales/topics/people-and-communities/people/future-generations-act/statutory-guidance/?lang=en>
13. The Council has to be mindful of the Welsh Language (Wales) Measure 2011 and the Welsh Language Standards when making any policy decisions and consider the impact upon the Welsh language.
14. The Council has to satisfy its public sector duties under the Equalities Act 2010 (including specific Welsh public sector duties) – the Public Sector Equality Duties (PSED). These duties require the Council to have due regard to the need to (1) eliminate unlawful discrimination, (2) advance equality of opportunity and (3) foster good relations on the basis of ‘protected characteristics’. The ‘Protected characteristics’ are:
- Age
  - Gender reassignment
  - Sex
  - Race – including ethnic or national origin, colour or nationality
  - Disability
  - Pregnancy and maternity
  - Marriage and civil partnership
  - Sexual orientation
  - Religion or belief – including lack of belief.
15. Where a decision is likely to result in a detrimental impact on any group sharing a Protected Characteristic, consideration must be given to possible ways to mitigate the harm. If the harm cannot be avoided, the decision maker must balance the detrimental impact against the strength of the legitimate public need to pursue any policy decisions. The decision maker must be satisfied that having regard to all the relevant circumstances and the PSED, the proposals can be justified, and that all reasonable efforts have been made to mitigate the harm.

## **RECOMMENDATION**

Cabinet is recommended to agree the response to the report of the Economy & Culture Scrutiny Committee entitled ‘Council Workshops & Innovation Premises’ (Appendix A)

<b>SENIOR RESPONSIBLE OFFICER</b>	<b>Neil Hanratty</b> <b>Director Economic Development</b> <b>12 April 2019</b>
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*The following appendix is attached:*

Appendix A: Cabinet Response to the Report published by the Economy & Culture Scrutiny Committee of November 2018 entitled ‘Council Workshops & Innovation Premises’.

Mae'r dudalen hon yn wag yn fwriadol

## **APPENDIX A**

### **CABINET RESPONSE TO THE REPORT OF THE ECONOMY & CULTURE SCRUTINY COMMITTEE ENTITLED ‘COUNCIL WORKSHOPS & INNOVATION PREMISES’**

#### ***Recommendation 1***

The Cabinet tasks officers to raise the capital required to provide new, more suitable workshop spaces by:

- a. Developing a trickle transfer programme of disposal of existing workshops that enables the Council to maintain a steady income stream and does not diminish the overall provision of workshop space in Cardiff.
- b. Reviewing Council owned employment land for possible disposal, using criteria to ascertain ‘best use’ for each site that detail the rationale for any decision taken to dispose of parcels of Council owned employment land.
- c. Utilising offers and opportunities that arise from the private sector that meet the Council’s Economic Development objectives.

**RESPONSE: The recommendation is accepted.**

**However it should be noted that there is no new capital allocation for such an approach, and that it will be reliant on either raising capital receipts or securing external investment. To that end officers are investigating working with public and private sector partners to secure further provision.**

#### ***Recommendation 2***

The Cabinet ensure that capital receipts from sales of Council owned workshops and Council land is ring fenced for new Council provision of workshops and innovation premises that meet market demand i.e. workshops, workshops with office space, and/ or office space.

**RESPONSE: The recommendation is partially accepted.**

**The approach will use capital receipts to secure provision that meets current and future demand and not simply replace previous provision. This approach could also be based on a model of co-investment. It should also be noted that the Council’s priority for capital receipts is to meet the balance of its £40m target for general fund capital receipts (net of fees) assumed in the 2018/19-2022/23 Capital Programme. As such the**

**earmarking of receipts would be limited to capital expenditure essential to secure a disposal, to meet the terms and conditions of a grant or whether approved by Cabinet to be ringfenced for specific projects or strategies.**

### ***Recommendation 3***

The Cabinet task officers to investigate the feasibility of introducing a sliding scale for rental, service charge and business rates costs for the first three years of workshop tenancy, with costs in Year 1 facilitating easy access for start-ups, and costs in Year 3 being close to market level. This would assist businesses to become 'market ready' and increase their ability to 'move-on' from Council provision.

**RESPONSE: The recommendation is accepted.**

**It should be noted however that CBTC has been operating a sliding scale of rental charges across the Council workshop and innovation portfolio since 2012. This scheme has worked well in supporting new start businesses and assists with their development and growth with a rise to market rent being achieved in the 3rd year of the lease. It should be noted that a sliding scale for service charges would be more difficult given the need to link service charges with the cost of provision. Generally common practice is to charge all tenants the service charges relevant to their accommodation and to vary the rental amounts only.**

### ***Recommendation 4***

The Cabinet task officers to investigate ways in which the Council can provide workshop space of 1,000+ sq. ft. for 'move-on' accommodation, to facilitate throughput from smaller Council workshop units.

**RESPONSE: The recommendation is partially accepted.**

**We would seek to ensure a provision of space with partners but not necessarily provide the space directly from the Council. However, we would be open to direct provision if it were deemed to be more appropriate route through a business planning process.**

### ***Recommendation 5***

The Cabinet task officers to review the application of the Council's employment land planning policy and propose amendments if these are necessary to ensure that the loss of employment land is addressed.

**RESPONSE: The recommendation is accepted.**

**The Cabinet is keen to ensure that we are able to apply our employment and land planning policy to protect against the loss of employment land, and is aware that pressure exists even within our strategic employment zones.**

### ***Recommendation 6***

The Cabinet task officers to work proactively to support existing CBTC1 tenants to relocate successfully

**RESPONSE: The recommendation is accepted.**

**Council officers will work with all the tenants at CBTC who may seek to relocate to new premises and support them in finding grow on space.**

### ***Recommendation 7***

The Cabinet considers how to work with existing Council resources, local businesses, entrepreneurs and networks to fill the gap identified in existing advice and mentoring services.

**RESPONSE: The recommendation is partially accepted.**

**Note that such support would is generally provided through national organisations, and that in many cases, especially in the area of innovation, specialist expertise is often require in terms of support which would be beyond the scope and resources of local government to provide. To that end, effective signposting and support for networks is seen as the most efficient and effective approach.**

***Recommendation 8***

The Cabinet continue to demonstrate effective leadership of place, creating a supportive landscape for local businesses, entrepreneurs and innovators in Cardiff.

**RESPONSE: The recommendation is accepted.**

**As noted above, this would also be an approach based on working with the local business networks and other organisations. Such an example would be the Council's support for the Creative Cardiff initiative.**

***Recommendation 9***

The Cabinet continue to engage in effective partnership and regional working to capitalise on opportunities for further innovation and investment in Cardiff and the region.

**RESPONSE: The recommendation is accepted, and will form much of the basis of its strategy for supporting innovation.**

**CARDIFF COUNCIL  
CYNGOR CAERDYDD**

**CABINET: 18 APRIL 2019**



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**ECONOMIC STRATEGY**

**INVESTMENT & DEVELOPMENT (COUNCILLOR RUSSELL GOODWAY)**

**AGENDA ITEM: 7**

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**Reason for this Report**

1. For the Economic Strategy to be approved by Cabinet.

**Background**

2. In late 2017 the Economic Strategy Green Paper: More and Better Jobs, attached a Appendix 1, was published to initiate a three-month public consultation exercise. The paper considered a range of issues for the city's economy, including proposed projects. The document also outlined a proposed spatial strategy for the future development of the economy.

**Issues**

3. The consultation process was a qualitative exercise which aimed to secure input to the Councils Economic Strategy from a broad range of communities and stakeholders. Responses were received from the following representatives and a report on their contributions and views is attached as Appendix 2:

- Local Councillors
- Large businesses
- SMEs
- Local residents
- Organisations representing the city's diverse populations
- Third sector organisations
- Business Improvement District
- Neighbouring local authorities
- City-region organisations
- Business representative organisations
- Universities

4. Following on from the Green Paper consultation the proposals put forward in the subsequent Draft Economic Strategy were debated at Full Council. The debate provided an opportunity for all local members to make a contribution to the final development of this important piece of strategic Council policy and for the views and comments of all local

members to be properly considered before the final report is considered by Cabinet.

5. The strategy has also been considered at a pre-decision session of the Economy and Culture Scrutiny Committee.
6. The final Economic Strategy is attached as Appendix 3. A background data document that, in addition to the consultation process, informed the development of the strategy is attached as Appendix 4.
7. The report does not commit any funding or resource to projects. Any decisions on funding and resources would require further and appropriate approvals.

### **Scrutiny Consideration**

8. The Economy & Culture Scrutiny Committee considered this item on 9 April 2019. Their comments are set out in the letter from the Chair attached at Appendix 5.

### **Reasons for Recommendations**

9. To allow for the approval of the Economic Strategy.

### **Legal Implications**

10. As and when individual proposals within the draft Economic Strategy are developed legal advice should be obtained, legal implications may arise if and when the matters referred to in the draft paper are implemented, with or without any modifications. The Green paper was subject to consultation. Consultation gives rise to the legitimate expectation that the outcome of the consultation will be duly considered when subsequent decision are made. Accordingly, in considering this matter due regard should be had to the consultation feedback received.
11. In considering this matter and in developing the proposals regard should be had, amongst other matters, to:
  - (a) the Welsh Language (Wales) Measure 2011 and the Welsh Language Standards;
  - (b) the Councils' duties under the Well –being of Future Generations (Wales) Act 2015; (Consideration to aspects concerning the Act are described in Appendix \*), and
  - (c) Public sector duties under the Equalities Act 2010 (including specific Welsh public sector duties). Pursuant to these legal duties Councils must in making decisions have due regard to the need to (1) eliminate unlawful discrimination, (2) advance equality of opportunity and (3) foster good relations on the basis of protected characteristics. Protected characteristics are: a. Age; b. Gender reassignment; c. Sex; d. Race – including ethnic or national origin, colour or nationality; e. Disability; f.

Pregnancy and maternity; g. Marriage and civil partnership; h. Sexual orientation; i. Religion or belief – including lack of belief.

### **Financial Implications**

12. Whilst, there are no direct financial implications arising from the report, as and when individual proposals are developed financial advice will need to be taken in order to demonstrate appropriate diligence and affordability and that it is affordable within the parameters set when Council approved the 2019/20 and the medium term revenue and capital budget and the accompanying strategies not least Capital.

### **Recommendation**

Cabinet is recommended to approve the Economic Strategy.

<b>SENIOR RESPONSIBLE OFFICER</b>	<b>NEIL HANRATTY</b> Director of Economic Development
	12 April 2019

*The following Appendices are attached:*

Appendix 1: Economic Green Paper

Appendix 2: Economic Green Paper Consultation Summary

Appendix 3: Economic Strategy

Appendix 4: Cardiff Economy Today Report

Appendix 5: Letter from Chair of Economy & Culture Scrutiny Committee

Mae'r dudalen hon yn wag yn fwriadol



# Building More & Better Jobs

## Consultation Green Paper

# 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.

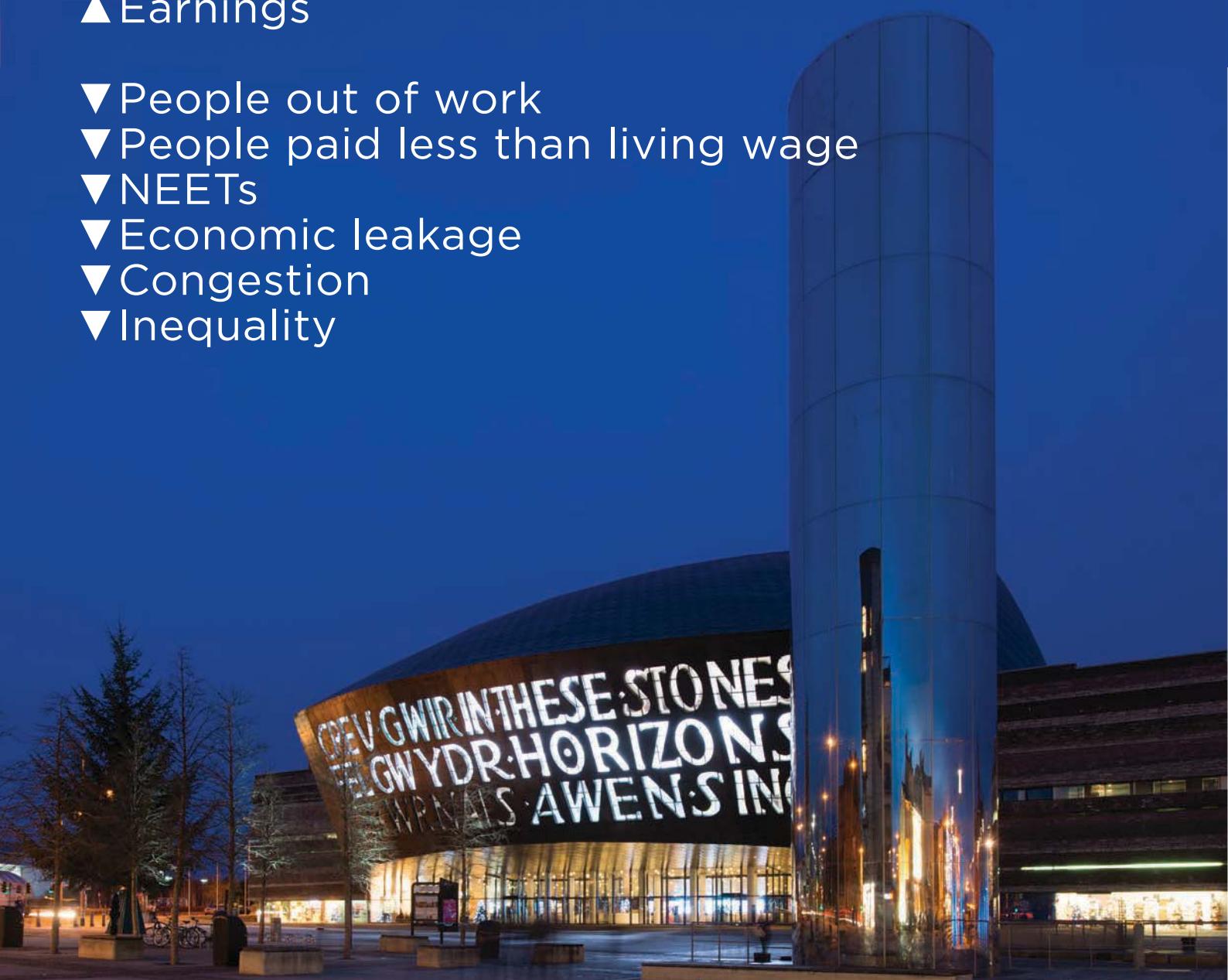
Strengths	Weaknesses
<ul style="list-style-type: none"><li>• Capital City Status – driver of the Welsh economy</li><li>• Fast growing and dynamic economy - proven ability to create jobs in competitive sectors</li><li>• Well qualified workforce – 2/5ths qualified to degree or equivalent</li><li>• Number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

**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



# 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”<sup>1</sup>**

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, if 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?

<sup>1</sup> Source: Competitive European cities: where do the core cities stand? (Urban Research Summary No. 13)

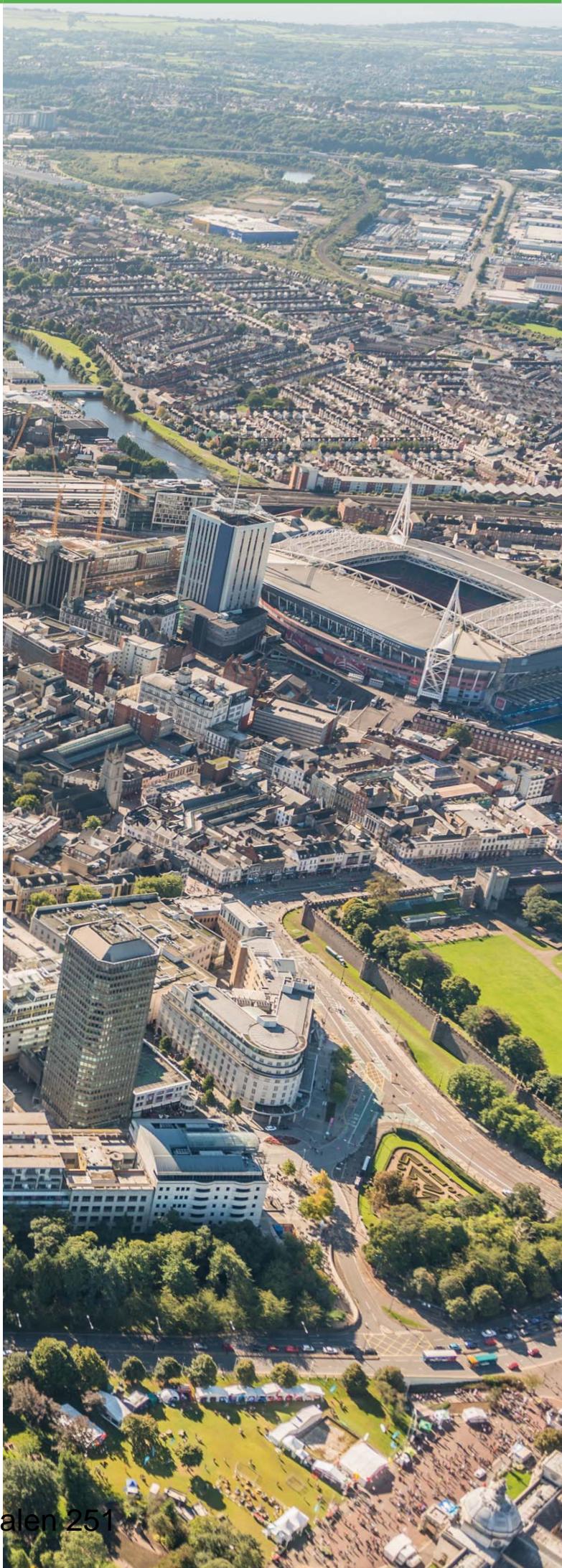
# A EUROPEAN CAPITAL

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?



# 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?

## 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.

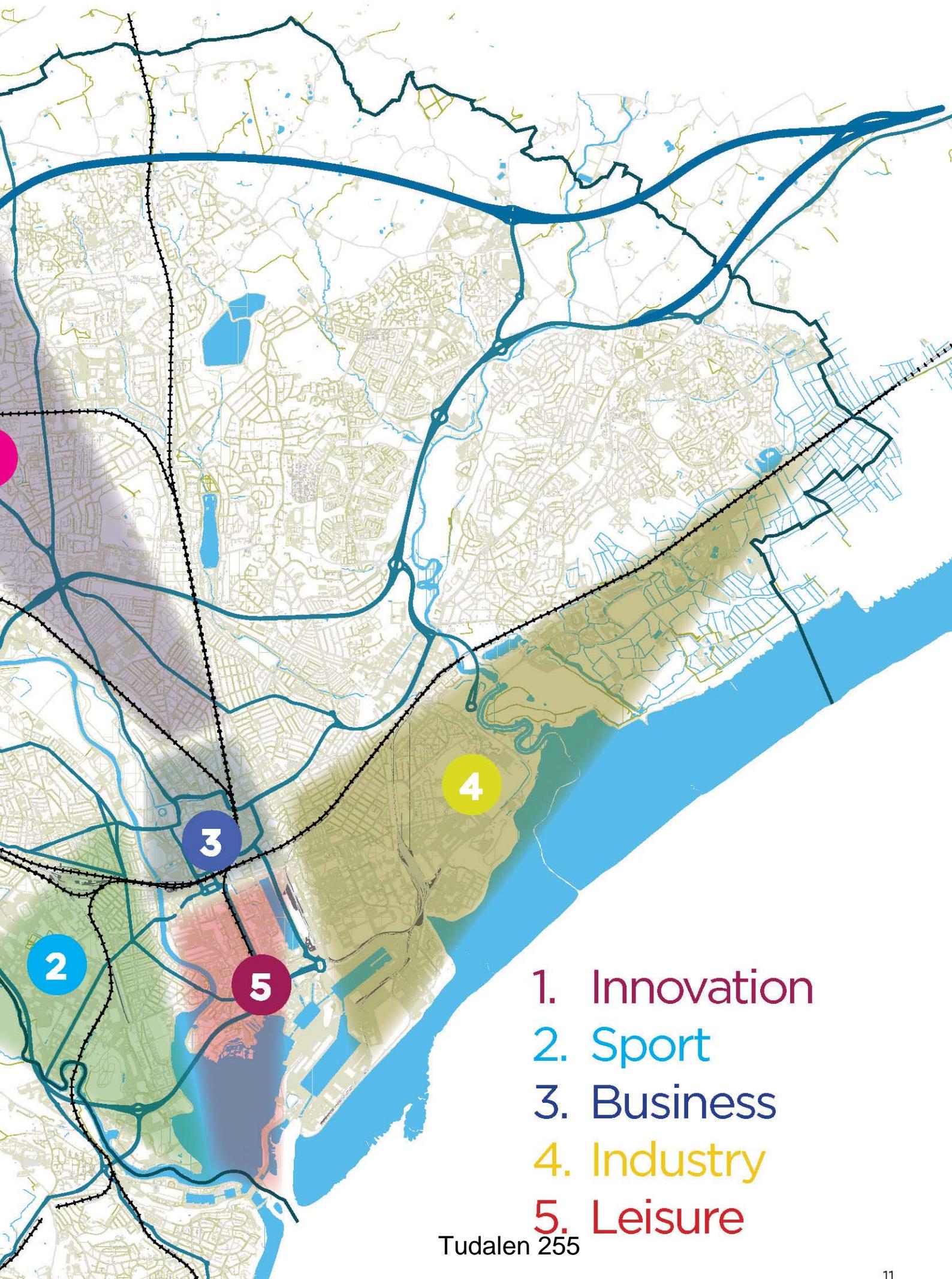
EAST CARDIFF, south of the railway line, is an existing industrial centre primed for expansion. Benefiting from a range of high quality infrastructure, including the Port of Cardiff and the Euro Freight Railway Terminal, the area has significant potential to deliver more manufacturing, distribution and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



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

Tudalen 255

# 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.

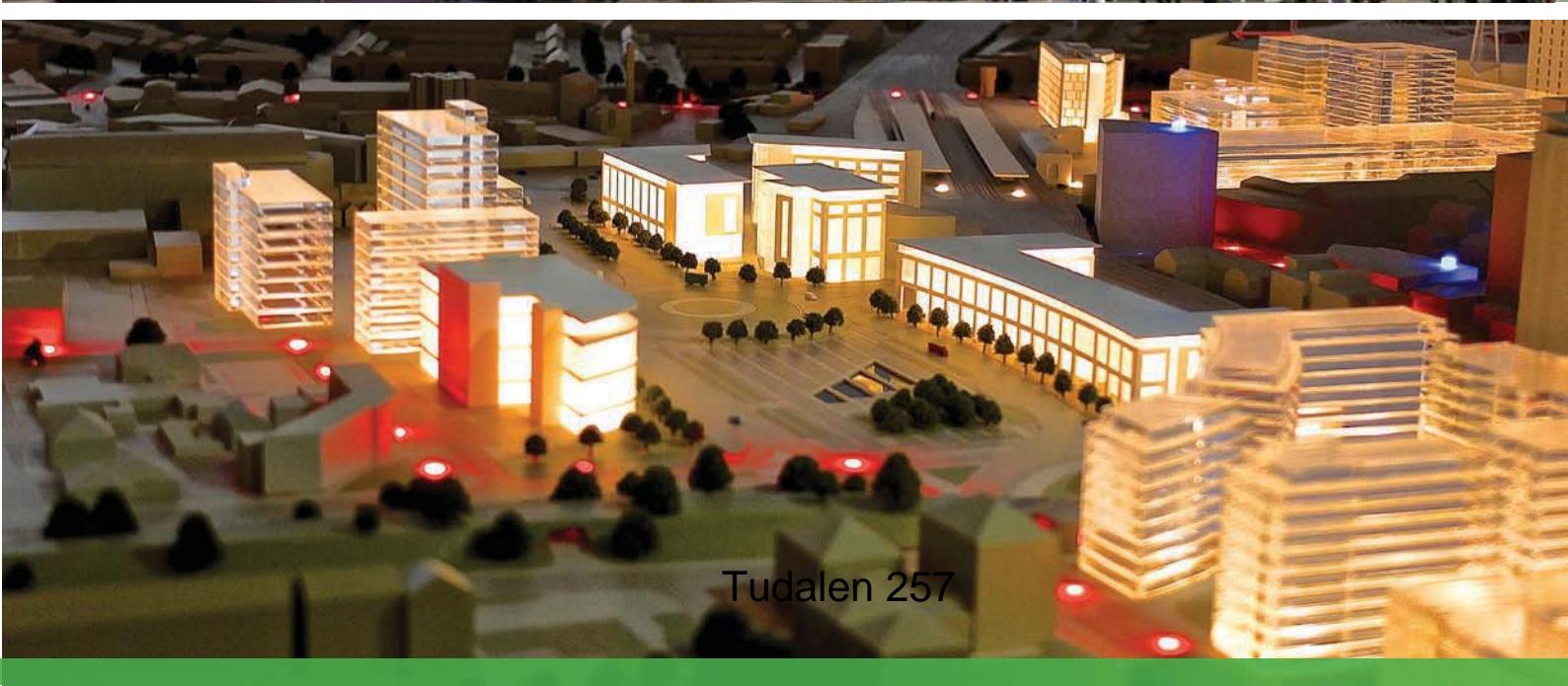
We must also build on the strengths of our city centre as a place to visit. However the threat to retail from technology is real, and it is essential we ensure that the city centre remains a place people want to visit. Investment in our city centre will also help provide a range and choice of jobs, jobs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

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Tudalen 257

# 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 100,000m<sup>2</sup> 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.

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.

**Q16:**

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





Please send responses to this Green Paper to:  
[econgreenpaper@cardiff.gov.uk](mailto:econgreenpaper@cardiff.gov.uk)

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



# Appendix 2



## 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, places 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 liveenvironments 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 carefully 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 Millennium 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.”

“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.”



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# **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.

# How this Strategy Works

Building More and Better Jobs is predicated on the city's successful public-private partnership approach to investment, and aims to align resources of all sectors of the economy to deliver its objectives. This strategy also sets out in more detail how we will deliver on the economic strands of the Capital Ambition and Cardiff Well-Being Plan. For that reason the objectives included in this strategy reflect both strategic documents for the city and its partners.

The strategy outlines to investors what we see as the priorities for Cardiff, and what we, as a Council, will seek to support. It also provides a focal point for other investment, whether it is UK Government, Welsh Government or city-region, so that they can see that any contribution they make to support our economy is underpinned by a clear economic strategy.

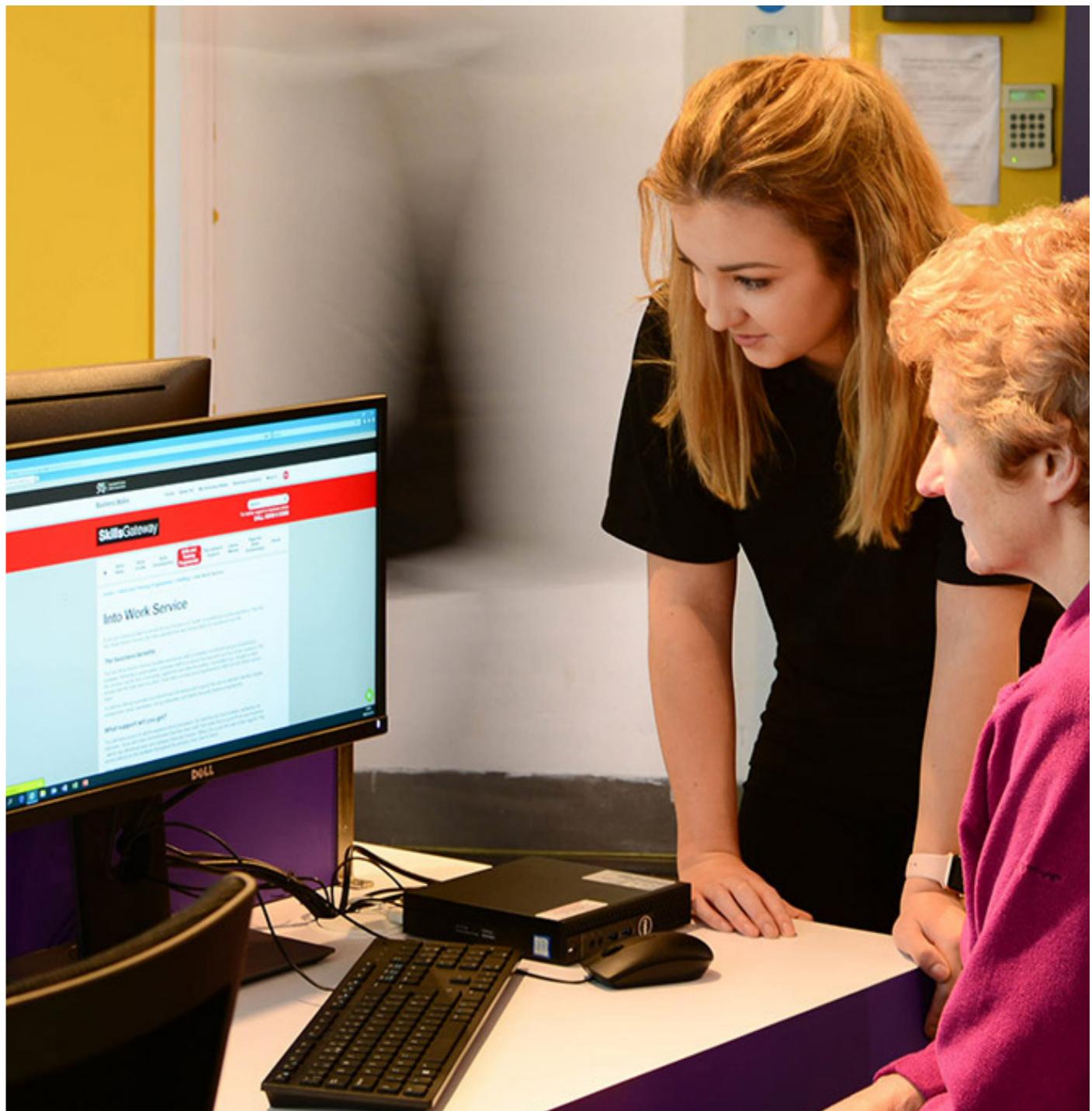
It must be noted that this strategy does not outline deadlines, dates or financial commitments, all of which would be subject to more detailed business planning processes. Furthermore, it is not the intention that the Council would be the lead on all the projects detailed in this strategy, indeed it is expected that many would be led by private sector partners.

## Inclusive Growth

The Council is also working with the Joseph Rowntree Foundation to develop effective means of embedding inclusive growth considerations in its decision-making processes. To that end work has been undertaken during the formulation of this Economic Strategy, working with partner cities, to develop an inclusive growth toolkit that establishes a simple methodology to consider how projects can best support our city's communities.

The toolkit helps determine whether and how investment or interventions supports inclusive growth. It enables decision makers to have a clearer understanding of the likely impact of projects on the people who live in our cities.

The toolkit can be accessed at <http://www.metrodynamics.co.uk/s/Inclusive-Growth-Decison-Making-Toolkit-njcw.pdf>.



# 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 Indictors

	Cardiff	Wales	UK	Core City Rank	Theme
GVA per head	£27,480	£19,140	£26,621	5th	Economic Growth
Earnings	£538.5	£505.9	£550.4	2nd	
Jobs Growth	6.0%	0.7%	1.2%	5th	
The amount of 'Grade A' office space committed to in Cardiff (sq. ft.)	366,000	n/a	n/a	n/a	
Visitor Spend	£1.3bn	n/a	n/a	n/a	
Gross Disposable Income per head	£18,137	£16,341	£19,106	2nd	Overall Wellbeing
Percentage of population aged 16-64 qualified NVQ4+	48.0%	35.1%	38.4%	2nd	
CO2 Emissions per capita	5.1	8.7	5.9	3rd	
Unemployment rate	6.1%	4.8%	4.4%	4th	
Employee jobs with hourly pay below the living wage	20.7%	24.7%	22.0%	5th	
Earnings - FT Weekly Pay - bottom decile as % of median	61%	62%	58%	5th	Inclusive Growth
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	
Claimant Count - % of ward with highest claimant count vs city average	210%				

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



# 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

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## 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



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### 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:

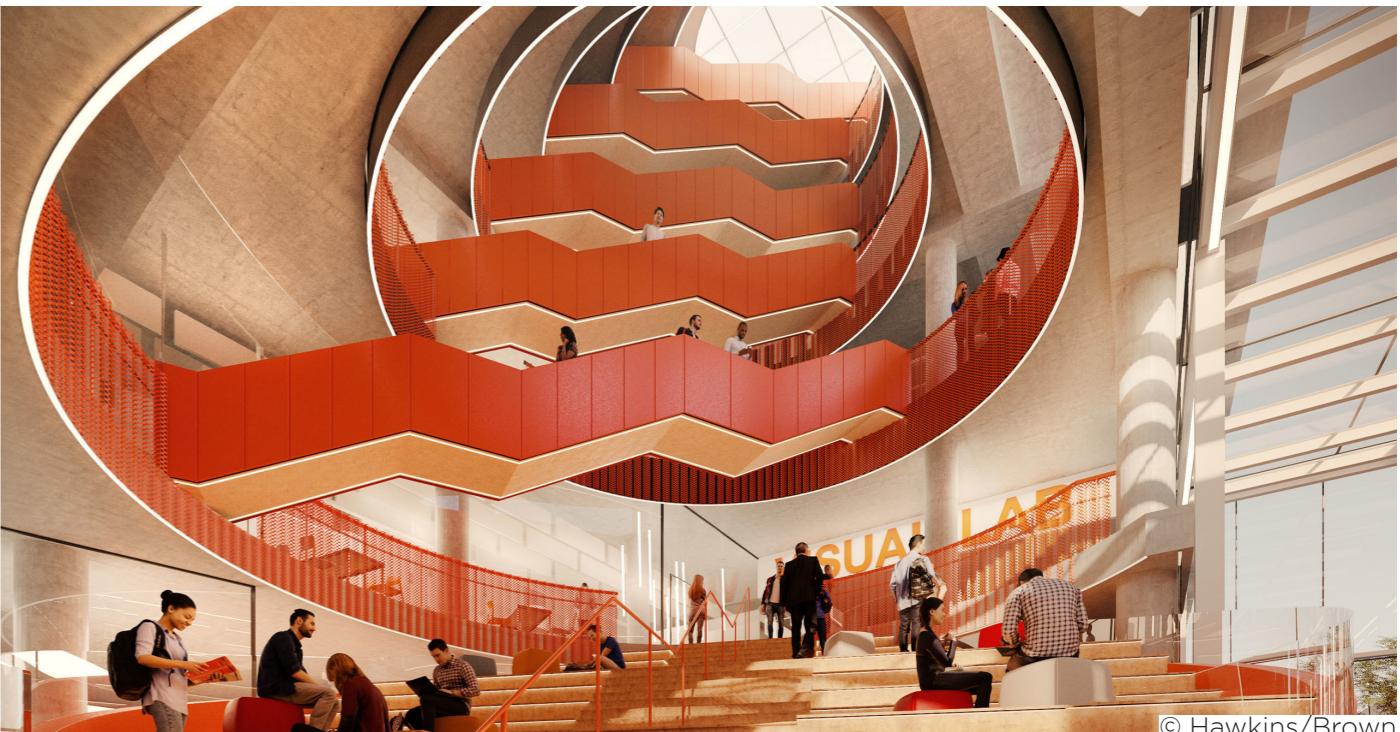
- Working with partners to deliver a new Cardiff Parkway Station at St Mellons
- Publishing an East Cardiff Development Strategy
- Better exploiting new and existing infrastructure to establish a cluster of logistics businesses
- Supporting the completion of the Eastern Bay Link Road
- Improving the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



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### 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.

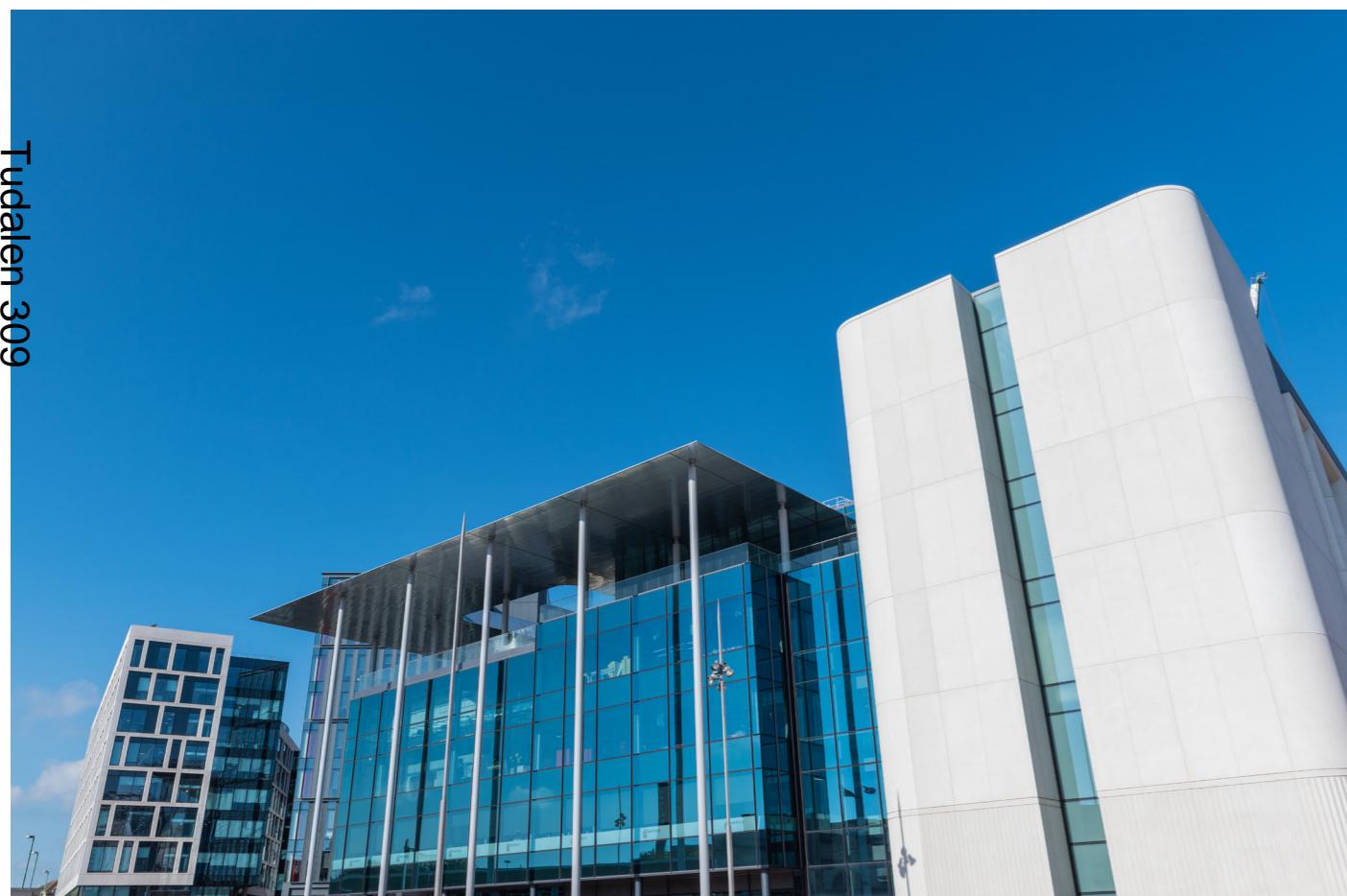
## **Key Priority 1: The City as a Creative and Digital Accelerator**

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**

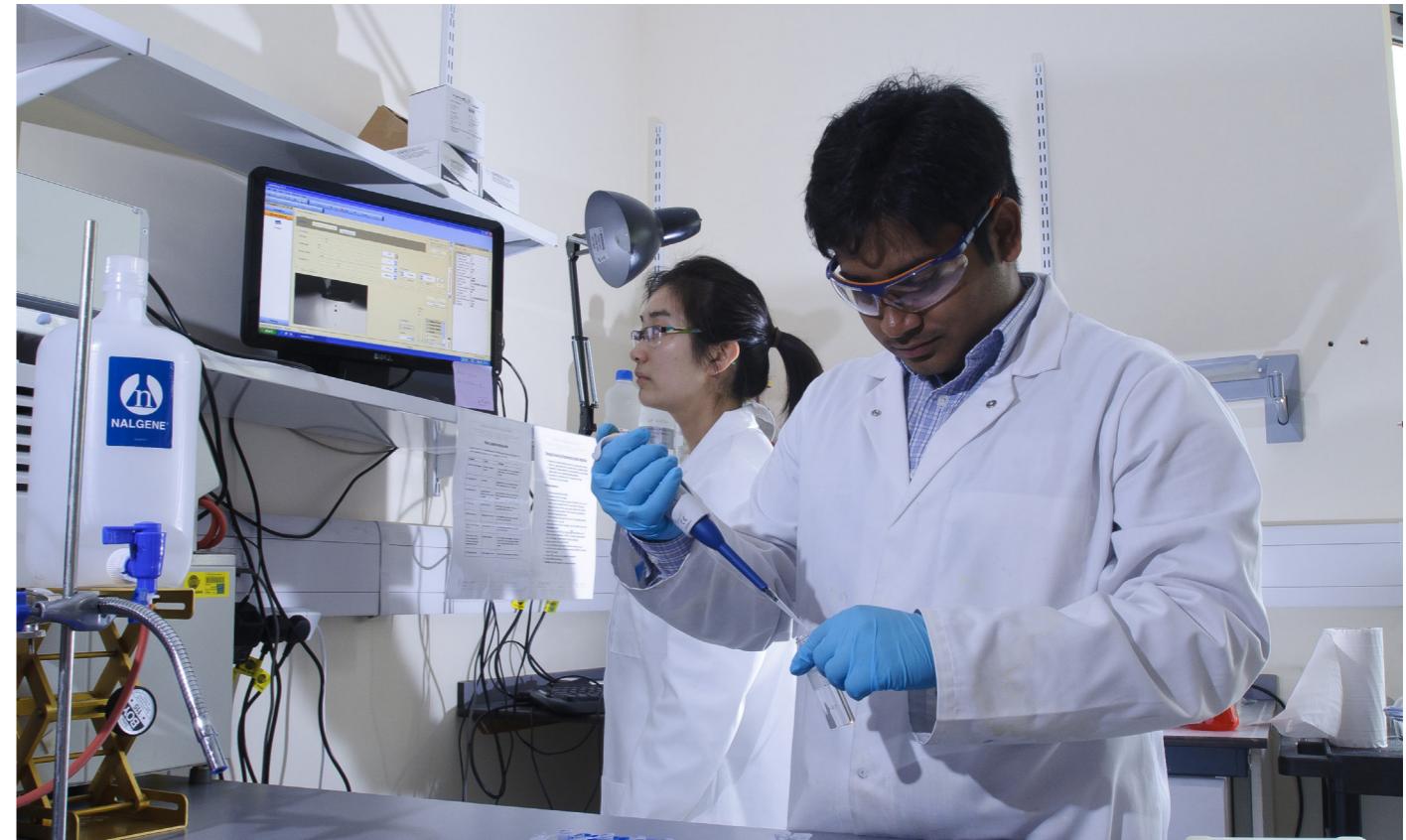
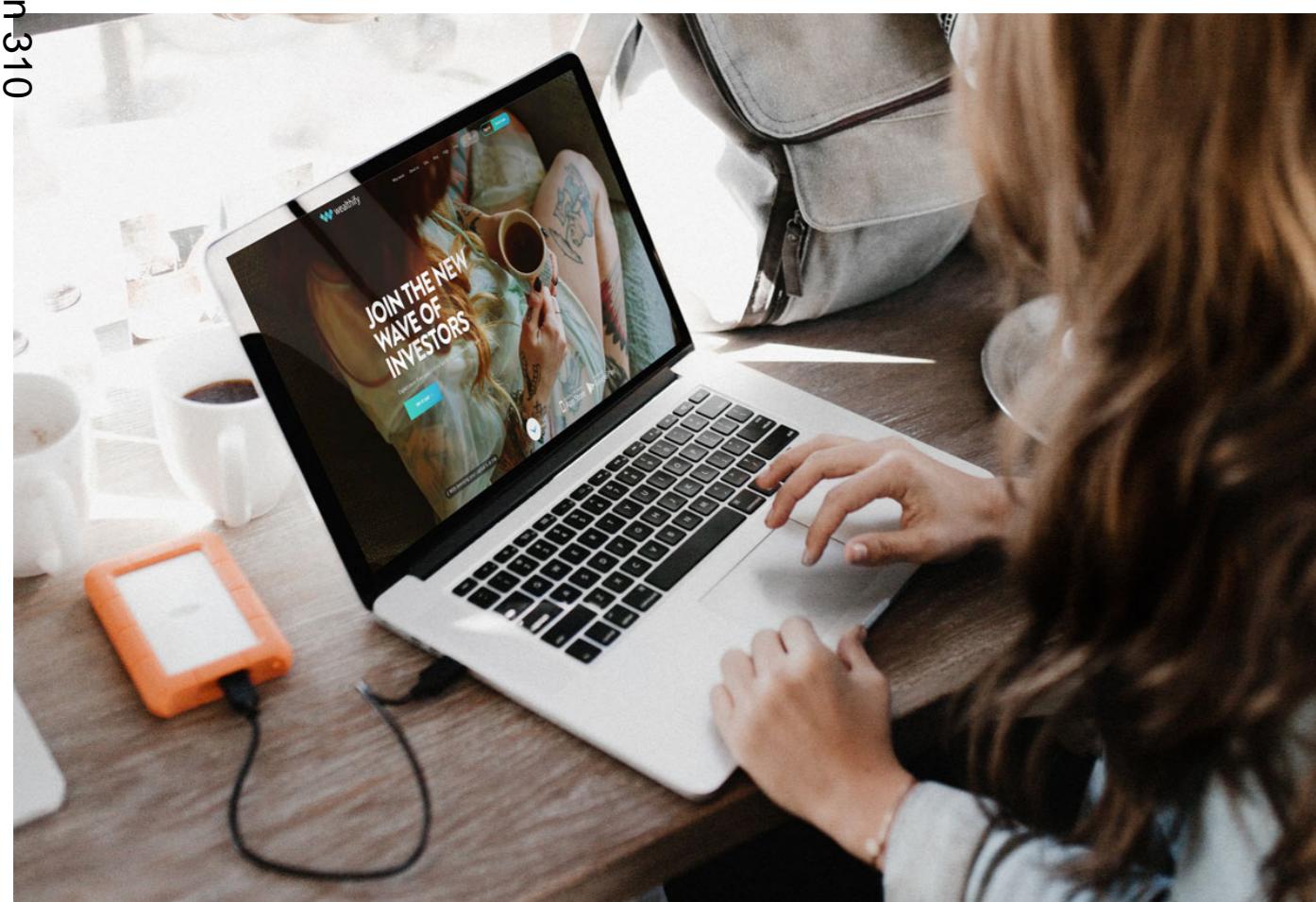
In recent years, a number of globally recognised financial services companies, some of the UK's biggest accountancy firms as well as home-grown companies have expanded their operation in Cardiff. All have been supported by higher education in the city providing a steady stream of skilled graduates as 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-adapted 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

# 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 ft<sup>2</sup> of commercial development with the potential to accommodate more than 30,000 jobs over the next 10 - 15 years.

#### 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 the Bay 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 ft<sup>2</sup> 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: 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. Where 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

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 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 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.



Tudalen 323

Mae'r dudalen hon yn wag yn fwriadol

## Appendix 4



# Cardiff Economy Today

Draft

Tudalen 325



# 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.

## Cardiff Economy Summary – SWOT

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

## 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	<b>5.6</b>	<b>2.5</b>	83.9	6.2
Construction	<b>13.9</b>	<b>6.1</b>	110.5	8.2
Creative industries	<b>16.1</b>	<b>7.1</b>	48.6	3.6
Energy & environment	<b>25.3</b>	<b>11.2</b>	155.8	11.6
Food & Farming	<b>1.6</b>	<b>0.7</b>	50.6	3.8
Financial & professional services	<b>43.1</b>	<b>19.0</b>	136.8	10.2
ICT	<b>5.6</b>	<b>2.5</b>	26.6	2.0
Life sciences	<b>3.4</b>	<b>1.5</b>	17.2	1.3
Tourism	<b>21.3</b>	<b>9.4</b>	131.2	9.8
<i>In A Priority Sector</i>	<b>108.6</b>	<b>47.9</b>	604.1	45.0
<i>Not In A Sector</i>	<b>118.3</b>	<b>52.1</b>	738.6	55.0
Total	<b>226.9</b>	<b>100.0</b>	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
<b>CARDIFF</b>	<b>69.9</b>	<b>74.9</b>
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
<b>CARDIFF</b>	<b>6.1</b>
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
<b>CARDIFF</b>	<b>£9,933</b>	<b>5.7</b>
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
<b>CARDIFF</b>	<b>£27,480</b>	<b>4.5</b>
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
<b>CARDIFF</b>	<b>1,780</b>	<b>361,168</b>	<b>49.3</b>
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 £132bn. 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
<b>Cardiff</b>	<b>372</b>	<b>1,736</b>	<b>120</b>
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)
Edinburgh	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
<b>CARDIFF</b>	<b>48.0</b>	<b>17.4</b>	<b>1.7</b>	<b>14.9</b>	<b>7.0</b>	<b>4.4</b>	<b>6.6</b>
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
<b>CARDIFF</b>	<b>538.5</b>	<b>0.8</b>
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
<b>CARDIFF</b>	<b>528.8</b>	<b>-0.9</b>
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
<b>CARDIFF</b>	<b>16,769</b>
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
<b>CARDIFF</b>	<b>19.2</b>	<b>20.7</b>
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**

<b>LA</b>	<b>2016 %</b>	<b>2017 %</b>
Blaenau Gwent	34.1	33.0
Bridgend	23.3	26.2
Caerphilly	22.4	20.2
<b>CARDIFF</b>	<b>19.2</b>	<b>20.7</b>
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.

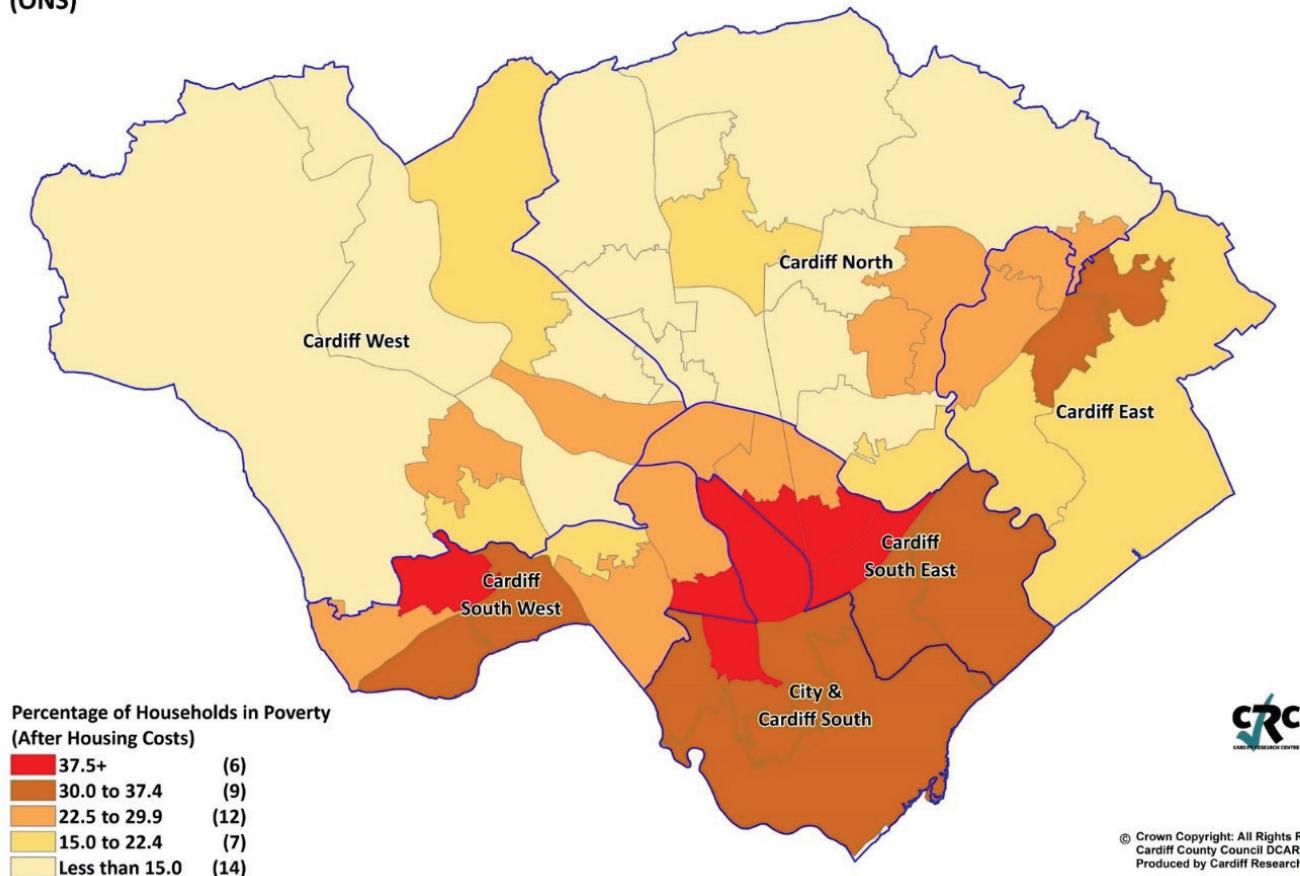
### Claimants as a proportion of residents aged 16-64 (August 2018)

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	3.4	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**

	<b>Household in material deprivation %</b>
Blaenau Gwent	19
Bridgend	11
Caerphilly	15
<b>CARDIFF</b>	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"> <li>• Highly qualified workforce</li> <li>• Over 65,000 higher education students</li> <li>• HE reputation for commercialisation of research</li> <li>• Established city-region</li> <li>• Service sector with exporting perspective</li> <li>• Strong TV and broadcast sector</li> <li>• Concentration of 'reg-tech' and cyber security skills</li> <li>• Competitive fin-tech and digital start-up community</li> <li>• Emerging technology clusters, including compound semi-conductors</li> <li>• Internationally prominent life-sciences businesses</li> <li>• Strong quality of life offer</li> </ul>	<ul style="list-style-type: none"> <li>• Low levels of productivity across all sectors</li> <li>• Knowledge base not being fully exploited</li> <li>• Prevalence of low value activity in business sectors</li> <li>• Lack of recognised brand</li> <li>• City centre dominated by retail</li> <li>• Need for infrastructure investment in both transport and digital connectivity</li> <li>• </li> </ul>

# 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

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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 will relocate 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. The newly launched Cardiff Metropolitan School of Technologies will move to a purpose-built campus in the city centre near Cardiff Central Station from 2020.

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:

- Lever £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

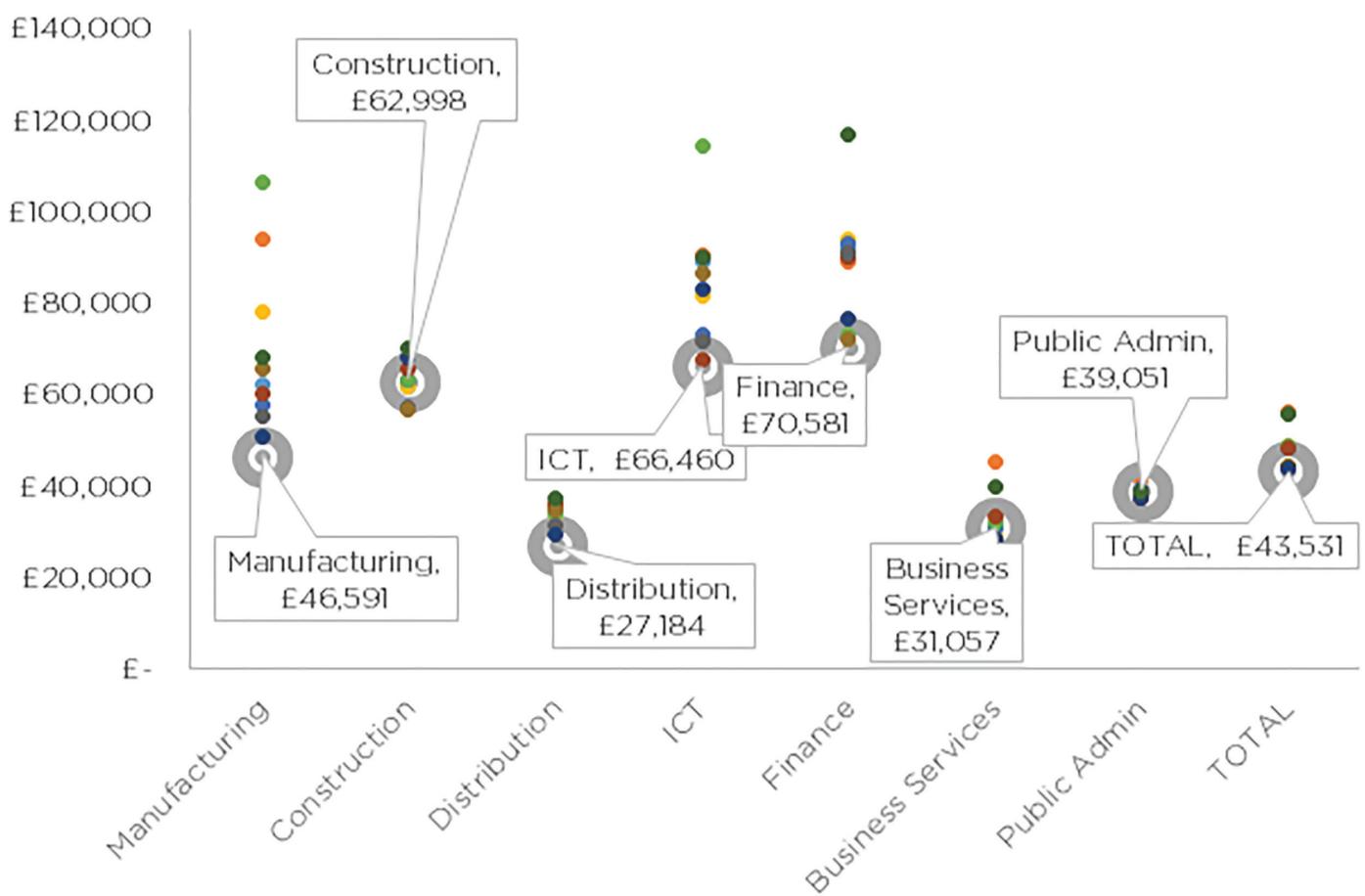
	City Centre Office	City Centre Retail	City Centre Size	radius of city centre (miles)
London	76%	11%	London	2
Birmingham	40%	19%	Large	0.8
Bristol	51%	20%	Large	0.8
Leeds	52%	21%	Large	0.8
Liverpool	45%	29%	Large	0.8
Manchester	55%	21%	Large	0.8
Newcastle	43%	35%	Large	0.8
Nottingham	35%	32%	Large	0.8
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 they 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 <sup>th</sup>
Jobs Growth (2017-2018)	6.0%	0.7%	1.2%	5 <sup>th</sup>
Unemployment rate (Dec 2017)	6.1%	4.8%	4.4%	4 <sup>th</sup>
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 <sup>rd</sup>
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 <sup>th</sup>
Percentage of population aged 16-64 qualified NVQ4+ (2017)	48.0%	35.1%	38.4%	2 <sup>nd</sup>
Earnings (2017 Weekly Resident FT Gross)	£538.5	£505.9	£550.4	2 <sup>nd</sup>
Employment Rate (Female as % of all)	67.4%	69.0%	70.3%	5 <sup>th</sup>
Employment Rate (BAME as % of all) Apr 2017-Mar 2018	59.0%	60.5%	64.8%	2 <sup>nd</sup>
Employment Rate (EA core disabled as % of all) Apr 2017-Mar 2018	43.7%	45.2%	50.8%	6 <sup>th</sup>
Percentage of households in poverty	16%	15%	n/a	n/a
Long-term JSA Claimants	56%	42%	42%	3 <sup>rd</sup>



Tudalen 360

My Ref: T: Scrutiny/Correspondence/Cllr NH

Date: 10 April 2019

Councillor Russell Goodway  
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Dear Councillor Goodway,

### **Economy & Culture Scrutiny Committee: 9 April 2019**

Thank you for attending Committee, along with Neil Hanratty and Jonathan Day, to discuss the draft Economic Development Strategy (White Paper).

Members welcome the draft Strategy, recognising it provides a high-level framework that gives focus and signals the Administration's priorities to partners. It is clear that much work has been undertaken to ensure the prioritisation process is evidence-led. Members are pleased to see that the White Paper contains significant revisions based on the consultation feedback, notably in terms of strengthening the commitment to inclusive growth and sustainable development as well as increasing visibility re the Industrial Strategy, sector strengths and district centres.

Overall, Members support the objectives of the Strategy and believe that the three interlocking elements – the spatial strategy, industrial strategy and underpinning themes – set the framework for these to be achieved. There is a lack of specific details in the Strategy, which is reasonable, as it is a framework; however, it is important that specific details are contained within the plans that will sit underneath this framework, such as actions, deliverables and timescales for these and how these link back to the objectives of the overarching Economic Development strategy. For example, Members will expect the Cardiff East Industrial Strategy to contain details of how it meets the inclusive growth, sustainable development and wellbeing objectives in the Strategy, with an environmental assessment to evidence and support this.

Linked to this point, Members are concerned that the Economic Development Strategy does not contain an assessment of how it complies with the Wellbeing & Future Generation Act requirements. We **recommend** that this be added to the report to Cabinet, either at the time of publication of papers or, if there is not time to achieve this, as an addendum to the report tabled at the Cabinet meeting.

With regard to the interface of the Economic Development Strategy, the Local Development Plan and the Transport Strategy White Paper, Members note that you have worked with Cllr Caro Wild, Cabinet Member – Strategic Planning & Transport, and that officers are working together, to ensure these plans support one another, finding solutions to ‘creative tensions’ that arise when trying to achieve economic growth in a sustainable way. Again, we will look to see how this has been achieved when scrutinising the masterplans for specific proposals/ quarters. We reiterate our belief that good public transport is essential for inclusive growth.

At committee, we explored the role of schools and education in helping to achieve inclusive growth. We note the on-going work to help pupils raise their aspirations by increasing their awareness of opportunities as well as specific work to enhance skills. We also note and welcome the intention to increase linkages between schools and colleges and higher-skilled industry and businesses, both in their locality and across the city, to open up opportunities.

We note the metrics selected, on page 23 of the draft Strategy. Members are interested in seeing these grouped by the underpinning themes, so that it is clear which indicators relate to Inclusive Growth & Skills, which relate to Developing Business throughout the City and so on. At the meeting, we asked how the indicators would be used going forward and note that they will be applied ward by ward to enable targeted action to be taken to address poor performance. We were also interested to hear that they would be used to learn lessons when shaping future projects and intended outcomes; Members would like to receive more details on this, illustrating how the metrics shown can be used to achieve this.

We reflected on the points raised at Council by fellow councillors during the debate on the White Paper. We wish to add our support to the following points, which we feel are valid, and we urge you to take these on board during the development of the plans that sit beneath the overarching framework of the Economic Development Strategy:

- Ensure plans include specific actions, deliverables and timescales for the following:
  - Inclusive growth and tackling poverty
  - Reducing NEETs ( young people Not in Education, Employment and Training)
  - Improving Job Opportunities for Young People in Care
  - Reducing Inequalities – particularly for females, BME communities and deprived communities
  - Developing Skills – by schools and colleges working in partnership with Cardiff universities and businesses
- Where relevant, ensure plans reference the opportunities arising from the removal of Prince Of Wales Bridge tolls, M4 relief road and changes to business rates
- Address the need to refresh St Mary’s Street.

Finally, Members were pleased to hear your assurances that you would ensure that scrutiny is able to contribute to the development of economic development plans and policies. We are committed to making time available to scrutinise these and wish to add value to this process. As part of our work programme discussion later on in the meeting, we reflected that it is easier to add value if involved in the earlier stages of developing policies and we are pleased that you have enabled this to happen, where possible. We recognise that there will always be exceptions to this, where market opportunities arise that require swift action, and that in these cases, we rely on pre-decision scrutiny. We look forward to plans coming forward for scrutiny and ask that officers liaise with scrutiny services as soon as is feasible to enable scrutiny to be as effective as possible.

This letter requires a response as it contains a recommendation and request for further information, as follows:

- *We recommend that an assessment of how the draft Economic Strategy complies with the Wellbeing & Future Generation Act requirements be added to the report to Cabinet, either at the time of publication of papers or, if there is not time to achieve this, as an addendum to the report tabled at the Cabinet meeting*
- *We would like to see the metrics, on page 23, grouped by the Strategy's underpinning themes, so that it is clear which indicators relate to which theme*
- *We would like more details of how these metrics can be used to learn lessons to shape future projects and intended outcomes.*

I ask that this letter be included in the report to Cabinet on the draft Economic Development Strategy, so that Cabinet may take our views on board.

Yours sincerely,



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

cc      Members of the Economy & Culture Scrutiny Committee  
          Neil Hanratty           Jonathan Day           Clair James  
          Cabinet Office

Mae'r dudalen hon yn wag yn fwriadol