

CABINET: THURSDAY, 10 OCTOBER 2019 at 2.00 PM

A Cabinet Meeting will be held in Committee Room 3 County Hall on 10 October 2019 at 2.00 pm

A G E N D A

- 1 Minutes of the Cabinet meeting held on 26 September 2019 *(Pages 3 - 6)*

Clean Streets, Recycling & Environment

- 2 Cabinet Response to the Environmental Scrutiny Report entitled 'Litter and Flytipping in Cardiff' *(Pages 7 - 50)*
- 3 Tender for Electricity Generation from Landfill Gas and Potentially Natural Gas, including Landfill Gas Management *(Pages 51 - 64)*
- 4 Shared Regulatory Services Annual Report 2018/19 *(Pages 65 - 96)*

Culture & Leisure

- 5 Cardiff Music Strategy Update *(Pages 97 - 234)*
- 6 Securing the Future of the New Theatre *(Pages 235 - 264)*

Education, Employment & Skills

- 7 Cardiff 2030 Vision and Strategy *(Pages 265 - 294)*

Investment & Development

- 8 Cardiff East Industrial Strategy *(Pages 295 - 364)*
- 9 International Sports Village Development Strategy *(Pages 365 - 394)*

Strategic Planning & Transport

- 10 Third Cardiff Local Development Plan Annual Monitoring Report *(Pages 395 - 642)*
- 11 National Development Framework Consultation Draft *(Pages 643 - 722)*

PAUL ORDERS

Chief Executive
4 October 2019

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**CARDIFF COUNCIL
CYNGOR CAERDYDD**



MINUTES

CABINET MEETING: 26 SEPTEMBER 2019

Cabinet Members Present:	Councillor Huw Thomas (Leader) Councillor Peter Bradbury Councillor Susan Elsmore Councillor Sarah Merry Councillor Michael Michael Councillor Lynda Thorne Councillor Chris Weaver Councillor Caro Wild
Observers:	Councillor Joe Boyle Councillor Adrian Robson
Also:	Councillor Shaun Jenkins
Officers:	Paul Orders, Chief Executive Chris Lee, Section 151 Officer Davina Fiore, Monitoring Officer Sarah McGill, Corporate Director Joanne Watkins, Cabinet Office
Apologies:	Councillor Russell Goodway Councillor Graham Hinchey

145 MINUTES OF THE CABINET MEETING HELD ON 11 JULY 2019

The minutes of the Cabinet meeting held on 26 September were approved

**146 TO RECEIVE THE REPORT OF THE COMMUNITY & ADULT SERVICES
SCRUTINY COMMITTEE ENTITLED TEMPORARY AND SUPPORTED
ACCOMMODATION - THE SINGLE PERSON'S GATEWAY (COPY
ATTACHED)**

Councillor Jenkins, Chair of the Community & Adult Scrutiny committee presented the report entitled 'Temporary and Supported Accommodation - The Single Person's Gateway'. The report contained 15 key findings and 9 recommendations.

RESOLVED: that the report of the Community & Adult Services Scrutiny Committee entitled 'Temporary and Supported Accommodation - The Single Person's Gateway' be received and a response be provided by December 2019

147 **APPOINTMENT OF ASSISTANT CABINET MEMBERS**

The Cabinet considered a report proposing the appointment of an additional Assistant to Cabinet Member and the changes to the role of an existing Cabinet Assistant. It was proposed that Councillor Peter Wong be appointed as an Assistant to Cabinet Member for Private Sector Housing Matters and that Councillor Ashely Lister's role now focus on Child poverty matters.

RESOLVED: that

- (1) the appointment of Councillor Wong as the Cabinet Assistant (Private Sector Housing), as set out in Paragraph 5 of this report be approved and
- (2) the amendment to refocus Councillor Lister's role as the Cabinet Assistant (Building Prosperity) be approved

148 **PROCUREMENT OF LIQUID FUEL**

A report proposing a mini competition for the Council spend on liquid fuel be undertaken to ensure that the Council was receiving best value was considered.

RESOLVED: that

1.
 - i) Officers run a mini competition for liquid fuel through the National Procurement Service (NPS) Framework for supply of fuels and associated products and services NPS-FT-0093-18. The duration of the arrangement will run from 1st December 2019 to 1st April 2023. The contracted value of this procurement will be £5.5m.
 - ii) evaluation criteria for a mini competition of 100% price, which is in line with framework guidelines be approved
 - iii) the issuing of tender documentation be approved
2. authority be delegated to the Corporate Director Resources in consultation with the relevant Cabinet Member to:
 - i) Deal with all ancillary matters pertaining to the mini competition.
 - ii) Award a User Agreement with the Provider selected (most economically advantageous provider) and placing orders under the contract.

149 **MONTH 4 BUDGET MONITORING**

The Cabinet received a report containing details of the budget monitoring position at month 4 of the 2019/20 financial year. It was reported that the overall projected deficit was £325,000 reflecting the financial pressures that the Council is facing, particularly

in social services. It was noted that work was ongoing to reduce the directorate overspend with management actions being put in place.

RESOLVED: that

1. the potential financial outturn based on the projected position at Month 4 of the financial year be noted
2. the allocations from specific contingency budgets to the People & Communities - Housing & Communities, People & Communities - Social Services and Planning, Transport & Environment directorates as set out in this report be noted
3. the requirement for all directorates currently reporting overspends as identified in this report to put in place action plans to reduce their projected overspend be reinforced.

150 **2019-20 QUARTER 1 PERFORMANCE REPORT**

A report outlining the progress against the steps and key performance indicators included in the 2019-2022 Corporate plan was received. It was reported that 83% of key performance indicators were green or amber and 97% of steps were green or amber.

RESOLVED: that the current position regarding performance, the delivery of key commitments and priorities as at Quarter 1, and the action being taken to ensure the effective delivery of Capital Ambition be noted

151 **ACQUISITION OF PROPERTIES FOR HOUSING REVENUE ACCOUNT PURPOSES**

Appendix 1 of this report is not for publication as it contains exempt information of the description contained in paragraphs 14 and 21 of Schedule 12A of the Local Government Act 1972.

Cabinet considered a report seeking approval of the purchase of residential properties from the open market within the parameters of the approved Housing Revenue Account capital programme. This represented the purchase of circa 160 properties in total and whilst there was a large housing need for all types of properties, the buy-backs procedure was placing a focus on acquiring larger family homes (3 & 4 bed homes) as well as ground floor accessible flats and also properties suitable for a specialist housing provision. These type of properties are not delivered through traditional build routes in large numbers and therefore the buy-backs procedure can help to address these gaps in housing need.

RESOLVED: that

1. the contents of the report be noted
2. the continued purchase of residential properties from the open market in accordance with the HRA business plan and approved Capital Programme be approved; and

3. authority be delegated to the Assistant Director, Housing and Communities, to approve the purchase of appropriate properties (pursuant to recommendation 2 above), subject to advice from the Council's Valuer, the Section 151 Officer and the Director of Governance and Legal Services; and compliance with the Procedure Rules for the Acquisition or Disposal of Land.

152 **STREET NAMING POLICY**

The Cabinet considered the street naming policy which had been developed to provide advice and guidance setting out how the council controls the naming and numbering of streets. The new policy sets out that for new street names a Welsh name would be adopted which is consistent with the local heritage and history of the area. In exceptional circumstances, the use of street names in other languages may be considered where a street name would clearly reflect and be congruent with specific local historical, cultural and linguistic associations and considerations and following consultation with the Street Names Panel and local communities/stakeholders.

RESOLVED: that the street naming policy attached to the report be approved and Council be recommended to adopt the Street Naming policy.

153 **BIODIVERSITY AND RESILIENCE OF ECOSYSTEMS (BRED) DUTY**

The Cabinet considered approving the Biodiversity and Resilience of Ecosystems Duty forward plan which included a vision for green infrastructure in Cardiff and a list of actions that would help deliver the objectives of the green infrastructure plan.

RESOLVED: that

1. the BRED Forward Plan be agreed in order to meet the Council's duty under Section 6 of the Environment (Wales) Act 2016.
2. the BRED forward plan help inform the Council's comprehensive refresh of its Climate strategy, now underway following the recent Climate Emergency declaration

**CABINET RESPONSE TO THE ENVIRONMENTAL SCRUTINY
INQUIRY INTO “LITTER & FLY TIPPING IN CARDIFF”****CLEAN STREETS, RECYLING AND ENVIRONMENT
(COUNCILLOR MICHAEL MICHAEL)****AGENDA ITEM: 2**

Reason for this Report

1. To present to the Cabinet response to the recommendations made in the report of Cardiff's Environmental Scrutiny Committee Inquiry into Litter and Fly Tipping in Cardiff

Background

2. A report of the Environmental Scrutiny Committee into Litter and Fly Tipping in Cardiff was presented to Cabinet on 13th June 2019.
3. The report made a wide ranging series of recommendations following a detailed inquiry that provided members with the opportunity to explore and consider how the Council could better manage litter and fly tipping issues in the city.

Issues

4. Waste and Street Scene in Cardiff is currently undergoing a transformation to ensure that resources are allocated to maximise the cleanliness of our streets and to deliver the recycling targets set by Welsh Government.
5. The scrutiny inquiring is timely to inform this transformation agenda and supports and adds to the direction of travel for the service. The 68 recommendations have been considered and 57 have been accepted either fully or in principle, 10 have been partially accepted, and 1 was not accepted.
6. Attached in appendix 1 is the detailed response to each recommendation and it should be noted that in a number of instances implementation has already been progressed.
7. An action plan is being developed to track the progress of the activity as part of the wider transformation of waste services.

Reason for Recommendations

8. To enable Cabinet to respond to the 'Litter & Flytipping in Cardiff' report by the Environment Scrutiny Committee.

Financial Implications

9. The attached report provides a formal Cabinet response to a scrutiny report in respect of the Litter & Fly tipping. The scrutiny report makes 68 recommendations, 66 of which are accepted either fully or in-part. In all instances, consideration will need to be given to any budgetary implications arising from the implementation of each recommendation and whether this can be accommodated within existing budgets held within the Directorate. Where this is not the case, then a formal bid will need to be submitted as part of the annual budget setting process, for consideration and approval. It is important that the budget position is fully understood and the required level of resources have been identified before entering into any commitments.

Legal Implications

10. In considering its response to the recommendations, the Cabinet should be mindful of the Council's statutory duties under:
 - (i) The Equalities Act 2010 – requiring the Council to give due regard to the need to (1) eliminate unlawful discrimination, (2) advance equality of opportunity and (3) foster good relations, in relation to groups having 'protected characteristics' (namely Age; Gender reassignment; Sex; Race – including ethnic or national origin, colour or nationality; Disability; Pregnancy and maternity; Marriage and civil partnership; Sexual orientation; and Religion or belief – including lack of belief); and
 - (ii) The Well-Being of Future Generations (Wales) Act 2015 – requiring the Council to consider how its decisions will contribute, and to take all reasonable steps, towards meeting its well-being objectives, which are set out in Cardiff's Corporate Plan 2019-22 and are aimed at achieving 7 national wellbeing 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. The Council is also obliged to act in accordance with the '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.
11. Further legal advice will be provided as specific proposals are progressed.

RECOMMENDATIONS

Cabinet is recommended to approve the response to the 'Litter & Fly tipping in Cardiff' report of the Environmental Scrutiny Committee as set out in Appendix 1.

SENIOR RESPONSIBLE OFFICER	SARAH McGILL CORPORATE DIRECTOR PEOPLE & COMMUNITIES
	4 October 2019

The following appendix is attached:

Appendix 1: Cabinet response to the 'Litter & Fly tipping in Cardiff' report published by the Environmental Scrutiny.

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Appendix 1: Recommendations

Resource Allocation & Technology

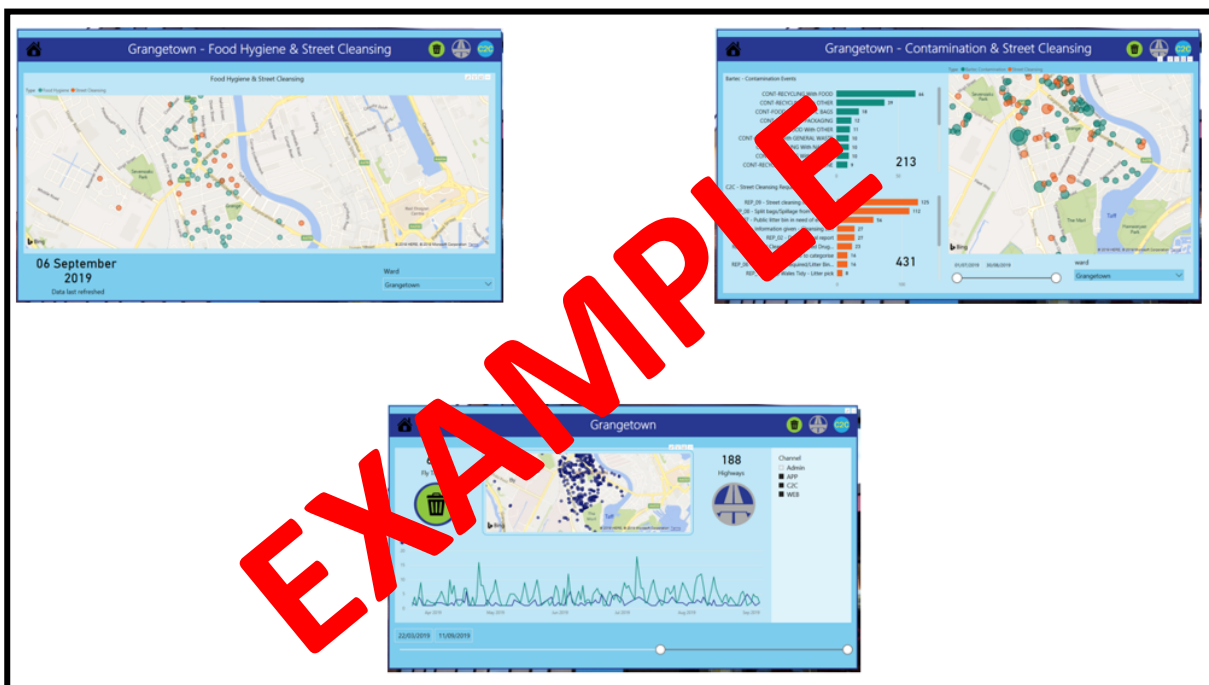
1: Resource Allocation Based on Good Data – A consistent message that came through during the task & finish exercise was the importance of understanding where the main litter and fly tipping challenges were located, and then prioritising the limited resources accordingly. This means having a robust data source that is easily and constantly updated to reflect the growth and changes in the city. Achieving this means having an extensive and integrated technology network that allows front line staff, members of the public, councillors and other key stakeholders the opportunity to constantly upload information into one single data source. This should also be supported with existing data, for example, LEAMS. This would provide management with a comprehensive picture of litter and fly tipping issues across the city so that they can then allocate resources appropriately.

Response: This recommendation is accepted

The committee has identified potential benefits to the organisation that new or improved technologies may deliver. There is a wealth of data available to the team ranging from individual team performance through to customer reporting. This data is often spread across various systems which, on their own may not illustrate the whole picture. Ensuring the teams are making the right decisions informed by data is a key part of using resources well. Already we have started to collate our reporting data to provide dynamic views which display customer reports.

This is part of Cardiff's overall move towards the use of data visualisations to provide narrative and context to activities. Whilst it is still relatively early in development there is a dedicated team looking at the use of tools such as Power Bi and developing use cases for its deployment across the organisation. Cleansing activities performance of waste services is at the forefront of this.

Example Data:



2: Ensuring Access to Staff Benefits for Frontline Staff - During the front line job shadowing exercise one of the Members identified that some front line staff were not aware of a number of benefits that were regularly offered to Council staff, for example, discounts on shopping, eating, tickets, etc.. He felt that this was unfair as they were missing opportunities that were regularly enjoyed by many office based staff who received regular updates by email or through the intranet. Providing this type of benefit to staff helps to make them feel valued and more of a part of the organisation. It has been proved that staff who feel valued are happier and more productive; therefore, the Council should find a way to keep front line staff more engaged with the range of discounts and offers made available, for example, regularly updating notice boards at depots with staff offers.

Response: This recommendation is accepted

The concerns raised here highlight an issue of more general communication challenges for teams without regular access to email. Learning from other front line services will be used to ensure all front line staff have access to information, benefits and offers and that the channels of communication are sustainable and reliable.

3: Multi Skilling & Recruitment – A theme identified by the research undertaken for this inquiry and from the job shadowing exercise was the benefit that multi skilling can provide. The inquiry recommends that the Council should do all that it can to provide relevant training opportunities to frontline staff, which in turn would help to create a multi skilled workforce. In addition to this, it needs to recognise the dedicated hard work of agency and other temporary staff. The job shadowing experience identified that some agency and temporary staff had proven their loyalty and competency over a long period of time – the Council’s failure to make them permanent left them a little frustrated and disgruntled. Therefore, after a reasonable time and when circumstances permit, the Council should do all that it can to offer agency and temporary staff a permanent contract of employment.

Response: This recommendation is accepted

As identified in the report the number of agency staff employed in the service and the average length of service indicates a need to review the balance of agency to permanent posts. As a first step, 26 permanent loader jobs have recently been created alongside a modified recruitment process. There was a very encouraging response to this opportunity from current agency staff with over 100 applications. This is a first phase of a wider piece of work that will be implemented over the next 18 months. Opportunities for multi-skilled roles will be considered as part of this wider review and individual training plans developed.

4: Greater Role Flexibility – During the job shadowing exercise Members identified there was a great reluctance by some staff to deal with or remove litter/ bags that were not on their designated route. A Member described that the material “could be on a side street that was meters away, but there was very much an attitude of ‘that’s another teams problem’”. Quite often, it takes less time and effort to deal with an issue than to report it and leave for someone else. From a residents perspective it means that it takes longer to address the actual problem. This reluctance to be proactive needs to be addressed, with staff (within reason) encouraged to deal with problems that directly impact the residents instead of only working to a fixed work pattern.

Response: This recommendation is accepted

A working group has been established to develop links across a wide range of street scene council services. One aspect of the work is to provide a clear understanding of what enforcement powers are available to all services; to understand whether and to what extent those powers are being used and to consider if the exercise of those powers could be extended to a wider range of officers including volunteers. The impact of the use of enforcement powers will also be considered.

Building on this better understanding of current roles and responsibilities recommendations will be considered in relation to the integration of tasks and roles to reduce duplication; eliminate gaps in service where possible and improve efficiency.

5: Work Preparation – Two of the Members involved in the job shadowing exercise reported that they were delayed at the start of the shift because their vehicles didn't have all of the necessary equipment. In addition to this a Member reported that this lack of preparation sometimes meant that they wasted time going back to base to collect pieces of equipment, for example, a bigger machine to lift the bags that they were not able to pick up due to the weight. This lack of preparation appears to disrupt the staff working pattern, which in turn results in less time spent carrying out cleansing activities. This needs to be addressed, therefore, Members recommend that a process is put in place ensuring that all vehicles are prepared for the working day in advance of the start of the working shift, for example, preparing a vehicle for the next day could be the last task of each working day.

Response: This recommendation is accepted

Work to review the preparedness of vehicles – both in terms of equipment and issues around defects – has commenced. This will clarify roles and responsibilities within Waste management and Central Transport Services and ensure clear processes and performance monitoring are in place.

6: Review Speed of Waste Transfer – A Member was very surprised at the length of time that it took to dispose the rubbish collected by the street cleansing team at Bessemer Close. The time the whole crew spent at Bessemer Close waiting to dispose of waste was time that they could have spent dealing with litter. This was a contrast to the approach witnessed by another Member who explained that only the driver went to dispose of the rubbish collected, while the other staff remained in the ward and undertook a litter pick. Members recommend that the process for disposing of rubbish at waste transfer sites be reviewed; with the aim of speeding up and minimising the number of staff involved with the waste disposal process. Alternative work should be identified for staff not required to visit waste transfer sites for rubbish disposal.

Response: This recommendation is accepted

The process of disposal at Bessemer Close waste transfer station is being reviewed. The team includes officers from the Corporate Health and Safety team to ensure all recommendations for change have no adverse health and safety impacts.

7: Clothing & Safety Equipment – A Member involved with the job shadowing exercise commented that some of the clothing and safety equipment used by staff was good, but felt that of it could have been better. For example, he suggested that quality of safety gloves could have been improved. Current sickness levels in many of the front line services are very high, therefore, ensuring that all clothing and safety equipment used by staff is of a good standard can only help improve conditions and in part help towards a reduction in sickness. The inquiry recommends that the Council reviews the quality of clothing and safety equipment provided to front line staff to ensure that they are adequately protected by the equipment that they use.

Response: This recommendation is accepted

Clothing and safety equipment is obtained via the NPS all Wales framework specifying items and the suppliers the Council must purchase from. The waste stores team in conjunction with workforce representatives continually work with the nominated suppliers to build up a range of equipment that is better suited for the tasks undertaken with in waste management. Trials are currently in place sampling new products including boots, gloves and high visibility tops.

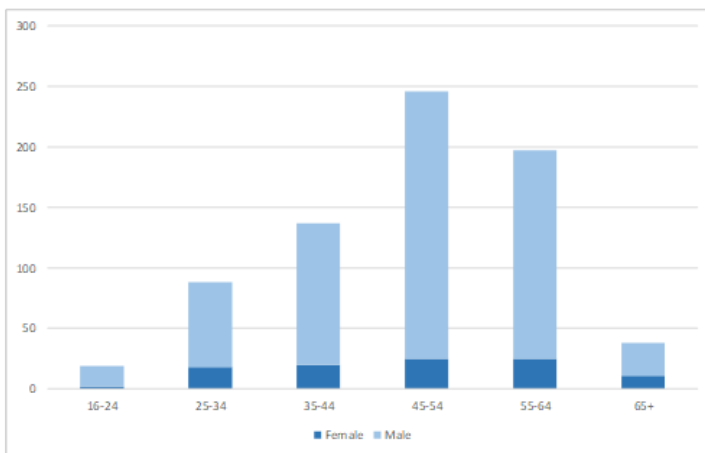
8: Workforce Planning – During the job shadowing exercise concern was raised about the average age of the street cleansing workforce and the physically demanding nature of the work that they undertake. It was suggested that the average age of the staff was quite high and that very few younger people were being recruited into the service. This older age profile has the potential to impact on sickness rates and medium to long term work succession planning. Members recommend that the service feed this issue into the Council’s wider workforce planning exercise.

Response: This recommendation is accepted

A workforce development plan was developed for Street Scene in 2018. Employing 725 members of staff the Street Scene covers Cleansing, Civil Enforcement, Environmental Enforcement, Highway Assets, Waste Collections and Waste Strategy.

Age Profile

The 45-54 age group is the highest represented group at 33.93% of the total workforce. The second highest age group is 55-64 at 27.17%. Although women represent only a 13.93% of the total workforce, the ratio of male to female has improved slightly within the 25-44 and 35-44 age groups. 16 -24 year olds are under-represented in the service area.



Work is underway to consider opportunities for the creation of apprenticeships in the service that will assist in addressing the issues identified in the workforce planning exercise.

9: Effective Allocation of Staff Resources – The research undertaken as part of the task & finish exercise identified a number of staff allocation and working patterns that were successfully delivered by other local authorities. The task groups feel that the Council should review and consider implementing **Targeted Cleansing in High Footfall Areas** and **Rolling Four Day Working Week**.

Response: This recommendation is accepted in principle

The principle of the recommendation to review staff allocation and working patterns is supported.

It is very important in moving forward that we fully engage with staff who will inform and influence service redesign decisions. Targeted cleansing is currently being piloted in a number of high footfall areas and the results will be analysed to consider the impact.

10: Trialling the 'Glutton' - The research carried out for the task & finish exercise identified that Exeter City Council delivered street cleansing improvements by trialling and then investing in a giant street cleansing vacuum called the 'Glutton'. The machine is described by its manufacturer as an urban and industrial vacuum cleaner that saves time, makes work more comfortable, reduces effort, and improves health and safety. The service has had very positive feedback from staff saying that this was "easy to maintain, it's quiet, it's not dusty, and it is quite impactful and this thing hoovers up all the detritus, all the litter". The machine is available for trial and if successful can be purchased for approximately £18,000. The task group recommends that the Council contacts the company to arrange a trial of this machine with a view to making a purchase if the trial is successful. Thought should also be given to approaching FOR Cardiff to see if they are interested in taking part in the trial of the 'Glutton' as the machine could help improve cleanliness in the city centre.

Response: This recommendation is accepted in principle

Cardiff Council Waste Management have trialled over the last 12 months, Electric Vac Sweeps, Electric Mechanical Sweepers, Street Washing vehicles and Gum Removal Machines.

Three Electric Vac Sweeps have been purchased with an arrival date of October 2019. They will be based in three wards initially and subsequently moved to other wards on an agreed rota.

This will deal with issues such as detritus, smoking related litter etc and will have a positive effect on the cleanliness of a ward

We have in previous year's trialled the Glutton and it was felt at that time that the manoeuvrability and suction would not be adequate for the locations it would be required to work in.

We do however recognise that technology moves on and when arranging further trials of machinery to improve the cleanliness of the city, will look again at the Glutton.

11: Needles in the City Centre – While job shadowing staff in the City Centre Cleansing Team a Member was made aware of the issue of discarded needles and syringes. This is clearly a health and safety concern and something that the Council has to deal with urgently. The task group recommends that the Council reviews what can be done to keep needles off the street in the city centre. This could include a number of options, including the possibility of introducing dedicated needle / syringe bins – something that Newport City Council is considering to tackle a similar problem.

Response: This recommendation is accepted

All Cleansing staff are needle stick trained and all staff carry a sharps box with them in their respective roles in the city centre to deal with any needle issues.

A recording procedure is now in place to record the amount of needles collected in the city centre and surrounding areas to highlight hot spot areas.

Cleansing and Enforcement Officers are working with the Police, Outreach Workers and Probation to ensure that the people most at risk are aware of needle exchange arrangements which include safe disposal "sharps" boxes.

Cleansing management are also currently included in the multi-agency vulnerable people task group which brings together all parties to work together as one team to work to address the needle issues in the city centre and surrounding areas.

12: Improving Digital Reporting – The inquiry was told that Connect 2 Cardiff, the Council's main point of contact and reporting mechanism, still prioritised phone calls over emails. This meant that there was quite often a delay in responding to emails submitted to the Council through this service. This is the exact opposite of digitalisation which is where the Council needs to be to maximise efficiencies – something that has to happen given the continually reducing budget. The task group feels that the Council should be doing more to integrate digital communication such as email into becoming the preferred method for reporting issues. Councillors quite

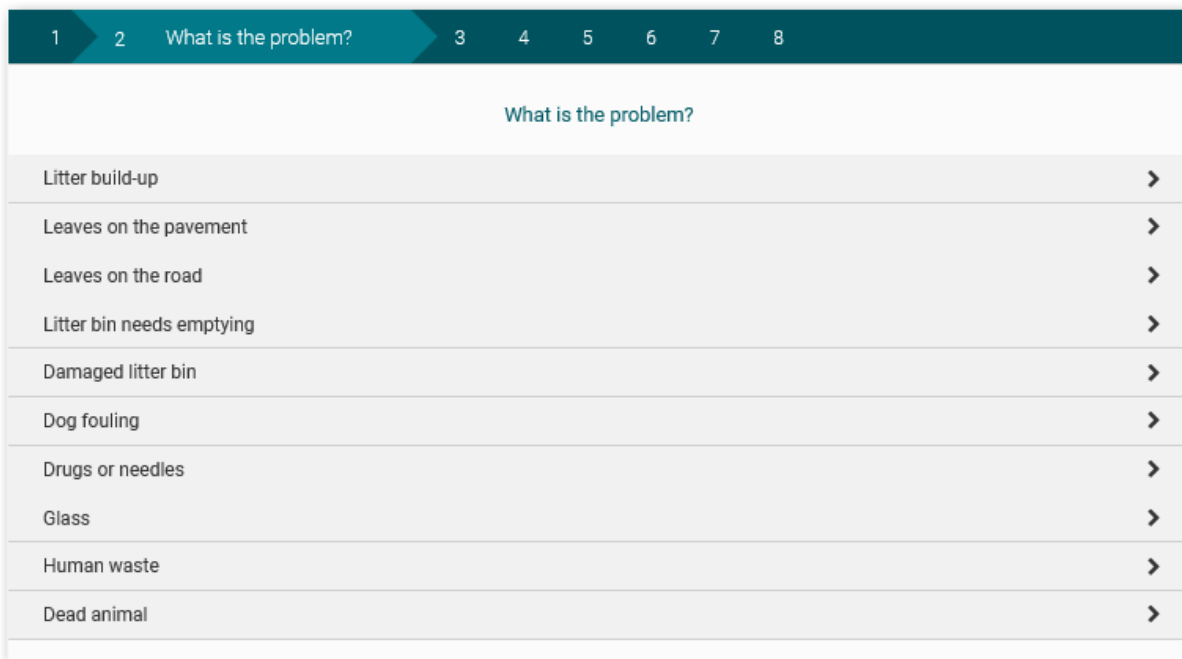
often receive feedback from Members of the public complaining that they have emailed the Council, but have not received a reply. Thought should be given as to how the Council provides:

- Quicker responses and feedback to members of the public to the inquiries that they raise;
- An early or holding response confirming that inquiries have been received, what happens next and the relevant timescale;
- Smooth integration of the inquiry through the system and directly to the part of the Council with responsibility for dealing with the inquiry;
- That details of each inquiry are recorded and built into a wider Council database so that it is able to build up a more detailed picture of the type and geography of various issues across Cardiff.

Response: This recommendation is partially accepted

We note the comments put forward by the committee around C2C and the delays experienced using email as a channel. The direct C2C@Cardiff.gov.uk email address was closed from June 2019 with customers asked to use the online services and forms held within the website. This has helped to ensure that reports made by customers are more structured and increases our ability to resolve the query at the first attempt.

When our customers use online services that we have built as part of the digital offering (e.g. street cleansing and fly tipping) the report is sent direct to the team responsible for delivery. As we continue to develop our services we expect to see more transactions of this nature leading to a much improved customer experience.



Littering

Litter can include all sorts of items such as sweet wrappers, fast food packaging, cigarette butts and chewing gum.

Report litter build-up

Our street cleansing team collect small amounts of litter on their regular cleansing rounds. If you come across a significant build-up of litter outside a property or on a Cardiff street please let us know.

1 2 3 Where is the problem? 4 5 6 7 8

Where is the problem?

Enter part of an address to find location

< Previous Next >

13: Reducing Litter Produced by Waste Carriers - A great deal of litter is caused because Lorries that transport rubbish have insufficient netting to prevent litter from being blown off. Representatives from Cardiff Rivers Group suggested that Tredelech Park on Southern Way was a good example, and wanted to see fines for Lorries or skips that were not properly covered by a net. There are several waste transfer stations in Cardiff, for example, at Wentloog, Leckwith and Cardiff Docks that accept commercial waste. Using existing CCTV monitoring, these sites should be targeted to encourage waste transporters to take greater care when transferring waste. Where waste carriers are in breach of the required standard then an appropriate fine could be issued. Visiting skip hire companies and waste transfer stations to remind them of their obligations was viewed as being a good start. The Council should also play its part by ensuring that all its vehicles are properly covered when transporting waste around the city.

Response: This recommendation is accepted in principle

Every business including transport companies have a Duty of Care to make sure that that no waste escapes from their control and it is securely tied or from the transport companies, securely netted to prevent waste from escaping. If the enforcement officers witness any lorry transporting waste and waste is escaping, a formal investigation would be initiated and the transport company would be prosecuted in court for Duty of Care offences under the Environmental Protection Act 1990. The transport requirements of the service are currently being reviewed and the Scrutiny observation in relation to covered vehicles will be fed into our re-procurement approach.

We work in partnership with our camera control room and with South Wales Police camera control room and if officers do witness this happening we would ask for the camera footage to further support the officers' evidence.

The enforcement officers use caged vehicles to remove waste or when they do use a flat-bed vehicle, a net is always used to secure any waste.

Enforcement & Fines

14: Dedicated Enforcement Team – The Council needs a dedicated Litter Enforcement Team that:

- A:** Focuses on issuing Fixed Penalty Notices for specific littering offences such as dropping fast food, smoking litter, chewing gum, dog fouling and litter in general;
- B:** Is dedicated to specific elements of litter enforcement and should not be able to drift into the delivery of wider education and enforcement issues;
- C:** Is a resource that is in addition to existing staff in the Education & Enforcement Team. The hope would be that staff in the Education & Enforcement Team are then freed up to focus on important roles such as delivering more education and awareness activities aimed at reducing litter;
- D:** Any business case, contract or service level agreement that is created for the dedicated Litter Enforcement Team should reflect a number of pre agreed Council aims, priorities and values;
- E:** The dedicated team should as a minimum be delivered on a cost neutral basis, i.e. the monies raised through issuing fixed penalty notices should be at least enough to cover the costs of the new operation. This has been achieved in the United Kingdom by using both private companies (for example, 3GS and Kingdom) and in house teams delivered by local authorities (for example, Newcastle City Council);
- F:** Issuing Fixed Penalty Notices against people that have committed litter offences is often a very confrontational task that can sometimes results in officers being subject to threatening or violent actions. As a safety precaution the officers in the dedicated Litter Enforcement Team should be provided with body cameras;
- G:** The priority of the task group is to have a dedicated Litter Enforcement Team that helps to reduce littering in Cardiff on at least a cost neutral basis. It is happy for the Council to assess how best to deliver this team, something that should involve the comparative merits of comparing private companies against in house provision. Once a business case for the delivery of the team is completed (and before the team is actually put in place) a copy of the document should be made available to the Environmental Scrutiny Committee for consideration;
- H:** As with all other teams involved with managing litter and fly tipping the work of the dedicated Litter Enforcement Team should, as far as is possible, be driven by the good information and data. This would mean identifying areas in the city with documented littering problems and then allocating the resource appropriately. Using good data would be an effective way of targeting repeat offenders;
- I:** Prior to launching the dedicated Litter Enforcement Team the Council should run a city wide promotional campaign to raise awareness about littering and the potential penalties. At the same time the public should also be made aware of the new team and the work that they are being tasked to deliver. A similar range of messages should be circulated on an ongoing basis to ensure that the public is reminded of the problems caused by litter and associated penalties.

Response: This recommendation is accepted in principle

The overall objective that this recommendation is seeking to achieve is accepted. Specifically in relation to a dedicated litter enforcement team a more “Whole Council” approach to street scene issues is being considered with particular emphasis on the wider use of enforcement powers by staff from across the Council. This approach has worked well in other areas of work. The opportunity for the involvement of volunteers will also be considered.

15: Encouraging Residents to Report Litter & Fly Tipping Offenders – The task group believe that helping to managing litter and fly tipping challenges is both a Council and community problem. To this end Members feel that local residents should play a vital role in reporting incidents and offenders. Local authorities like Conwy County Borough Council have actively encouraged local residents to report offences such as dog fouling through the ‘DON’T STAND FOR IT’ campaign. This approach has worked in identifying persistent offenders and in raising the public profile of a range of littering offences. The task group believe that there is merit in this approach and recommend that the Council run a public reporting pilot in the city to test how effective this approach might be in Cardiff.

Response: This recommendation is accepted in principle

Through the Love Where You Live Campaign we are launching a Green Dog Walker Campaign which has proven successful elsewhere. The Campaign will encourage Dog Walking Champions who carry and share bags for dog fouling to encourage others to dispose of waste responsibly. Public Spaces Protection Orders (PSPOs) are also to be adopted to issue Fixed Penalty Notices for dog fouling related issues. The PSPOs will be publicised alongside the campaign.

Information provided by residents is already utilised by the Environmental Enforcement team to investigate and enforce issues relating to fly tipping and dog fouling. The service area is required to work under data governance legislation to ensure the management of any information and the details of those providing the information.

The Service area will review the development of a ‘report offenders’ element as part of the ‘report it’ aspect of the Council website and app. A media campaign could be utilised to promote the ‘report it’ website and app as well as the associated features.

16: Community Protection Notices – The Litter & Fly Tipping Survey identified fast food litter as a significant problem in Cardiff. The public perceive that since 2012 the enforcement effectiveness of dealing with fast food litter has reduced by 8.33%. Newport City Council has also identified fast food litter as an issue, and so to address the problem they are due to start using Community Protection Notices. These will be used against establishments who do not proactively deal with and control litter from their establishment. This approach will allow the local authority to issue a fine to a maximum value of £150 a day if the establishment fails to comply the Community Protection Order. Newport City Council seemed confident that this approach would work well, therefore, the task group recommends that the Council reviews the option of applying this approach against persistent offenders in Cardiff.

Response: This recommendation is accepted

We will consider the use of a Community Protection Notices as part of the approach to tackling retail food litter. It will be important to fully understand the range of tool’s available to resolve identified issues in a more location specific way and also to pilot and test interventions to understand the impact.

17: Cameras & Litter from Vehicles – The Council needs to explore the possibility of using Cardiff’s wider camera network to issue fines against those committing litter and fly tipping offences, i.e. not just Council cameras but also those owned by other public bodies such as South Wales Police. Members felt that this approach would be particularly useful if it was used to target people who were throwing litter or fly tipping from a vehicle. An educational campaign would be needed to support this approach, with the public being made aware that throwing litter or fly tipping from vehicles is not acceptable. In doing this, the campaign should highlight the range of reporting vehicles available to the public.

Response: This recommendation is accepted in principle

The Council will continue to use CCTV cameras when appropriate in this regard. The process can be challenging with stringent guidelines for us set by the Surveillance Commissioner however, we continue to work with all parties to deploy cameras in an appropriate and responsible way. We have been in contact with Glasgow and extensively studied their joint operations centre with a view to building a business case to support a similar approach in Cardiff. This will allow the Council to take full advantage of the range of camera's at our disposal, including public realm camera's which are jointly operated with South Wales Police as well as Council traffic cameras and the camera network operated to support our housing and hub estates.

Education & Awareness

18: Refresh the 'Love Where You Live Campaign' - Educational campaigns need to be refreshed on a regular basis to keep important messages fresh in the mind of the public. 'Love Where You Live' was a successful campaign; however, given the low level of educational campaign awareness Members believe that it now needs to be refreshed. Initially there was strong volunteer support for the 'Love Where You Live Campaign' – they thought that it projected a strong message to the public, and gave the Council a consistent brand against which to run a range of litter related projects. The task group recommends that the Council relaunch 'Love Where You Live' and support it with a wide range of Council and community supported initiatives aimed at reducing litter and fly tipping.

Response: This recommendation is accepted.

There continues to be strong volunteer support for LWYL, and there has been a continuous increase in the number of constituted community groups as well as the number of litter champions. The LWYL brand will continue to be promoted through regular campaigns. Upcoming campaigns include:

- Leave Only pawprints campaign
- Love Your Lanes
- Urban Orchards/Community Street Planters
- Careful littering

'Love Where You Live' is an overarching brand to deal with aspects where Street Scene services work to support community initiatives. Volunteering is a strong part of this work but the team also promotes aspects such as National Campaigns (Refill, Single use Coffee Cups – Time to change', No Straw Stand, The Gum Slam Dunk – bin it your way etc...).

The service will be meeting the volunteering groups following the response to this recommendation and will be asking how volunteer groups and the services can work together to promote initiatives aimed at reducing litter and fly tipping.

19: Using Social Media to Deliver Targeted Messages – Evidence provided during the task & finish exercise suggested that there is no one size fits all approach to dealing with litter and fly tipping. Litter and fly tipping problems vary from area to area; the background and demographics of those responsible vary from area to area. For many years officers have attended scrutiny to comment on litter and waste issues. Time after time, they have provided examples of challenges caused by difficult to reach groups. Transient populations, language barriers and cultural differences have regularly been referenced, these are then followed by a commitment to make leaflets available in a wider range of languages and to send out education and enforcement officers. Times have changed. We now live in a digital world where a huge number of people from right across our society communicate through social media and other electronic formats. The electronic footprints that most people now create mean that it is possible to identify an issue and then link it to a specific group of people by a wide range of categories including geography, age and language. The cost of running a ward targeted campaign through Facebook adverts is very low – a whole ward in Cardiff could be targeted for less than £10 a day which is much cheaper than the current approach. It is also possible to accurately measure the success, reaction to and impact of such posts in almost real time – meaning that the Council would be able to constantly review and adapt campaigns to improve the impact. This approach also provides greater flexibility in that groups could be targeted outside of normal Council working hours (for example, in the evening or on weekends) if circumstances required, while repeating the exercise would only involve a click of a button and small cost. Clear, concise and regularly repeated Facebook campaigns are a tried and tested approach to delivering behaviour change. The task group recommends that the Council selects an area with challenging litter and fly tipping issues, identifies the root cause of the problem and then delivers a pilot Facebook campaign aimed tackling the problem. This

should feature a series of simple and clear messages, for example, the impact and associated fine for the offence. The message should be repeated over a three or four month period. At the end of the exercise the success of the pilot should be evaluated and if successful rolled out across the city where appropriate.

Response: This recommendation is accepted in principle

Cardiff Council now has over 92,500 Twitter followers and over 23,000 Facebook followers. The Council uses a combination of organic social media posts and paid for targeted Facebook advertising. Organic posts on Facebook are scheduled strategically to work with the algorithms of the platform and therefore maximising the reach of each post. The Facebook advertising is tailored to reach the target audience using the demographic and geographical specifications built in to Facebook Business Manager. It is a very cost effective way of reaching the target audience.

The Council is looking at an area to pilot new approaches to tackling littering and fly-tipping. Targeted communications and education will support this initiative. As well as using targeted Facebook, the campaign will include all other Council social media platforms, on the ground public engagement and marketing communications activity.

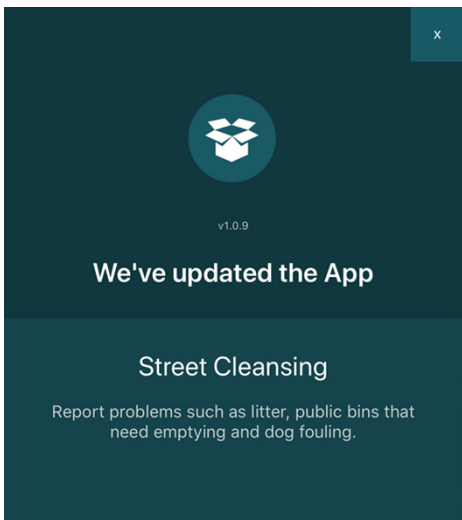
Based on data collected, the Council is currently exploring which area has challenging litter and fly tipping issues and to identify the root cause of the problem. This data will be used to shape the key messages and inform the strategic approach to developing the activity in the communications plan and on the ground education.

20: Cardiff Gov App – The Council has recently created the ‘Cardiff Gov App’ that provides members of the public with an opportunity to report fly tipping. This is a positive step forward for digitalisation that will provide the Council with an opportunity to gather more accurate fly tipping data and create a clearer picture of hotspots across the city - but the ‘Cardiff Gov App’ has the potential be so much more. If the key to better litter management is improved data then the app needs to be a public reporting tool for all of the main litter categories. All of the gathered data could then feed into a single database that would create a much clearer picture and act as an excellent management tool for resource allocation. The task group recommends all of the main litter offence categories are added to the ‘Cardiff Gov App’. Once these have been added then the Council should run a promotional campaign aimed at encouraging people to sign up for the upgraded app, and in particular raise awareness of the benefits of reporting litter and fly tipping.

Response: This recommendation is accepted in principle

We were pleased to hear that the Committee felt that the mobile app as a mechanism for customers to report issues was a positive step. In September 2019 “Street Cleansing” as a topic was introduced to the app and our digital platforms. The ethos that we have followed when developing these services is to ensure that we are developing across all platforms and the same service (which puts reports direct to the back office teams) is available on the Cardiff website and also for agents within C2C.

This design is key to developing services with the widest level of coverage, offers a consistent experience and develops in the most efficient manner possible, re-using the underlying technology in all cases.



The data from this is consolidated into on database to allow us to clearly see where our reporting hotspots are and the preferred methods of contact for our customers.

The introduction of street cleansing reports to the app is a continuation of a rolling programme of service development which was first launched in June 2018 and has since seen over 17k downloads from residents with new services released on 14-16 week cycles. We are also taking the lead from our customers with suggestions added to the backlog for future works.

21: Litter & Fly Tipping Promotional Materials for Councillors – 3,443 people completed the 2018 Litter & Fly Tipping Survey. This was a 53% increase in participation compared to an almost identical survey that was circulated by scrutiny in 2012 – and delivered with significantly less resource. The reason for the huge increase was the use of local social media networks - in particular the social media accounts of local councillors. Many local councillors are very effective at communicating with residents through social media and other electronic formats. At a time of shrinking budgets this is a resource that the Council cannot afford to ignore. Given the range of materials available to promote litter and fly tipping problems the Council should get into the habit of providing councillors with copies of these materials so that they can then circulate appropriate messages to local residents through, for example, Facebook posts and other social media. Should the Council require additional promotional materials then it should contact Fly Tipping Action Wales and Keep Wales Tidy who have access to such materials.

Response: This recommendation is accepted in principle

The Council's media team already promote environmental aspects via social media and there is an agreed programme to ensure key messages are delivered to promote the services we deliver and the good work taking place. The waste cowboy and the staged fly tipping outside City Hall is an example of promotional information on dealing with issues relating to residents giving waste material to companies or individuals who do not have a waste carrier license.

Members Briefings are now used to highlight initiatives and campaigns, a recent example being the briefing on changes to Concessionary Travel Cards. These briefings can also be used to provide information for Councillors to share in their wards. The Cardiff Council social media feeds will continue to push anti-littering and fly-tipping messages, and Councillors sharing these posts with their followers will be extremely valuable in helping to spread these messages.

22: Keep Wales Tidy – Campaign & Promotional Material Consultee - Before launching any litter or fly tipping promotional campaigns it would seem sensible to test the proposal with a consultee third party. A suitably experienced third party like Keep Wales Tidy should be able to provide appropriate feedback that could help iron out any issues and provide assurance for the Council on the proposed campaign. The task group, therefore, recommends that Council liaise with Keep Wales Tidy to ask them to act as a consultee for all future litter and fly tipping campaigns.

Response: This recommendation is accepted

The Council has a Partnership Agreement with Keep Wales Tidy to support sharing of promotional campaigns and support resources in Cardiff. The service area will ensure any promotional campaigns are shared with Keep Wales Tidy for comment.

23: Deliver Simple Clear Messages – The Litter & Fly Tipping Survey identified that public awareness of current educational campaigns or promotions aimed at reducing litter and fly tipping was very low. The 2018 results show that only a relatively small percentage (between 11% to 36% across the range of litter categories) were aware of current or ongoing litter campaigns. In addition to this the recognition levels of a sample of litter campaign logos used by the Council was also very low, with all five images scoring less than 50% recognition. The best performing logo was the simple, yet clear dog fouling logo that achieved 48% recognition. Members felt that this scored the highest response because it was clear, simple and universally recognisable – irrespective of where people are from or the language that they speak, the simple message of the dog fouling logo was easy to understand. Keeping educational material simple, clear and very recognisable was the key to a successful promotion.

Response: This recommendation is accepted

The service is looking at how we promote clear messages across Cardiff in terms of campaigns relating to litter and keeping the street scene tidy. We have targeted fly tipping but there is still work to be undertaken relating to lanes where issues of fly tipping or abuse by residents persist. The service area is currently reviewing data relating to street cleanliness to inform where aspects like campaigns would be most beneficial.

24: Dedicated Budget for Litter & Fly Tipping Campaigns - The research undertaken for the task & finish exercise identified many local authorities no longer have dedicated budgets for litter and fly tipping campaigns. Members felt that this was a mistake since the key to delivering real behaviour change is through a combination of education and enforcement. The task group recommends that if the Council is serious about reducing litter, then it needs to maintain a dedicated budget for litter campaigns and other educational initiatives.

Response: This recommendation is partially accepted

Financial pressures mean that dedicated budgets for media campaigns have reduced over time. However alternative funding sources are used wherever possible and there is scope to use existing channels of communication more effectively. Service change proposals in this area will also include the cost of communication and promotion as part of the business case.

25: Promotion of Key Educational Messages – The range of key educational themes that should be considered when promoting educational messages include:

- Promotion of Accepted Service Standards - Service standards for cleansing should be promoted through education and awareness campaigns.

- Litter Enforcement Directing Behaviour Change - It was emphasised that litter enforcement should be used as a tool for behaviour change, however, it is essential that this should be supported by education. The idea of an all Wales litter campaign was suggested during the inquiry.
- Litter Prevention - Litter prevention should be the first priority, i.e. to stop it from happening before it is created.

Response: This recommendation is accepted

We are currently working in partnership with Caru Cymru (Keep Wales Tidy) on a programme of activities. The focus will be on behaviour change and litter prevention rather than one-off clear ups. Keep Wales Tidy will coordinate pan-Wales campaigns that all Local Authorities can access, this is supported by Natural Resources Wales, Cardiff University and Welsh Government.

A set of Service Standards will be developed. Benchmarking is currently underway to establish how other authorities have set and communicated such standards.

26: Educational & Promotional Messages Aimed at Young People – It has been documented on many occasions that young people under the age of 18 are more likely to litter than other age groups. Taking enforcement action against people under the age of 18 is not possible; therefore, the only way to address the problem is through education. To tackle this problem the Council needs to work with schools and Keep Wales Tidy to develop a specific strategy to educate younger people on the problem of litter. This should include information about the problems and costs of litter; the practical steps that schools can themselves take to reduce litter both at school and on the main routes into and out of the school. Given the number of schools in Cardiff, the information should be something that the teachers or other school staff are able to deliver without outside support.

Response: This recommendation is accepted

Cardiff Council runs the annual Really Rubbish campaign which focusses on messages around recycling and littering. Officers can deliver workshops in schools to all ages from reception upwards. Resources are also available for teachers to deliver via the Keep Cardiff Tidy website. Keep Wales Tidy have a dedicated ECO schools staff member who we work in partnership with. In 2018 the Love Where You Live team delivered story books to all 98 primary schools in Cardiff around marine plastics. Cardiff Council also works with secondary schools in Cardiff as part of the environmental element of their Welsh Bacallaureate.

Bins

27: Bin Management Based on Good Data - Allocation and emptying of bins should be based on extensive and reliable data. Evidence suggests that local authorities with good data are able to create more efficient bin collection rounds. The time saved can be directed towards other tasks or to produce savings. To support good data gathering all of the Council's bin stock needs to be electronically documented (digitalised) or referenced with unique identifiable number. The unique bin number then needs to be recorded on a central litter database so that incoming data relevant to that bin can be stored to build up a picture of how the bin is used, and the frequency with which it needs to be emptied. Creating this bin data gathering structure will involve lots of work initially, however, once established will provide valuable data that will allow the creation of shorter and more efficient bin emptying rounds.

Response: This recommendation is accepted in principle

Litter bin sensors have been trialled on 100 litter bins and a number of benefits identified. A business case has now been developed to procure further sensors, with the aim of procuring further sensors by the end of the financial year.

28: Rotating Sensors to Gather Data – Given the cost of sensors and the challenging financial position facing the Council, the existing sensor stock (ENEVO technology) should be continually rotated around Cardiff's bins to gather data. Once the data is collected it should then be used to design more efficient bin collection rounds. The rotation should be managed to take account of seasonal variations. For this to work properly the precise location of all bins needs to be electronically documented (see the bullet point above). To date the sensors have been mostly located in city centre bins – given the high footfall in this area and that the public rate bin emptying in the city centre as the best in Cardiff, the Council should undertake an assessment to establish if the new sensor technology is a contributing factor to the better performance in this part of the city. As Cardiff has an extensive bin stock, and given the urgent need to achieve almost immediate savings, the Council might also give consideration to leasing more of these sensors in the short term to help accelerate its bin data gathering exercise.

Response: This recommendation is partially accepted

Sensors are not currently based in the city centre, and it can be a costly exercise to move them. As operatives have to litter pick the city centre locations regularly anyway, these areas are seen as low priority for sensors, as operatives can visually check these bins daily. As such, sensors will be prioritised to outer areas to ensure maximum efficiency. Use of the sensors will be cost effective as it will reduce the size of litter bin rounds and therefore the number of litter bin rounds required.

29: Fewer But Bigger Bins - Evidence suggests that the Council needs to gradually replace smaller bins, for example, bins mounted on lampposts, and move towards the provision of fewer and bigger bins. The research carried out for this inquiry indicated that several local authorities were creating efficiencies and reducing litter by replacing smaller bins with fewer large ones. This resulted in shorter bin emptying rounds and reduced the number of overflowing bins – a common cause of litter in some locations.

Response: This recommendation is partially accepted

This recommendation will be trialled where appropriate. Unfortunately, some locations are not suitable for free-standing litter bins, and in such scenarios lamp-post bins are the best available solution.

30: Bins – 'Cardiff Gov App' – As per a wider recommendation on the 'Cardiff Gov App', the task group recommends that a public reporting facility similar to the existing one for fly tipping be added to the app for

bins. This would require all bin locations to be digitally recorded (see above), which in turn would allow the public to report any full or overflowing bins through the app. This would help provide management with information so that they can better direct resources to improve how they manage bins.

Response: This recommendation is partially accepted

This recommendation will be explored. However, hopefully the litter bin sensors will remove the need for such a service.

31: Covered Bins – Given the large number of seagulls and other vermin in Cardiff, the Council should move away from the provision of uncovered bins. Placing a top or cover on each bin would prevent the vermin from entering the bin and removing pieces of litter, which in turn would reduce the amount of litter on the street.

Response: This recommendation is accepted

The Litter Bin Policy stipulates the types of bin that should be utilised. The Policy stipulates that bins should be covered, and where we have uncovered bins they are being prioritised for replacement.

An investment programme to improve bins in the City over the last 3 years has seen £262,600 spent on replacement bins and their installation over this period. Open top bins are no longer procured and there has been a targeted focus to replace open top bins with bins with lids as part of this investment. There are 3,600 bins across Cardiff.

Volunteering

32: Annual Recognition Ceremony – The Council needs to run an annual ceremony to recognise the efforts of volunteers. This could be held annually in one of the Council’s flagship heritage buildings, for example, City Hall or the Mansion House. It should be designed to reward volunteers for their efforts and send out a clear message that the Council values the work that they deliver.

Response: This recommendation is accepted

Agreed – this is something we have set budget aside for and plan on holding in February, and to continue to do so on an annual basis. This year we held ‘coffee and cake’ thank you events as part of National Volunteer Week and held a picnic to link in with Splott Beach Clean.

33: Incentivise Volunteering – The Council and Keep Wales Tidy should review the range of opportunities around creating incentives or benefits for those who volunteer. For example, they should develop a consistent approach that would mean that all volunteers are able to report and access time credits for all the work that they undertake – at the moment the ability of volunteers to access time credits is patchy. They should also look into using the large volunteer base across Cardiff (and possibly Wales) to apply for a collective bid to access ‘employee benefit’ or ‘employee discount schemes’. With a sufficiently large group of people such schemes are free and offer discounts for things like retail shopping, event tickets, etc... Creating access to these benefits and discounts would help pass on a well-earned thanks to volunteers for the great work that they carry out.

Response: This recommendation is accepted in principle

The Council has worked in partnership with Tempo time credits in the past, but due to the vast nature of volunteer work completed by litter champs the time credit model is not sustainable. Instead, time credits are offered via Tempo to ‘Keep Tidy’ groups who wish to sign up. This is the decision of individual groups whether or not to sign up to the time credit scheme. The Council will look into how current staff benefits may be passed onto volunteers. In the past we have offered ad hoc ‘thank you treats’, such as concert tickets.

34: Volunteer Co-ordinator Post – Members understand that the current volunteer co-ordinator post is on a temporary contract basis, and that approximately only a quarter of her time is allocated to co-ordinating volunteers. It clear that the post has provided a significant return on investment for the Council (equivalent to a value of £41,252 in Quarter 1 2018/19 alone), and that if this was a dedicated resource then this could be significantly increased. The task group recommends that this post is made permanent and that the role is dedicated to volunteer co-ordination). The success of the post should be monitored, and if it is clear that the value added continues to increase then the Council should look to add to this resource. In addition to this, an additional post should be created within the Cleaner Cardiff Team to cover the tasks previously undertaken by the Volunteer Co-ordinator that don’t relate to volunteer co-ordination, for example, education and awareness work.

Response: This recommendation is accepted in principle

We are continuously exploring funding opportunities in order to ensure that we can retain this role. Furthermore, we have recently recruited a community development assistant. This will ensure that time spent co-ordinating volunteers remains the primary function of the role.

A new post has been created on a temporary basis to focus on the litter champion scheme and the new ‘leave only pawprints’ champions.

35: Strategy & Consistency – Whilst it is important to provide volunteer groups with the independence to grow and thrive, the Council and other key agencies (for example, Keep Wales Tidy) should develop an outline volunteer strategy that helps to properly structure volunteer groups and point them in the right direction. This should include:

- The basics of what each group might need (for example, litter picking equipment, insurance, key contacts, etc);
- The available support from the Council and other key stakeholders;
- Details of other litter picking groups and the Cardiff litter network;
- Advice and support around how to promote the group, for example, social media and promotional material;
- Support around how to access funding for grants;
- Incentives available for each group, for example, time credits;
- How to constitute a group and the benefits that this creates;
- How their contribution helps to support Cardiff as a sustainable city;
- How each new group can receive a needs assessment;
- How to create a bespoke strategy and plan for their group.

Response: This recommendation is accepted in principle

Much of this is in place already and support is provided by both Keep Wales Tidy and the Love Where You Live team. The Council will work with Keep Wales Tidy to ensure that support given is consistent to all groups across Cardiff and will look at putting a 'Group Information Pack' together, with resources made available on the Keep Cardiff Tidy website. We are happy to provide ongoing support for all groups and can meet with them at their own convenience to consider their individual needs. All new funding streams are emailed directly to group leads as and when they are available and can be found on the Keep Cardiff Tidy website.

Volunteer Support

36: Support & Grow the 'Cardiff Tidy Network' – The Council and Keep Wales Tidy need to work together to expand and support the growth of the 'Cardiff Tidy Network'. This is a great way for volunteer groups to meet, share experience and talk about best practice. It is also a good way to develop contacts and improve volunteer collaborative working. This could help develop a consistency of approach towards volunteering, sharing best practice, etc...

Response: This recommendation is accepted

The 'Keep Tidy' network meeting will recommence running quarterly and provide an opportunity for groups to come together and share what they are doing, key successes and discussions around key concerns. These are attended by council officers from Love Where You Live, cleansing and enforcement, along with Keep Wales Tidy.

37: Storage – The Council needs to give serious consideration to providing established volunteer groups with access to storage facilities on Council land. Cardiff Rivers Group, for example, is in need of additional storage to keep its equipment and certain recycled materials (that they sell on to raise income for the group). They are currently looking into the cost of leasing a suitable storage space. Given the size and diversity of the Council's estate, this is something that could be assessed on a case by case basis, and where the volunteer group meets the criteria then storage could be provided for free.

Response: This recommendation is accepted

Cardiff now has 15 'litter lockers' based in Cardiff's hubs and libraries. These can be accessed by groups around Cardiff to access equipment. Equipment can also be stored in the hub/libraries as needed. Keep Cathays Tidy

currently have their own kit in Cathays Library and Fork and Trowel Gardening Group store equipment at Llandaff North and Gabalfa Hub. Cardiff Rivers Group have been given storage at Lamby Way. We are happy to work with groups to look into other options as well.

38: Deep Cleans – The Council needs to improve liaison between itself and volunteer groups when ‘blitz’ or ‘deep cleans’ take place in the ward in which they are based. This will provide local residents with an opportunity to run events in conjunction with the ‘blitz’ or ‘deep cleans’, thereby increasing local participation and ownership. In addition to this, when the Council consults with volunteer groups asking for advice on the work that needs to take place it should not completely ignore their suggestions. Acting in this way leaves local volunteer groups feeling disappointed and feeling ignored.

Response: This recommendation is accepted

The Community Development Coordinator based within Waste Management has been liaising with Cleansing to support community litter picks over the last 12 months, which has worked very well, and good feedback has been received.

It is now intended that the Deep Cleanse and Blitz Schedule going forward will be drawn up with input from the coordinator, which will ensure local residents are aware of the areas to be cleansed and joint operations can be put in place.

This will also allow the local volunteer groups to feel included and address any feelings that they are being ignored.

39: Provision of Litter Picking Equipment – The Council should create a dedicated budget for volunteer litter picking equipment. This should be used to cover the costs of bags, pickers, safety equipment, etc... This budget should then be reviewed on an annual basis and adjusted to reflect the amount of work delivered by the volunteers.

Response: This recommendation is accepted in principle

Cardiff Council now has 15 ‘litter lockers’ based around Cardiff within the hubs and libraries that both litter champions and groups can access. This provides a sustainable model moving forwards to ensure that as many volunteers as possible can access kit, and is the same model that Keep Wales Tidy have now moved to. The Council can support all groups by lending them equipment as needed, as well as helping to write funding bids to secure their own equipment. Keep Wales Tidy will also be adding 5 kit access points around the city, on an annual basis, to make kit as widely available as possible.

40: Provision of Promotional Materials - The Council should create a dedicated budget for volunteer promotional support material. This should be used to cover the cost of promotional materials such as business cards and volunteer group banners (to be placed out at every event), etc... This budget should then be reviewed on an annual basis and adjusted to reflect the amount of work delivered by volunteers across Cardiff.

Response: This recommendation is accepted in principle

We are happy to work with volunteer groups to help them promote their groups and the amazing volunteer work that is being undertaken. Under the new Caru Cymru funding there will be a small budget that can be accessed for this purpose and all requests will be reviewed on an individual basis. In previous years we have supported Keep Roath Tidy with flyers and have had signage made for Canna Collective along the street bins on Cathedral Road.

41: Communications Support for Volunteer Groups – Where required the Council should provide communications support to volunteer groups who are interested in expanding their range of activities and

events. For example, information on how to create and manage social media platforms and wider distribution of their messages through the Council's social media platform – this should include circulating to and through the Council's associated partner networks. Volunteer groups would also benefit from featuring alongside and being promoted through the Cardiff Council 'Love Where You Live' brand.

Response: This recommendation is accepted

Cardiff Council actively promotes 'Keep Tidy' groups on their social media platforms, as well as through our internal communications to staff and schools. Groups are featured on the Keep Cardiff Tidy website and we encourage groups to write blogs about their successes. Two recent features on the website were Dave King's MBE (CRG) and Keep Creigiau Tidy's clear up of Llantrisant Road.

The Council is committed to provide communications support for volunteer groups. Social media is a particularly effective means of promoting volunteer groups. Litter picks are now promoted by Cardiff Council beforehand and coverage provided during and after the events to encourage more people to volunteer in the future. For those that cannot make it to a litter pick but are keen to get involved, Cardiff Council is using its social media to publicise the litter pick equipment that is available to borrow from its Hubs.

The Council shares and likes the social media posts from the individual volunteer groups' accounts and their accounts are also tagged into the Council's social media posts for them to then share with their followers. Links to the volunteer groups' social media accounts are published on www.keepcardifftidy.com. The Council also uses social media to highlight the individual stories from the volunteer groups. For example, this year the Council has highlighted the story of Cardiff's 'youngest litter picker' and the story of a person who received an MBE for the voluntary work to keep their community tidy.

In addition to using its social media platforms, Cardiff Council is also providing communications support through its other channels. Blog posts are written and published on www.keepcardifftidy.com as well as www.cardiffnewsroom.co.uk. Press Releases are issued to all local media outlets and the Council utilises all its internal communications channels to promote the groups to staff working in the local authority.

The promotion of the volunteer groups sits under the Love Where You Live brand and the Council continues to explore new ways of using its popular social media channels to promote their work. For example, its Facebook account will now be used to create Facebook Events as a means of promoting individual litter picks. This will allow followers of the Cardiff Council account to express their interest in attending the litter pick, and to share the event with their social media connections.

42: MOT Support – Some of Cardiff's more established volunteer groups rely on the use of a vehicle for work that they undertake, for example, Cardiff Rivers Group. Using vehicles for volunteer work incurs a range of costs; this can include an annual MOT. Cardiff Council has an in house MOT testing facility that is based at Coleridge Road which is used to undertake MOT's on Council vehicles. The task group believes that if a volunteer group is using a dedicated vehicle for litter picks and other community projects, then the Council should provide a free MOT for that vehicle.

Response: This recommendation is not accepted

The utilisation of vehicles will not be just for volunteering relating to Council based activities and therefore it would be difficult to identify a dedicated vehicle. The Council supports groups to identify sources of funding available to assist them to fund their activities.

43: Household Waste Recycling Centre – ‘Waste Carrier Licence’ - Where a volunteer group is collecting a reasonable quantity of waste (both recyclable and non-recyclable), the Council should issue them with a ‘waste carrier licence’ so that they are able to dispose of the waste collected by taking it directly to the Household Waste Recycling Centre. This would help to save costs as the Council would no longer need to send out an officer to remove the waste.

Response: This recommendation is partially accepted

The Cardiff Rivers Group are the only group to have access to the waste transfer station and are not charged for depositing waste collected from volunteering events. The driver has received an induction to Lamby Way depot and the associated risks of driving and delivering waste within the working depot.

The Council will continue to support volunteer groups to collect bags or remove waste due to the issues of having volunteers accessing a working waste depot.

44: Fundraising – The Council should provide volunteer groups with additional support and opportunities to raise funds for their group, which in turn would help make them more self-sufficient. Feedback suggested that certain volunteer groups wanted more flexibility and opportunity to raise funds, which would mean that they could carry out more work and extend support to other groups. For example, a volunteer suggested that if they had access to the Household Waste Recycling Centres to pick up unwanted items, then these could be ‘upcycled’ and sold on to raise funds for the group. The Council already has this type of arrangement in place with Cardiff Cycle Workshop; this is an example of social enterprise that has worked very well.

Response: This recommendation is accepted

We are happy to work with groups to help them raise funds, either by formal means such as grant applications, or to support more flexible approaches. When community funding becomes available all information is emailed out to groups and is also put on the Keep Cardiff Tidy website and we can support with writing the funding applications. We are happy to work with groups to identify alternative ways of fund raising.

45: Attendance at Volunteer Events – Volunteers felt that the events that they ran would benefit from greater support from local councillors, PCSO’s and Council Enforcement Officers. The task group recommends that this should be reviewed by the Council to see what can be done to improve participation by these groups at future volunteer events.

Response: This recommendation is accepted in principle

We promote all volunteer events via the Keep Cardiff Tidy website, as well as promotion our social media platforms. Where it is appropriate we can arrange for enforcement officers to attend events, where they will be able to offer additional support. We can also publicise events through our network of community hubs and staff from a range of organisations will be made aware of the opportunity to take part.

46: Refresh ‘Love Where You Live’ – Volunteers felt that ‘Love Where You Live’ was a strong brand that had provided a strong message. They felt that it was no longer promoted in the way that it had been in the past, and that it now needed to be refreshed. The task group agrees with the volunteers and recommends that ‘Love Where You Live’ is refreshed to reflect the current challenges facing Cardiff in terms of addressing litter and fly tipping. Refreshing ‘Love Where You Live’ it was thought would provide a consistently branded and ongoing message.

Response: This recommendation is accepted

Love Where You Live is constantly adapting and responding to the changing needs of the city. Under Caru Cymru there will be greater focus on behaviour change and prevention and education, as well as supporting volunteers and volunteer groups. We are linking in more closely with waste management, cleansing and enforcement to ensure that there is consistent messaging in all that we do. The Keep Cardiff Tidy website has been updated to make it more friendly and easy to use.

47: First Aid Kits – Volunteers felt that the Council should provide all volunteer groups with a first aid kit.

Response: This recommendation is accepted

We are happy to supply first aid kits for groups relating to Love Where You Live volunteer groups.

48: Recording Volunteer Achievements - The Council needs to get a better understanding of the amount of rubbish that volunteers pick up. Several volunteers commented that the figures provided to illustrate the work of volunteers was a gross underestimate. A process needs to be put in place that accurately records the volume of litter collected by volunteers so that their achievements can be celebrated.

Response: This recommendation is accepted

All volunteers are asked to self-report the amount of bags that have been collected and these are the figures that are circulated. Keep Wales Tidy has recently introduced their eppicollect app which allows volunteers and groups to provide on-the-spot recording of their volunteering – giving us a more accurate picture of what volunteers are doing across Cardiff. We understand that there are people voluntarily litter picking that are not signed up as either Love Where You Live or Caru Cymru champions and we are unable to record what we don't know about. We encourage anyone we know about to sign up as a champion to ensure that they have the appropriate Personal Protective Equipment and safety awareness and are covered by either Keep Wales Tidy or Caru Cymru's public liability insurance.

We will also build on the approach to volunteer recognition developed in relation to other volunteering opportunities. For example for Advice and Benefit volunteers the Council holds annual celebration / thank you events for volunteers. These have been held in City Hall. We provide light refreshments and invite families of the volunteers to attend too. They are presented, on stage, with a commemorative plaque / pen and a certificate. We also have a handful of special contributions award with prizes presented by Members. We also nominate our volunteers for external awards. To date the teams have been successful in winning the WCVA Awards for Digital Volunteers.

49: Recycling Waste Collected by Volunteer Groups - Several volunteer groups felt that all recyclable materials collected should be recycled and not sent for incineration. They felt that the Council were not always recycling the material that they collected and that the position needed to be clarified. The task group recommends clarification on this position, and that the Council provides volunteer groups with information on what can and cannot be recycled. A sensible way to deliver this might be via a presentation at the 'Cardiff Litter Network', so that attendees can then circulate the information to their respective groups.

Response: This recommendation is accepted

In terms of events Cleansing now offer the hire of BIN PODS to event organisers. This allows all waste to be placed in separate waste streams and removed from site separately. The BIN PODS have proved to be very

successful and are a frame, which includes four 140 litre bins and signage to indicate which bin are for which waste stream such as recycling, food and general waste.

The half marathon in 2018 trialled the BIN PODS and Cleansing were able to produce a 96% recycling rate for an event with over 20,000 people attending including runners and spectators, and this has been agreed for 2019 also.

We have also used the BIN PODS in St Fagans Food and Drink Festival and trialled them in the school holidays in Victoria Park.

These have proved to be very popular and we have been asked to extend the hours of placements at next year's food and drink and expand the number of parks we place the BIN PODS in next summer.

Litter in General

50: Litter on Sports Pitches - Litter on sports fields is a problem, for example, in Pontcanna fields after a football game. There are always bottles left after games and during the football and rugby seasons this dramatically increases. Cardiff Rivers Group believe the hire agreement for pitches stipulates that they need to be cleared of all litter after the games. They suggest a “three strikes and you are out” approach – three warnings in a season for not clearing up or your pitch would result in bookings being refused. This approach would need policing and accepting photos from other park users could be one way of identifying when there is a problem. It was suggested that “Pop-up” bins could be provided with a booking – the club would be responsible for the bin in the same way that they use their own nets for the goals. The task group feel that this is a good suggestion, and one that the Council should look to pilot at a sports field where litter has already been identified as an issue.

Response: This recommendation is accepted in principle

Litter on Sports pitches are accepted as a significant issue, mainly for plastic single use water and energy drink bottles.

Every pitch in the City is used for Mini and Junior football on a Saturday morning with clubs acting as key holders for the changing facilities on match days. Approaches to tackle the problem so far include:

- Leagues introduced a fine for offending teams but dispute resolution proved problematic to resolve with teams suggesting the need for pre and post-match photographic evidence. Consideration is therefore being given to introducing a penalty to the league to encourage a more holistic approach to resolving the problem.
- Every team is provided with a black bag to collect their litter with some but limited effect. The pop up bin idea will be trialled to see if the impact is greater.
- Random enforcement High Viz patrols will be carried out at certain points in the season. This is likely to be quite effective in preventing litter drop at these times but can only be a part of the solution. We will encourage the leagues to send out a communication with their registration regarding litter and regular reminders. We will approach the WRU and FAW to consider a joint promotion/campaign to build on the Sport v plastic approach.
- We have running drinking water at all sites and therefore methods to encourage the use of refillable drink bottles will be considered. Vending machines have been removed at sites to reduce the waste bottle problem.

51: Localised Litter & Fly Tipping Approach - The key message put forward by Jemma Bere from Keep Wales Tidy was that “one size fits all” does not work for litter and fly tipping management - the approach needs to be tailored to local needs and challenges. The task group agrees with this and recommends that once the Council is confident in its litter and fly tipping data, then it should look to develop localised litter and fly tipping approaches that involve the local community and volunteer groups.

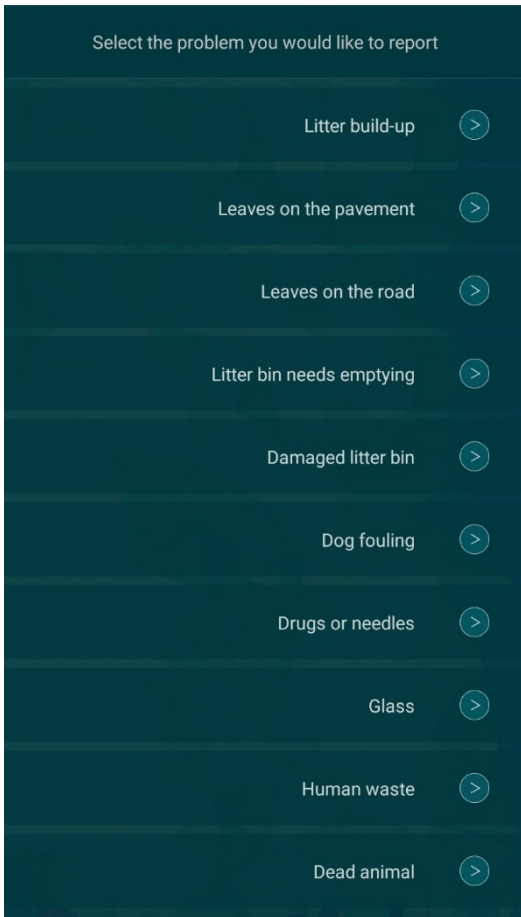
Response: This recommendation is accepted

The service area is currently working to review data with regards litter and fly tipping to ascertain how we deal with issues. As part of this work, a Locality Programme Board has been formed bringing together service areas from enforcement, cleansing, parks, housing and communities to deal with concerns. At this programme board there is a recognition on local issues specific to individual communities and work is progressing to see how best to implement specific interventions and monitor the outcomes achieved.

52: Litter in General – ‘Cardiff Gov App’ – As per a wider recommendation on the ‘Cardiff Gov App’, the task group recommends that a public reporting option for litter in general is added alongside the existing reporting option for fly tipping on the app. This would help provide management with better information to help direct resources and improve how the Council deals with litter in general. A similar reporting option for the main litter types covered in this report should also be built into the same section of the app.

Response: This recommendation is accepted

We are pleased to confirm to the Committee that “Street Cleansing” was released in September 2019 to allow customers to report various cleansing issues including Litter Build up, Leaves on the pavement or road, litter bins that need emptying or are damaged, Dog fouling, Drugs or needles, Glass, Human waste or dead animals. This uses the same process as fly tipping to allow customers to identify the location of the issues and this feeds into locational reporting as part of our Data Visualisation work. As with all services developed for the app this is replicated on the Web and within C2C for consistency.



Fast Food

53: Fast Food Litter Awareness Stickers – Given that fast food litter is regarded by the public as one of the biggest litter problems in Cardiff, the task group felt that something had to be done to target this litter at source. The only way to target this litter at source is at the point of purchase, i.e. in the shop or take away where the fast food is sold. Members reflected on the positive impact of the recently introduced ‘Food Hygiene Ratings Stickers’. All Welsh food establishments are now required to display these in a prominent location at the establishment to demonstrate the standard of food hygiene that they achieve. This very cost effective initiative has significantly increased food hygiene standards across Wales. The task group recommends that fast food litter should be targeted in a similar way, i.e. by asking all establishments to display a sticker at the point of purchase. The sticker should highlight the problem that fast food litter creates and provide details of the maximum penalty for the offence. The Council could quickly deliver this scheme by working with the Shared Regulatory Service who already distribute Food Hygiene Ratings stickers to 3,252 establishments across Cardiff. 3,500 stickers would cost less than £500 to purchase, and would ensure blanket coverage of establishments that sell fast food across the city.

Response: This recommendation is accepted in principle

The evidence of the impact of fast food litter in general terms is very clear but it is important that, in line with a more tailored approach, we clearly understand the issues on a locality basis. The work to gather and integrate appropriate data streams (see Recommendation 1) will help to inform the interventions in respect of fast food outlets. Consideration is also being given to developing a Cardiff rating system for retail premises in respect of their approach and compliance with waste and recycling matters. This is more likely to be a medium term initiative but will be included in the action plan associated with the delivery of the scrutiny recommendations.

54: Fast Food Litter – ‘Cardiff Gov App’ – As per a wider recommendation on the ‘Cardiff Gov App’, the task group recommends that a public reporting option for fast food litter is added alongside the existing reporting option for fly tipping on the app. This would help provide management with better information to help direct resources and improve how the Council deals with fast food litter. A similar reporting option for the main litter types covered in this report should also be built into the same section of the app.

Response: This recommendation is accepted in principle

The committee has identified some key areas of problematic litter which may not be covered by our existing services, in terms of the fast food outlets and problems associated with these we are tracking these through our “litter build up” category within the street cleansing service and will look at how we can introduce a specific category for Fast Food Outlets. We will take the same approach with Chewing gum and look at introducing an additional category for this.

We note the smoking related litter issues raised by the committee and this kind of enforcement issue is already planned in for a future release along with issues such as littering from a vehicle and poorly presented waste.

55: Community Protection Notices – Newport City Council identified fast food litter as an issue in the city, so to address the problem they are due to start using Community Protection Notices. These will be used against establishments who do not proactively deal with and control litter from their establishment. This approach will allow the local authority to issue a fine to a maximum value of £150 a day if the establishment fails to comply the Community Protection Order. Newport City Council seemed confident that this approach would work well; therefore, the task group recommends that the Council consider applying this approach against persistent offenders in Cardiff.

Response: This recommendation is accepted

We will consider the use of a Community Protection Notices as part of the approach to tackling retail food litter. It will be important to fully understand the range of tool's available to resolve identified issues in a more location specific way and also to pilot and test interventions to understand the impact.

Fly Tipping

56: New Fixed Penalty Notice for Fly Tipping – The task group believe that the introduction of the new £400 Fixed Penalty Notice for fly tipping is a positive step forward. They are encouraged that the Council issued 27 Fixed Penalty Notices in the first two months of the fine being introduced; particularly as the proceeds now go directly back to the Council and can be reinvested to tackle litter and fly tipping. The task group believe that more can be done to promote this new fine, and recommend that the Council uses social media, the press and other promotional tools to raise awareness – for example, publicising details of those who are fined.

Response: This recommendation is accepted

Currently there has been 184 fly tipping fixed penalties issued. The introduction of this fixed penalty has certainly supported the officers in the issues of addressing fly tipping within their wards. There has recently been an enforcement staged event where waste was fly tipped outside City hall. This was to highlight to all residents living in Cardiff and persons working in Cardiff the dramatic effect of one fly tipping incident can have on the environment and the process of the time taken by the officers for investigation through searching the waste for evidence and the removal of the waste. This was published by our press team on social media sites to raise awareness and the Waste Cowboys campaign followed on from this incident to raise awareness to residents that they are responsible for their waste and if they ask any person to remove waste from their properties, to make sure they are a licensed waste carrier and have a legitimate waste carriers registration number.

57: Digitalisation, Technology & Data – Officers explained that the process for dealing with the end-to-end management of fly tipping was not digitalised, with some teams using three separate systems to report one incident. This means that there are parts of the process that have to be recorded manually which is very time consuming. This creates gaps in Cardiff's fly tipping knowledge. As has already been mentioned in this report, gathering data is a vital part of dealing with litter and fly tipping. Good data helps staff to efficiently manage the process, as it creates an accurate picture of where the main problem areas can be found. All data received needs to be recorded in a single location, with all stakeholders able to report information into this system through a range of technology. Positive steps forward have been taken in recent months, for example, the 'Cardiff Gov App' provides the public with a great tool to photograph, record and report fly tipping incidents – something that should reduce inaccurate reporting which has been a feature of the fly tipping process in recent years (in 2017/18 no waste was found at 19% of reported incidents). However, the ability of front line staff and other partner stakeholders to digitally report into the process remains limited. Encouraging a wider range of staff and partner stakeholders to use technology will increase the number of eyes on the street, resulting in problems being dealt with quicker. The process should deal with complaints on both public and private land, and link into data that is currently held on the fly mapper database. Based on this information, the task group recommends that the Council reviews its fly tipping reporting and monitoring systems so that all aspects of this process become digitalised.

Response: This recommendation is accepted in principle

The 'Cardiff Gov App' provides the public, stakeholders and frontline staff with a tool to photograph, record and report fly tipping incidents. All data received through the App and anything reported through C2C is currently recorded in a single location into the Fly Tipping email inbox. The reported incidents are screened by an experienced officer before being redirected to the correct team. If a report is confirmed as a suspected fly tipping case it is assigned to an Enforcement Officer who on visiting site if it is confirmed as fly tipping will record the incident into the Startraq Environmental Enforcement system on their handheld device.

The initial plan was for a full digital process from the 'Cardiff Gov App' directly into Startraq by use of Startraq's application programming interface (API) which is a set of protocols, routines, functions and/or commands that

the programmers use to facilitate interaction between distinct systems. This would generate a case in StarTrag for every report and assign to an Enforcement Officer to attend. However, after a review of the type of reports coming through the App it was clear that many were not reports of fly tipping but were actually regarding other issues, mainly street cleansing. Currently there is not the technology available to provide the screening that is carried out by the officer who monitors and redirects the reports from the email inbox.

As the 'Cardiff Gov App' develops and the functionality grows, the accuracy and quality of the reports should improve to the extent that the screening by the officer becomes unnecessary. We will continue to monitor this to ensure that if an end to end digital process is feasible we take the opportunity to implement. We, as a digital improvement team, are constantly monitoring and searching for new and emerging technologies which may assist in the full digitalisation of this process and others.

Cardiff Council do not have the legal authority to issue fly tipping fines for incidents on private land. The Owner of the land is responsible for the clearance of any fly tipping. The Cardiff Council Education and Enforcement team can issue a notice to instruct the Landowner to remove waste on private land. If the owner does not comply the council may remove the waste and recharge the landowner.

58: Growing the CCTV Presence – The task group believe that using CCTV to catch fly tippers is a very positive step forward. CCTV is a great way to covertly catch fly tippers, and the proceeds raised from the fines can be reinvested back into the service to catch even more fly tippers. In addition to this, promotion of the fact that a local authority uses CCTV is in itself a deterrent against fly tippers who do not wish to be caught. The approach has been successful in many areas, with groups like Fly Tipping Action Wales supporting the use of CCTV – to the extent that they hold a stock of real and dummy cameras that they are willing to loan to Welsh local authorities. This approach was supported by both the findings of the Litter & Fly Tipping Survey and opinions voiced in the volunteer workshop. The task group recommends that the Council continues with the roll out of this initiative and in doing so it should:

- As the success of the scheme grows look to introduce more cameras to Cardiff through further investment and borrowing cameras from Fly Tipping Action Wales;
- Explore the possibility of using Cardiff's wider camera network to help catch fly tippers (this is done in Glasgow and Exeter);
- Promote the fact that the Cardiff is using this technology, and publicise details of those that they catch in the local press and across social media.

Response: This recommendation is accepted in principle

The Council will continue to use CCTV cameras when appropriate in this regard and note the response. The process can be challenging with stringent guidelines for us set by the Surveillance Commissioner however, we continue to work with all parties to deploy cameras in an appropriate and responsible way. We have been in contact with Glasgow and extensively studied their joint operations centre with a view to building a business case to support a similar approach in Cardiff. This will allow the Council to take full advantage of the range of camera's at our disposal, including public realm camera's which are jointly operated with South Wales Police as well as Council traffic cameras and the camera network operated to support our housing and hub estates.

59: Planning Advisory Notes – The task group recommends that the Planning Service place a standard advisory note against all planning applications or building regulations cases, stating the importance of using a properly registered waste carrier for the removal of waste from their property. This advisory note should provide details of the potential £400 fine and that the applicant has a "duty of care" to ensure that they use a registered waste carrier. Household owners are not always able to accurately verify an operator's waste carrier licence – this means that they face the risk of having their waste collected and fly tipped by an illegal operator.

Response: This recommendation is accepted in principle

The service area will review information provided through the planning process to ascertain whether further information can be provided as part of the planning or building control process.

60: Multi Skilling – Best practice evidence gathered by the inquiry and working practice observed by Members during the job shadowing exercise suggests that the Council’s approach to dealing with fly tipping could be improved by multi skilling staff. This applies to staff in the Fly Tipping Team and those who deliver wider street cleansing roles. For example, members of the Fly Tipping Team told a councillor that they would save time and money if they were trained on asbestos removal rather than the Council relying on a third party to remove the material. Conwy County Borough Council provided staff in the Street Cleanse Response Team with training on dealing with fly tipping. They are now able to extract evidence from bags (for example, letters, envelopes, prescriptions or other contact information), record and report the incident; meaning that fly tipping doesn’t always have to be passed onto the Fly Tipping Team which speeds up the process. The task group recommends that the Council invest in additional training for staff in the fly tipping team and wider street cleansing service. This would increase the range of staff skills that in turn would create savings.

Response: This recommendation is partially accepted

Multiple training and development opportunities have been offered to staff, ranging from essential skills training to level 2 and 3 NVQ’s. We will continue to work with staff and local union representatives to identify and offer relevant training opportunities in line with the workforce development plan. The arrangements for asbestos are currently under review.

61: Police Partnership – Evidence gathered as a part of the research for the inquiry identified a number of examples of where close working relationships with police forces had significantly improved fly tipping management. For example, Birmingham City Council seconded a police officer to deal with fly tipping. The improved ability to share information meant that it became quicker and easier to check all suspected vehicles so that, for example, falsely registered vehicles became much easier to remove from the road. Birmingham’s approach was copied by Newcastle City Council. Newport City Council also work closely with Fly Tipping Action Wales and Gwent Police to undertake multi-agency operations, for example, they periodically carry out stop and search exercises checking waste carrier licences. The stop and search exercises happen three or four times a year. Based on this, the task group recommends that the Council should review its working relationship with South Wales Police and other partner agencies (for example, Fly Tipping Action Wales) to establish how partnership working and information sharing can be improved.

Response: This recommendation is partially accepted

Cardiff Council enforcement team also work closely in partnership with Fly tipping Action Wales. Fly Tipping Action Wales have been seconded a Police Officer from Gwent Constabulary and we have meetings with them to share any intelligence we have and they have on any alleged offenders and the vehicles they are using and where they are operating and what waste they are fly tipping so we have a full understanding on where they are operating, crossing Authority boundaries.

We also work closely with several other local authorities throughout Wales where we meet on a regular basis and share intelligence on any known fly tippers and whether we know if they are crossing authority borders.

Cardiff Council enforcement officer have for several years attended multi agency operation (VOSA) days where we work with all agencies including South Wales Police and issue waste transfer notes and waste carrier licence requests to all vehicles that are carrying waste. One operation is being planned in the near future where we are

working cross border partnerships with Fly tipping Action Wales, Gwent Police and South Wales Police to ensure we capture all vehicles crossing authority boundaries.

We also work closely with South Wales Police on CCTV footage with the possibility of tracking the fly tippers vehicles and there is an operation planned in the near future working with South Wales Police and Fly tipping Action Wales within Cardiff.

62: Infrastructure – Public opinion and volunteer feedback suggested that a lack of waste infrastructure made it difficult for members of the public to dispose of waste correctly, which in turn contributed to increased levels of fly tipping. In particular there was strong support for providing a Household Waste Recycling Centre in the north of the city and the reintroduction of the community waste skip scheme. The task group recommends that the Council urgently identifies a suitable site and then delivers a new Household Waste Recycling Centre in north Cardiff, and also reviews the option of reintroducing a community skip scheme in areas of the city that are prone to fly tipping.

Response: This recommendation is accepted in principle

There is already a commitment to secure a suitable site for a household waste recycling centre in the North of the city. It is very important that this task is undertaken with care so that the new facility is sustainable into the long term. The service area monitors the tonnages of waste entering Household Waste Recycling Centres and can confirm there has been no significant impact in terms of a reduction in usage. This indicates that residents are using the infrastructure available to them and there is significant remaining capacity at both current sites. The opportunities to re-introduce the community skip scheme will be considered.

63: Education & Awareness - Only 20.3% of the respondents were aware of any campaigns or promotions aimed at reducing fly tipping. If the Council is serious about reducing fly tipping in Cardiff then this is something that needs change. In order to increase education and awareness about fly tipping the task group recommends that the Council should:

- Run an ongoing educational campaign aimed at reducing fly tipping. All communications should contain clear and consistent messages about the impact that fly tipping has and reference the newly introduced £400 Fixed Penalty Notice.
- Social media should be used as a tool to push forward the message (but also supported by other communication tools), which should target specific groups to increase community engagement – an approach that was referenced as best practice during the inquiry.
- As has been mentioned, promotion of the public's "duty of care" to ensure that they use a properly licenced waste carrier has to happen. The public needs to understand that ignorance is not an excuse that will prevent a £400 fine.
- Fly Tipping Action Wales has an extensive range of effective promotional techniques and materials that it is happy to share with the Council. Officers should contact Fly Tipping Action Wales to discuss the option of using this material, and to discuss the best approach to take in Cardiff.

Response: This recommendation is accepted

This year Cardiff Council launched its Waste Cowboys campaign. The key messages of the campaign are:

- The public need to beware of using unregistered waste carriers that dispose of waste by fly-tipping
- Fly-tipping traced back to a member of the public can result in a £300 fine
- Waste carriers found to be fly-tipping can be fined £400

A range of marketing collateral has been produced for the campaign, including pull-up banners, posters and infographics.

OSGOWCH Y COWBOIS GWASTRAFF

BEWARE THE WASTE COWBOYS

Gallech gael dirwy ddiiderfyn os yw'r person rydych wedi'i logi i waredu eich gwastraff heb ei gofrestru!

You could be issued with an unlimited fine, if the person you've hired to remove your waste is unregistered!

www.caerdydd.gov.uk/aillgylchu
www.cardiff.gov.uk/recycling

Os bydd unrhyw dipio anghyfreithlon yn cael ei dracio'n ôl atoch chi... **CHI** fydd yn gyfrifol am dalu'r ddirwy, yn ogystal â'r masnachwr!

Ewch i www.caerdydd.gov.uk/cowboisgwastraff i gael rhagor o wybodaeth

If this fly-tipping is tracked back to you... then **YOU will face the fine, as well as the trader!**

For more information please visit:
www.cardiff.gov.uk/wastecowboys

www.caerdydd.gov.uk/aillgylchu
www.cardiff.gov.uk/recycling

BEWARE THE WASTE COWBOYS

You could be fined upto £50k, if the person you've hired to remove your waste is unregistered!

If this fly-tipping is tracked back to you... then **YOU will face the fine, not the trader!**

You can avoid this by requesting a **Waste Transfer Note** from your carrier or checking if they are registered with **National Resources Wales** on **0300 065 3000** or enquiries@naturalresourceswales.gov.uk

For more information please visit www.cardiff.gov.uk/wastecowboys

For more information on bulky collections or recycling visit **Cardiff Council** - www.cardiff.gov.uk/bulkywaste or the **British Heart Foundation** - www.bhf.org.uk/cardiff

www.cardiff.gov.uk/recycling Working for Cardiff, Working together

Caerdydd yn ailgylchu
Cardiff recycles

Fly-tipping in Cardiff

Cardiff Council collects

4 tonnes a day <small>about the size of two Rhinoceros</small>	80 tonnes a month <small>about ten times as heavy as an Elephant</small>
1040 tonnes a year <small>about seven-and-a-half times as heavy as a Blue Whale</small>	20 tonnes a week <small>about three times as heavy as a Tyrannosaurus Rex</small>

5219 - Incidents in 2018/2019 alone
£2,640 - Average level of fine handed out by the court
171 - Number of fixed penalty notices issued last year
 Costs Cardiff Council **£150,000** per year to clean up

Hazardous objects are dangerous to children and other vulnerable people

Affect communities and the way people feel about the place that they call home

The harmful effects of fly-tipping

- Toxic chemicals could be leaked into the environment
- Encourages pests and vermin and is a danger to wildlife, nature and pets

For more information on how to check a trader is a registered waste carrier, please visit www.cardiff.gov.uk/wastecowboys

Cardiff Council is continuing to explore innovative ways of getting its fly-tipping messages out there. Since the completion of the Task & Finish Group’s report, the Council has successfully planned and implemented a staged fly-tip outside City Hall to highlight the consequences of fly-tipping, the dangers of using unlicensed waste carriers and the £400 fine that will be issued to anyone caught fly-tipping.

Delivered under the Waste Cowboys brand, a communications strategy was created to maximise the impact of the staged fly-tip, utilising social media, local media, national media, [Cardiff Newsroom](#) and all internal communications channels.



A number of media outlets carried the story, including the BBC, ITV and Walesonline. The event also generated public debate on social media and in the comments sections of the various news websites, helping to further raise the profile of the Council’s campaign.



Council behind huge pile of rubbish dumped outside Cardiff's ...

ITV News - 8 Aug 2019

Cardiff Council has confirmed it was behind the huge pile of rubbish that was dumped outside the City Hall overnight. Sofas, mattresses and ...

Huge pile of rubbish dumped outside Cardiff's City Hall

WalesOnline - 8 Aug 2019

[View all](#)



The reason why a pile of rubbish was dumped outside Cardiff ...

WalesOnline - 8 Aug 2019

Cardiff council has admitted it was behind a four-tonne pile of rubbish dumped outside Cardiff City Hall. The local authority said it was ...



Cardiff council is on Twitter defending its City Hall waste stunt ...

WalesOnline - 8 Aug 2019

Cardiff council has been criticised after a pile of rubbish was dumped outside City Hall as part of a publicity stunt to highlight the problem of ...



Council behind fly-tipped waste outside Cardiff's City Hall

Wales247 (press release) - 9 Aug 2019

Council behind fly-tipped waste outside Cardiff's City Hall ... have been allowed to get dumped in front of one of Cardiff's most famous buildings.

Cardiff launches anti fly-tipping campaign

letsrecycle.com - 9 Aug 2019

[View all](#)



Fly-tipping: Council dumps four tonnes of rubbish in stunt

BBC News - 8 Aug 2019

A council dumped four tonnes of rubbish outside its own building to raise ... and used furniture were left outside Cardiff's City Hall on Thursday.

Analytics shows that to date the Council's social media activity supporting the Waste Cowboys campaign has reached 945,000 people, made 113,000 impressions and generated 650 clicks to the Council website.



Cardiff Council
@cardiffcouncil



Did you see the fly tip mountain outside City Hall? This is a typical amount we collect in [#Cardiff](#) in just ONE DAY. It cost the council £150,000 to clear up the mess last year. Find out how to dispose of your waste responsibly: socsi.in/QTH4c [#WasteCowboys](#)



11:24 AM · Aug 8, 2019 · [Orlo](#)

 View Tweet activity

44 Retweets **62** Likes

The Council's efforts to reduce fly-tipping continues, and officers will continue to work with partner organisations to support the ongoing communications and public education. In addition to the Waste Cowboy campaign, Cardiff Council is delivering a range of other waste campaigns, including Love Where You Live, Love When You Leave, Everyone in Cardiff's Doing it and Cardiff Council Skip Hire.

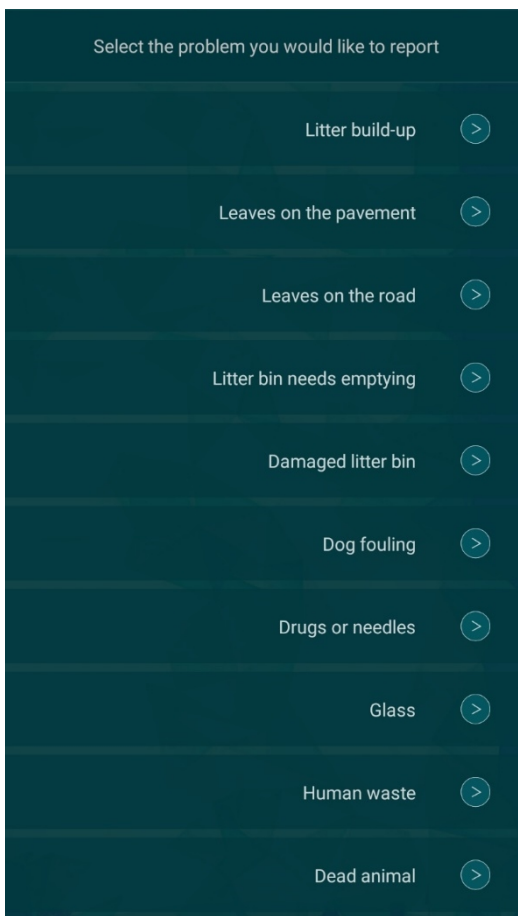
Dog Fouling

64: Dog Fouling – ‘Cardiff Gov App’ – As per a wider recommendation on the ‘Cardiff Gov App’, the task group recommends that a public reporting facility similar to the existing one for fly tipping is added to the app for dog fouling. This would help provide management with information so that they can better direct resources to improve how they deal with dog fouling.

65: Dog Fouling – ‘Cardiff Gov App’ – As per a wider recommendation on the ‘Cardiff Gov App’, the task group recommends that a public reporting option for dog fouling is added alongside the existing reporting option for fly tipping on the app. This would help provide management with better information to help direct resources and improve how the Council deals with dog fouling. A similar reporting option for the main litter types covered in this report should also be built into the same section of the app.

Response: This recommendation is accepted in principle

We are pleased to confirm to the Committee that “Street Cleansing” was released in September 2019 to allow customers to report various cleansing issues including Litter Build up, Leaves on the pavement or road, litter bins that need emptying or are damaged, Dog fouling, Drugs or needles, Glass, Human waste or dead animals. This uses the same process as fly tipping to allow customers to identify the location of the issues and this feeds into locational reporting as part of our Data Visualisation work. As with all services developed for the app this is replicated on the Web and within C2C for consistency.



Smoking Related Litter

66: Smoking Litter – ‘Cardiff Gov App’ – As per a wider recommendation on the ‘Cardiff Gov App’, the task group recommends that a public reporting facility similar to the existing one for fly tipping is added to the app for smoking litter. This would help provide management with information so that they can better direct resources to improve how they deal with smoking litter.

67: Smoking Litter – ‘Cardiff Gov App’ – As per a wider recommendation on the ‘Cardiff Gov App’, the task group recommends that a public reporting option for smoking litter is added alongside the existing reporting option for fly tipping on the app. This would help provide management with better information to help direct resources and improve how the Council deals with smoking litter. A similar reporting option for the main litter types covered in this report should also be built into the same section of the app.

Response: This recommendation is partially accepted

The committee has identified some key areas of problematic litter which may not be covered by our existing services, in terms of the fast food outlets and problems associated with these we are tracking these through our “litter build up” category within the street cleansing service and will look at how we can introduce a specific category for Fast Food Outlets. We will take the same approach with Chewing gum and look at introducing an additional category for this.

We note the smoking related litter issues raised by the committee and this kind of enforcement issue is already planned in for a future release along with issues such as littering from a vehicle and poorly presented waste.

Chewing Gum

68: Chewing Gum – ‘Cardiff Gov App’ – As per a wider recommendation on the ‘Cardiff Gov App’, the task group recommends that a public reporting option for chewing gum is added alongside the existing reporting option for fly tipping on the app. This would help provide management with better information to help direct resources and improve how the Council deals with chewing gum. A similar reporting option for the main litter types covered in this report should also be built into the same section of the app.

Response: This recommendation is partially accepted

The committee has identified some key areas of problematic litter which may not be covered by our existing services, in terms of the fast food outlets and problems associated with these we are tracking these through our “litter build up” category within the street cleansing service and will look at how we can introduce a specific category for Fast Food Outlets. We will take the same approach with Chewing gum and look at introducing an additional category for this.

We note the smoking related litter issues raised by the committee and this kind of enforcement issue is already planned in for a future release along with issues such as littering from a vehicle and poorly presented waste.

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**TENDER FOR ELECTRICITY GENERATION FROM LANDFILL
GAS AND POTENTIALLY NATURAL GAS, INCLUDING
LANDFILL GAS MANAGEMENT****CLEAN STREETS, RECYCLING AND ENVIRONMENT
(COUNCILLOR MICHAEL MICHAEL)****AGENDA ITEM: 3**

Reason for this Report

1. To provide an update on the landfill gas position at Lamby Way and Ferry Road Landfill sites.
2. To seek approval to tender for electricity generation from landfill and potentially natural gas, including landfill gas management.

Background

3. There is a current landfill gas lease at Lamby way which has been in place since December 1997 (and which was subsequently extended with effect from December 2014).
4. Under the current contractual arrangement, Cardiff Council receives 15% of the gross income from the generation and sale of electricity.
5. At the end of the current contract, apart from the tenant's installations, much of the site apparatus and equipment together with the conducting media will remain in the Council's ownership for use by the incoming contractor / tenant. The existing tenant is entitled to remove the Tenant's Installation (for example generators, amongst other things).
6. The landfill site at Lamby Way is closed and all cells have been capped since 2018.
7. Lamby Way Landfill Site has produced 359,809 MWhs of renewable energy during the period from 2004 to 2018. The amount of energy produced has declined by 3.5% per year and relates to a reduction in landfill gas.
8. Lamby Way Landfill Site has outperformed most other UK landfill sites by an average of 16.7% over the past seven years, according to efficiency

data obtained from the industry regulator (ofgem) based on 446 landfill sites across the United Kingdom.

9. The Ferry Road Landfill Site has been closed since 1994.
10. The Ferry Road Landfill Site lease has been place since 31st March 1998.
11. Ferry Road has produced 19,747 MWhs of renewable energy during 2004-2018, and its energy has declined by 6.9% per year and relates to a reduction in landfill gas.
12. From the income generated in the last 10 years and the future projection of the landfill gas curve; the anticipated the value of the electricity generated from landfill gas will be in the region of £11.2m from 2020-2032.
13. Should the landfill gas curve continue as forecast until 2040, it is anticipated the total value of the electricity generated from landfill gas will be in the region of £13.3M from 2020-2040.
14. The contractor/tenant as part of the contract covers all costs to manage and maintain the landfill gas wells, pipes and electrical generators.
15. Independent research of the publically reported royalty rates (as a percentage of each site's gross income) by three UK landfill gas operators on four similar comparative sites shows owners of landfill sites are receiving royalty percentage shares of between 30-43% of gross income.
16. There is an opportunity for natural gas to deliver electricity to the power network as landfill gas decreases. This opportunity will be within the proposed tender as it may provide additional income to the Council.
17. The Council is looking to procure long term for both landfill sites. Further detail will be set out in the delegated report referred to in recommendation 2.
18. The Council intends to procure new arrangements via OJEU open procedure via 'Sell to Wales'. The Council will utilise the SQUID pre-qualification document for the purposes of the selection process.
19. The Council are seeking a percentage share of the royalty payments for the electricity that is transferred to the grid, this is to include GDUoS income, Triad income, Traded Power (until 2021), ROC and BSUoS and all associated income and savings.

Issues

20. There is no mechanism to extend the current arrangements and therefore the Council intends to undertake a tender exercise to put in place new arrangements for electricity generation from landfill and

potentially natural gas and landfill and potentially natural gas management at Lamby Way and Ferry Road landfill sites.

21. The Council has a requirement under legislation to manage landfill gas from the landfill sites and the contract will manage this requirement on our behalf. This includes the managing of landfill gas following any economical return by generating electricity.
22. If there is a new contractor / tenant they would take over from our current contractor / tenant. They will need to connect to the national grid and supply the equipment which is within the current contractor's / tenant's installation (e.g. generators and other apparatus within a demised area) may be removed.

Local Member Consultation

23. There are no implications for Ward Members resulting from this report.

Reasons for Recommendations

24. To seek approval to tender for electricity generation from landfill and potentially natural gas and landfill and potentially natural gas management.

Financial Implications

25. Although the Directorate are confident the financial outcome for the Council will be an improved position, with a reduction in the current under recovery of income compared to budget, the actual financial implications will not become apparent until the procurement has been concluded. Given the long term nature of the concession proposed the financial evaluation will need to consider the net financial benefits over the proposed term of the concession and any profiling implications if the bids are not a fixed percentage of income

Legal Implications

26. As set out in the report, the report recommends procuring the contracts as set out in the report. Based on current information, the new arrangements could either be classed as a land (which is not caught by the procurement regulations) or a concession arrangement (which depending on value would be caught by the procurement regulations). In any event, Legal Services understands that the Council intends to publish a voluntary Ojeu notice and to carry out the procurement in line with the Public Contract Regulations (procurement regulations).
27. The legal advice is based on information currently available and matters will need to be kept under review and ongoing legal advice should be sought to ensure the proposals are achieved within legal parameters. Detailed legal advice should also be obtained with regard to i) the drafting of all the relevant procurement documentation (including the draft terms and conditions of contract and duration of such contract/s) and ii)

the procurement process. Any further legal implications will be set out in the delegated report referred to in recommendation 2.

Equality Duty.

28. 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.
29. As noted in the report, consideration has been given to the requirements to carry out Equality Impact Assessments (‘EIA’) and an EIA is attached to this report so that the decision maker may understand the potential impacts of the proposals in terms of equality. This assists the decision maker to ensure that it is making proportionate and rational decisions having due regard to the public sector equality duty.
30. 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 the recommended approach. 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.
31. It is noted that Equality Impact Assessments (which include consideration of views and information obtained through consultation) is attached as appendix to this report. The decision maker must consider and have due regard to the Equality Impact Assessment prior to making the decisions recommended in the report.

Well Being of Future Generations (Wales) Act 2015

32. 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.
33. 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.

34. 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
35. 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>

General

36. The decision maker should be satisfied that the procurement is in accordance within the financial and budgetary policy and represents value for money for the council.
37. The decision maker should also have regard to, when making its decision, to the Council's wider obligations under the Welsh Language (Wales) Measure 2011 and the Welsh Language Standards.

HR Implications

38. There are no current employee implications to be considered in this report.

RECOMMENDATIONS

Cabinet is recommended to;

1. Agree to the proposed procurement process to commission new arrangements for the provision of electricity from landfill and potentially natural gas and landfill and potentially natural gas management at Lamby Way and Ferry Road landfill sites.
2. delegate authority to the Corporate Director of Communities and People, subject to consultation with the Cabinet Member Corporate Services &

Performance and the Cabinet Member clean streets, recycling and environment, s.151 Officer and Director Governance and Legal Services, to deal with all aspects of the procurement process (including approving the evaluation criteria to be used, commencing the procurement and authorising the award of the proposed contract) and all ancillary matters pertaining to the procurement.

SENIOR RESPONSIBLE OFFICER	SARAH MCGILL Corporate Director People & Communities
	4 October 2019

The following appendix is attached:

Appendix 1 – EIA for electricity generation from landfill gas and potentially natural gas, including landfill gas management

Equality Impact Assessment
Corporate Assessment Template



Policy/Strategy/Project/Procedure/Service/Function Title: Electricity generation from landfill gas and potentially natural gas, including landfill gas management
New/Existing/Updating/Amending: Amending

Who is responsible for developing and implementing the Policy/Strategy/Project/Procedure/Service/Function?	
Name: Matthew Wakelam	Job Title: Assistant Director Street Scene
Service Team: Street Scene	Service Area: Planning, Transport and Environment
Assessment Date: September 2019	

1. What are the objectives of the Policy/Strategy/Project/ Procedure/ Service/Function?

The objective of the project is to manage landfill gas of the Council’s landfill sites and to provide an opportunity for income to the Council with regards electricity generation.

2. Please provide background information on the Policy/Strategy/Project/Procedure/Service/Function and any research done [e.g. service users data against demographic statistics, similar EIAs done etc.]

The management of landfill gas is required under environmental legislation but can provides an opportunity to provide an income via electricity generation from burning the landfill gas. As the landfill gas decreases, there is a further opportunity of utilising natural gas to create electricity to feed into the power network.

CARDIFF COUNCIL

Equality Impact Assessment Corporate Assessment Template

3 Assess Impact on the Protected Characteristics

3.1 Age

Will this Policy/Strategy/Project/Procedure/Service/Function have a **differential impact [positive & Negative]** on younger/older people?

	Yes	No	N/A
Up to 18 years			x
18 - 65 years			x
Over 65 years			x

Please give details/consequences of the differential impact, and provide supporting evidence, if any.

What action(s) can you take to address the differential impact?

3.2 Disability

Will this Policy/Strategy/Project/Procedure/Service/Function have a **differential impact [positive and negative]** on disabled people?

	Yes	No	N/A
Hearing Impairment			x
Physical Impairment			x
Visual Impairment			x
Learning Disability			x
Long-Standing Illness or Health Condition			x
Mental Health			x
Substance Misuse			x
Other			

Please give details/consequences of the differential impact, and provide supporting evidence, if any.

What action(s) can you take to address the differential impact?

CARDIFF COUNCIL

**Equality Impact Assessment
Corporate Assessment Template**

3.3 Gender Reassignment

Will this Policy/Strategy/Project/Procedure/Service/Function have a **differential impact** on transgender people?

	Yes	No	N/A
Transgender People (People who are proposing to undergo, are undergoing, or have undergone a process [or part of a process] to reassign their sex by changing physiological or other attributes of sex)			x

Please give details/consequences of the differential impact, and provide supporting evidence, if any.

--

What action(s) can you take to address the differential impact?

--

3.4. Marriage and Civil Partnership

Will this Policy/Strategy/Project/Procedure/Service/Function have a **differential impact** on marriage and civil partnership?

	Yes	No	N/A
Marriage			x
Civil Partnership			x

Please give details/consequences of the differential impact, and provide supporting evidence, if any.

--

What action(s) can you take to address the differential impact?

--

3.5 Pregnancy and Maternity

Will this Policy/Strategy/Project/Procedure/Service/Function have a **differential impact [Positive & negative]** on pregnancy and maternity?

	Yes	No	N/A
Pregnancy			x
Maternity			x

CARDIFF COUNCIL

**Equality Impact Assessment
Corporate Assessment Template**

Please give details/consequences of the differential impact, and provide supporting evidence, if any.
What action(s) can you take to address the differential impact?

3.6 Race

Will this Policy/Strategy/Project//Procedure/Service/Function have a **differential impact** on the following groups?

	Yes	No	N/A
White			x
Mixed / Multiple Ethnic Groups			x
Asian / Asian British			x
Black / African / Caribbean / Black British			x
Other Ethnic Groups			x

Please give details/consequences of the differential impact, and provide supporting evidence, if any.
What action(s) can you take to address the differential impact?

3.7 Religion, Belief or Non-Belief

Will this Policy/Strategy/Project/Procedure/Service/Function have a **differential impact** on people with different religions, beliefs or non-beliefs?

	Yes	No	N/A
Buddhist			x
Christian			x
Hindu			x
Humanist			x
Jewish			x
Muslim			x
Sikh			x
Other			x

Please give details/consequences of the differential impact, and provide supporting evidence, if any.
What action(s) can you take to address the differential impact?

CARDIFF COUNCIL

**Equality Impact Assessment
Corporate Assessment Template**

3.8 Sex

Will this Policy/Strategy/Project/Procedure/Service/Function have a **differential impact** on men and/or women?

	Yes	No	N/A
Men			x
Women			x

Please give details/consequences of the differential impact, and provide supporting evidence, if any.

What action(s) can you take to address the differential impact?

3.9 Sexual Orientation

Will this Policy/Strategy/Project/Procedure/Service/Function have a **differential impact** on the following groups?

	Yes	No	N/A
Bisexual			x
Gay Men			x
Gay Women/Lesbians			x
Heterosexual/Straight			x

Please give details/consequences of the differential impact, and provide supporting evidence, if any.

What action(s) can you take to address the differential impact?

3.10 Welsh Language

Will this Policy/Strategy/Project/Procedure/Service/Function have a **differential impact [positive]** on Welsh Language?

	Yes	No	N/A
Welsh Language			x

CARDIFF COUNCIL

**Equality Impact Assessment
Corporate Assessment Template**

Please give details/consequences of the differential impact, and provide supporting evidence, if any.

What action(s) can you take to address the differential impact?

4. Consultation and Engagement

What arrangements have been made to consult/engage with the various Equalities Groups?

This EIA has no impact on equalities that can be identified at this time. The Council will continue to monitor any aspects relating to this project and where required modify the EIA an actions required .

5. Summary of Actions [Listed in the Sections above]

Groups	Actions
Age	
Disability	
Gender Reassignment	
Marriage & Civil Partnership	
Pregnancy & Maternity	
Race	
Religion/Belief	
Sex	
Sexual Orientation	
Welsh Language	
Generic Over-Arching [applicable to all the above groups]	

CARDIFF COUNCIL

Equality Impact Assessment Corporate Assessment Template

6. Further Action

Any recommendations for action that you plan to take as a result of this Equality Impact Assessment (listed in Summary of Actions) should be included as part of your Service Area's Business Plan to be monitored on a regular basis.

7. Authorisation

The Template should be completed by the Lead Officer of the identified Policy/Strategy/Project/Function and approved by the appropriate Manager in each Service Area.

Completed By : Kathryn Palmer	Date:
Designation: Digitalisation and business Improvement Team Leader	18 th September 2019
Approved By:	M Wakelam
Designation:	Assistant Director – Street Scene
Service Area:	Street Scene

- 7.1 On completion of this Assessment, please ensure that the Form is posted on your Directorate's Page on CIS - *Council Wide/Management Systems/Equality Impact Assessments* - so that there is a record of all assessments undertaken in the Council.

For further information or assistance, please contact the Citizen Focus Team on 029 2087 3059 or email citizenfocus@cardiff.gov.uk

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SHARED REGULATORY SERVICES ANNUAL REPORT 2018-19

**CLEAN STREETS, RECYCLING AND ENVIRONMENT
(COUNCILLOR MICHAEL MICHAEL)**

AGENDA ITEM: 4

Reason for this Report

1. To enable the Cabinet to receive and note the Shared Regulatory Services Annual Report for 2018-19.

Background

2. In April 2015, Cardiff Council, Bridgend County Borough Council and the Vale of Glamorgan County Borough Council signed a Joint Working Agreement (JWA) for the provision of regulatory services across the three Council areas. The document created the Shared Regulatory Service (SRS) and the SRS Joint Committee.
3. The Cabinet Member for Clean Streets, Recycling & Environment and the Chair of the Licensing and Public Protection Committees are the two Cardiff Council representatives on the SRS Joint Committee following appointment by the Council on 24 May 2018.
4. In accordance with Clause 5.1 of the JWA, the SRS is required to produce an annual report that covers the operational and financial performance of the service for the preceding year. The SRS Annual Report covers the period from 1 April 2018 to 31 March 2019 and was approved by the SRS Joint Committee on 11 June 2019.

Issues

5. In July 2017, the Council ratified the insertion of a new Clause 5.6 into the JWA to enable each partner authority's Cabinet to receive the SRS Annual Report, for information purposes. This report appraises Cabinet of the decisions taken and functions carried out by the SRS Joint Committee over the preceding financial year, as well as the performance and financial position of the SRS.
6. A copy of the report considered by the SRS Joint Committee on 11 June 2019, which incorporates the SRS Annual Report 2018-19, is attached as **Appendix A** to this report.

7. The management of key operational performance is through the Client lead for Shared Regulatory Services in Planning, Transport & Environment. The Client Lead and the Head of the SRS works closely with Finance, Legal and other Service Areas to ensure that the delivery of services is to the required level and where required improvements are implemented.

Operational Performance and Implications

8. The key aspects of operational performance across the region from the annual report are as follows:
 - Sickness absence levels for 2018/19 were 7.55 days per FTE person. This is below the Council's average of 11.53 days FTE, but is an increase on the previous year where absence rates were recorded as 6.89 per FTE person. There are mitigating factors with a number of staff undergoing planned medical interventions. There are no discernible trends in either the short or long term absence figures.
 - The Gross Revenue Budget position for 2018/19 for the service was an underspend of £496k against the gross revenue budget of £8.504m. The Authority Specific Services for Cardiff Council, mainly licensing activities, overspent by £94,000, a reduction of £40k on the previous year. The outturn position in respect of Authority Specific services is due to expenditure in excess of budget and a reducing income stream. On a positive note, service efficiency drives have seen a gradual reduction in expenditure on authority specific services in comparison to the previous years. Additionally, the Wales Audit Office completed its independent financial audit of the service in September 2019; there were no recommendations for improvement.
 - The SRS has consolidated service delivery in accord with the agreed standards and delivered the requisite financial savings. However, more demands are being placed upon the service at a time of reducing resources
 - Operational performance throughout 2018/19 has been reported both to the Joint Committee and to the Council through the corporate system. The targets and actions identified in the 2018/19 plan were achieved for the most part. All statutory documents were published on time and the change programmes identified for the period concluded on time. The only failings were an inability to complete all of the proactive programmes due to resourcing.
 - Agile working, which underpins the new operating model, continues to be deployed to allow maximum flexibility for the deployment of officers. In 2019, the SRS is seeking to understand how to quantify objectively that this mode of working is increasing productivity.
 - The SRS has been active in the Courts and Appendix 2 of the Annual report set out the successful interventions undertaken in the 2018/19 period.
9. The key operational implications for Cardiff Council are as follows:

- Public Accountability Measures –
 - *PAM 13, Percentage of empty private sector properties brought back into use during the year through direct action by the local authority*
 - *PAM 14, Number of additional dwellings created as a result of bringing empty properties back into use.*

These indicators are focused upon reducing the number of empty properties remains the same. The indicators are not explicitly mentioned in the Annual Report, as the SRS did not perform this function in the Vale of Glamorgan for the 2018/19 period and only began to deliver the function in Bridgend from November 2018.

In recent years, there has been concern regarding performance against this indicator. In 2017/18, the performance level achieved was for PAM 13 and PAM 14 felt short of the target. However, in 2018/19, performance has improved and SRS exceeded the target number:

- The performance against PAM 13 was 58 properties brought back into reuse against a target of 40
- The performance against PAM 14 was 32 additional dwellings created against a target of 30.

For 2019/20, PAM 14 has been redesignated as PAM 45. The targets have been set at 48 properties to be brought back into use for PAM 13 and 33 additional dwellings created for PAM 45.

- *PAM 23 - the percentage of food premises that are broadly compliant.* This measure provides an indication of how well a food business complies with food hygiene legislation. The food industry is responsible for producing and distributing safe food. The SRS, as the enforcement agency, conducts inspections, ensuring that standards are met through a robust enforcement programme to deal with those who do not comply with standards. The business support regimes introduced into the SRS structure also play a part in promoting an increase in hygiene standards, but ultimately this is a measure of the performance of the food businesses themselves. Premises are deemed broadly compliant if specified risk scores are achieved for cleanliness, structural issues, and confidence in the management of the business. The target for 2018/19 was 93% of businesses to be broadly compliant; the performance recorded was 94.54%. This is the best score ever recorded in the City. It is important to note that Cardiff has a significant turnover of food business operators, many of these new entrants to the market do not attract immediately a broadly compliant rating, and that affects the overall broadly compliant score for Cardiff. Areas with a more settled food business community often score well on this indicator because the

food business operators have had time to become accustomed to the requirements of the food hygiene legislation.

10. The SRS also has targets contained within the Capital Ambition document. They are:

- *Ensure taxi users and visitors to the city experience a consistently high-quality and safe service and that Cardiff taxi drivers are provided with a level playing field by using our regulatory powers to support customers and providers.*

During the year the Council recognised the Cardiff Hackney Alliance as a properly constituted taxi trade organisation allowing direct consultation with a group that represents over 300 licenced drivers.

The consultation on Welsh Government proposals on new taxi legislation was received during December 2018 and took the form of a wider consultation on transport in Wales. SRS prepared a response to the consultation and supported the engagement events hosted by the Welsh Government. SRS officers gave evidence to the National Assembly for Wales Economy and Transport Committee on this issue.

In February, 2019, the Public Protection Committee received a report proposing changes to the age of taxis and private hire vehicles and a new element incorporating an emissions standard. The policy proposals support the City wide action plan to address air quality; improvements in the emission standards of the licensed taxi fleet in Cardiff will have a positive impact on NO₂ levels as demonstrated in the modelling work undertaken as part of the Councils Feasibility Study. Consequently, a consultation on the proposal to introduce emissions standards for Taxis has been carried out through the Taxi forum and other stakeholder meetings. This complements the work being done on the wider air quality improvement programme. The consultation will extend into 2019/20 and be reported back to the Public Protection Committee later this year.

- *Drive up standards in the private rented housing sector by taking enforcement action against rogue agents and landlords letting and managing properties.*

Following the tragic fire and loss of life at Grenfell Tower in North Kensington there has been a nationwide review of the use of a particular type of cladding known as Aluminium Composite Material (ACM) which was used on the Tower. Within Cardiff in the last year, the SRS has begun to take a more prominent role in respect of the affected high-rise buildings and remains in consultation with Welsh Government and the Fire Service and the Councils Building Control service on the remedial action being taken by property owners and developers.

The Minister for Housing and Regeneration convened an Expert Group, to develop a 'road map' to respond to the issues raised by the Independent Review of Building Regulations and Fire Safety (the 'Hackitt' review). The SRS attends this group as a representative of the Regulatory services in Wales. The SRS is encouraging the Welsh

Government to update aspects of the Housing Act in Wales and to make other policy changes to Housing law to improve standards in the private rented sector.

Houses in Multiple Occupancy (HMO) often present the worst physical and management standards, as well as having a detrimental impact on the neighbourhoods in which they are situated particularly in relation to street scene. The SRS took prosecutions on 6 properties in Cardiff during 2018-19 for a range of offences including neglect of proper management standards, failure to obtain a HMO licence or to register with Rent Smart Wales and breach of a Prohibition Order, with fines totalling £70,000. In addition to this enforcement work, the Housing Enforcement Team dealt with over 900 complaints about property conditions, issued over 400 works notices and licensed over 500 HMOs, bringing the total licensed in Cardiff to 3,500. The team carried out over 100 fit and proper person checks for Rent Smart Wales, with a small number of these becoming more significant investigations into landlord performance. The team carried out Rent Smart Wales audits of 9 managing agents, identifying action plans for improvement in each case and will follow up during 2019-20.

- *Help protect the public and ensure businesses act responsibly through the provision of the collaborative Regulatory Service.*

SRS protects the public and ensure that businesses act responsibly through the delivery of a programme of activities that are outlined in the SRS Business Plans. Delivery of the programme ensures the Council improves health and wellbeing, safeguards the vulnerable, protects the environment, supports the local economy and maximises the use of resources. The Business Plan for 2019/20 highlights achievement made under these headings and is attached at Appendix 2.

Air Quality has become a high profile issue, featuring in the headlines on an almost daily basis. The annual Local Air Quality Management Progress Report for 2017 was submitted to the Welsh Government by the 31st December deadline. SRS continues to review monitoring locations in the City, but the most significant challenge for the SRS in 2018/19 was to assist with the development of Cardiff Council's Air Quality Strategy. This follows the issue of a direction by Welsh Government to identify the option that will deliver compliance with legal limits for nitrogen dioxide in the city in the shortest possible time. The SRS has seconded an officer to support the Council achieve this goal while continuing to support elected members with other associated initiatives.

11. Cabinet has asked for a report outlining the performance of the SRS over a longer period. Such a report would allow trends to be identified and provide a different perspective on the performance of the SRS since its formation in 2015. In May 2019, the Wales Audit Office (WAO) began its own assessment of the environmental health discipline, revisiting its earlier study in 2014. That report, when published, will be used as a part

of the wider SRS assessment. It is proposed that the SRS assessment report be presented to Scrutiny at Cardiff in November 2019 and thereafter reported to Cabinet.

Reason for Recommendations

12. To comply with Clause 5.6 of the revised SRS Joint Working Agreement; this enables the Cabinet to receive the SRS Annual Report 2018-19 for information purposes.

Financial Implications

13. The SRS Annual Report is a common report to all three authorities and the financial implications are embedded within the annual report.

Legal Implications

14. The SRS Annual Report is a common report to all three authorities and the legal implications are within the annual report.

RECOMMENDATION

Cabinet is recommended to note the Shared Regulatory Services Annual Report 2018-19.

SENIOR RESPONSIBLE OFFICER	ANDREW GREGORY Director of Planning, Transport & Environment
	4 October 2019

The following appendix is attached:

Appendix A: Shared Regulatory Services Joint Committee Report, 11 June 2019 – *Shared Regulatory Services Annual Report 2018-19.*

The following background papers have been taken into account

Council Report, 20 July 2017: Shared Regulatory Services – Review of Joint Working Agreement

Cabinet Report, 6 July 2017: Shared Regulatory Services – Review of Joint Working Agreement

Joint Working Agreement approved by County Council of the City and County of Cardiff - 20th July 2017

Shared Regulatory Services Business Plan 2018-19

Meeting of:	Shared Regulatory Services Joint Committee
Date of Meeting:	Tuesday, 11 June 2019
Relevant Scrutiny Committee:	Homes and Safe Communities
Report Title:	Shared Regulatory Services Annual Report
Purpose of Report:	To advise members on the performance and financial position of the Shared regulatory Service for the 2018/19 financial year.
Report Owner:	Dave Holland, Head of Shared Regulatory Services Carys Lord, Head of Finance, Vale of Glamorgan Council
Responsible Officer:	Miles Punter, Director Environment and Housing
Elected Member and Officer Consultation:	Click here to enter text.
Policy Framework:	Click here to enter text.
<p>Executive Summary:</p> <ul style="list-style-type: none"> • The Shared Regulatory Service (SRS) is a collaboration between Bridgend County Borough Council, the County Council of the City and County of Cardiff and the Vale of Glamorgan County Borough Council that commenced on the 1st May 2015, and is charged with the provision of Regulatory Services across the Authorities. • The Joint Working Agreement requires the Head of the SRS and the Head of Finance to produce an Annual report, which once approved by the Committee is forwarded to the partner Councils • The report indicates that the SRS has consolidated service delivery in accord with the agreed standards and delivered the requisite financial savings. However, the report indicates that more demands are being placed upon the service at a time of reducing resources • The SRS is reporting an overall underspend of £496k against the 2018/19 gross revenue budget of £8.504m. • This report advises on the draft financial outturn position of the Service, and the resulting impact this has to each of the Partner Authorities, appertaining to the provisional outturn position in respect of financial year 2018/19. 	

- The Draft Shared Regulatory Services Statement of Accounts 2018/19 is presented to Committee, to be signed by both the Chair of the Committee and the Section 151 Officer as Treasurer of the Committee, to formally invite Welsh Audit Office to commence their audit of the account.

Recommendations

1. That the Joint Committee approves the report and authorises the Managing Director, Vale of Glamorgan Council, to forward a copy of the report to the Heads of Paid Service for the other partner Councils.

Reasons for Recommendations

1. To meet the requirements set out in Clause 5.1 of the Joint Working Agreement.

2. Background

- 2.1 Under the Joint Working Agreement, the Shared Regulatory Service (SRS) is required to produce an annual report that covers the operational and financial performance of the service for the preceding year. Clause 5 of the Joint Working Agreement states:

"The Joint Committee shall receive in each year at its annual meeting which shall be held no later than 30th June the report of the Head of Regulatory Services and the Lead Financial Officer in respect of the functions delegated to the Joint Committee relating to the twelve months ending 31st March of that year and a copy thereof shall be forwarded to the Chief Executive of each Participant.

- 2.2 The report shall include:-

- (i) *a statement showing the performance of the Regulatory Service Functions and progress in achieving the Objectives and delivering the Business Plan.*
- (ii) *a summary revenue account and statement of capital spending including the distribution or use of any revenue surpluses and the financing of any capital expenditure"*

- 2.3 This is the fourth report produced under this requirement and covers the period 1st April 2018 to 31st March 2019. If the content of this report is agreed, a copy of the report must be sent to the Head of Paid Service of each of the three Councils along with the SRS Business Plan for 2019/20. The report outlines many of the actions undertaken at each partner Council to deliver the wide range of statutory functions assigned to the Service. The report provides a review of operations across the service, a summary of the financial position, and outlines performance against the 2018/19 service objectives.

Operating the Shared Regulatory Service

- 2.4** The Shared Regulatory Service (SRS) operates across Bridgend, Cardiff and the Vale of Glamorgan. The SRS delivers a range of statutory services through a collaborative model that are critical to maintaining the health, safety and economic wellbeing of local communities. The operating model delivers an integrated service for the Trading Standards, Environmental Health and Licensing functions, which has three service delivery sectors focusing upon the customer rather than the traditional professional delivery model.
- 2.5** The Annual report is presented here for consideration by the Joint Committee.
- Neighbourhood Services: activities relating to residential premises or having an impact on the local community.
 - Commercial Services: activities relating to business premises (generally where national standards apply).
 - Enterprise and Specialist Services: specialist areas of work and income generating services.
- 2.6** As a regional organisation, providing regulatory services across three local authority areas, the SRS seeks to ensure that the corporate priorities and stated outcomes of the three councils at the heart of all its activities. Using them as a focus, the strategic priorities for the Shared Regulatory Service:
- Safeguarding the Vulnerable
 - Improving Health and wellbeing
 - Protecting the Environment
 - Supporting the local economy
 - Maximising the use of resources
- 2.7** Provides a robust base for achieving the outcomes identified in the 2019/20 business plan and the partner Council's corporate aspirations.
- 2.8** The Joint Working Agreement, executed in April 2015, and updated in July 2017, underpins the entire service provision. The JWA contains a number of "milestones and requirements". In accordance with those requirements:
- The Wales Audit Office completed an independent financial audit of the service in September 2018 there were no recommendations for improvement.
 - The service set its budget in December 2018 for the 2019/20 period. This implements Year 2 of the 3 year budget reduction programme which set out a budget reduction of 5% p.a. for the period to March 2021.

- The Business Plan for 2019/20 is presented for political approval in other papers to the June 2019 Committee, following consultation with stakeholders.
- The Joint Committee will receive an audited statement of accounts in September 2019.

3. Key Issues for Consideration

3.1 The 2017/18 Annual report illustrated that the SRS consolidated service delivery in accord with the agreed standards and delivered the requisite financial savings. However, the report indicated that more demands were being placed upon the service at a time of reducing resources. The Key Milestones for 2018/19 were:

- Delivery of the SRS Business Plan 2018-2019.
- A review of the organisational structure for the SRS to meet the budget savings set out for 2019/20 and 2020/21.
- Consequently, to implement the financial savings agreed for the delivery of the SRS for the period 2018 – 2020.
- As with any law enforcement agency, new legislation and new policy developments were anticipated to place greater responsibilities upon the service; and with those responsibilities greater expectations. The consequences arising from the Grenfell disaster, the changes to the Public Health regime, the increased exploitation of vulnerable people, the challenges of improving air quality, all placed the SRS under considerable pressure the at a time of reducing budgets cannot be understated.

Human Resources

3.2 Throughout 2018/19, filling vacancies has continued to be challenging and the SRS has struggled to recruit suitable individuals into the service. This was exacerbated by the consultation undertaken on the budget reduction process where a number of officers formed a view that the SRS could not offer the job security they needed and left the service. However, the Service's programme of "growing our own" officers particularly in the food and trading standards disciplines has seen a number of individuals achieve higher accreditation levels to allow them to undertake a wider range of inspections. With officers assuming new roles and the taking on of new responsibilities to deliver the service, the retention of those officers needs a clear commitment to the resourcing of training and development within the organisation; competency within remains, of paramount importance.

3.3 The SRS is undergoing another significant period of change; the functions delivered for the partner councils such as Air Quality, Food Hygiene, Housing

enforcement are attracting new demands. As indicated above, recruitment and retention of good officers remains a challenge to ensure the SRS meets existing targets but is nimble enough to meet future agendas for public protection. The shortage of applicants with the right skills, abilities and experience in the different professions, Environmental Health, Trading Standards, has created a more competitive market. These shortages, attributable to an aging professional demographic, increasing turnover due to retirement and a reduced investment in sponsorship of students by the Councils have to be addressed if SRS is to continue delivering effective regulatory services. We know that the majority of our officers are content with their employment within the SRS, yet the SRS delivery model is at significant risk due to the inability to attract, recruit and retain a high calibre workforce.

- 3.4** Consequently, the SS management team have developed a new recruitment and retention strategy which seeks to enable the SRS to recruit high calibre individuals and experienced professionals to ensure the provision of high quality regulatory services across the region. Alongside that aim will be a clear objective of managing existing resource effectively to be able to respond speedily and effectively to necessary changes. The first step toward doing that is to extend the criteria for use of the Regulatory reserve created in 2016 to include the funding of apprentices and trainee officers. Elected members will be aware of an underspend in 2018/19, much of which is attributable to staff vacancies. Continued vacancies will impact upon service delivery and it is proposed to use the Regulatory reserve over the next three years to address the recruitment and development challenges faced by the service.
- 3.5** Sickness absence levels for 2018/19 were 7.55 days per FTE person. This is an increase on the previous year where absence rates were recorded as 6.89 per FTE person. There are mitigating factors with a number of staff undergoing planned medical interventions. This increase, while disappointing, compares favourably when viewed in a wider context through comparison against the average sickness rates across the partner Councils. In June 2018, the management team began the consultation process on the need for further budget savings and that may have had an impact upon attendance, even where managers are providing all of the relevant support to staff. There are no discernible trends in either the short or long term absence figures.
- 3.6** Over the summer of 2018, Conflict Management and Lone Worker training was arranged for SRS operational staff. Local provider, Safety Training Solutions Ltd delivered eight sessions of the day long course in house. The trainer engaged fully with SRS to create training that was tailored to the needs of the Service and its ways of working. This included working to SRS specific risk assessments, and teams were invited to submit examples of scenarios encountered previously that would be suitable for use as case studies in the training.
- 3.7** The course was designed to provide the skills necessary to identify confrontational / threatening behaviour through the combination of observation,

communication, threat and risk assessment; and to enable participants to take control of challenging situations.

3.8 Topics covered included teaching to provide:-

- Awareness of the health and safety legislation in the context of workplace violence and aggression.
- Understanding of how confrontation maybe expressed through use of body Language.
- Ability to identify situation where personal safety may be at risk.
- Recognition of the sings of alcohol, drugs, solvents and mental health issues being exhibited by individuals.
- An ability to use effective communication skills and positive body language to diffuse and manage confrontational situations.
- Safe strategies particularly when engaging with individuals at their own property / at home.
- An understanding of when to report incidents and how to produce effective incident reports to assist in the event of complaints/litigation.
- Basic actions to take when approached by a dangerous dot at a client's home or out in the community.
- Awareness of legislation in respect of self defence.

3.9 In addition, some perhaps less obvious areas of teaching included:

- Awareness of one's outline and social media profiles and steps to manage effectively.
- Use of the mobile phone in emergency situations.

3.10 By the end of the eight sessions, over 130 staff had received the training with excellent feedback being received.

Operational Performance

3.11 Operational performance throughout 2018/19 has been reported both to the Joint Committee and to each partner Council through the legacy systems. Performance is gauged against the 2018/19 Business Plan and the targets and actions identified in the plan were achieved for the most part with all statutory documents being published on time, the change programmes identified for the

period concluded on time. The only failings were an inability to complete all of the proactive programmes due to resourcing. The SRS had a role in two of the Council Public Accountability Measures; PAM 023 and PAM 013 and 014 for Cardiff only.

- PAM 023 – Food establishments - broadly compliant (%). This measure provides an indication of how well a food business complies with food hygiene legislation. The food industry is responsible for producing and distributing safe food. The Shared Regulatory Service, as the enforcement agency, conducts inspections, ensuring that standards are met through a robust enforcement programme to deal with those who do not comply with standards. Additionally, the business support regimes introduced into the SRS structure play a part in promoting an increase in hygiene standards, examples of that are set out under the priority heading supporting the local economy. Premises are deemed to be broadly compliant if specified risk scores are achieved for cleanliness, structural issues, and confidence in the management of the business.

3.12 The number of premises that are broadly compliant with food hygiene requirements, i.e. scoring 3* or above, are gradually increasing and in line with the UK average of 95%. The number of food businesses with a food hygiene rating of more than 3 increased in each authority area during 2018/19 from the previous year to a higher rating than ever before. (Bridgend from 96.69% to 97.52%, Cardiff 92.71 % to 94.54%, Vale of Glamorgan 95.40% to 95.92%). The results show an increasing number of businesses improving their standards. This translates to an additional 83 premises in Bridgend, 131 in Cardiff and 55 in the Vale over the last 2 years achieving a satisfactory rating, some of which can be attributed to the success of the intervention programme for food businesses. It is important to note that Cardiff has a significant turnover of food business operators and many of these new entrants to the market do not attract immediately a broadly compliant rating and that affects the overall broadly compliant score for Cardiff. Areas with a more settled food business community often score well on this indicator because the food business operators have had time to become accustomed to the requirements of the food hygiene legislation.

- PAM 13, Percentage of empty private properties brought back into use and PAM 14, the number of new homes created as a result of bringing empty properties back into use. This is a new indicator, but the core subject matter of reducing the number of empty properties remains the same. The performance measure guidance suggests that there are categories of direct action that local authorities can take to bring a property back into use, including:

Grants, loans or other financial assistance either provided or facilitated by the local authority; (managed by Cardiff Council).

Enforcement action including statutory notices;

Dialogue with the owner where the owner has engaged with the responded to the local authority.

- 3.13** Progress has been made on over 200 empty homes cases giving an indication of the level of activity and the potential for future performance. The annual target has been achieved and the actions undertaken in this area of work have been positive; the response from property owners has been encouraging and bodes well going forward. It is important to understand that the nature of empty homes means that there can be a significant lag time between attempted contact with empty property owners and re-occupation which means it can take time to see results. In addition to SRS work on this indicator, a key contributor to this PI in the past has been the Welsh Government Houses into Homes Scheme operated by the Council to assist in bringing properties back into beneficial use.
- 3.14** The SRS has recently begun to support Bridgend County Borough Council in delivering this function and discussions are on-going on the scope of the SRS activity for 2019/20.
- 3.15** Finally the performance indicator PAM 14 is being replaced with PAM 45, which takes account of commercial properties being brought back into use as residential property. PAM 14 has previously not accounted for these increases in private residences.
- 3.16** The detail of performance against all the agreed indicators is set out in **Appendix 1**.
- 3.17** The SRS may, through the relevant participative Council, prosecute breaches of legislation, particularly in respect of those who flout the law or who act irresponsibly, or where there is an immediate risk to health and safety. In the period, the service has been successful in challenging a range of unfair practices, many of which attracted significant media attention. An example of a significant increase in prosecutions is clearly evident. Last year there were 11 food hygiene investigations initiated, in 2018/19 this figure increased to 39. The time and work required to thoroughly investigate these matters and the consequences of officers' ability to carry out day to day work whilst these matters are on going is significant.
- 3.18** The details of all the prosecutions concluded in the period 1st April 2018 to 31st March 2019 are set out in **Appendix 2**.
- 3.19** The SRS has also continued to support relevant corporate challenges at each Council, most notable in recent months with the issues arising from "Brexit". The uncertainty surrounding the UK's departure from the EU has required increased interaction with civil servants in Westminster and Cardiff on a range of public protection matters. Other examples of providing corporate support include officers playing a key role in assisting the Councils to deal with the requirements to improve air quality, participating in a range of audits including the WAO audit

on safeguarding and in the Vale of Glamorgan SRS officers have played a key role on the reshaping programme, particularly in relation to the management development programme.

- 3.20** SRS officers have supported all three Councils statutory Licensing and Public Protection Committees through the year. The Committees have agreed a number of policy documents on Alcohol licensing and Gambling to protect the vulnerable in the community.
- 3.21** The SRS has held discussions with the partner Councils on the potential for a joint Scrutiny regime for the service. It is evident that the different scrutiny processes at work in the Councils are likely to lead to a duplication of resource. An examination of specific items through the process operated at Cardiff, for example, would be likely repeated at any joint session. Notwithstanding, the SRS has appeared before a number of Scrutiny Committees and task and finish groups in the last year.

Significant Service achievements

- 3.22** Paragraph X above, sets out the priorities for the SRS; there have been a number of achievements in 2018/19 that demonstrate progress toward delivering the outcomes associated with those priorities. These actions can be found in Section 6 of the SRS Business plan for 2019/20. Set out below are some examples of the work undertaken in the previous 12 months.

Improving Health and Wellbeing

- 3.23** Improving health and wellbeing is a key priority for Shared Regulatory Services. Work undertaken to ensure that food is safe, that infectious disease, noise and air emissions are controlled, that risks in the workplace are managed properly, allows people to live in healthy environments. Add to this our activities to ensure the quality of private rented property, the promotion of a safe trading environment and our regulation of licensed premises to ensure they operate responsibly and it is evident that the work undertaken by the SRS is hugely important to the health and wellbeing of the region.
- 3.24** The Gambling Policy for all 3 authorities was reviewed and reissued. The review was undertaken to meet the requirements of the Gambling Act 2005. Previous years reviews have focused upon young people and ensuring they are not able to gamble at premises licensing by the Councils. More recently, gambling is being recognised as a public health problem. While only a minority of gamblers are identified as problem gamblers, research is emerging that suggests that the financial, health and social harms that arise from gambling can impact upon families, communities and wider society. The increase in on-line gambling, the increase in the advertising of gambling products all plays a significant role. Research suggests, such developments increase gambling behaviours and possibly shape a more permissive social attitude to gambling. The Councils role

here is limited, but the SRS is working with a range of organisations in Wales to contribute where possible to mitigate the impact gambling has upon vulnerable individuals

- 3.25** Following the tragic fire and loss of life in Grenfell Tower in North Kensington there has been a nationwide review of the use of a particular type of cladding known as Aluminium Composite Material (ACM) which was used in the Tower. Within Cardiff in the last 12 months, the SRS has begun to take a more prominent role in respect of the affected high-rise and remains in consultation with Welsh Government and the Fire Service as to the potential changes in policy and practice as a consequence of Grenfell. Recently, the Minister for Housing and Regeneration convened an Expert Group, to develop a 'road map' to respond to the issues raised by the Independent Review of Building Regulations and Fire Safety (the 'Hackitt' review). The Head of Service attends this group as a representative of the Regulatory services in Wales. A new addendum to the Housing Health and Safety Rating System guidance (HHSRS) to clarify how an HHSRS assessment of fire risk where aluminium composite material (ACM) cladding is present in high rise buildings should be conducted has been introduced in England. The SRS is encouraging the Welsh Government to introduce the addendum promptly in Wales and to make other policy changes to Housing law.
- 3.26** Three owners of takeaways in the Barry and Bridgend areas were prosecuted following test purchases carried out in relation to allergens. Orders were made of rice dishes where the businesses were specifically told it was for someone who was allergic to egg. However, when tested the food was later found to contain egg or egg protein. In one case, 77 times the amount of egg required to cause a reaction in an allergic person was found. Furthermore, these purchases were conducted only a few months after informal test purchases had been carried out when all three businesses had failed and subsequently been provided with advice. The businesses were fined in total £1800, £1975 in costs and £265 victim surcharges. One owner was given a Community Order to undertake 300 hours of unpaid work. This project is now being undertaken in other parts of the Country.
- 3.27** A business was fined £140,000, ordered to pay costs of £11,835 and a victim surcharge of £170 following a successful prosecution instigated by Shared Regulatory Services for a health and safety offence. The incident which occurred in 2018 occurred at a pub in Barry when a customer was left with serious injuries after falling through a cellar door which had been left open for cleaning staff. The customer fell down a concrete flight of stairs and was found unconscious after suffering a fractured skull and a bleed on the brain.
- 3.28** The SRS began an investigation into the safety of trampoline parks in 2018. These indoor activity areas have become increasingly popular and attract significant numbers of children. SRS investigated the construction materials used at one site and determined that the products used were of concern. The application of the law to these relatively new play environments was unclear. Following a legal

opinion, the SRS intervened and required the operator to undertake a number of corrective actions before reopening the facility to the public. The SRS will now extend this piece of work in 2019 to the other similar venues in the region.

- 3.29** The Port Health work has received significant attention this financial year. At Cardiff Airport due to the airport having divert status and being a designated point of entry for Communicable Disease, SRS port health are working closely with Public Health Wales, the Ambulance Trust and airport management to ensure suitability of facilities in case of an infectious disease emergency. Imported trade is continuing to be monitored from Qatar Airlines, to date no food has been identified as being imported.
- 3.30** Vessel movements at the sea ports of Cardiff and Barry continue to be monitored with ships boarded according to risk in order to carry out inspections. The importance of this in protecting crew welfare was highlighted when a ship arrived at Cardiff sea port with a ship sanitation control certificate that had been issued in Turkey but without any indication of what these controls should be. A port health officer from SRS boarded the ship and found that conditions on board were very poor with issues relating to cleanliness of the galley, welfare of the crew i.e. a lack of food provision for the crew with only a very small amount of dry food and frozen meat and no fresh food, and disrepair to the structure of the ship including in cabins. The officer through the agent and owner arranged for food to be delivered to the ship within 24 hours and contacted the Maritime and Coastguard Agency who detained the ship at Cardiff dock due to major contraventions being identified and the ship was not able to leave until the MCA had approved it.

Safeguarding the Vulnerable

- 3.31** Our safeguarding work seeks to ensure that children are protected from harmful substances and products, that older and vulnerable people are protected from unscrupulous individual and traders, that illegal money lending activities across Wales, are challenged robustly and that the public feel safe when using taxis as public transport. We will do this in partnership with our Council colleagues and other agencies to help people who need our support. Safeguarding the vulnerable is a central theme to many of the activities undertaken by SRS.
- 3.32** Call blockers can put an end to nuisance or malicious calls. They can be installed at the homes of residents being repeatedly targeted by scams and once fitted, prevent all calls coming through other than those from recognised friends and family numbers. In one case a referral was received from a social worker concerned about a person who was being bombarded by sales and nuisance telephone calls. Following intervention by SRS officers and a review of the individual's financial commitments, "unnecessary" payments to different organisations were terminated and the vulnerable person also received some compensation. SRS now has some 40 call blockers installed in residents' as a highly effective way of reducing nuisance and scam calls. Figures for 2018

published by the device supplier indicate that 41% of all incoming calls at these properties are nuisance or scam related, and that the devices are blocking 100% of unwanted calls from getting through to the residents concerned.

- 3.33** Research has shown that the average amount lost through a scam is £1,862, however the true value of call blocker devices can be immeasurable when they provide the comfort and peace of mind older and vulnerable residents need to help them continue living independently in their own homes. The SRS call blockers are now being supplemented by the use of "Memocams" which can be fitted to deter cold callers at the door.
- 3.34** In order to strengthen improvements in safeguarding, particularly in relation to children, a programme of training and awareness of Child Sexual Exploitation (CSE) with the taxi community and other stakeholders was undertaken in Bridgend where training sessions were held with the trade in conjunction with South Wales Police and Social Services. A recent initiative, Operation Brake, involved Licensing Officers in Bridgend working with South Wales Police to raise awareness of child Sexual exploitation within the night time economy in Bridgend. Officers visited licensed premises and taxi ranks in the town centre to engage with workers in the night time economy on how to spot the signs of child sexual exploitation and how to report anything suspicious. This operation involved partnership working to highlight this crucial issue which impacts on the most vulnerable young persons within our communities. In Cardiff, the hackney carriage/private hire driver's written knowledge test was also updated to include a section on CSE, based on the booklet produced in conjunction with Cardiff Children's Services. Drivers must pass this test to show that they can spot the signs of vulnerability and what to do if they see an issue to become a licensed driver.
- 3.35** Following a spate of tragic incidents involving the use of knives, Cardiff was identified as one of two areas of concern in Wales with regard to the prevalence of knife crime. In order to play a key role in tackling this disturbing trend, SRS successfully bid for nearly £20,000 of Home Office funding to undertake compliance checks to identify the extent of which young people were able to purchase knives and other bladed instruments across the city and identify problem sectors of the trade. 250 test purchases took place of knives, bladed articles and axes across SRS using trading standards volunteers under the age of 18. The failure rate was 11% with 28 out of 250 premises selling to a person under the age of 18. A variety of products were sold including kitchen knives, Stanley knives and an axe. Following the test purchasing exercise all of the premises that failed were sent a warning letter and invited to engage with SRS to discuss the sale and the training that is provided to staff. Most of the premises made contact and further visits were carried out by officers to offer advice and education. Fifteen premises that failed have recently been re tested with South Wales Police assisting and all of the premises passed. Some premises had removed all knives from the shop whilst others had taken extra steps to reduce

accessibility of the product by placing them behind the till areas. A further thirteen premises are due to be re tested at the end of April.

Protecting the Environment

- 3.36** Protecting the environment is a core strategic priority of SRS. Many of the activities such as water sampling, monitoring air quality, and remediating contaminated land contribute toward promoting a better environment. This in turn means better long term prospects for the health and wellbeing of our communities. The SRS has a key role to play in ensuring we make best use of existing resources and bringing back redundant/derelict properties into use is an important contributor to both the environment and local community development. We have a key role to play in the wider climate change and future generations agendas through our enforcement role on energy efficiency controls on properties and products. The impact of these activities is less apparent in the short term for communities, but has an important role for future generations. In the more immediate term, we ensure communities are protected from nuisance and are safer by investigating noise complaints, dealing with stray dogs and horses.

Empty Homes

- 3.37** Within Bridgend and Cardiff Council the SRS has provided dedicated Officer resource to assist with the work bringing empty properties back into residential use. It is recognised that empty properties are a wasted resource. Whilst they may not always be left in a state of disrepair, there are always consequences, and these can be summarised into three factors:

Social, such as crime including arson, graffiti, squatting, as well as reduced public confidence in the area or the Council.

Environmental, including rodent infestation, fly tipping, dangerous structures, and a poor impression of the area

Economic, such as repair costs, increased burdens on councils' resources, property devaluation, deterred investment

- 3.38** Within Bridgend an SRS Officer has co-ordinated an Empty Homes Working Group which has led to consultation on a new Empty Homes Strategy, using a whole authority approach. The council and its partners seek to work cooperatively with owners of empty properties to bring their properties back into use. The council also provides owners with help and assistance, including empty homes grants and empty property loans and where appropriate, through the use of targeted enforcement action. The renewed focus on empty properties has led to increased performance, with a total of 104 properties brought back out of 1237 empty at the start of the year.

- 3.39** Similarly at Cardiff, the Welsh Government performance indicators were exceeded for last year as a result of a combination of both proactive and reactive work, with an on going caseload of approximately 200 empty properties. Casework involves both informal negotiation and formal enforcement work in order to assist owners in bringing their properties back into use or to require improvements to eradicate associated nuisances. The work follows a general process in line with the Council's Empty Property Policy in order to open a dialogue with owners and where that fails, formal enforcement in the form of statutory notices, in addition to such measures as compulsory purchase and enforced sale. During 2018/2019 the compulsory purchase procedure has been commenced on 3 long term problematic empty properties, one of which is currently being renovated by the owner. The Empty Homes Policy within Cardiff is being reviewed this year and we will consult with internal and external stakeholders as part of that process.
- 3.40** Although no dedicated SRS resource has been allocated within the Vale, we continue to contribute to the Empty Homes Strategy through the use of enforcement where owners have refused offers of help and the property is having a significant impact on the surrounding area.
- 3.41** During the last year, SRS ensured that the Bridgend, Cardiff and the Vale of Glamorgan Councils met their statutory obligations under the Environment Act by producing air quality reports for each area and reporting to the respective Cabinets. Failure to produce said reports could have led to the issue of a Welsh Government direction under Section 85(3) of the Environment Act 1995.
- In Cardiff, SRS continued to play a significant role in assisting the City of Cardiff Council as it identifies the most effective way to improve air quality going in the city going forward. The SRS Team Manager Specialist Services Environment has been seconded to Cardiff Council for a period of at least nine months in the role of Project Manager for the Council's Air Quality Strategy.
 - In Bridgend, the monitoring at a new location during 2017 and 2018 identified average nitrogen dioxide levels (NO₂) that breach the annual objective set for NO₂. As a result of this finding, Bridgend County Borough Council approved a recommendation made by SRS to designate an Air Quality Management Area (AQMA) at this town centre location (Park Street), and the new AQMA was declared, effective from 1st January 2019. Public engagement is due to commence on possible solutions for the AQMA and a draft action plan is being produced to set out and consider a range of measures.
 - In the Vale of Glamorgan, Cabinet approved a recommendation made by SRS to revoke the Windsor Road, Penarth AQMA as a result of improvements in air quality over a number of years. Public engagement on the revocation is due to

commence and residents are reminded that the monitoring will continue in the area to ensure that the greatly improved standard of air quality is maintained.

- 3.42** Officers within Cardiff have led a consultation on new emission standards for taxis and private hire vehicles which is part of the package of proposals aimed at improving air quality and ensuring legal compliance by 2021. Currently 87 % of the taxi fleet licenced in the city does not meet the latest Euro 6 standard and it is estimated that should the proposals be implemented 622 of the oldest and most polluting vehicles will be replaced within the first year. Officers will continue to liaise with the Trade and will draft a report on the result of the consultations for Members to take a final decision on the age, emission and testing proposals for taxis licensed in the city.

Supporting the Local economy

- 3.43** A strong local economy is a key component in the quality of life experienced by local people. The work of SRS has a significant, but often unseen, impact upon the local economy. The provision of timely advice and guidance on regulation can benefit the economic viability of businesses resulting in improved business practice. Much of our market surveillance activity focuses upon maintaining balance in the “marketplace”; the equitable enforcement of regulations helps businesses to compete on equal terms ensuring a fairer trading environment. Our role as regulator also extends to providing information to support consumers to enable them to become better informed and confident. In an age where people can purchase goods and services without leaving home, the importance of the principle of “caveat emptor” has never been more relevant.
- 3.44** SRS hosted a forum for food businesses at the Principality Stadium in March to give businesses advice on how best to meet standards. Over 170 delegates booked onto the event, representing a diverse range of organisations, including cafés, health boards, nurseries and hotel chains. Environmental Health and Trading Standards professionals from SRS advised delegates about health and safety in catering, how the food hygiene rating system works in practice and how to improve and maintain a food hygiene rating. Furthermore advice was given on preventing the spread of norovirus and the topic of food allergens which gave attendees the chance to understand their responsibilities in law whilst ensuring the safety of their customers. The event also highlighted the tailored advice services available via paid-for services, or through Primary Authority partnerships which can include staff training, auditing of terms, conditions, policies and procedures and mock food hygiene inspections to better prepare businesses for the real thing. The event was very well received by all attendees, in fact, following the event, a food inspection was undertaken at a delegate’s food business where he had implemented improvements as a result of the event and received an improved food hygiene rating score.

3.45 Helping businesses to improve their food hygiene rating score was the drive behind a successful bid to the Food Standards Agency for project funding during 2018. The FHRs intervention grant enabled SRS to target those businesses most in need of support in improving their score, and officers worked with food businesses across the region having poor scores of between 0 and 2. What followed was a programme of intensive 1 to 1 assistance provided to some 14 businesses. The impact of the interventions has been evaluated by reference to the FHRs scores of each of the businesses both before and after the training and support was provided. The results are quite remarkable. Most notably:

The average FHRs score across the fourteen businesses before the intervention was 1.5.

The average FHRs score across the fourteen businesses after the interventions was 4.

The greatest improvement was shown by a business achieving a FHRs rating of 4 having previously been zero rated.

Three premises achieved a 5 rating after the intervention, two having been on a rating of 2 previously and the other on a rating of 1.

3.46 As an added benefit of this work, officers were able to pilot the newly developed SRS HACCP training for businesses which is now available to book. It is hoped that given the huge success of the project in driving up low FHRs scores, similar interventions will be possible in the coming year, ideally with further FSA funding.

3.47 The three Licensing teams throughout the SRS are busy front line services dealing with a wide variety of activities which require licensing by the Council in order to protect public health and safety. One of the major developments in the Licensing sphere is a consultation and report by Welsh Government in relation to the future of taxi licensing. Reports have been taken to all three Public Protection Committees to advise Members of the proposals which include the option of removing Licensing of taxis from local authority control and the setting up of a Joint Transport Agency to undertake this work. Officers have participated in stakeholder meetings with Assembly Members and have fed back the view that whilst local authorities support the establishment of national standards and information sharing between Authorities, there is no evidence to support the view that the public would benefit from the role being passed to one JTA.

Maximising the use of resources

3.48 Maximising the use of resources was the original catalyst for creating SRS, and our work in this area continues. By reducing “triplication” of effort, introducing better processes, making our systems work without constant intervention, improving access into the service, our business improves and we increase

customer satisfaction. Income generating activities like marketing our metrology laboratory, offering paid for advice services, building Primary Authority partnerships and extending our training provision to business are examples of our move to a more “commercial” culture. Our income levels in 2018/19 were the best to date and we are confident that this will continue in 2019/20.

- 3.49** Above all, we recognise that crucial to the success of SRS are the people who work within the service. We will ensure that our officers are effective in their roles by investing in learning and development opportunities, by engaging them fully in the development of the service, and by fostering an environment where people are encouraged to think, lead and innovate. The service has been recognised by different organisations for our efforts in regulating particular aspects of the marketplace. In 2018/19 the SRS was recognised by the RSPCA award for our work on animal welfare, by the Hallmarking Council for our investigations into sales of gold and silver, and by the Anti Counterfeiting Group for our challenges to the sale of fake products.
- 3.50** Our Business Support team has achieved further efficiencies over the course of the year as we continue to streamline and harmonise working practices across the three hubs. This work has been particularly successful in respect of the processing of Freedom of Information requests and in the transcription of defendant interviews as part of the prosecution process where demand can now be managed over the different offices. In addition, a further tranche of the remaining phone calls dealt with by the Cardiff hub have been transferred to C1V.
- 3.51** Further improvements have been made in accessibility to, and the content of, the SRS website with greater reliance being placed on web forms as a means of contacting the service for non-urgent matters. Going forward, this continues to be an important element of the wider SRS agenda for digital channel shift which over time will lead to a reduction in enquiries reaching the service by telephone.
- 3.52** The SRS Twitter account (@SRS_Cymru) continues to prove popular with a steady growth in the number of its followers. A more recent development has been the launch of the dedicated Twitter account for the Wales Illegal Money Lending Unit (@LoanSharksWales) As well as the obvious benefits this brings in terms of raising awareness of the dangers of dealing with loan sharks; complaints, the account provides an additional route for complaints, intelligence and requests for victim support to come through to the Unit direct.
- 3.53** While the SRS budget savings work resulted in the loss of three Support Officer posts last year, the progression of a number of staff into vacancies elsewhere in the structure meant that that the number of staff leaving the service was kept to a minimum.

Financial Performance

- 3.54** The Gross Revenue Budget and provisional outturn position for 2018/19 are shown in the tables below, with the position in respect of each of the partners detailed to include both Core and Authority Specific expenditure positions. The service has a provisional underspend of £496k against the gross revenue budget of £8.504m, as illustrated in the following table:

	Gross Budget	Provisional Outturn	Outturn Variance
	£'000's	£'000's	£'000's
Authority			
Bridgend	1,774	1,602	172
Cardiff	4,978	4,789	189
Vale	1,752	1,617	135
Total Gross Expenditure	8,504	8,008	496

- 3.55** However, it should be noted that to enable the Service to successfully meet the agreed savings target of 2019/20, a mini restructuring of the service was undertaken during 2018, which has actively contributed towards the draft outturn position.
- 3.56** An unanticipated outcome of the savings consultation was the departure of officers who were not at risk, to take up employment elsewhere. Recruitment drives have been undertaken, however the Service has experienced some issues in attracting suitable candidates to certain disciplines.
- 3.57** As a direct consequence of staff vacancies, a number of planned (Core) operations scheduled to be undertaken during 2018/19 have been postponed until 2019/20. This has contributed to the increase in the provisional underspend position since the last report.
- 3.58** A full breakdown of the projected gross revenue outturn position is shown in Appendix 3.

Implementation

- 3.59** Provision was made in the 2016/17 accounts for items that were yet to be realised within the accounts. Funding for the remaining two items will be carried forward into 2019/20. These include:

£46k to cover the anticipated cost of setting up the SRS as a separate employer within the Cardiff & Vale Pension Fund as agreed by the Joint Committee on the 20th December 2016.

£10k in respect of partially completed additional IT consultancy work.

Core Services

3.60 The approved gross Core Services budget for 2018/19 is £6.261m, and has achieved a provisional underspent outturn position of £500k. The Core Service budget is allocated in line with the population split across the participating authorities, as detailed in the following table:

Authority	%	Gross	Provisional	Outturn
		Budget	Outturn	Variance
		£'000's	£'000's	£'000's
Bridgend	22.39%	1,401	1,286	115
Cardiff	57.51%	3,601	3,318	283
Vale	20.10%	1,259	1,157	102
Total Core		6,261	5,761	500

3.61 Employee costs achieved a £300k underspend, which may in part be the result of the reduced staffing levels and subsequent recruitment issues which were particularly felt within the Food and Health and Safety Teams. Sixteen members of staff have left the Service during the year. Thus, resulting in a number of vacant posts that are actively contributing towards the employee underspend. There continues to be on-going issues in attracting suitable cover within particular disciplines that did not form part of the savings initiative, plus a shortage of suitable agency cover.

3.62 The Service has also borne an above average percentage of maternity and paternity taken in 2018/19, which has exerted additional pressures on existing staffing levels. The Vale's Corporate average instances of maternity leave stands at 1.51%, whereas, the SRS is 2.67% higher at 4.18%.

3.63 Included within the Employee expenditure are the costs of two part-year unbudgeted members of staff, who supported the Public Space Protection Order initiatives at Cardiff Council and the Vale of Glamorgan. The costs of which were recharged directly back to the two instructing Authorities. Additionally, two team leaders from within Core are currently on secondments out of the service, with team members acting up into the management roles. Unfortunately, this has left vacancies further down the structure.

3.64 Transport costs have achieved a £4k overspend which is the result of an anticipated spend in excess of budget on vehicles repair costs.

3.65 A number of vehicles inherited by the Service have been determined as approaching the end of their economic life due to disproportionate repair and running costs. As a result, the service has purchased a number of replacement vehicles which will have reduced running costs and make a positive contribution towards air quality standards resulting from lower emissions. These purchases have been met by a revenue contribution to capital, and are shown within the Supplies and Services element of this report.

- 3.66** Supplies and Services have achieved a total overspend of £110k. This includes an unbudgeted spend of £123k against vehicle acquisitions, which will be met by the overall revenue underspend. Additional overspends on this heading include £27k on legal costs, £18k on equipment plus an overspend of £17k on audit fee's, which include the WAO charge associated with the external audit of the 2018/19 Statement of Accounts. These have then been offset by £75k of various underspends across a number of headings. The legal fees are partially offset by income received in accordance with a Monetary Order which was imposed as a result of a Trading Standards case heard at Crown Court.
- 3.67** Income has over recovered by £314k. Which is made up of £111k of recharged staff costs associated to the Public Space Protection Orders projects at both Cardiff and the Vale Councils, a recharge to Cardiff in respect the secondment of a team leader to their Clean Air Feasibility Study. £73k of various Fees and Charges. Compensation of £47k has been received in respect of the Monetary Order, which offsets the legal and investigation costs of the case. £40k of recharges to Welsh Government in respect a staff secondment to support the Special Procedures Project which is to be incorporated in to the Public Health (Wales) 2017 Act, £33k of Primary Authority income, plus the receipt of an unbudgeted £10k Food Standards Agency grant.
- 3.68** The 2018/19 Welsh Government Rentsmart Grants of £66k have been built into the SRS budget. The Service has recouped 100% of the costs incurred from the grants from both Welsh Government, and also from the partner Authorities included in the pilot scheme where the grant now forms part of the Flexible Funding Grant received by the participating Authorities.

Authority Specific Services

- 3.69** The approved gross budget of £2.243m in respect of Authority Specific Services is projected to overspend by £4k as detailed in the following table:

	Gross Budget	Provisional Outturn	Outturn Variance
Authority	£'000's	£'000's	£'000's
Bridgend	373	316	57
Cardiff	1,377	1,471	(94)
Vale	493	460	33
Total Authority Specific Services	2,243	2,247	(4)

- 3.70** The £57k underspend at Bridgend is partially the result of a £29k underspend within the Licensing Section. This is made up of an £25k underspend on employees, where the majority of this variance is due to a temporary vacancy that was carried for a number of months, plus a £4k underspend within Supplies and Services. There is also a £28k underspend within Kennelling and Vets where

activity is below budget. This service was subject to a re-tendering exercise earlier in the year, which has also actively contributed toward lower Kennelling Costs being achieved. The decreasing level of service take up agrees with previous year's performance, and is consistent with the national trend in the reduction of dogs presented as being homeless.

- 3.71** The £94k overspend at Cardiff predominantly relates to overspends within Licencing and Night Time Noise, which have then been partially offset by underspends elsewhere on the budget.
- 3.72** There is an overspend of £150k within the Licensing Section. Where there are £50k of unbudgeted Employee costs. This is partially due to agency being accessed to cover sickness absences, plus providing operational support as required, and will be offset through License Fee income received directly by Cardiff.
- 3.73** The £2k underspend on Premises is the result of the Licensing Unit vacating the privately rented offices at Hadfield Road, Cardiff. The Licensing Section are now no longer geographically split, with the unit occupying a suite of offices at City Hall.
- 3.74** There is an overspend of £102k within the Licensing Supplies & Services heading which includes unbudgeted Disclosure & Barring Service (DBS) costs of £45k, plus £25k Taxi Plate costs. There is also an overspend of £26k of General Offices Expenses, plus legal fees of £6k. It is understood that this position will be fully met by offsetting Licensing Income. The 3 years Hackney Carriage and Private Hire Driver Licences were renewed from late 2018 onwards, which has impacted on the level of DBS expenditure incurred in the year. However, there will also be an offsetting uplift in the DBS income received in the year at Cardiff as this cost is met directly by the customer.
- 3.75** HMO Plasnewydd and Cathays have a combined underspend of £24k.
- 3.76** As a direct result of the post of Student Liaison Officer being vacant for many months, there is an underspend of £38k. The post lay vacant whilst revised funding mechanisms were investigated by Cardiff Council. The position has now been resolved, and it is expected that the vacancy will be filled in the near future.
- 3.77** The £7k overspend within Night Time Noise relates directly to activity levels in excess of budget.
- 3.78** The £1k underspend at Cardiff Port Health is the result of smaller underspend across the headings.
- 3.79** The £33k underspend in the Vale of Glamorgan is partly the result of a £16k underspend within Kennelling and Vets. This is due to a lower than budgeted uptake in the service, and emulates the reduction in pressures experienced at

Bridgend. There has also been a change in the supply of kennelling services which has actively contributed towards this position.

- 3.80** The £6k underspend within Licensing due to an underspend on Employees where there was a temporary vacancy. This post has now been filled.
- 3.81** The £8k underspend within Pest Control is the result of expenditure being below budget within both Transport and Supplies and Services.
- 3.82** The Additional Licensing Scheme which is located within the Castleland Ward in Barry has now expired, and will not be renewed, thus resulting in a £4k underspend.
- 3.83** There is a 1k overspend within Burials where the cost of Public Health Funerals exceeds the available budget. However, this may in part be met by income recovered from the estate of the deceased.

Net Position

- 3.84** In accordance with the Joint Working Arrangement (JWA), income budgets remain the responsibility of each Participant Authority and are shown in this report for completeness. The following table illustrates the provisional net underspend of £355k at year-end, against a net budget of £6.146m:

	Net Budget	Provisional Outturn	Outturn Variance
Authority	£'000's	£'000's	£'000's
Bridgend	1,328	1,199	129
Cardiff	3,410	3,334	76
Vale	1,408	1,258	150
Total Net Expenditure	6,146	5,791	355

- 3.85** A full summary of the projected net outturn position is illustrated in **Appendix 4**.
- 3.86** Year-end income positions were provided by partner Councils. At year-end, the Service offered recommendations to the legacy accountants in respect of the treatment of income received during 2018/19 but relating to future periods.
- 3.87** The net position for Bridgend is an overall underspend of £129k against a net budget of £1.328m, and is the result of income received being £43k below target overall. Licensing income experienced a shortfall against target of £48k, which may in part be due to an in year income budget increase. It is hoped that this position will improve in 2019/20 upon the implementation of the revised fees and charges rates that was recently presented to the Licensing Committee. This is then partially offset by Core income which over recovered by £5k.

- 3.88** The net position for Cardiff is an underspend of £76k against a net budget of £3.410m. There is an overall shortfall in income of £113k, of which £29k relates directly to Core with the remaining £84k shortfall relating to Authority Specific Services.
- 3.89** The Authority Specific position may in part be due to the historic pattern of income receipts falling off from the second year onwards of the 5 year HMO licence period. HMO Plasnewydd will finish its current cycle in October 2019, with HMO Cathays finishing in December 2021. 2016/17 was the first year that an adjustment in respect of income received in advance had been administered to the account, with no consideration within the accounts made for periods prior to 2016/17.
- 3.90** HMO Cathays and Plasnewydd have achieved income of £211k against a combined budget of £232k, resulting in a shortfall in the achievement of income targets by £21k.
- 3.91** The Licensing Section has achieved a shortfall in income of £91k against a budget of £959k, which is marginally below the performance achieved in 2017/18.
- 3.92** The Student Liaison scheme has achieved income of £16k against a budget of nil. The costs of the scheme are shared between Cardiff Council and the local Universities.
- 3.93** Cardiff Port Health Authority is funded by precepts, and would therefore, be anticipated to meet target. Income received by this unit has exceeded target by £12k and negates expenditure.
- 3.94** The net position in respect of the Vale of Glamorgan is a net overall underspend of £150k, against a net budget of £1.408m. Which has been achieved by an over recovery of income valued at £15k.
- 3.95** Core has achieved income of £17k against a budget of £14k, equating to an over recovery of income valued at £3k.
- 3.96** The Licensing Section has achieved income of £304k against a budget of £290k, exceeding target by £14k.
- 3.97** Unbudgeted income of £2k has been received within the Burial section.
- 3.98** This is then partially been offset by an under recovery of income with the Pest Control unit of £4k.
- 3.99** The Draft Statement of Accounts is shown as **Appendix 5**.

4. How do proposals evidence the Five Ways of Working and contribute to our Well-being Objectives?

- 4.1** The Annual report demonstrates the partner Councils commitment to improving social, economic, environmental and cultural well-being and promoting sustainable development in line with the Well-being of Future Generations (Wales) Act 2015. Equalities, Sustainability and safeguarding issues have all been taken into account when drafting this plan. Our work with stakeholders seeking to ensure that our early intervention and prevention activities maintain wellbeing in the SRS region is a crucial element of our approach to protect local people and the environment.
- 4.2** The Well-being of Future Generations Act requires the SRS to underpin decision making by contributing to the seven well-being goals of the Act, following the five ways of working, and consequently undertaking actions that will have a positive impact on people living in the future as well as those living today The SRS Business Plans contains a number of initiatives that contribute to the well being objectives. Section 6 of the 2017/18 plan approved in June 2018 illustrates how the SRS priorities interface with the well being goals on matters such as safeguarding the vulnerable and protecting the environment and forms the basis for the Annual report.
- 4.3** Aligning the Well-being Goals of the Act enables us to evidence our contribution to the National Well-being Goals. Promoting the five ways of working is reflected in our approach to integrated business planning. Setting consistently challenging yet realistic steps and performance improvement targets, the SRS is able to clearly demonstrate progress towards achieving the national goals by the production of the Annual report.

5. Resources and Legal Considerations

Financial

- 5.1** The implications are set out in the body of the report.

Employment

- 5.2** The implications of the budget reductions undertaken in 2018/19 are set out in the body of the report.

Legal (Including Equalities)

- 5.3** The partner Councils have a duty to improve under the Local Government (Wales) Measure 2009. The report outlines achievements in 2018/19 for the matters assigned to the Shared Regulatory Service.
- 5.4** The Shared Regulatory Services Business Plan 2017 / 2018 and 2018 / 2019. The Joint Working Agreement executed on 10 April 2015 and amended July 2017.

6. Background Papers

Appendix 1 – SRS Performance Measures 2018 / 2019

Appendix 2 – SRS Prosecution Statistics 2018 / 2019

Appendix 3 – Projected Gross Revenue Outturn Position

Appendix 4 – A Summary of the Projected Net Outturn Position

Appendix 5 – Draft Statement of Accounts

CABINET MEETING: 10 OCTOBER 2019

MUSIC STRATEGY UPDATE

CULTURE & LEISURE (COUNCILLOR PETER BRADBURY)

AGENDA ITEM: 5

Appendix 5 of this report is not for publication as it contains exempt information of the description contained in paragraphs 14 and 21 of Schedule 12A of the Local Government Act 1972.

Reason for this Report

1. To obtain Cabinet authority to establish a new Music Board for the city in response to the recommendation outlined in the Sound Diplomacy report.

Background

2. Capital Ambition recognises the city's "cultural offer is an area of competitive advantage and its 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. Subsequently, the city's Economic Strategy, approved by Cabinet in April 2019, identified the creative industries as a key part of the city's industrial strategy.
3. In developing the city's economic strategy, music was identified as a strength and opportunity within the 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.
4. To that end the Economic Strategy identified '*Delivering a Music Strategy for Cardiff*' as a key priority. To progress this work, Sound Diplomacy - a global leader of the Music Cities movement – were appointed to analyse Cardiff's music ecosystem to inform the development of a Music Strategy for the city.

5. The Cardiff Music Ecosystem Study (attached as Appendix 1), produced by Sound Diplomacy, was presented to the Cabinet Meeting on 18 April 2019 where it was resolved that the contents of the report be noted, and that a future report be brought to Cabinet to:
 - Provide a detailed response to the Music Ecosystem Study and Strategic Recommendations; and
 - Establish a Music Board, taking into consideration the recommendations of the Sound Diplomacy Music Strategy Report and including detail of the governance arrangements and the Board's Terms of Reference.
6. This report outlines that response, and in particular seeks approval for the Terms of Reference for the Music Board and to approve the proposed appointments to the Board.

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

7. The Cardiff Music Ecosystem Study, attached as Appendix 1, analysed Cardiff's music ecosystem to identify the most effective way to use music to promote the city. 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;
 - Licensing & Police;
 - Spaces and Places;
 - Planning;
 - Transport;
 - Education;
 - Employment & Skills;
 - Tourism & Branding.
8. The April 2019 Cabinet Report noted that the Council intends to develop a Music Strategy Work Programme to progress the recommendations of the Sound Diplomacy Report. It is considered that, should it be established, the proposed Music Board would be the most appropriate delivery body for overseeing the implementation of the Report recommendations.

Establishing a Music Board

9. The Sound Diplomacy report noted that "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, demonstrated how valuable facilitated opportunities were for these venues to meet to discuss their work, trends, issues and ideas."

10. The report proposed that governance should be established to address these issues that will:
 - Create a leading representative body formed by a wide range of people with proven leadership ability and influence within the music ecosystem;
 - Provide an advisory board to help establish, promote and maintain the city as a music friendly city;
 - 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.
11. Subsequently the Sound Diplomacy report recommended the establishment of the Music Board to act “as a platform that enables better communication between a city’s governing body and its music ecosystem”.
12. A draft Terms of Reference for the Board, developed in conjunction with Sound Diplomacy, has been established that is attached as Appendix 3.
13. The draft Terms of Reference notes the mission of the Cardiff Music Board as being “to champion Cardiff’s music scene, protect and promote music at grassroots level and provide a platform for increased communication and collaboration across the sector”.
14. The draft Terms of Reference notes the objectives of the Board as being to:
 - Promote the development of and champion Cardiff’s music scene;
 - Lobby for investment in Cardiff’s music scene;
 - Promote fairness, access and diversity in Cardiff’s music scene and champion diversity initiatives;
 - Support a partnership approach to the development of Cardiff’s music scene;
 - Explore ways to increase the resilience and sustainability of grassroots music sector and venues;
 - Support developers and communities to protect existing music spaces and develop new music venues and workspaces.
15. The administration and secretariat function of the Board will be provided by Cardiff Council. Membership of the Board is voluntary. Members cannot claim expenses and are not paid to attend board meetings, provide advice and comment, represent the board or undertake any other activity related to the work of the Board. The costs associated with administering the Board will be met from within existing Council Economic Development resources.

16. The Music Board will act in a purely advisory manner, with the aim of both influencing public sector intervention and support, but also with the aim of aligning private sector investment. It should be noted therefore that the Board is not an executive body, and does not have the authority to:
 - Expend money on behalf of Cardiff Council;
 - Commit or influence Cardiff Council to any arrangement;
 - Consider any matter outside its specific Terms of Reference;
 - Direct Cardiff Council staff in the performance of their duties and shall not seek to do so;
 - Or purport or represent Cardiff Council in any communication with the public or media.
17. The Board will, however, be responsible for developing the Cardiff Music Strategy, which will include:
 - A strategy and subsequent programme of activities that deliver the objectives of the Board;
 - Identifying resources for delivering the strategy;
 - Promoting the sector;
 - Lobbying for investment in the sector.
18. To establish the Board an open invitation for Board Members was issued in August 2019 seeking applications. The advertisement and the criteria for appointing Board Members is attached as Appendix 4.
19. Following the advertisement 50 applications were received and assessed by Cardiff Council officials and Sound Diplomacy. The proposed composition is established as Confidential Appendix 5. Should the Cabinet approve the Terms of Reference and proposed composition of the Board successful candidates will be notified.

Response to the Recommendations of the Sound Diplomacy Music Strategy Report

20. As noted in paragraph 5, at the Cabinet Meeting of 18 April 2019 it was resolved that a future report be brought to Cabinet to provide a detailed response to the Music Ecosystem Study and Strategic Recommendations.
21. This report outlines the Council's initial response to the recommendations, which is attached as Appendix 2. It should be noted that some elements of consideration will be deferred for consideration by the Music Board, should its establishment be approved. This will allow for a wider consideration by the sector of the recommendations, and to enable the delivery of the Music Strategy as outlined in paragraph 18 above.

Signature Event

22. The Sound Diplomacy study recommended the creation of a cross-genre international artist showcase and signature event. In particular, it notes:

“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.”

23. It has for some time been considered that establishing a regular home-grown event would be a major addition to Cardiff’s event portfolio. Subsequently the Council has been working with Welsh Government and private sector partners to develop proposals for a new signature event. It is intended that the event would take the form of an internationally relevant music festival, as well as providing an opportunity to develop the sector within Cardiff through show-casing and industry events. The proposed key objectives of such an event would be to:

- Provide a two-week period to host a range of music events;
- Establish a regular event that attracts international audiences;
- Establish a respected event for industry;
- Establish an event that showcases new talent, and promotes Cardiff and Wales as a leading destination for music tourism;
- Provides a legacy for the music industry in Cardiff and Wales;
- Supports contemporary performance including light and sonic installation;
- Promotes the use of the city as a festival and conference destination in its own right;
- Build a 5-year plan to expand the festival
- Brings the city, region and nation together to promote culture in Cardiff and Wales on the world stage.

24. A report will be presented to Cabinet later in 2019 outlining the detail of the proposed event and associated budgetary implications.

Scrutiny Consideration

25. The Economy and Culture Scrutiny Committee considered this issue on 3 October 2019. The letter from the Chair is attached at Appendix 6.

Reason for Recommendations

26. To approve the next steps in establishing the Music Board and establishing a Music Strategy for Cardiff.

Financial Implications

27. The Cabinet Report sets out the Terms of Reference of the Cardiff Music Board and the Cabinet response to the Sound Diplomacy Report. Contained within the Sound Diplomacy Report is a recommendation to appoint a Music Officer and if this is progressed then the funding source will need to be established as there is currently no budget allocation for

this purpose. All other recommendations prior to be implemented will need to identify if any additional resource is required as there is no budgetary allocation currently set aside. Each recommendation needs to consider both the direct cost of implementation as well as the cost impact it may have on any other services.

Legal Implications

28. Legal Services are instructed that the client service area, in drafting the proposed Actions, have given careful consideration to the legal framework and policies that govern the Council functions and roles referred to (such as planning and licensing), and that the Actions can be achieved within legal constraints.
29. It is important to highlight, prior to implementing the various Actions as set out in the proposed response to the report, the appropriate advice is sought to ensure the Council complies with any applicable procedure. By way of example only, any proposed Traffic Regulation Orders must follow due statutory process prior to being implemented and becoming enforceable.
30. The Report recommends Members to approve the Terms of Reference for the Cardiff Music Board. Legal Services are instructed that the Music Board is not a decision making body but is a forum which aims to enable better communication between the Council and its music ecosystem. Accordingly, the Terms of Reference do not provide for decision making, rather their purpose is to clarify the role and responsibilities of the Board, its membership, its Terms of Reference generally and how the same will be resourced funded.
31. The decision about these recommendations has to be made in the context of the Council's public sector equality duties. The Council also has to satisfy its public sector duties under the Equality 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. 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. If the recommendations in the report are accepted and when any alternative options are considered, the Council will have to consider further the equalities implication and an Equality Impact Assessment may need to be completed.
32. 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.

33. 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 2018-21: <http://cmsprd.cardiff.gov.uk/ENG/Your-Council/Strategies-plans-and-policies/Corporate-Plan/Documents/Corporate%20Plan%202018-21.pdf>
34. The well-being duty also requires the Council to act in accordance with '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 comprising 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; and
 - Involve people from all sections of the community in the decisions which affect them.
35. 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>
36. 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, the report and Equality Impact Assessment deals with all these obligations. The Council has to consider the Well-being of Future Generations (Wales) Act 2015 and how this strategy may improve the social, economic, environmental and cultural well-being of Wales.

RECOMMENDATIONS

Cabinet is recommended to:

- (1) Approve the response to the Sound Diplomacy Report attached as Appendix 2.
- (2) Approve the Terms of Reference for the Cardiff Music Board attached as Appendix 3.
- (3) Approve the appointments of the Cardiff Music Board and instruct the Director of Economic Development to appoint the individuals named in Confidential Appendix 5.

- (4) Delegate authority to the Director of Economic Development, in consultation with the Leader of the Council, the Cabinet Member for Culture and Leisure, the Monitoring Officer and Section 151 officer to work with partners to develop detailed proposals for the signature event as outlined in paragraph 22 of this report and to bring an update to a future Cabinet meeting.

SENIOR RESPONSIBLE OFFICER	Neil Hanratty Director of Economic Development
	4 October 2019

The following appendices are attached:

- Appendix 1: Sound Diplomacy Music Strategy Report: Music Ecosystem Study and Strategic Recommendations
- Appendix 2: Cardiff Council Response to Sound Diplomacy Report
- Appendix 3: Cardiff Music Board Terms of Reference
- Appendix 4: Cardiff Music Board Member Advertisement
- Appendix 5: Proposed Music Board Member Appointments Confidential
- Appendix 6: Letter from Chair of Scrutiny

SOUND
DIPLOMACY

SOUND DIPLOMACY MUSIC CITY REPORT INFORMING A MUSIC STRATEGY FOR CARDIFF

Music Ecosystem Study and Strategic Recommendations

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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 2017.¹ Music contributed £4.4 billion in GVA to the UK and supported over 142,000 jobs in 2016,² 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.³ 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.⁴ Music tourism sustained 47,445 full time jobs, up 18% from the year before⁵. In 2017, Wales saw 379,000 music tourists spend £115 million (direct and indirect) on concerts and festivals.⁶ 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

¹ IFPI (2018)

² UK Music (2017a)

³ Ibid.

⁴ Ibid.

⁵ Ibid.

⁶ 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.

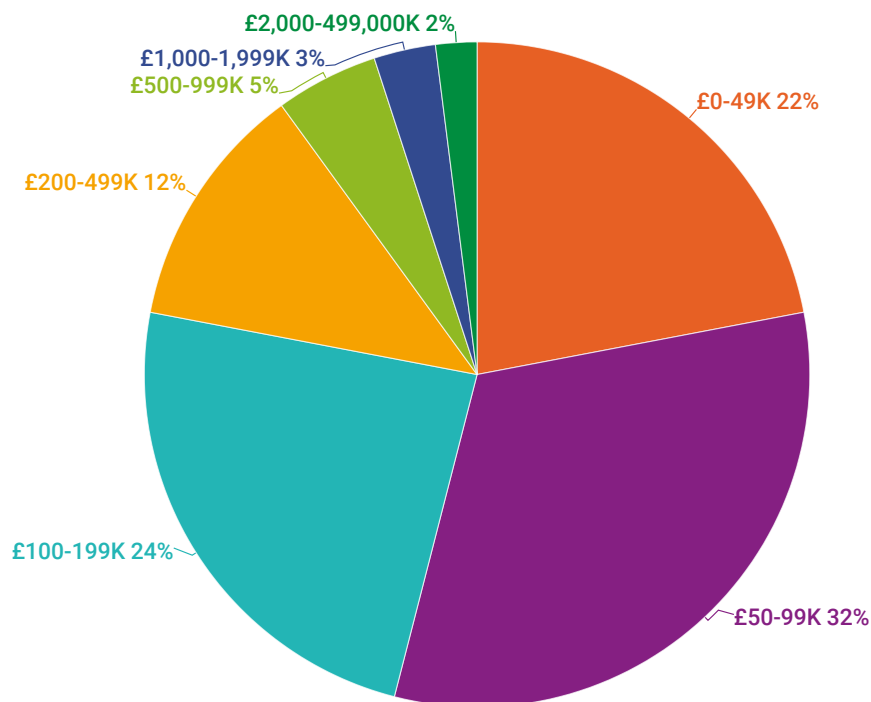
DIRECT IMPACT

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).



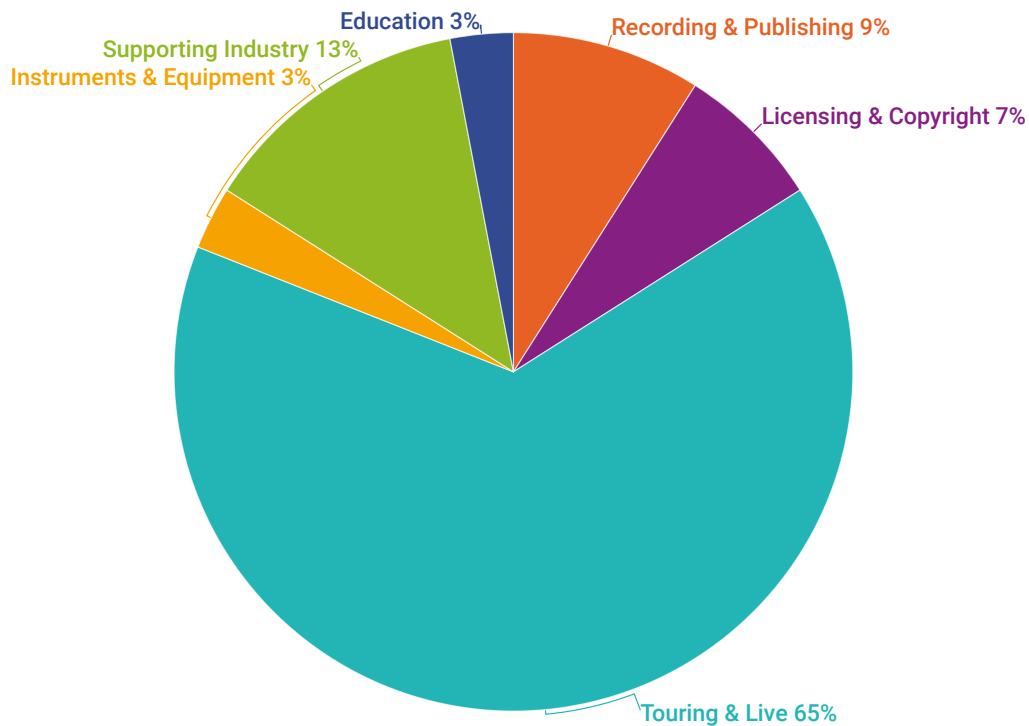
GRAPHIC 1: CARDIFF – MUSIC ENTERPRISES TURNOVER, 2016



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%).



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 activities⁷, while the remaining 37% is associated with commercial, technical and management support⁸.

Average annual income of artists and creative agents in the music sector is £18,000⁹, with a varied source of income and not necessarily all from music, while technical and management music sector workers¹⁰ 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.

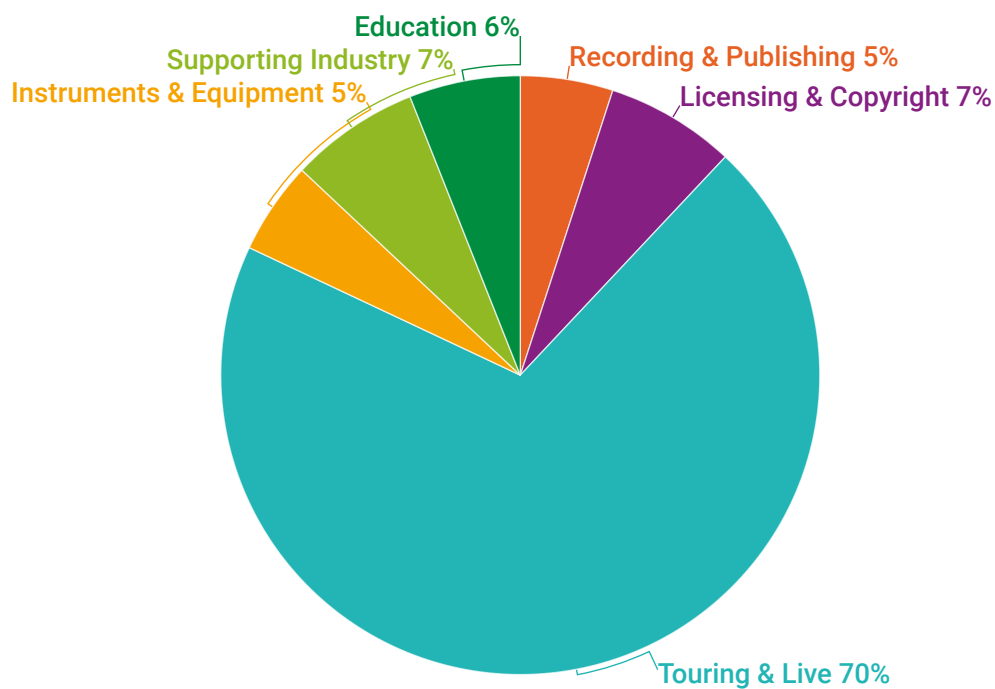
⁷ Artistic and creative activities are those that are involved in the processes of creation and production within the music ecosystem, whether for live music or recorded music, for example musicians, authors, photographers, designers, among others.

⁸ 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.

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

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

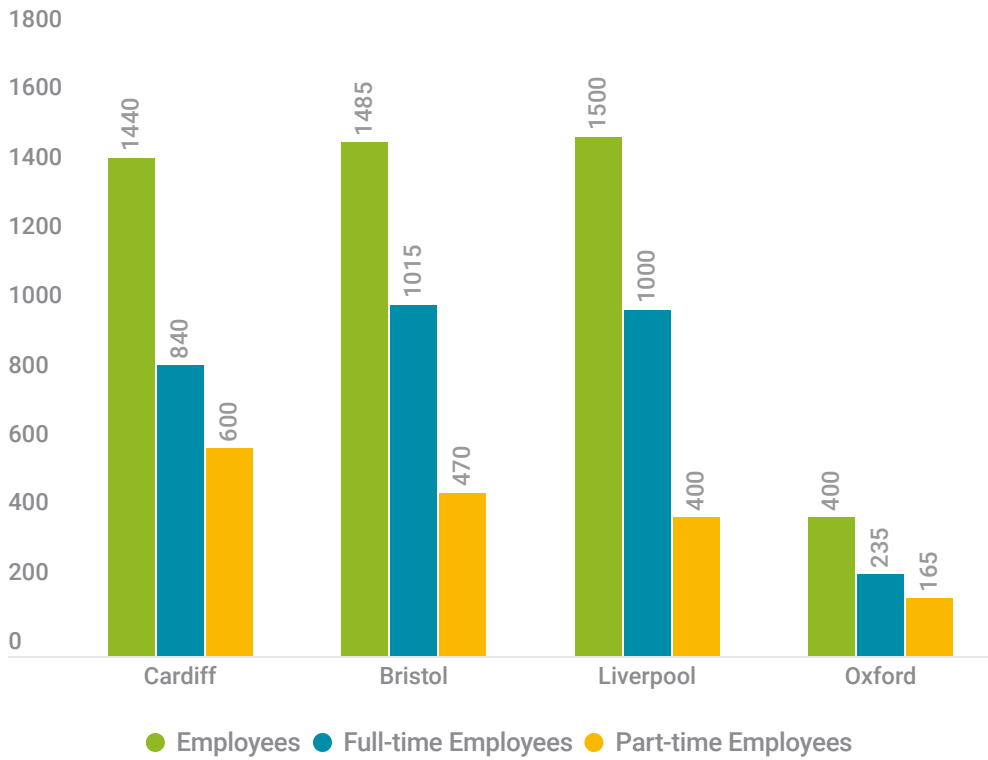
GRAPHIC 3: CARDIFF – MUSIC ECOSYSTEM EMPLOYMENT, 2016



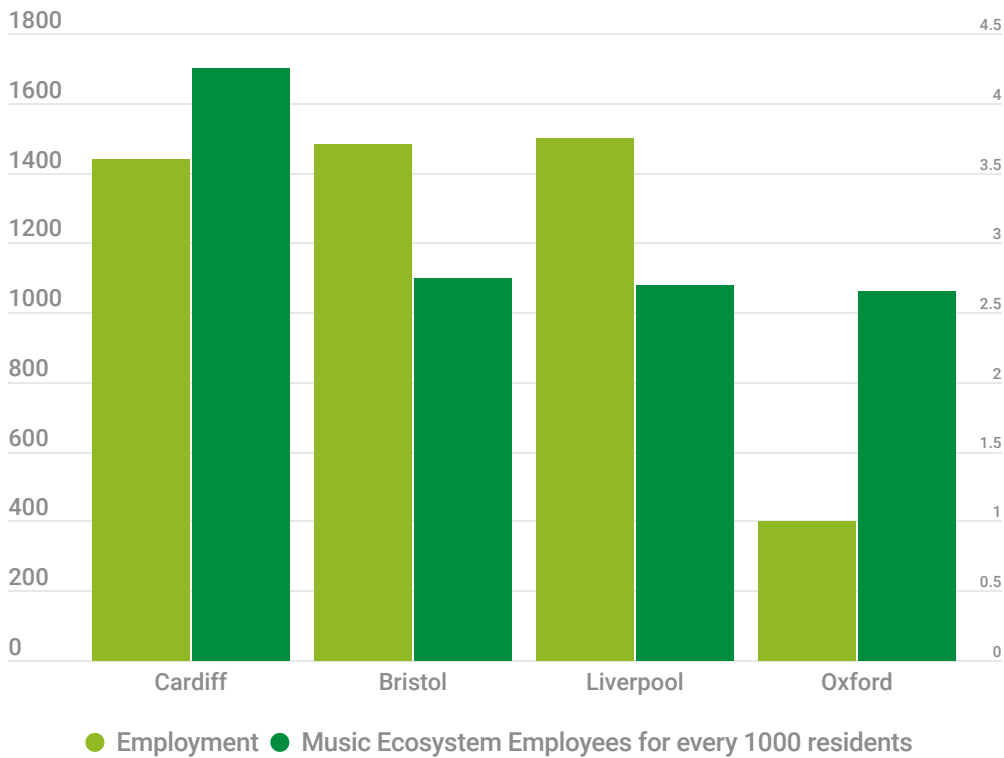
The number of employees working in the music sector in Cardiff is similar to those of Bristol (1,485) and Liverpool (1,500), and much greater than Oxford (400). However, we found that Cardiff generates 4.3 jobs in the music sector for every 1,000 residents, while Bristol, Liverpool, and Oxford only generate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

¹¹ Demographic information obtained from the United Kingdom CENSUS 2011

GRAPHIC 4: COMPARATOR CITIES – EMPLOYMENT, 2016

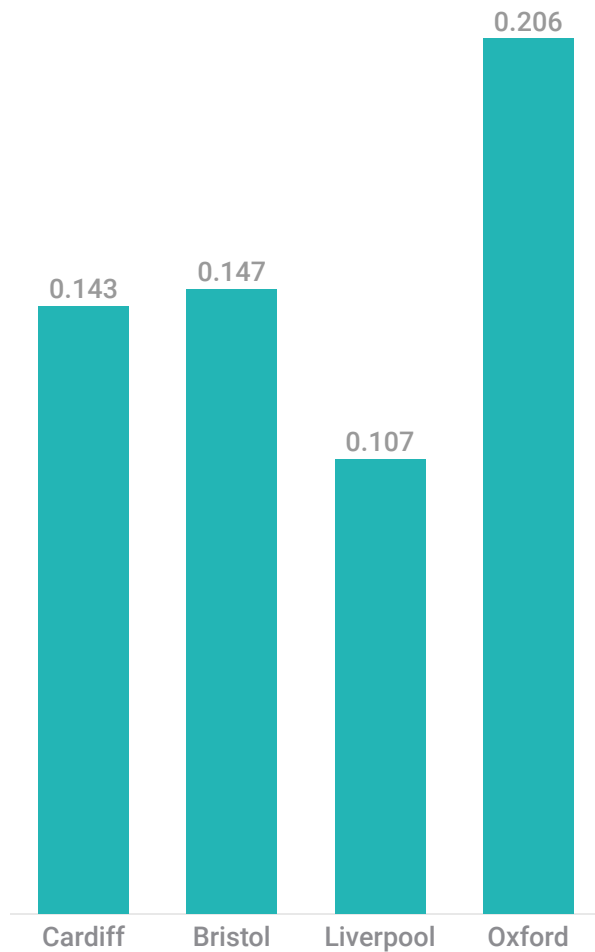


GRAPHIC 5: COMPARATOR CITIES – EMPLOYMENT, 2016



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"¹². 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

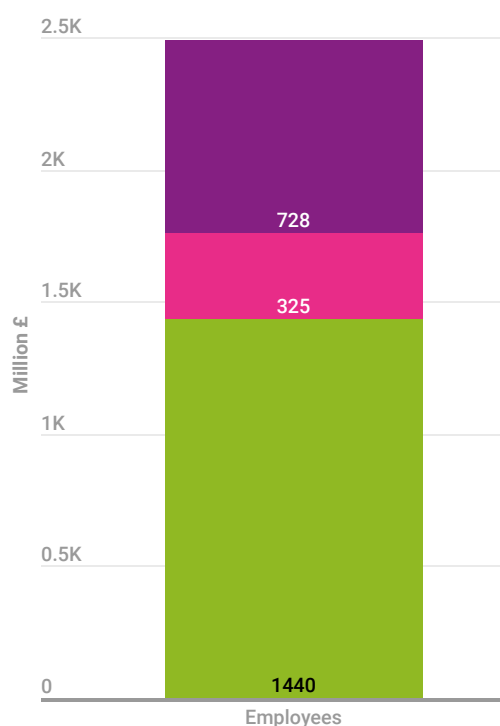
Output: £49.95 million
GVA: £43.32 million
Wages: £33.58 million
Employees: 729

¹² 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
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	2494

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 labels¹³.

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.¹⁴ 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 Songkick¹⁵. 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

¹³ Mapping information identified in Cardiff as of July 10, 2018.

¹⁴ Information obtained via economic impact analysis.

¹⁵ 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).¹⁶ 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.

¹⁶ 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)¹⁷. 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:

¹⁷ 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 halls¹⁸. 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 unserved. 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-

¹⁸ 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 students¹⁹. 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 music²⁰. 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 performance²¹. Cardiff Metropolitan University offers teaching qualifications in PGCE Secondary Music. There are also musical instrument classes at Chapter Arts Centre²², as well as classes in music theory and group workshops at the International Music School²³.

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

¹⁹ National Assembly for Wales (2018)

²⁰ Cardiff University (2018)

²¹ Royal Welsh College of Music & Drama (2018)

²² Cardiff Music School (2018)

²³ 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 cuts²⁴).

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 Anthem²⁵ 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.

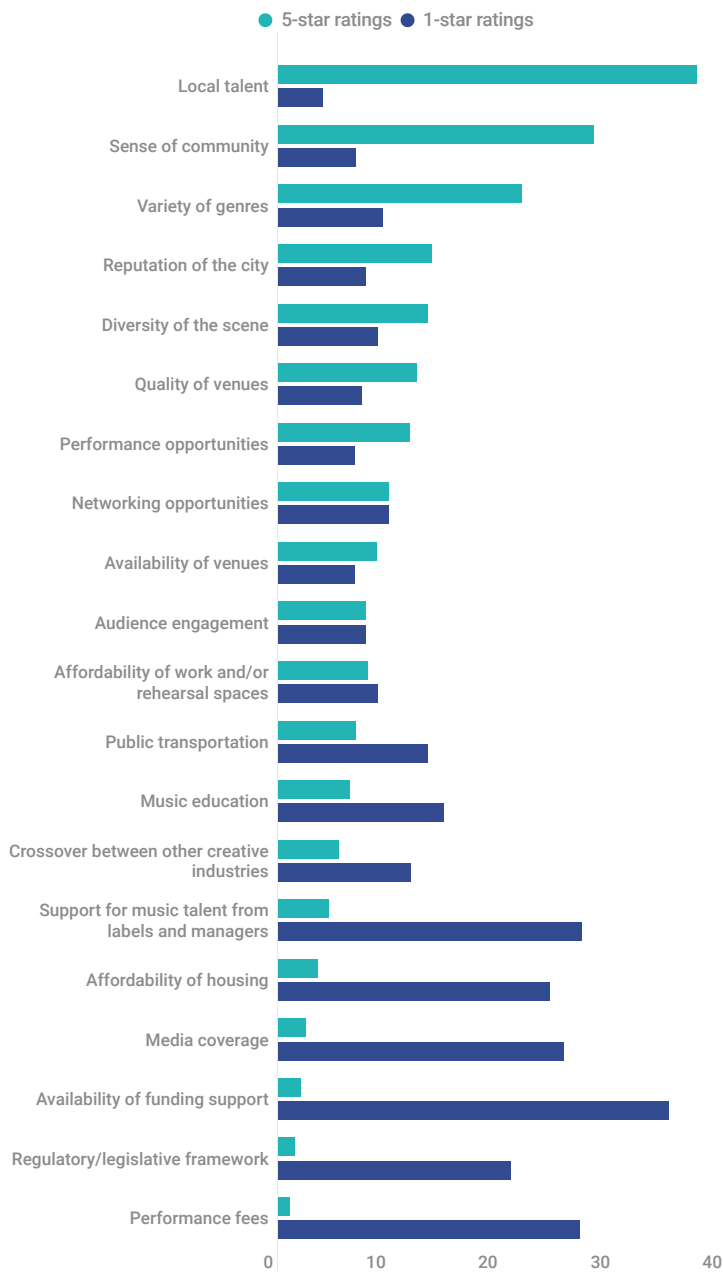
EMPLOYMENT & SKILLS

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.

²⁴ BBC, Welsh Music Foundation (2014)

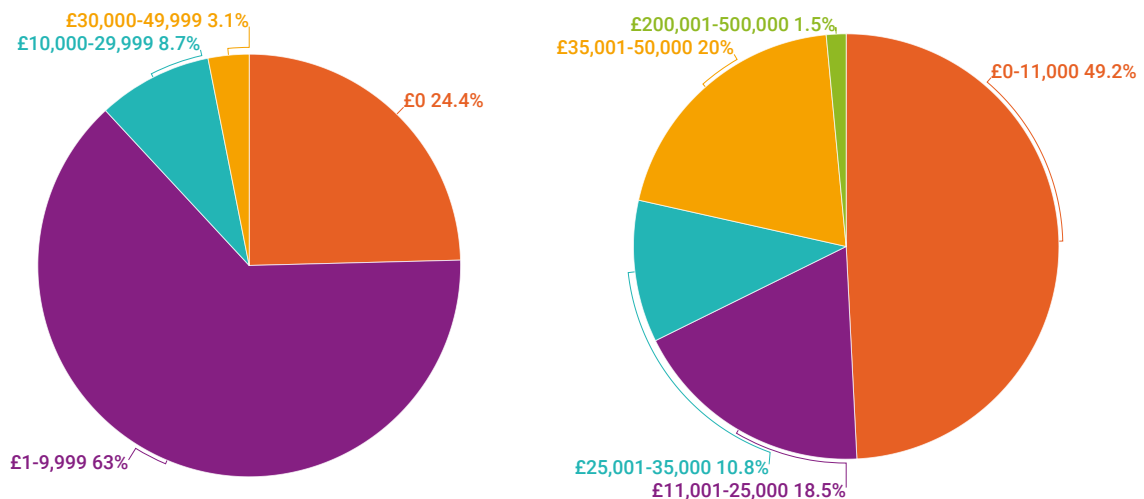
²⁵ <http://www.arts.wales/139279>

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.²⁶ 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 1,908.²⁷ 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 gigs²⁸. 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.

²⁶ UK Music (2017b)

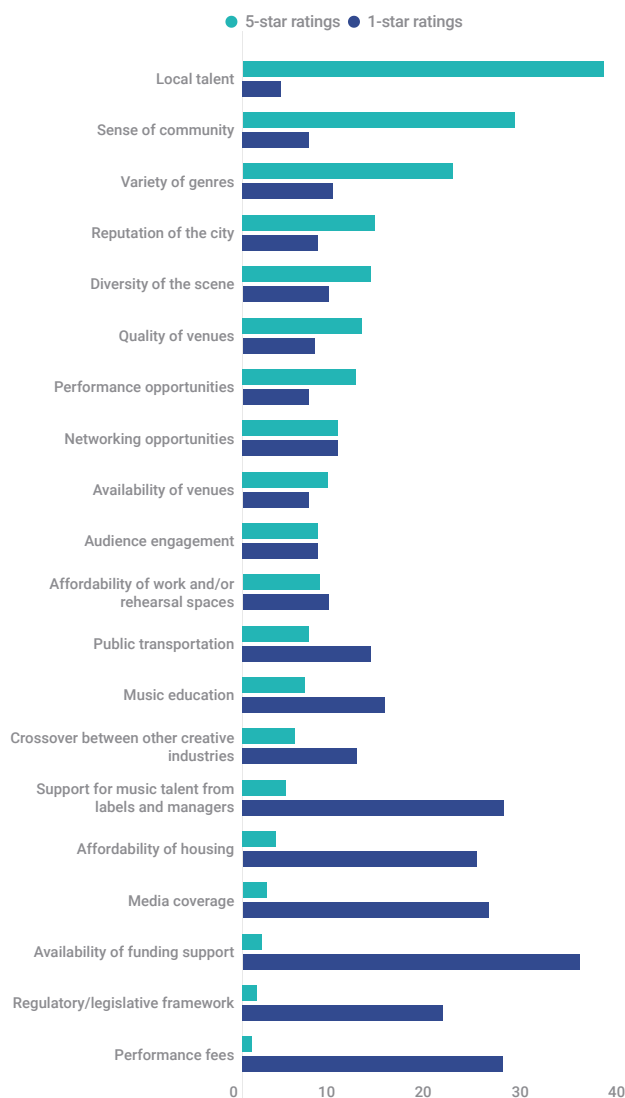
²⁷ Ibid.

²⁸ 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.

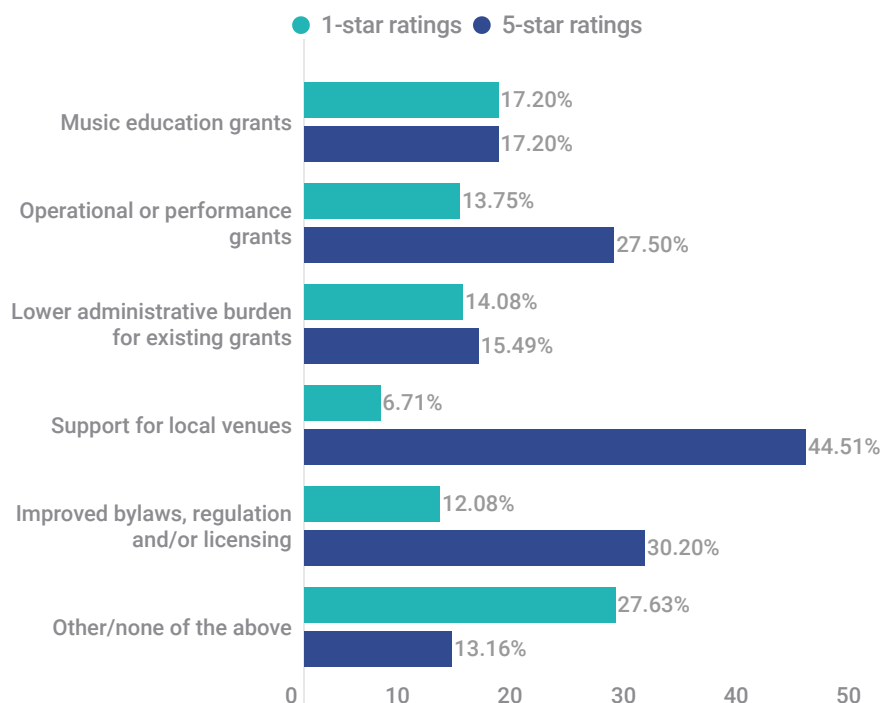
FIGURE 3. OVERVIEW OF 5-STAR AND 1-STAR RATED ASSETS IN CARDIFF’S MUSIC ECOSYSTEM



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 (MC²) 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.²⁹

²⁹ 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.

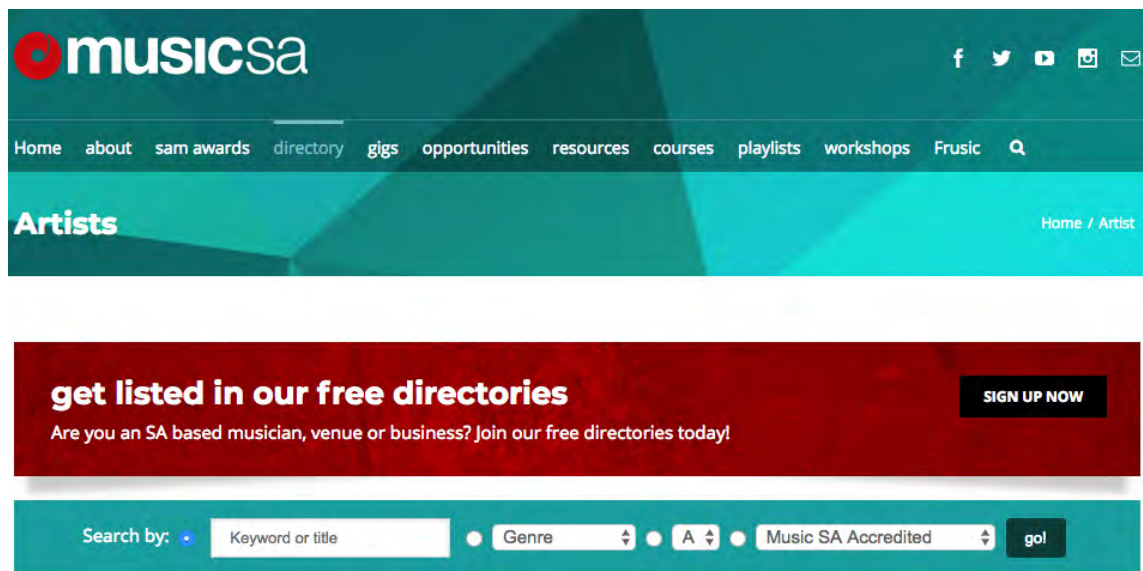
A structured approach and a unified digital database should be the starting point. This will allow transparent communication, keep different stakeholders up to date with anything related to the Music Office, policy updates, new funding opportunities, networking events, workshops, etc. This database will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



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

MUSIC SA'S DIRECTORY

Music SA's³⁰ 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.



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.

³⁰ 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 noise³¹. 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.³²

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

³¹ Nacht Burgemeester Amsterdam (2018)

³² 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 defensible. 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 Board³⁵ 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.

³⁵ 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, Tremolino 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)³⁴. 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 NETWORK³⁵

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

³⁴ Les Fabriques (2018)

³⁵ 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 2016³⁶. 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 Strategy³⁷, and tourism has a predominant presence in its City of Music Strategy³⁸, 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](https://www.visitliverpool.com)³⁹, 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 website⁴⁰ 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.

³⁶ 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

³⁷ 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

³⁸ 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

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

⁴⁰ 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 Police⁴¹ had a key role in the Met Police's dismissal of the Promotion Event Risk Assessment Form 696⁴², a form that intended a collaborative approach to the management of licensed premises but, in practice, targeted grime, garage and R'n'B acts unfairly⁴³.

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)⁴⁴. 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

⁴¹ https://www.facebook.com/events/404142732962526/?active_tab=about

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

⁴³ 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>

⁴⁴ 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.⁴⁵

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 CATALUNYA⁴⁶

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.

⁴⁵ Victorian Commission for Gambling and Liquor Regulation (2013)

⁴⁶ 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.⁴⁷

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 safer⁴⁸. 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 of risk of harm or injury caused by street entertainment activities to residents and businesses. These issues can be

⁴⁷ City of Austin (2017)

⁴⁸ 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 BUSKING⁴⁹

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

⁴⁹ 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.⁵⁰

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

⁵⁰

<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 events⁵¹.

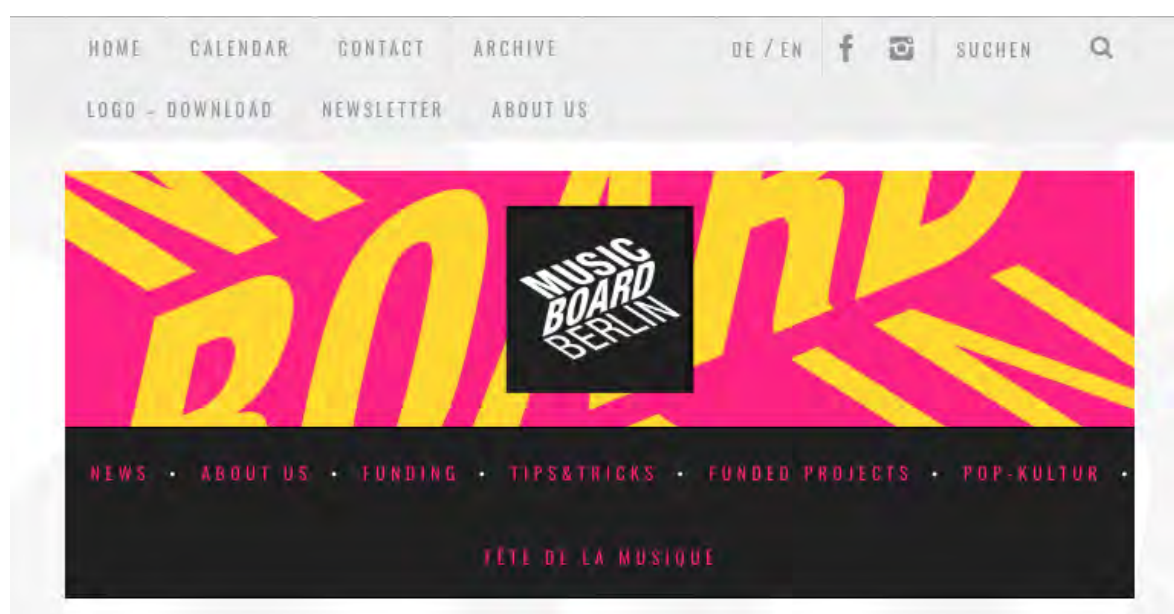


Figure 5. Screen Shot of Musicboard Berlin's Website Header as of 27-8-2018

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

⁵¹ Music Board Berlin (2018a)

programmer⁵². 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 calculated⁵³
- **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.⁵⁴

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.

⁵² Music Board Berlin (2018b)

⁵³ Music Board Berlin (2018c)

⁵⁴ Music Board Berlin (2018d)

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

BA MÚSICA⁵⁵ 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, CATALUNYA⁵⁶

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.

⁵⁵ Gobierno de Buenos Aires (2018)

⁵⁶ 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.⁵⁷

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.

⁵⁷ 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, UK⁵⁸

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.⁵⁹

TREMPOLINO, NANTES, FRANCE⁶⁰

Tremolino 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

⁵⁸ <https://www.thegladcafe.co.uk/>

⁵⁹ Behr, Dr. A.(2014)

⁶⁰ Tremolino (2018)

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

KREATIVE RÄUMEN WIEN, VIENNA⁶¹

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 companies⁶².

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

⁶¹ Kreative Räume Wien (2018)

⁶² 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 attenuation⁶³. 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.



⁶³ 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 Machine⁶⁴, 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 Plan⁶⁵ 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 1km², 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.⁶⁶

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.

⁶⁶ 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, MELBOURNE⁶⁷

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 weekends⁶⁸. 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 use⁶⁹. 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 Ecce Vandal produced its musical single.

⁶⁷ Public Transport Victoria (2018)

⁶⁸ Premier of Victoria (2018)

⁶⁹ 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.⁷⁰

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)⁷¹. 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.⁷²

⁷⁰ Government of Western Australia (2015)

⁷¹ SKIP Consulting Pty Ltd. (2015)

⁷² Victorian Building Authority (2014)

AMSTERDAM'S EXTENDED VENUE CURFEWS⁷³

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 disbursal 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, UK⁷⁴

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.

⁷³ Diaz (2017)

⁷⁴ 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 Scheme⁷⁵, 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.

⁷⁵ Arts Council of Wales (2018)



Tiny Rebel Cardiff. Photo: Kacie Morgan – therarewelshbit.com

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)⁷⁶.

⁷⁶ 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 SCHEME⁷⁷

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"⁷⁸.

The guide⁷⁹ 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.

⁷⁷ Musicians' Union (2015b)

⁷⁸ Ibid.

⁷⁹ 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.⁸⁰ 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 Wales⁸¹. The report’s findings and recommendations would seem to strongly

⁸⁰ Beat (2016)

⁸¹ 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.



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 Synch
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.⁸²

⁸² 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 effectivity 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 PORTFOLIO⁸³

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 businesses⁸⁴.

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.

⁸³ Project Music Portfolio (2018)

⁸⁴ 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.⁸⁵

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

⁸⁵ 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 event⁸⁶, Attitude is Everything's Access Starts Online⁸⁷ and DIY Access Guide⁸⁸, and Making Music's Events Accessibility Checklist⁸⁹ 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 venues⁹⁰. 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

⁸⁶ UK Government (2017)

⁸⁷ Attitude is Everything (2018a)

⁸⁸ Attitude is Everything (2018b)

⁸⁹ Making Music (2015)

⁹⁰ 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.santiagoweeek.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 Davids Hall. Image courtesy St Davids 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.⁹¹

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.⁹²

⁹¹ The New York Times (2014)

⁹² 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.⁹³

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 2016.⁹⁴

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

⁹³ Atfield (2016)

⁹⁴ *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-WESTPHALIA⁹⁵

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 #Urbanana⁹⁶, 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

⁹⁵ Discovering Urbanana (2018)

⁹⁶ 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](https://www.discoverpuertorico.com) (currently being redesigned and rebranded as [SeePuertoRico.com](https://www.seepuertorico.com)). A specific section for nightlife highlights the entertainment options available on the island⁹⁷, 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 website⁹⁸, but the page also includes links to dance clubs, informative videos and guided tours available for booking.

See Puerto Rico's Facebook⁹⁹ 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

⁹⁷ Discover Puerto Rico (2018a)

⁹⁸ Discover Puerto Rico (2018b)

⁹⁹ 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) 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.

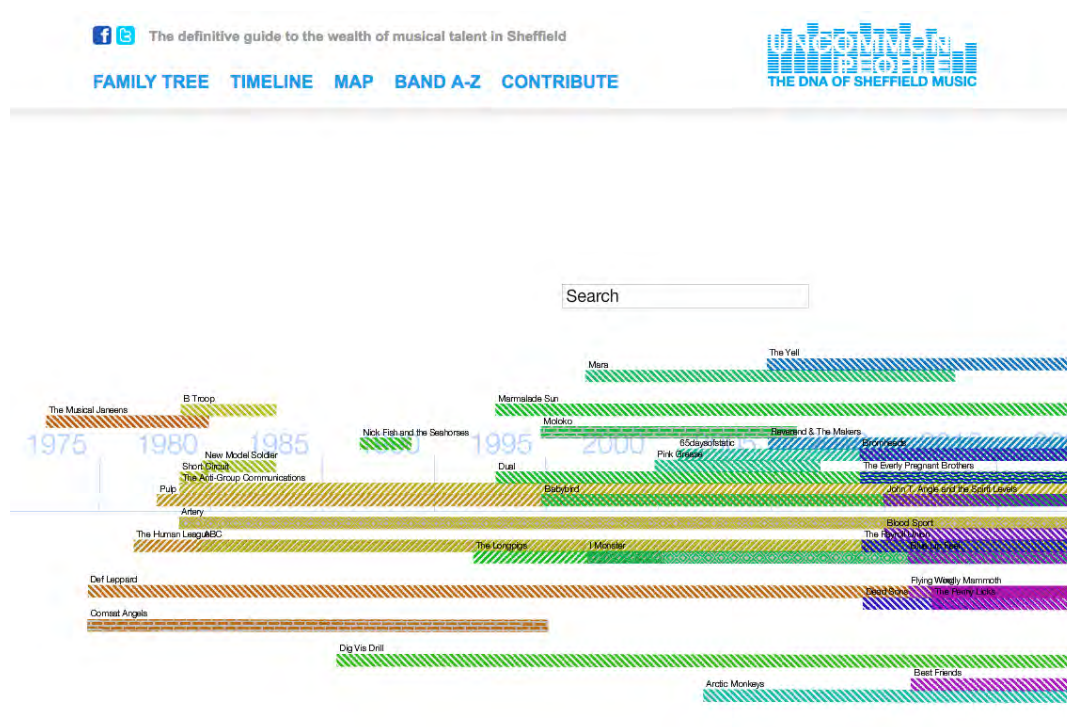


Figure 6. Screen shot of Uncommon People’s interactive ‘Timeline’ site as of 27-8-2018

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, LIVERPOOL¹⁰⁰

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.



¹⁰⁰ <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.



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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.¹⁰¹

Perhaps the biggest contributor to the current boom in music tourism is the world-famous Elbphilharmonie.¹⁰² 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.¹⁰³ The designation as a UNESCO World Cultural Heritage Site has also enhanced Hamburg's image considerably.

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

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

¹⁰³ https://www.elbphilharmonie.de/media/filer_public/43/86/4386f78b-fd9a-4137-b929-334ad1bf857e/broschuere_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).¹⁰⁴ 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 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.¹⁰⁵

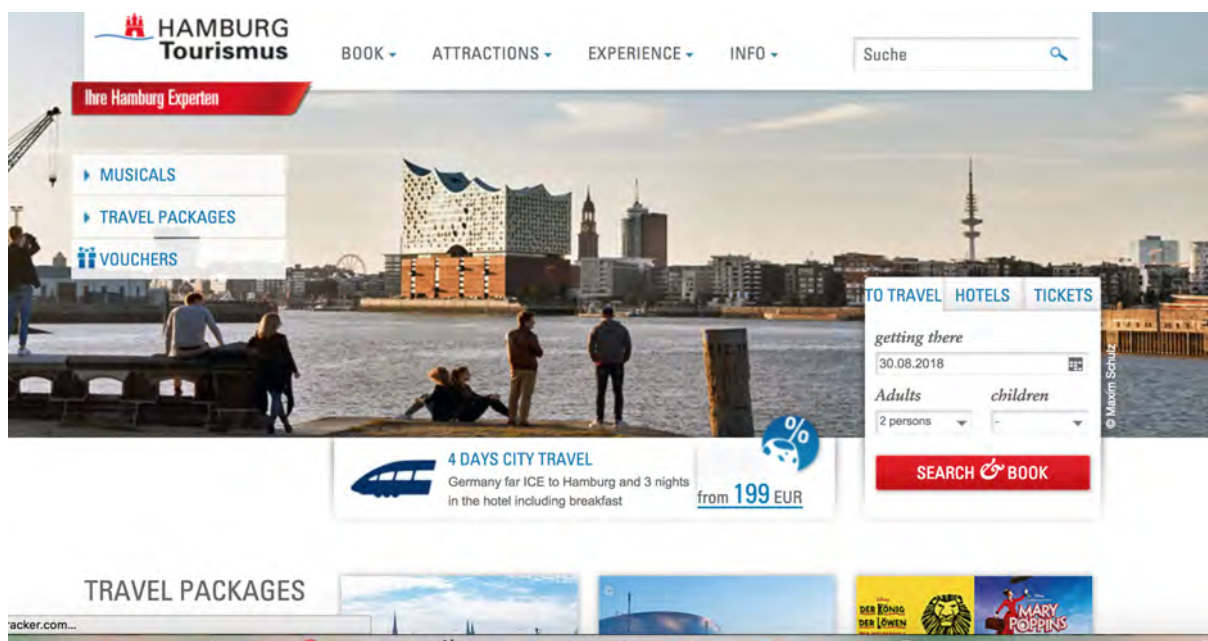


Figure 7. Screen shot of Tourism Hamburg's website as of 23-8-2018 (1)

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

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

¹⁰⁵ <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.

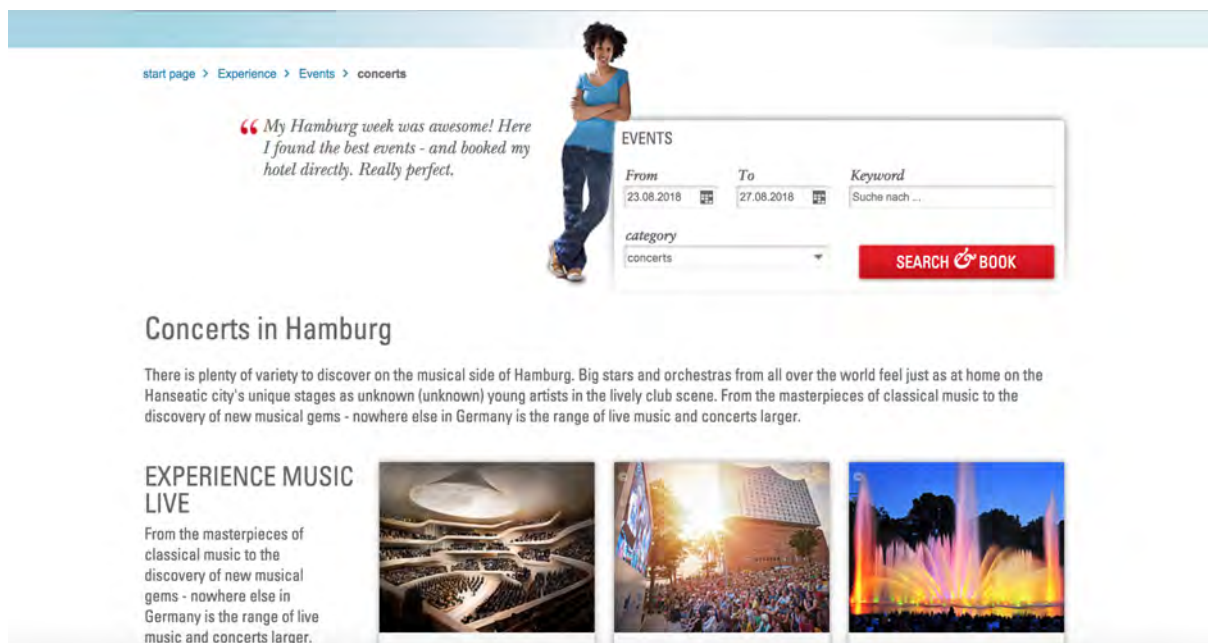


Figure 8. Screen shot of Tourism Hamburg’s website as of 23-8-2018 (2)

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.¹⁰⁶

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:¹⁰⁷

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.

¹⁰⁶ https://www.austintexas.gov/sites/default/files/files/Austin_Music_Census_Interactive_PDF_53115.pdf

¹⁰⁷ <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.¹⁰⁸

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.

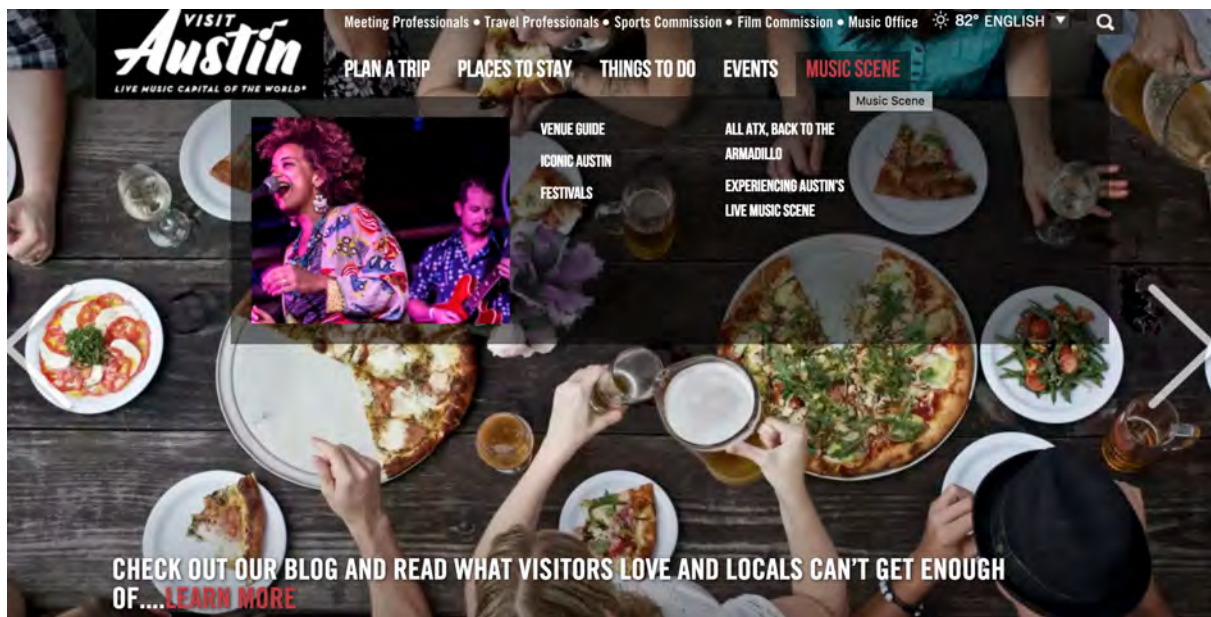


Figure 9. Screen shot of Visit Austin's website as of 23-8-2018 (1)

¹⁰⁸ https://www.austintexas.gov/sites/default/files/files/CT_Plan_Final.pdf

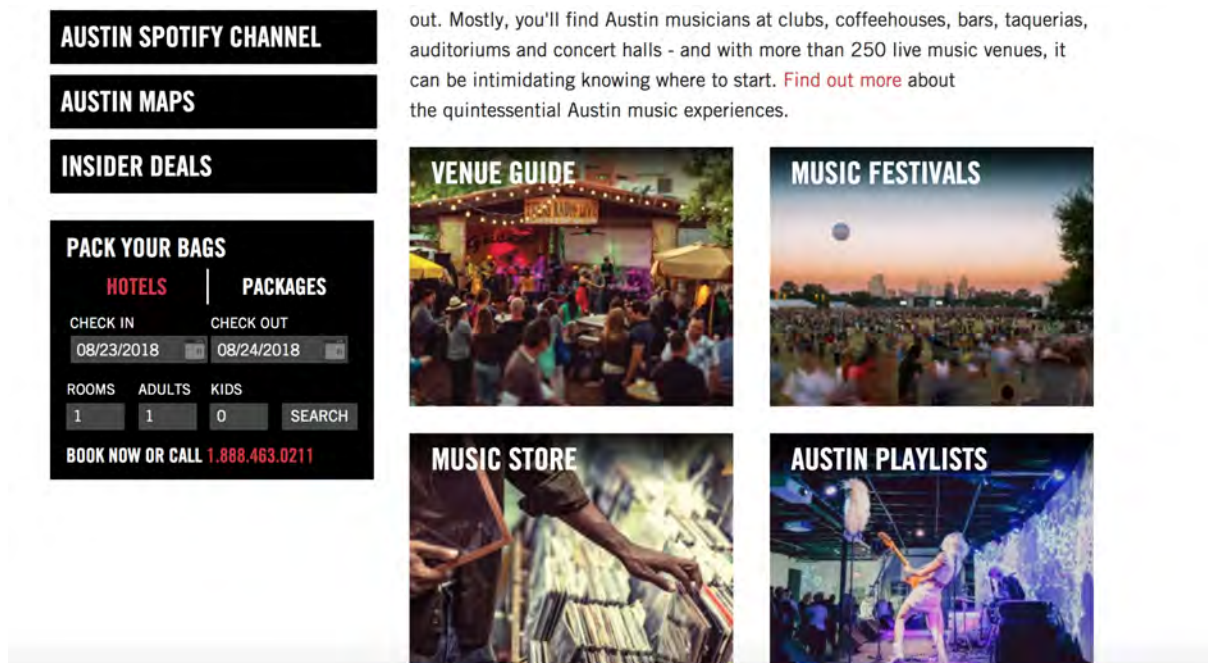


Figure 10. Screen shot of Visit Austin’s website as of 23-8-2018 (2)

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.

PROMUS¹⁰⁹ (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 2020.¹¹⁰

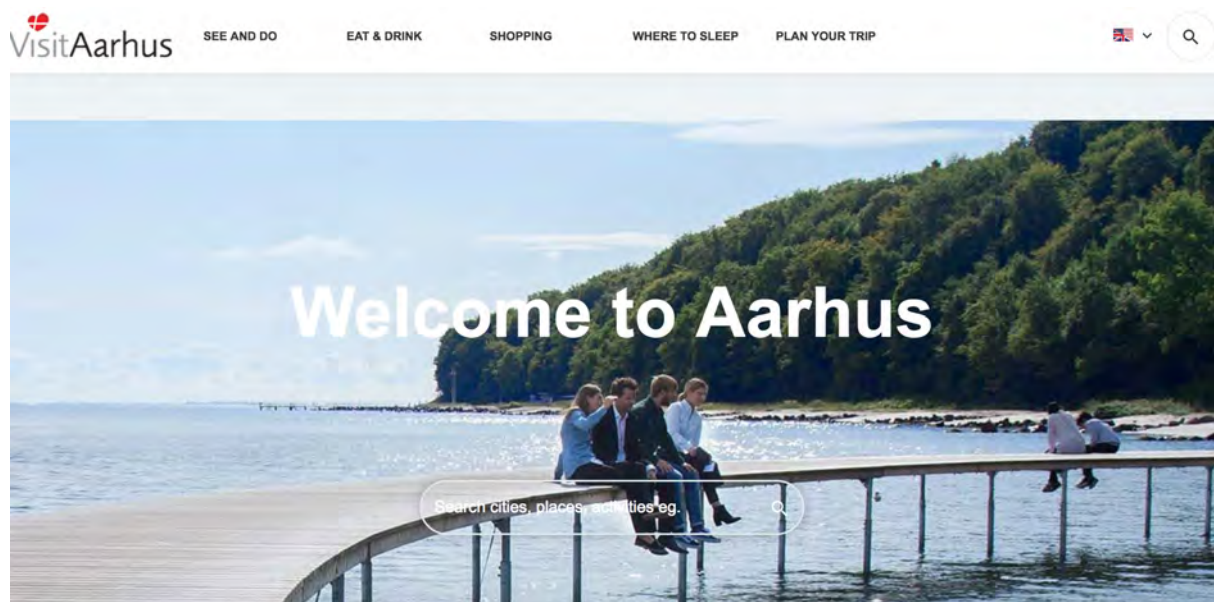


Figure 11. Screen shot of Visit Aarhus' website as of 23-8-2018 (1)

¹⁰⁹ http://www.promus.dk/files/MusicCityAarhus2015_net.pdf

¹¹⁰ <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.

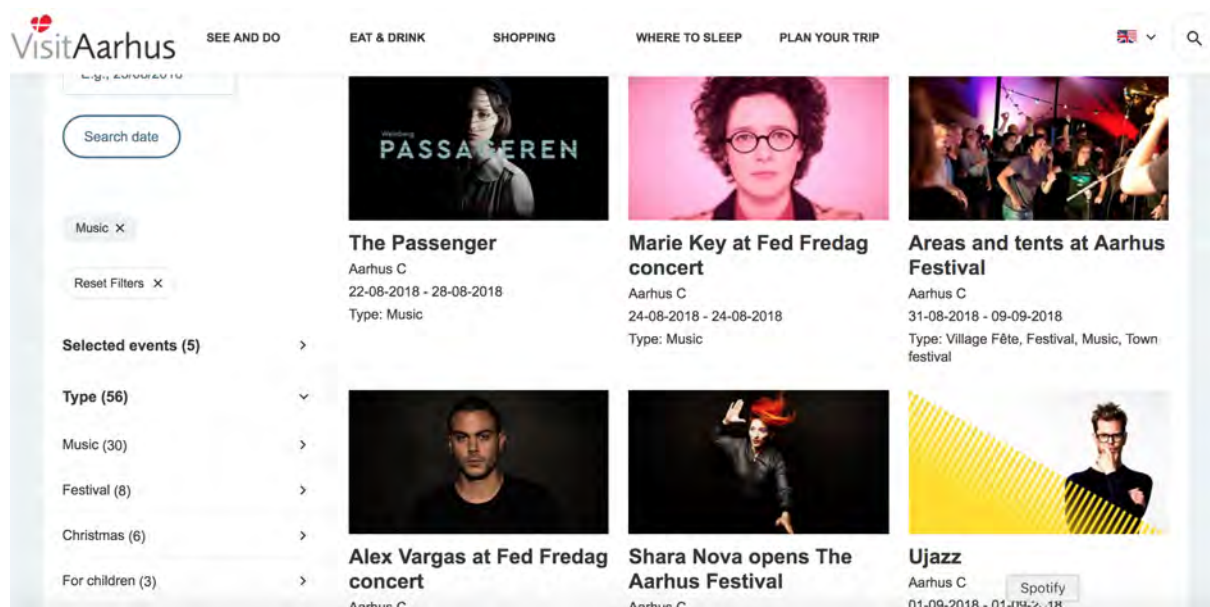


Figure 12. Screen shot of Visit Aarhus' website as of 23-8-2018 (2)

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



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CABINET RESPONSE TO THE REPORT OF THE ECONOMY & CULTURE SCRUTINY COMMITTEE ENTITLED 'SOUND DIPLOMACY MUSIC CITY REPORT. INFORMING A MUSIC STRATEGY FOR CARDIFF. MUSIC ECOSYSTEM STUDY AND STRATEGIC RECOMMENDATIONS'

Please note that all actions are subject to not presenting any legal/policy issues'

**Recommendation 1
Governance and Leadership
Music Office**

Work pragmatically with all stakeholders to unlock the potential of Cardiff's music ecosystem.

Actions:

- 1.1 Appoint a Music Officer.
- 1.2 Build and maintain a business directory of the local music ecosystem.
- 1.3 Develop a platform to communicate between music event organisers, local residents and visitors.

RESPONSE:

Action 1.1: The Council, through the establishment of the Cardiff Music Board will seek to identify resources to enable the appointment of a Music Officer. Meanwhile administrative and secretarial support will be provided by the Council to the Music Board.

Action 1.2: The Council will build upon the data collected by Sound Diplomacy and seek to provide an online database that includes music venues, performance spaces and other key infrastructure.

Action 1.3: The Council will work with the Cardiff Music Board to explore ways of improving the communication relating to music events in the city and local residents.

**Recommendation 2
Governance and Leadership
Music Board**

Empower music stakeholders to represent and champion Cardiff as a music-friendly city recognising quality and diversity on a local, national and international level.

Actions:

- 2.1 Establish a Cardiff Music Board.
- 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.

RESPONSE:

Action 2.1: The Council has committed to establishing a Music Board.

Action 2.2, 2.3: With regard to the professional organisations sub-group and venues sub-group this will be considered once the Cardiff Music Board is in operation. Whilst there is benefit from the establishment of these boards, this also needs to be balanced with any time and resource requirements from the sector, and critically whether the roles of both sub-groups can be considered as an Agenda item for the main Board itself.

Action 2.4: The Council will strengthen and develop inter-city collaborations through the Music Board.

Recommendation 3

Governance and Leadership

Music-Friendly Licensing & Policies

Review existing licensing arrangements to promote a 'music-friendly' city.

Actions:

- 3.1 Streamline permits and licences 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 the city centre.
- 3.5 Create a voluntary busking guidance for Cardiff that reflects residents, businesses and musicians needs.

RESPONSE:

Action 3.1 to 3.3: The Council will work with the Music Board to undertake a review of the permits and licenses processes required for music activity with the view of exploring the implementation a more streamlined service that also reflects the statutory requirements of such a service.

Action 3.4: The Council's Highways team and City Centre Management will undertake a review of the suitability of introducing Musician Loading zones in consultation with the Music Board.

Action 3.5: The Council will work with FOR Cardiff, the city's Business Improvement District to establish new voluntary busking guidance for Cardiff that reflects residents, businesses and musicians needs.

Recommendation 4
Governance and Leadership
Grants and Funding

Economically support diversity in the city's music ecosystem.

Actions:

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

RESPONSE:

Action 4.1: The Council will explore proposals for establishing a Cultural City Compact - a strategic partnership bringing together the Council, business, education, cultural and community leaders, to co-design and deliver a vision for culture in the city. The Compact will set out business plans to deliver measurable progress against local priorities. The establishment of any Compact however will be subject to a further Cabinet report.

Action 4.2, 4.3: The Council will work with partners to explore the potential to establish a database of funding and support organisations for the sector and will disseminate through the Music Board.

Recommendation 5
Spaces and Places

Allocate spaces for musicians and industry professionals

Increase affordable music spaces and places available for artists and music professionals in Cardiff.

Actions:

- 5.1 Develop a Community Music Hub.
- 5.2 Provide a framework to facilitate temporary leases and one-off permissions for local music and cultural organisations in non-traditional spaces.

RESPONSE:

Action 5.1: The Council will review current community facilities to assess the best model for a Community Music Hub.

Action 5.2: The Council will work with the Music Board to explore means of supporting and promoting temporary leases for local music and cultural organisations in non-traditional spaces.

Recommendation 6

Planning, Transport, Placemaking

Maximise existing planning tools in Cardiff to promote a 'music friendly' city.

Actions:

- 6.1 Consistently implement Planning Policy Wales 10 and apply the 'Agent of Change' principle in Cardiff.
- 6.2 To highlight the Castle quarters unique position within Cardiff's music scene, liaise with departments that are working on a Place Making strategy, developing a collaborative approach.
- 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.

RESPONSE:

Action 6.1: The Council agrees to consistently implement Planning Policy Wales 10 and apply the 'Agent of Change' principle in Cardiff.

Action 6.2: The Council will work with the landowners and private businesses in the Capital Quarter, including Womanby Street to promote the area as a focal point for the city's cultural scene.

Action 6.3: The Council will engage the Music Board in supporting the development of the Arena and establish a partnership with the operator to support and promote the sector.

Action 6.4: The Music Board will engage with public transport providers, including Transport for Wales and Cardiff Bus, to consider actions to improve evening and night time public transport accessibility.

Recommendation 7

Education

Access to music education in all levels and ages

Build partnerships to enable a collaborative provision of music education in Cardiff.

Actions:

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

RESPONSE:

Action 7.1: The Council will review the potential routes to develop a 'Map of

Musical Opportunities' to support young people in their musical journeys.

Action 7.2: The Council will bring together key stakeholders in Cardiff to consider interventions required to develop a universal music education offer.

Action 7.3: The Council will work with the Music Board and partners to identify resource to seek to establish music workshops aimed at primary and secondary students.

Recommendation 8

Artist Development

Provide artist development opportunities for local artists

Champion access to artist development opportunities in Cardiff regardless of age, skills level and genres of work.

Actions:

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

8.2 Create a platform for performance development.

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

RESPONSE:

Action 8.1: The Council will work with the Musicians Union and partners to consider the development of a 'Fair Play' charter of ethics and certificate for venues in the city centre.

Action 8.2: The Council will work with the Cardiff Music Board to explore options to develop a platform for performance development.

Action 8.3: The Council will work with the Welsh Government and partners to establish an international artist showcase and signature event.

Recommendation 9

Professional Development

Provide professional development opportunities for the local sector

Support industry professionals to develop their career, network and skills in Cardiff.

Actions:

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

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

RESPONSE

Action 9.1: The Council will work with the Music Board to organise and attract

music business workshops and conferences in partnership with UK and international organisations and professionals.

Action 9.2: The Council will assist the Music Board in developing proposals to support the music industry in Cardiff.

***Recommendation 10
Audience Engagement***

Expand music activities in Cardiff.

Actions:

10.1 Advocate for increased daytime and community music programming, including audience development plan.

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

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

RESPONSE:

Action 10.1: The Council will work with the Music Board to support the development of increased daytime and community music programming.

Action 10.2: The Council will work with partners through public platforms and Visit Cardiff to scope a gig and event listing platform that is inclusive and representative of the wider music offer in Cardiff; working with partners to ensure audience development for music events in the city.

Action 10.3: The Council will work with partners to explore the potential to lever additional investment in St David's Hall..

***Recommendation 11
Music Marketing
Music City brand building***

Bring music stakeholders together to build the Cardiff Music City brand.

Actions:

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

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

RESPONSE:

Action 11.1: The Council will work in partnership with the Cardiff Music Board; Visit Cardiff; business organisations such as FOR Cardiff; relevant tourism organisations, including the hotel sector; and city tourism ambassadors to host a series of initial roundtables to align goals, discuss expectations and

see how collaborations can be taken further.

Action 11.2: The Council will look to increase Cardiff's music promotion channels through strategic alliances between the Music Board, local promoters, organisations, cultural institutions and existing platforms.

Recommendation 12

Music Marketing

Music Tourism Activities

Develop a brand and create a Cardiff 'Music City' tourism and marketing strategy to align with existing strategies and plans.

Actions:

12.1 Create a Cardiff 'Music City' communication plan with event organisers, local residents and visitors.

12.2 Create opportunities to promote Cardiff as a music city in order to increase music tourist's visitors.

12.3 Create a music heritage tour.

12.4 Explore potential bids to host, develop and facilitate music industry events.

12.5 Explore a partnership with Bristol's Colston Hall.

RESPONSE

Action 12.1: The Council will develop a communication strategy in consultation with industry stakeholders and the hotel sector, including music listing information and event calendars.

Action 12.2: The Council aims to work with the sector and business to integrate music 'made in Wales' within the public realm where appropriate, including a busking strategy and aural installations.

Action 12.3: The Council aims to work with sector and museums look to celebrate Cardiff's music heritage tour. Exploring activity to coincide with live music event and cultural events.

Action 12.4: The Music Board will lead on a bid to host at least one high-profile UK/international music industry event and one UK/international celebration of the grassroots sector.

Action 12.5: The Council will explore a potential strategy to attract more audiences to Cardiff from the South West of the UK. To help build audiences in St David's Hall, the Wales Millennium Centre and other venues, liaising with Bristol's cultural sector.

Cardiff Music Board

Draft Terms of Reference

Mission

1. The mission of the Cardiff Music Board ('the Board') is to enable better communication between Cardiff's governing body and its music ecosystem. The purpose of the board is to champion Cardiff's music scene locally, nationally and internationally, protect and promote music at grassroots and all levels, providing a platform for increased communication and collaboration across the sector, whilst supporting the aspiration for Cardiff being celebrated as a Music City.

Objectives

2. The Board will address the following objectives:
 - Promote the development of, and champion Cardiff's music scene
 - Lobby for investment in Cardiff's music ecosystem
 - Promote fairness, access and diversity in Cardiff's music scene and champion diversity initiatives.
 - Support a partnership approach to the development of Cardiff's music scene
 - Explore ways to increase the resilience and sustainability of grassroots music sector and venues
 - Support developers and communities to protect existing music spaces and develop new music venues and workspaces

Cardiff Music Strategy

3. The Board will be responsible for developing the Cardiff Music Strategy, which will include:
 - A strategy and subsequent programme of activities that deliver the objectives of the Board, informed by the recommendations in the Sound Diplomacy Music City report.
 - Identifying resources for delivering the strategy
 - Promoting the sector
 - Lobbying for investment in the sector

Board Membership

4. The board will comprise up to 18 members. Membership of the Board will be openly advertised by Cardiff Council and members will be selected by an open recruitment process led by Cardiff Council from individuals who have experience in one or more of the following fields:

Local government	Disability-led music organisations
Schools	Pro-culture property developers

Recorded music industry	Night time economy specialists
Artists, DJs, producers	Public funders
Music publishers	Unions
Music managers	Music education hubs
Music agents	Music journalism and media
Booking agents	Youth music organisations
Major concerts and festivals	Community music organisations
Grassroots music venues	Further and higher education
Larger music venues	Research and analysis
Studios and rehearsal spaces	Tourism
Cardiff's diverse music genres	Music PR
Busking and street performance	

5. The membership of the Board will represent the social diversity of Cardiff.
6. The Board will have the ability to co-opt members on a consensual basis.
7. Standing positions will be made available for Cardiff Council (Economic Development, Planning and Licensing), South Wales Police, Arts Council for Wales, Welsh Government and FOR Cardiff (Business Improvement District).

Chair

8. The Board will be chaired by the Leader of Cardiff Council to provide leadership to the Board. In the absence of the Chair at a meeting, a Vice Chair shall be appointed by the Board members present to chair the meeting

Membership requirements

9. Meetings of the Board will take place approximately every two months. Members are expected to make every effort to attend all meetings in person. Attendance will be recorded formally through the minutes
10. The Board will determine its own programme, which shall be designed to achieve the Board's objectives, subject to compliance with these Terms of Reference and prior agreement of the Operational Manager of Investment and Tourism of Cardiff Council..
11. Subject to their availability, Members may be invited by the Chair and Cardiff Council to undertake the following activities on behalf of the Board:
 - give public speeches
 - participate in round-tables and panel discussions
 - write or contribute to press articles
 - give media interviews
 - provide quotes for media activity
 - Research

12. Where members are unable to attend Board meetings, delegates are not accepted without prior approval of the Chair.
13. The Board has no political affiliation and will not propose any recommendations or solutions related to political affiliation.

Administration and conduct of Board meetings

14. The Board will convene approximately every three months. The meetings will take place at County Hall, Cardiff CF10 4UW or an alternative agreed location. All meetings will be held in accessible locations, unless written warning is given in advance.
15. The agenda for each meeting will be set by the Chair. Members are encouraged to suggest agenda items for forthcoming meetings.
16. All members must act professionally and lawfully, be punctual to meetings and announce all potential conflicts of interests in advance, in line with the Nolan Principle standards of public life, good governance and collaboration, all members will strive to be respectful, consensus-oriented, transparent and accountable.
17. The Secretariat and administrative support services to the Board will be provided by Cardiff Council or an individual or organisation appointed by Cardiff Council, including meeting organisation, circulating meeting agendas, taking meeting minutes and overseeing general board administration.
18. All final papers/reports, must be submitted to the meeting secretariat 7 days in advance of the meeting.
19. The agenda and supporting papers shall be forwarded to each member of the Board 3 days in advance of the meeting.
20. The meeting administrator will prepare an attendance register for each meeting and ensure that the attendance/non-attendance of all individuals, along with any declarations of interest made, is correctly recorded at each meeting.
21. Minutes will be made of Board meetings held
22. The Board can agree to establish sub-groups to consider issues in more detailed than otherwise could not be reasonably considered at meetings of the whole Board. These terms of reference shall apply to all such sub group
23. As the Board is not a decision-making body, there is no specific quorum for its meetings.

Duration of membership

24. Members will be appointed on a two year term. Members may be re-appointed by the Chair, in consultation with the Operational Manager of Investment and Tourism for Cardiff Council.

25. Any member may resign by giving written notification to the Chair.
26. Membership may be terminated by the Chair in the event that a member is unable to regularly attend meetings of the Board or breaches these Terms of Reference.

Remuneration

27. Membership of the Board is voluntary. Members cannot claim expenses and are not paid to attend board meetings, provide advice and comment, networking and providing introductions, representing the board or any other activity related to the work of the Board.

Limitation of authority

28. The Board is an advisory body to Cardiff Council. It is not a decision making body. It does not have the authority to:

- Expend money on behalf of Cardiff Council
- Commit or influence Cardiff Council to any arrangement
- Consider any matter outside its specific terms of reference
- Direct Cardiff Council staff in the performance of their duties and shall not seek to do so
- Or purport or represent Cardiff Council in any communication with the public or media

29. The actions of the Board or any of its members shall not fetter the discretion of the Council in the exercise of any of its functions

Communication

30. The Board will communicate via a private invite-only email list. Communication may include:

- Periodic updates concerning Board's activities
- Dissemination of minutes and initiatives
- Links and research related to Board's aims and ambitions
- Draft documents for review and comment

General requirements

31. In so far as it relates to the activities of the Board, the Board and individual Board members:

(i) will comply with all applicable requirements of Cardiff Council's Welsh Language Scheme and the Welsh Language (Wales) Measure 2011 ("the Measure") and the Welsh language standards issued to the City of Cardiff Council (Compliance Notice – Section 44 Welsh Language (Wales) Measure 2011) insofar as it relates to the activities of the Board. A copy of the Welsh language standards is available from www.cardiff.gov.uk/bilingualcardiff

(ii) will comply with any and all requirements under the Data Protection Legislation and shall not disclose or allow access to any personal data as defined under the Data Protection Legislation (“Personal Data”) provided or acquired during the term of the Board .

(iii) shall not unlawfully discriminate within the meaning and scope of any law, enactment, order, or regulation or good practice relating to discrimination (whether in age, disability, gender reassignment, race, religion or belief, sex, sexual orientation, marriage and civil partnership, and pregnancy and maternity or otherwise) .

(iv) acknowledges that the Council is subject to the requirements of the Code of Practice on Government Information, Freedom of Information Act and the Environmental Information Regulations and shall assist and cooperate with the Council to enable the Council to comply with its Information disclosure obligations, and

(vi) shall not behave in a manner so as to bring Cardiff Council into disrepute

Declarations

32. Members of the Board must submit, upon appointment, a declaration of personal interests, including a declaration that they understand and will abide by the Nolan Principles of Standards in Public Life.

33. Everyone in attendance at Board meetings must declare any actual or potential conflicts of interest; these shall be recorded in the minutes. Anyone with a relevant or material interest in a matter under consideration must be excluded from the discussion; this shall also be recorded in the minutes.

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Person Specification

Cardiff Music Board Board Member Application

THE PERSON(S) SO APPOINTED MUST FULFIL THE FOLLOWING REQUIREMENTS:

	<i>Essential</i>	<i>Desirable</i>
Experience	<p>Experience of working in the music industry or sector in Cardiff outlined in Table 1 below.</p> <p>Currently works within or represents a group outlined in table 1 below.</p> <p>Experience of working on a partnership basis.</p> <p>Experience of communicating effectivity and responsibly at all levels.</p>	<p>Experience of undertaking a representative role in the music sector.</p> <p>Experience of delivering live music events, running a venue, providing a music service, or supporting music development</p> <p>Experience of licensing, planning policy or legal expertise related to music industry</p> <p>Experience of developing the night-time economy and or/audience development.</p> <p>Experience of supporting skills development within the music sector.</p>
Skills and Abilities	<p>Strong communication skills and the ability to contribute to Board-level discussion, wider policy and strategy development.</p> <p>The ability to act as an ambassador for the Cardiff Music Board, demonstrating tact and diplomacy in dealings with stakeholders.</p> <p>An understanding of the current challenges facing the music industry, education and grassroots venues, and the ability to think creativity on how these challenges can be addressed.</p>	<p>Strong presence in the music industry or related public service, with a willingness to speak for the interests of the music community.</p>
Personal Attributes	<p>A strong commitment to equal opportunities and diversity.</p> <p>A clear understanding of professional conduct and commitment to the Nolan Severn Principles of Public Life</p>	

Table 1: Representative Groups

Local government	Disability-led music organisations
Schools	Pro-culture property developers
Recorded music industry	Night time economy specialists
Artists, DJs, producers	Public funders
Music publishers	Unions
Music managers	Music education hubs
Music agents	Music journalism and media
Booking agents	Youth music organisations
Major concerts and festivals	Community music organisations
Grassroots music venues	Further and higher education
Larger music venues	Research and analysis
Studios and rehearsal spaces	Tourism
Cardiff's diverse music genres	Music PR
Busking and street performance	

By virtue of paragraph(s) 14, 21 of Part(s) 4 and 5 of Schedule 12A of the Local Government Act 1972.

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My Ref: T: Scrutiny/Correspondence/Cllr NH

Date: 4 October 2019



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

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

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

Dear Councillor Bradbury,

Economy & Culture Scrutiny Committee: 3 October 2019

Members of the Economy & Culture Scrutiny Committee have asked me to pass on their thanks to you, Neil Hanratty, Kathryn Richards, Jon Day and Ruth Cayford for attending Committee for pre-decision scrutiny of the report to Cabinet titled '*Music Strategy Update*'. Members have asked that I pass on the following comments and observations from their discussion at the Way Forward.

Overall, Members are content with the recommendations to Cabinet. Members are pleased to see progress shaped by partnership working and that the call for Music Board members took place in an open and transparent manner.

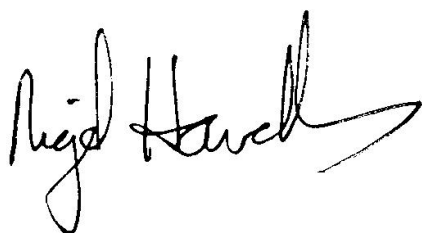
We note that the Sound Diplomacy recommendations will form the basis of initial work by the Music Board, resulting in a more detailed response to these recommendations with a route map and plan of action. Members were pleased to hear your offer to bring these to this committee, prior to Cabinet, and we will make time in our work programme for this. Similarly, Members are interested in scrutinising proposals for the Signature Event and were pleased to hear your support for ensuring this event is not based solely in the city-centre/ Cardiff Bay but reaches into communities across Cardiff.

Implementing the Music Strategy is resource-dependent and Members support the need for collective creative thinking to maximise impact from available resources and in-kind contributions.

Members note that the Sound Diplomacy report has been shared with Regulatory Services and that they will be looking at licencing and approaches to noise nuisance in the light of the report's findings.

Thank you again for attending Committee. Members wish to pay tribute to the excellent work of officers and partners in developing the Music Strategy, the implementation of which will bring benefits across Cardiff and the region, both economic and in terms of increasing well-being.

Yours sincerely,

A handwritten signature in black ink, appearing to read 'Nigel Howells', with a stylized flourish at the end.

COUNCILLOR NIGEL HOWELLS
CHAIR, ECONOMY & CULTURE SCRUTINY COMMITTEE

cc Members of the Economy & Culture Scrutiny Committee
Neil Hanratty Kathryn Richards
Jon Day Ruth Cayford
Clair James
Cabinet Support Office

SECURING THE FUTURE OF THE NEW THEATRE

CULTURE & LEISURE (COUNCILLOR PETER BRADBURY)

AGENDA ITEM:6

Appendices 1 – 6 are not for publication as they contain exempt information of the description contained in paragraphs 14 and 21 of Schedule 12A of the Local Government Act 1972.

Reason for this Report

1. To present Cabinet with the outcome of the market process to secure a theatre operator to rent, operate and maintain the New Theatre.

Background

2. The New Theatre is one of Cardiff's most important cultural assets. The oldest surviving traditional theatre in the Welsh Capital, it is the sister venue to St David's Hall, the National Concert Hall of Wales. With a focus on live performances of drama, musicals, dance, children's shows and an annual pantomime season, the New Theatre presented 39 productions, 346 performances and sold over 203,000 tickets in 18/19. Based on the Arts Council England economic impact formula, the venue delivered £21m back to the local economy in 18/19.
3. The building is now over 110 years old and is in need of investment. Whilst essential maintenance works have been undertaken by the Council to ensure the building remains compliant and is able to be open to the public, there is a growing maintenance backlog including high priority works estimated at circa £350,000.
4. The operation of the New Theatre has required an annual Council subsidy of circa £500,000. On top of this, the Council also spends circa £200,000 per annum on Facilities Management directly related to operating the theatre including cleaning, utility costs and NNDR.
5. In 2015/16 the Council undertook a public procurement exercise to identify an external operator in an attempt to eliminate the operational subsidy and secure investment in to the building as part of a wider process involving St David's Hall. Following an 18 months procedure and detailed assessment, the Council decided not to proceed and to retain

the operation of the building in-house, as the benefit of externalisation through that process was marginal. A key factor in the outcome of that process, provided as feedback from bidders, was the level of control the Council wished to retain over the on-going operation of the facility which limited the potential for the bidders to manage the facility commercially.

6. In November 2018, Cabinet considered a report on the future of Cardiff's heritage buildings. This report included proposals for the future operation and maintenance of the New Theatre as follows:

Cabinet is requested to provide authority for officers to explore the potential to rent the building to a theatre operator without subsidy.

In addition to the removal of subsidy there may be potential to secure a small rental income which could be ring-fenced to assist with on-going maintenance issues.

7. Cabinet authorised officers to explore the potential to rent the building to a theatre operator without subsidy and to return to a future meeting of Cabinet for final consideration and decision on the outcome of that process.

8. In February 2019, Cabinet approved the Budget Report which included a savings proposal for £404,000 relating to the New Theatre as follows:

Secure a private theatre tenant for the New Theatre building to develop and sustain the current theatre offer in the city.

9. The proposal formed part of the 19/20 Budget Consultation. Three in five respondents (59.2%) support the proposal to secure a private tenant for the New Theatre to develop and sustain the current theatre offer in the city. Support for this proposal was highest amongst the under 35s (66.5%), men (65.2%), those living in the 'Southern Arc' (65.0%) and the most deprived areas of the city (64.1%). These groups had visited the New Theatre the least over the past 12 months.

10. Where concerns were expressed these related to affordability, quality and variety of offer, lack of accountability and potential detriment to the city's cultural offer as a result of the programme being commercially led.

Issues

11. In February 2019, the Council placed a rolling advertisement in the Arts Professional publication. The advert invited expressions of interest from theatre/arts organisations to consider a 25 year lease to secure investment into the building and to ensure its long term future as a theatre. Links to the advert and the expression of interest form were also placed on the Council's website. The advert attracted over 1,544 views.

12. A total of 8 expressions of interest were initially received, including some of the most influential promoters and venue operators in the industry. One respondent withdrew prior to the evaluation process leaving a final

seven proposals to be considered. Expressions of interest were evaluated against an agreed set of criteria (as detailed below) by a multi-disciplinary team of property, legal and cultural venue officers:

- Experience in operating similar theatres
- Experience in repairing and maintaining historic buildings
- Staff Management and Experience of TUPE
- Financial lease terms
- Repairing obligations
- Planned Maintenance Programme
- Financial Strength
- Mobilisation timescale
- Programming

13. All interested parties were invited for interview to present and discuss their proposals so that officers could further test assumptions and explore opportunities. Due to the high quality of the submissions, a further evaluation of the 7 interviews was undertaken. A shortlist of four final respondents were invited to submit full and final bids.
14. In addition to financial considerations, effective maintenance of the listed building and consideration of employees, it was important to understand intentions for the future theatre programming, especially given concerns expressed in the budget consultation. The evaluation team were encouraged by many of the proposals that sought to mirror the existing theatre offer and in many cases aspired to improve on it. Respondents were able to demonstrate a strong commitment to accessibility and dynamic pricing ensuring that the theatre remains accessible and affordable to current and future patrons.
15. It was clear from the evaluation process that the experience of existing staff at the theatre was recognised and valued and in all cases, over and above legislative TUPE considerations, there was a clear commitment to engage, retain and develop existing staff.

Outcome of the Evaluation

16. Four offers were short-listed for final evaluation with details attached at Confidential Appendices 1 and 2.
17. Two of the short-listed offers were subsequently discounted because they were based on a profit-share arrangement that provided no guarantees in terms of income and/or the removal of the current operating subsidy and therefore did not meet the Council's minimum requirement.
18. The remaining two offers were of a similar monetary value over the full term of the lease. Both offers commit to operating the theatre without subsidy from the Council, and both provide an index linked annual rent. Over the whole term of the 25 years lease, the bids are worth in the region of £25m to the Council based on the cumulative elimination of the

current annual subsidy (and associated costs) and the cumulative rental income.

19. Both offers are from reputable theatre companies have an existing relationship with the New Theatre.
20. Both offers have committed to the retention and development of all existing staff through the TUPE process with pensions protected.
21. The key difference in the two offers is the strength of covenant underpinning the lease agreement with the preferred offer being able to provide a significant parental company guarantee.

Overview of the Preferred Offer

22. Details of the financial and cultural standing and performance of the company making the preferred offer is provided in Confidential Appendix 3. The key highlights of their offer are set out below:

- 25 year lease with no rent free period or breaks
- No requirement for an operational subsidy from the Council
- Rent of £6.75m over the term of the lease (and subject to RPI growth)
- Parental guarantee
- Council to retain responsibility for the maintenance and repair of the roof and external structure
- Operator to have responsibility for the maintenance and repair of all other aspects of the building including plant and machinery
- Commitment to invest £2.7m in the building over the term of the lease including a comprehensive refresh of front of house areas, bars and kiosks.
- Commitment to maintain and enhance the mix of week-long musicals, drama and ballet
- Commitment to grow the programme from 335 performances in year 1 to 359 by year 3 and thereafter.
- Existing staff structure to be retained and all costs associated with staff transfer and the protection of pensions to be covered.
- Good existing union relations
- Commitment to retain the existing volunteer programme

23. More detailed information and due diligence on the preferred offer and the alternative offer is attached as Confidential Appendix 3.

Risks

24. In considering a lease agreement Members will need to be mindful of the risks and implications associated with this form of contract. In particular, Members need to consider the ability of the tenant to fulfil the agreement over the full term of the lease. Members also need to be clear that the lease based approach effectively removes Council control over the operation of the theatre including programming. Obligations placed on

the tenant through the lease are predominantly property related including only a high-level control of use in accordance with planning use classes.

25. Confidential Appendix 4 sets out some of the key risks and implications of the leased based approach and the preferred offer including information uncovered through the due diligence process.

Scrutiny Consideration

26. The Economy & Culture Scrutiny Committee considered this issue on 3 October. The letter from the Chair is attached at appendix 6 (confidential).

Reason for Recommendations

27. To secure the future maintenance and financial sustainability of The New Theatre as a vibrant, successful Theatre for the residents of and visitors to Cardiff.

Financial Implications

28. The report proposes the lease of the New Theatre building and will result in income received to the Council as highlighted in the confidential Appendix over a twenty five year period. Subject to completion of legal agreements and detailed terms, the recommended provider will be responsible for all associated costs and income required for all operations in relation to the theatre.
29. The heads of terms indicate that as part of the lease the Council will receive annual rental income and together with the transfer of operations this will allow the Council to effectively achieve all approved revenue budgeted savings targets in connection with the theatre. In addition it will allow for the consideration of opportunities in retaining any surplus income into a earmarked reserve to contribute towards the future investment (e.g. maintenance of the fabric of the building) in the facility and linked operations that remain a Council responsibility.
30. The recommendation assumes the transfer of the majority of staff under TUPE regulations. This and any pension fund responsibilities will need to be set out in an agreement as part of completion of the lease.
31. The timing of the transfer, staff consultation and exact detail of the contractual agreement will have an impact on the achievability of savings for 2019/20 and any ongoing liabilities for the Council and therefore will need to be reviewed accordingly as part of the finalisation of the contractual terms. This will include any impact on any other venues operated by the Council.

Legal Implications

32. The Council has a legal obligation to obtain the best consideration reasonably obtainable from its property leases pursuant to section 123 of the Local Government Act 1972
33. The decision about these recommendations has to be made in the context of the Council's public sector equality duties. The Council also has to satisfy its public sector duties under the Equality 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. 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. If the recommendations in the report are accepted and when any alternative options are considered, the Council will have to consider further the equalities implication and an Equality Impact Assessment may need to be completed.
34. 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.
35. 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 2018-21:

<http://cmsprd.cardiff.gov.uk/ENG/Your-Council/Strategies-plans-and-policies/Corporate-Plan/Documents/Corporate%20Plan%202018-21.pdf>

The well being duty also requires the Council to act in accordance with '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 comprising 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 integrates 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

36. 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>

37. 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, the report and Equality Impact Assessment deals with all these obligations. The Council has to consider the Well-being of Future Generations (Wales) Act 2015 and how this strategy may improve the social, economic, environmental and cultural well-being of Wales.

HR Implications

38. The report sets out that the proposed tenant will mirror the existing theatre offer. The consequences of this are that the Transfer of Undertaking of employment (TUPE) legislation is likely to apply and that a number of staff will transfer to the new organisation. A process of consultation with trade unions and employees must take place in advance of the TUPE transfer. In the event that TUPE applies, the new organisation will be required protect the terms and conditions of employment of the staff who transfer. In addition, in accordance with the Welsh Government's Code of Practice on Workforce Matters, the new organisation will also need to apply those terms and conditions to any new employees who are delivering the New Theatre offer.

RECOMMENDATIONS

Cabinet is recommended to:

- (1) Approve the selection of the recommended tenant.
- (2) Delegate authority to the Director of Economic Development in consultation with the Cabinet Member for Culture and Leisure, the Monitoring Officer and the Section 151 officer to finalise a lease based on the Heads of Terms set out in Confidential Appendix 5.

SENIOR RESPONSIBLE OFFICER	Neil Hanratty Director of Economic Development
	4 October 2019

The following appendices are attached:

- Confidential Appendix 1 – Evaluation Matrix
- Confidential Appendix 2 – Outcome of the Evaluation Process
- Confidential Appendix 3 – Due diligence

Confidential Appendix 4 – Risks and Implications
Confidential Appendix 5 – Draft Heads of Terms
Confidential Appendix 6 – Letter from Chair of Scrutiny

The following background papers have been taken into account

- November 2018 Cabinet Report – Securing the future of Cardiff's Heritage Buildings
- February 19 Cabinet Report – Budget Report

By virtue of paragraph(s) 14, 21 of Part(s) 4 and 5 of Schedule 12A of the Local Government Act 1972.

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**CARDIFF COUNCIL
CYNGOR CAERDYDD****CABINET: 10 OCTOBER 2019**

CARDIFF 2030 EDUCATION VISION**EDUCATION, EMPLOYMENT & SKILLS (COUNCILLOR SARAH MERRY)****AGENDA ITEM: 7**

Reason for this Report

1. To enable the Cabinet to consider a recommendation to adopt the *Cardiff 2030 Education Vision*.

Background

2. In May 2016, Cabinet approved the Cardiff 2020 renewed vision for education and learning in the city. This vision was launched in June 2016 and has provided a framework for educational improvement over the last three years. However, with the year 2020 fast approaching this vision needs to be refreshed to articulate ambitions for the next phase of change.
3. Prior to the launch of Cardiff 2020 education in Cardiff had been deemed to require 'significant improvement' by Estyn, following the inspectorate's judgement in February 2014. Inspectors later judged that sufficient progress had been made to remove this categorisation in January 2016. Cardiff 2020 was developed to secure the progress made during this period, and to set out a pathway for future improvement up to 2020.
4. Since that date there has been significant progress against the priorities set out in Cardiff 2020, and much of what is needed is to consolidate and build on this. However, it is clear that many aspects of the education system in 2030 will look very different, and significant innovation will be needed over the next ten years to respond to societal, economic and technological change.
5. In addition there has been significant change in the policy framework for education in Wales, with the Welsh Government's 'National Mission for Education' outlining major reforms over the coming five to ten year period.

The Way Forward

6. *Cardiff 2030* sets out an ambitious vision, underpinned by two clear themes, five goals and priority commitments to action in relation to each goal. Citywide partnership and Children's rights are key to the approach, recognising that Education is Everybody's Business and that Cardiff is aspiring to be a UNICEF Child Friendly City.
7. Education in Cardiff is at the forefront of priorities for the city. Cardiff Council's Capital Ambition commits to driving forward Cardiff's economy and making the city a great place in which to live, work, study and visit. There has been a continued focus on improving and investing in education and helping young people, particularly those from disadvantaged and deprived communities, into employment, education or training.
8. Cardiff Public Services Board's Well-being Plan 2018-23 contains commitments from the leadership across the public sector in Cardiff to ensure Cardiff is a great place to grow up, recognising that education is the most vital investment into the city's economy and the surest route out of poverty for individuals.
9. It is proposed that *Cardiff 2030* is adopted and developed to both build on progress to date and to realise the full potential of the education system by 2030, with a vision that will best serve the needs of a growing capital and city region.

Reason for Recommendations

10. To create an ambitious and bold ten-year vision for education and learning in Cardiff that secures the commitment of all key stakeholders.

Financial Implications

11. This Cabinet report sets out the Cardiff vision for education over the forthcoming 10 year period. Whilst the recommendations to the report do not directly result in any financial implications, consideration will need to be given to each action arising and whether or not there is a resource implication. Any financial implications will need to be managed within existing and future resources, as there is no budgetary allocation specifically set aside for the implementation of operational plans to deliver this vision. Should there be any financial implications, it will be necessary to consider the impact upon both the Education service and schools, as well as any indirect impact on other services.

Legal Implications

12. The Council has a legal obligation under the Education Act 1996 to promote high standards and fulfilment of potential when exercising their education functions. The Local Government Measure 2009 sets out the Council's obligations to ensure continuous improvement in the exercise

of its functions. This report sets out the Council's vision for its education and learning in Cardiff Strategy.

13. The Council has to satisfy its public sector duties under the Equality Act 2010. Decisions must have due regard to the need to (a) eliminate unlawful discrimination (b) advance equality of opportunity and (c) foster good relations on the basis of the protected characteristics defined in the Act. The Council needs to make its decision to make a proportionate and rational decision with proper regard for its equality duty.
14. In accordance with the Welsh Language (Wales) Measure 2011 and the Standards issued by the Welsh Language Commissioner, the Council must also consider the impact on the Welsh language when making decisions.
15. 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.
16. 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. 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

HR Implications

17. 'Cardiff 2030, a ten year vision for a Capital City of Learning & Opportunity' includes a focus on developing 'A world class education workforce'. Joint working between the Council and the Central South

Consortium, and potentially other partners, will be required in order to develop strategies for the delivery of the actions identified. Communication with stakeholders will be required which includes school leaders and staff, governing bodies and will also require trade union engagement.

RECOMMENDATIONS

The Cabinet is recommended to:

1. Approve the adoption of the *Cardiff 2030 Vision*
2. Delegate responsibility to the Director of Education and Lifelong Learning for the development and implementation of operational plans to deliver the success measures set out in the strategy.

SENIOR RESPONSIBLE OFFICER	NICK BATCHELAR Director of Education & Lifelong Learning
	4 October 2019

The following appendix is attached:

Appendix 1 - Cardiff 2030 – October 2019

Cardiff 2030

A ten year vision for a Capital City of Learning & Opportunity

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Foreword

Signatures:

Leader

Cabinet Member for Education and Skills

Chair of Education Development Board

Chairs of Primary, Secondary and Special Conferences

Chair of Cardiff Governors Association

Chair of Cardiff Youth Council

The Case for Change

As the capital city of Wales, Cardiff is a proud and thriving city with the wellbeing and prosperity of its children, young people and communities at its heart. We want Cardiff to be known as a city that promotes and delivers high quality education and learning as the key to success in the city and in a rapidly changing world. Cardiff also aspires to be Wales' first UNICEF Child Friendly City, a city where the rights of all children and young people are recognised and respected, and which is a great place to grow up.

Cardiff is a global city, where diversity is recognised and valued. Over 118 languages are spoken across the city. Cardiff is also home to the largest Welsh speaking community in Wales. We are committed to promoting both the Welsh language and multilingualism as distinctive features of Cardiff's identity.

We can be proud of our collective achievements across the education system over the last five years. Much of what we need to do over the next ten years to 2030 will be to consolidate and extend the progress we have made since Cardiff 2020 was launched. We see this continuity as a strength; many of the most successful education systems have benefitted from having a stable and consistent approach to improvement over many years. However, we also know that education in 2030 will look very different to today - although it is hard to predict with any certainty exactly what precise changes there will be. As Professor Mick Waters has argued in his review of the teaching profession in Wales there is an urgent need to "re-imagine" what the education system might look like in 2030. He points out that most of the current way of organising our education system has remained unchanged since the mid-19th century.

This 're-imagining' will call for much greater levels of innovation over the next ten years as we continue to raise ambition and refocus efforts upon providing all children and young people with access to the experiences, knowledge and skills that they need to succeed, whatever their individual ambitions may be. We will promote and encourage good global citizens who actively care about each other, their communities and the world around them, work together to solve problems across boundaries, work hard to meet goals and develop resilience in the face of uncertainty and change.

This restatement of Cardiff's education vision builds on extensive engagement and consultation with school leaders, governors, wider educators, partners and stakeholders, together with many children and young people, between January and July 2019. It sets out to consolidate the gains made under Cardiff 2020 but also marks out a broader scope and greater ambition for learning in Cardiff for the future. This embraces learning beyond formal statutory schooling, and looks to strengthen the place of schools in relation to learning throughout the city more broadly. Under five key Goals it shapes, at a high level, the actions that we believe will be needed to realise our ambitions for education in Cardiff to 2030. The actions to achieve these Goals will be based firmly on the two key themes of shared responsibility and partnership, and on the recognition of children and young people's rights in all that we do.

Context

Education in Cardiff is at the forefront of priorities for the city. Cardiff Council's **Capital Ambition** commits to driving forward Cardiff's economy and making the city a great place in which to live, work, study and visit. This will be achieved through a continued focus on improving and investing in education and helping young people, particularly those from disadvantaged communities, into employment, education or training.

Cardiff Public Services Board's **Well-being Plan 2018-23** contains commitments from leaders across the public sector in Cardiff to ensure Cardiff is a great place to grow up, recognising that education is the most vital investment into the city's economy and the surest route out of poverty for individuals.

The **Well-Being of Future Generations (Wales) Act 2015** 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 order to maximise the contribution to these national well-being Goals, Cardiff Council and the Cardiff Public Services Board have agreed seven complementary local Well-being Objectives:

- A capital city that works for Wales
- Safe, Confident and Empowered Communities
- Cardiff grows in a resilient way
- Cardiff is a great place to grow up
- Supporting people out of poverty
- Cardiff is a great place to grow older
- Modernising and Integrating our Public Services

Over the last decade Cardiff grew by around 11%, or 34,600 people. This growth is set to continue with the city population projected to grow 20%, approximately 74,500 people, in the next 20 years – making the Welsh capital the fastest-growing major British city and projected to see a larger growth in population than the other 21 Local Authorities in Wales put together.

This population growth will not be evenly distributed across all age groups, and it is expected that the number of young people in Cardiff will increase by 23.3% over the next 20 years. This will create additional pressures on the education system, requiring more school places and more teachers.

Cardiff has a diverse population of children and young people. According to the 2011 Census, a quarter (24%) of Cardiff's youth population have a non-white ethnicity, and just under a tenth of young people aged 3-15 in Cardiff do not identify English or Welsh as their main language.

Cardiff contains some of the most deprived areas in Wales - geographically there is a concentration of deprivation in the 'southern arc' of the city. Approximately 35,500 children and young people live in the 'southern arc'. Growing up in poverty can have a detrimental and lasting impact on a child's future prospects and well-being.

As is the case nationally, there is a significant gap in educational outcomes between pupils from low-income families and those from more affluent backgrounds in Cardiff. In 2018/19 more than a fifth (21.2%) of school pupils aged 5-15 were eligible for free school meals. With focus across Cardiff being placed on tackling inequality across the city, concentrated effort is required to close the attainment gap between those eligible for free school meals and those not.

Education Reform in Wales

Welsh Government have set out an ambitious 'national mission' for education that will inform and shape work in Cardiff over the next five to ten years. At its heart is the design and development of the new curriculum which has been led by schools across Wales including pioneer schools in Cardiff.

Over the next three years to 2022 schools will need to work together to take forward the curriculum and will be engaging with local industry, cultural, voluntary and partners to develop inspiring and motivational learning experiences and resources for young people in Cardiff.

Alongside the development of a new curriculum other changes in education are under way:

- A new national approach to professional learning to support teachers' career development.
- Introduction of new professional standards for Teaching and Leadership and a new National Academy for Educational Excellence to support and inspire leaders.
- A new 'made in Wales' teachers' pay and conditions framework.
- Implementation of the reforms to supporting learners with additional needs through the Additional Learning Needs legislation.
- Development and implementation of a new Assessment and Evaluation framework.
- Implementation of reforms to Initial Teacher Education to strengthen school and university partnerships.

Underpinning all these changes is a continued focus on developing schools as learning organisations (www.oecd.org/education/school/school-learning-organisation.pdf) and the continued development of a self-improving school system in which schools are at the heart of leading and shaping the implementation of all reforms, supported by an effective middle tier of local authorities and regional consortia facilitating collaboration between schools and the sharing of best practice.

Vision

All children and young people in Cardiff experience high quality education and develop the knowledge, skills and attributes that enable them to become personally successful, economically productive and globally engaged citizens.

Values

We are committed to:

- The development of happy, well informed and resilient learners, through a focus on academic achievement, personal well-being and progression beyond school.
- Equality of opportunity, championing and celebrating the success and life chances of all children and young people.
- Respecting the rights of all children and young people and actively listening to them and involving them in all that we do.
- Supporting parents, carers and families as the first and most enduring educators of their children.
- Promoting the emotional, mental and physical well-being of children, young people and of our education workforce.
- Raising the aspirations of all children and young people and our expectations of what they can achieve, irrespective of their background.
- Championing the Welsh language and our Welsh heritage/culture and facilitating the use of the Welsh language much more widely.
- Embracing diversity of the city, practising tolerance and respect.
- Respecting and protecting our natural environment, for the children and young people of today and for generations to come.
- Sharing knowledge, practice and learning openly and collaboratively.

Desired Outcomes

We will step up our ambition for 2030 and make Cardiff a city where all children and young people:

- Are aware of their rights, can participate, have their opinions heard and be involved in decision-making about policies and services which affect their lives.
- Are ambitious, healthy, resilient and ethical citizens that care for themselves, each other and the world in which we live.
- Are safe and their emotional well-being is high.
- Are able to access high quality education and learning, from their early years to post 16, which meets their individual needs and helps them develop their skills and talents to the full.
- Are prepared and ready to start statutory schooling, having experienced an excellent start to their learning at home with their family and pre-school education in their early years.
- Leave primary school literate and numerate, ready to embrace ongoing education and learning opportunities.
- Are confident digital citizens, able to engage meaningfully with technology to support their learning.
- Leave statutory schooling with the attributes and life skills that will support a successful transition to education, employment or training.
- Are increasingly able to use and speak the Welsh language in their daily lives.

We will measure progress against these outcomes through ongoing review and evaluation using a mix of qualitative evidence, such as feedback from learners, parents, the workforce and partners; as well as quantitative measures such as progression outcomes, measures of key skills such as literacy and numeracy and other attainment measures appropriate to the Curriculum for Wales 2022 as it develops.

We will strengthen accountability frameworks, particularly at key transition points in the learner journey, through refreshed reporting models and enhanced governance frameworks.

Themes and Goals

Themes

1. A shared responsibility for education and learning across the city.

All children and young people in Cardiff benefit from a dynamic and collaborative education system, in which everyone takes shared responsibility for the well-being and achievement of learners.

All education providers, city partners, parents/carers, and children and young people work together to create the conditions which give all learners the opportunity to achieve and thrive throughout their education and in life. A collective capacity for improvement continues to develop and grow, involving everyone who can contribute to the success and life chances of children and young people within, between and beyond school walls.

Why this matters

Only when everyone works together and proactively shares responsibility for education will we transform the future for our children and young people. Have collaboration and partnership working has had a significant impact on educational improvement in Cardiff over recent years. We must build on this success and continue to cultivate an environment where everyone openly contributes time, skills, knowledge and experience to improve education and learning for all. We recognise, and commit to supporting, the key role of parents and carers as the primary educators of children.

Strong citywide partnerships will continue to play an essential role. Over the last five years, the collective commitment to make 'Education everybody's business' in Cardiff has had a significant impact. Partnerships between schools, the wider Council, other public services, business, health, higher and further education, the third sector and communities are fundamental to enrich education for learners in Cardiff, particularly the most vulnerable.

Cardiff schools have been at the forefront of developing a self-improving school system and have collaborated with other schools across the Central South Region to improve outcomes for our children and young people. We need to build on and consolidate this work as we move into the next phase of improvement, recognising that we need consistently great schools, complemented by flexible, innovative, informal and personalised learning opportunities. We will work towards a system of shared accountability for learner outcomes in Cardiff, encouraging transparency and openness in sharing results and practice.

We recognise that the accelerating pace of change calls for new approaches to learning and schooling. We need to deepen collaboration between schools and partners across the city and with those at the cutting edge of technological, social and

environmental change. We must also enable learners to take greater responsibility for their own education and learning beyond statutory education and into lifelong learning

2. Meaningful participation of children and young people

Every child and young person in Cardiff has their voice and needs heard and taken into account. Children, young people and their families are aware of and champion children's rights, and play a key role in continuing to improve education and learning in Cardiff.

Children and young people are celebrated and empowered to be active members of civil society now and in the future. Meaningful participation strengthens individuals' ability to influence decision-making and hold organisations, institutions and government to account over decisions that affect their own lives and the lives of future generations.

Why this matters

Cardiff is the first city in Wales to participate in Unicef UK's national Child Friendly City initiative. Our ambition is for Cardiff to be a city with children and young people at its heart, where the rights of children and young people are respected by all, a great place to grow up. The involvement of children and young people in their own education has improved in recent years, with increasing numbers of schools involved in the Rights Respecting Schools Programme and the active engagement of young people in developing this vision and reviewing our progress towards Cardiff 2020.

Despite being 'experts' in their own lives, children and young people are often excluded from decisions which affect them. In re-imagining education and learning for the 21st century we must ensure that young people, and the recognition of their rights, guide decisions and actions which have a substantial impact on their daily lives. Nowhere is this more true than in education and learning.

Goals

1. A Learning Entitlement

All children and young people are able to access appropriate routes into education and learning opportunities that enable them to achieve, thrive and realise their individual dreams and ambitions.

No child or young person is left behind.

High quality lifelong learning, from the early years to Post 16 delivers excellent outcomes for all learners, reduces disadvantage and raises aspirations for all. Learners benefit from seamless transitions from pre-school, to primary school, secondary school and onward to further or higher education, training or employment.

2. Learners' health and well-being

Children and young people are ready and able to learn, and can easily access support to promote their emotional, mental and physical well-being.

Cardiff is well established as a great place to grow up with every child having a good childhood and a positive outlook for their adult lives. We all recognise the vital importance of belonging, friendship, relationships, parents, families and communities in children's lives, and work together to nurture these key aspects of a positive education.

When required, children and young people benefit from early intervention and support from schools and effective multi-agency services, which protect and improve their well-being and help them to deal with the pressures of everyday life.

3. Realising the Curriculum for Wales 2022 in Cardiff

Children and young people in Cardiff benefit from an inspiring, relevant, real world curriculum that meets their needs and equips them for their future lives.

The curriculum in Cardiff offers all learners rigorous, inspiring, relevant, contextualised opportunities to become ambitious and capable learners, ethical informed citizens, enterprising and creative contributors and healthy and confident individuals.

4. A world class education workforce

All children and young people benefit from the best, most talented and most effective teachers and support teams in Cardiff schools and education settings. Our workforce is passionate and energetic, with a clear set of values and the belief that all children and young people can succeed.

A career in education in Cardiff is attractive and rewarding, offering unique added career benefits, during training, at entry and through continuous professional development, brokered through the extensive partner networks in the Capital city.

Committed governing bodies with a wide range of skills drive excellence in Cardiff schools.

5. High Quality Learning Environments

There are appropriate, high quality school places for children and young people which meet the needs of Cardiff's growing and changing population. Schools provide a safe and inspiring environment for learning and are strongly connected to their communities. Learning beyond the classroom is extended through the creative use of digital technologies and through accessing the resources of the city and its wider environment.

Goals

1. A Learning Entitlement

All children and young people are able to access appropriate routes into education and learning opportunities that enable them to achieve, thrive and realise their individual dreams and ambitions.

No child or young person is left behind.

High quality lifelong learning, from the early years to Post 16 delivers excellent outcomes for all learners, reduces disadvantage and raises aspirations for all. Learners benefit from seamless transitions from pre-school, to primary school, secondary school and onward to further or higher education, training or employment.

Why this matters

Education is consistently ranked as the top priority for children and young people in Cardiff, a key social and cultural right which plays an essential role in overcoming poverty and disadvantage. Over the last five years we have continued to see improvement in the standards achieved by learners in Cardiff schools. We have developed strong partnerships and turned around schools that were not providing the expected level of education for their children and young people.

However, outcomes are still not high enough for our most vulnerable learners, many of whom face barriers to engagement in education and learning. Addressing this inequality is a key focus of this strategy. A long term national focus on a narrow set of performance measures at the end of secondary school has also resulted in a lack of choice for many learners, limited options and in the worst cases some children and young people have struggled to maintain access to a regular education that meets their individual needs. In short, too many children and young people fail to do well enough because they do not feel included in our education system.

We must ensure equal access to education and learning at all stages of the learning journey, making sure that all learners access opportunities from the early years, into primary and secondary education and then on into Post 16 education, training and the world of work. We need to do more to ensure that we have a fully integrated model of early childhood education and care that better connects early learning, childcare, health and family support building on existing provision such as Flying Start and the Childcare offer to support the transition from Early Years to the Foundation Phase and Primary School.

We also need to ensure these pathways are working effectively for specific groups of learners who face greater challenges – Looked After Children, young people educated other than at school (EOTAS) and pupils eligible for free school meals. For some young people this will also be about supporting them to re-engage with full-time education, ensuring that successful models of alternative provision are available and

that all learners are able to achieve at least to Level 1 by age 16. There must also be a strong culture of inclusion amongst schools and other education providers that supports all learners to stay engaged.

We need to do more to stretch our most able and talented learners to reach their academic potential, stretch their skills and make the very best of their talents.

For learners with Additional Learning Needs we will enact the national reforms to provide better and more joined up support through a more integrated approach to education, health and care. Local clusters of schools will play a key role in delivery here.

Commitments to action

We will:

- Develop a Cardiff model of integrated Early Years provision, which links early learning, childcare, health and family support; sharing lessons from the Welsh Government Early Years Integration Pathfinder areas.
- Implement the national Additional Learning Needs reforms and work with clusters of schools to ensure appropriate and high quality learning pathways and support are in place for all children and young people with additional learning needs.
- Ensure access to a continuum of education and learning in the Welsh Language from the early years to Post 16, in schools and community settings.
- Develop new models of alternative education provision for learners who are struggling to manage the demands of a full time mainstream curriculum.
- Develop a wider range of 14 – 19 learning pathways, including more high quality vocational options to meet the economic demands of a growing city and to secure progression to skilled employment and/or Higher Education.
- Provide targeted support and opportunities for More Able and Talented learners through the work of school clusters and the SEREN network, to ensure that these learners are given greater opportunities to engage with Higher Education and Industry, to compete for university places and jobs.
- Further develop models of school to school support and collaboration to continuously enhance the self-improving capacity of the school system.
- Continue to support and challenge schools to improve educational outcomes for pupils at risk of under-achievement, learning from those who have already had success in closing these achievement gaps.

Success measures

- Schools report that children starting school are ready and prepared to learn.
- All learners are achieving at least Level 1 by the age of 16.
- All learners progress into education, employment or training post 16.
- A broad range of high quality learning pathways, including vocational options, is available in the city for learners aged 14 – 19.

- Improved levels of achievement for vulnerable learners in line with their individual requirements, needs and aspirations. In particular:
 - Pupils with additional learning needs
 - Pupils educated other than at school
 - Children looked after
 - Pupils entering Cardiff schools with English as an additional language
 - Pupils in receipt of free school meals.
- Higher numbers of More Able and Talented Learners progressing to the top third universities or highly skilled employment sectors.
- All learners of statutory school age are accessing regular, appropriate education and learning which meets their personal learning requirements.

Goals

2. Learners' health & wellbeing

Children and young people are ready and able to learn, and can easily access support to promote their emotional, mental and physical well-being.

Cardiff is well established as a great place to grow up with every child having a good childhood and a positive outlook for their adult lives. We all recognise the vital importance of belonging, friendship, relationships, parents, families and communities in children's lives and work together to nurture these key aspects of a positive education.

When required, children and young people benefit from early intervention and support from schools and effective multi-agency services, which protect and improve their well-being and help them to deal with the pressures of everyday life.

Why this matters

Children and young people consistently highlight the importance of well-being, stating the many issues that they often face in relation to staying safe, keeping healthy, managing relationships and navigating the challenges of growing up in such an unpredictable and ever changing society. And they want to see a much greater focus on supporting them to manage these challenges, to help build self-esteem, high levels of emotional intelligence and resilience throughout their future lives.

Cardiff's Child Friendly Strategy has already set out priorities to ensure that all children have good physical, mental and emotional health and know how to stay healthy. We want to build on those commitments to ensure the whole of the education system is prioritising the mental and physical health and wellbeing of our young people. A more integrated approach to education, health and care is a key feature our strategy and approach to implementation over the next ten years.

Whilst there has been a positive shift in how we view the outcomes of learners, from what has been largely a focus on academic achievement to a more holistic approach incorporating learner well-being, there is clearly much more to do. Children and young people have driven this and speak out about key issues, including a coherent system of support for mental health and emotional well-being. We all have a responsibility to listen to them and change systems that are stopping them from thriving.

We must also not forget about the role of physical well-being in improving the overall happiness and resilience of a child, leading to short and long-term health benefits including improved self-confidence, improved social skills and reduced symptoms of anxiety and depression. Making regular physical activity a habit for life will improve children's health now and as they grow up. This includes healthy travel to and from school, regular activity within the education setting as well as a good and nutritious food offer in school.

Commitments to action

We will:

- Ensure an effective, accessible Early Help and Family support offer is available across the city, to provide support at the earliest possible moment for those that need it.
- Deliver a single point of access for emotional well-being and mental health that provides access to appropriate multi-agency support and services.
- Ensure that all Cardiff schools are designated as Rights Respecting Schools.
- Provide an integrated model of Youth Support Services, built upon high quality youth work, to remove barriers to engagement and participation, ensuring it is accessible to all, particularly our most vulnerable young people who may have experience of isolation, marginalisation, exploitation, or discrimination.
- Improve the range of opportunities for children and young people to be active and healthy through the Healthy Schools offer and citywide partnerships with sports, leisure, and health and recreation providers.
- Reduce health inequalities through a whole school approach and healthy environment, including encouraging children and young people to move more, eat well, have smoke free gates and have their vaccinations.
- Provide citywide opportunities for children and young people to play, maximising the use of safe outdoor education, green spaces and the natural environment.

Success measures

- Children and young people report that they are happy, healthy and their well-being is good.
- Consistent and effective support is in place for emotional, mental health and physical well-being as evidenced through consultation sessions and surveys with children and young people.
- Fewer children and young people develop serious mental health problems and those that do are given the best possible support in the community.
- An increase in school attendance in Cardiff schools
- A decrease in the number of exclusions from Cardiff schools.

Goals

3. Realising the Curriculum for Wales 2022 in Cardiff

Children and young people in Cardiff benefit from an inspiring, relevant, real world curriculum that meets their needs and equips them for their future lives.

The curriculum in Cardiff offers all learners rigorous, inspiring, relevant, contextualised opportunities to become ambitious and capable learners, ethical informed citizens, enterprising and creative contributors and healthy and confident individuals.

Why this matters

The new Curriculum for Wales for schools and funded non-maintained settings will be introduced from September 2022. We want to take full advantage of this development in Cardiff to ensure all learners enjoy their learning and develop the skills, knowledge and emotional resilience they need to succeed in life as ethical individuals who play an active part in their community and society. They should be prepared to thrive in the world of work and capable of adapting and responding to ongoing changes in technology.

We must take full advantage of all of the resources and experiences the city has to offer to make the curriculum real to learners in Cardiff and adapt it to the range of contexts facing our schools and learners. A key component of our approach will be the contextualisation of learning – placing the essential skills, knowledge and understanding in a meaningful, appropriate and engaging context. Schools cannot do this on their own – they will need to work with city partners to reimagine the possibilities presented by the curriculum and develop new and engaging experiences for learners.

We also want to see a strong focus on supporting multilingualism and expanding the range of opportunities for learners to engage with and develop their Welsh language skills and connection with our Welsh heritage and culture.

Young people say that one of the most important priorities for them is better support to be ready for their lives after education. The Curriculum for Wales recognises this and once realised will support all learners, especially those most at risk, to develop the skills they need to manage all aspects of their lives – housing, personal finances and budgeting, independent living, personal and family relationships, sex education, cultural awareness and community cohesion, sustainable living and citizenship.

Young people are also very clear that they want to lead in promoting the sustainability agenda and to encourage all of those working in the education system to consider how we can promote strategies which tackle the climate emergency with greater urgency.

Commitments

We will:

- Ensure that all maintained education settings and schools are using the Curriculum for Wales 2022, in all year groups up to and including Year 11, by 2026.
- Draw on the resources of the city to bring the 'Cardiff Curriculum' to life for learners – through inspiring and authentic learning experiences and 'city challenges' which have currency in the world today.
- Enhance opportunities for learners in Cardiff schools to develop life skills as part of the curriculum, with support from Cardiff Commitment partners, the Youth Service and wider agencies.
- Develop a continually evolving series of industry approved projects around digital competence, which will improve the skills of teachers and learners, so that they are able to respond to an increasingly digital world.
- Develop a 'Passport to the City of Cardiff', which will guarantee that every child can access a broad range of extra-curricular experiences across the city, for example free access to cultural/sporting events, city institutions and heritage sites.
- Demonstrate a commitment to helping prevent climate change by encouraging and supporting schools and partners to work together to develop innovative curriculum enrichment projects focused upon the protection of the natural environment and the sustainability of our planet.
- Work with cultural partners to support learners to engage with Welsh culture across the curriculum and develop their Welsh language skills.

Success measures

- Increasing numbers of learners feel well prepared to enter the world of work and are able to pursue their individual dreams and ambitions.
- Learner outcomes as measured by new accountability and assessment frameworks for Wales in Cardiff are high performing and continue to improve as we reach 2030.
- Learners express confidence that they are getting a broad range of experiences to develop the real life skills that are relevant to their futures.
- Education professionals express confidence about their ability to deliver the curriculum and to collaborate outside school to provide exciting and authentic learning experiences.
- The curriculum better prepares learners for life and young people report that they feel more confident in making the transition to independence.
- Learner outcomes through the medium of Welsh continue to improve and children and young people report enjoyment in and a sense of belonging to our Welsh culture and communities.
- The curriculum in Cardiff demonstrates a clear commitment to helping limit climate change.

4. A world class education workforce

All children and young people benefit from the best, most talented and most effective teachers and support teams in Cardiff schools and education settings.

Our workforce is passionate, energetic and diverse, representative of the city it serves, with a clear set of values and the belief that all children and young people can succeed.

A career in education in Cardiff is attractive and rewarding, offering unique added career benefits, during training, at entry and through continuous professional development, brokered through the extensive partner networks in the Capital city.

Committed governing bodies with a wide range of skills drive excellence in Cardiff schools.

Why this matters

Teachers have the biggest impact on learner outcomes and getting it right for all of our children and young people is what drives the profession. The abilities, knowledge, passion, commitment and enthusiasm of teachers and teaching assistants is crucial in determining the success of learners.

We recognise the importance of teacher development in improving learner outcomes. As we navigate the challenges of the New Curriculum for Wales, Additional Learning Needs Reform and the skills demands of the workplaces of the future, our education workforce must be given the opportunity to adapt, upskill and excel at what they do.

Many future education leaders and practitioners in Cardiff will either just be starting their careers or may not yet have started training. How we attract the best talent to work in education and then support professionals to progress and develop will be critical. It is equally important that we support and develop staff at all levels across education – teaching assistants, support staff, early years and childcare professionals as well as post-16 teachers who are all a vital part of our education workforce.

We also need to enable school governing bodies to exercise support and challenge for securing the best possible outcomes for children and young people in their communities. Governing bodies will need to be representative of the communities that they serve and have diverse skill sets and competencies to be highly effective in their roles. We need to work together to strengthen and enhance support for governors and build capacity across the city through more collaboration between governing bodies.

Commitments to action

We will:

- Develop all Cardiff schools and education settings as 'learning organisations' as a key means of realising the new curriculum, ensuring staff teams have the

capacity to continuously change and adapt, whilst securing positive well-being and outcomes for all their learners.

- Create clear career progression routes, upskilling and professional development opportunities for all Cardiff education professionals that take account of the development of a new 'Careers, Conditions and Pay Framework for Wales'.
- Develop and implement a new 'Cardiff Guarantee' – an offer of enhanced continuous professional development for new teachers in Cardiff schools which provides hands on, practical experience in a range of different education, business/industry and wider city settings.
- Support Initial Teacher Education programmes to enable empower new student teachers in Cardiff to access a wide range of learning experiences and to develop more specialist skills in specific areas such as Additional Learning Needs and Welsh language throughout their studies.
- Employ talent management strategies, to identify and develop aspiring and emerging school leaders of the future and provide pathways into leadership positions which build both professional and personal skills.
- Launch and maintain innovative recruitment campaigns to attract the most talented school leaders and teachers to Cardiff, promoting the benefits of living and teaching in the capital city of Wales.
- Strengthen school governance, by enhancing governor training, encouraging shared capacity building between school governing bodies, developing Federation models where these would add value and extensive promotion and marketing campaigns to attract new governors into Cardiff schools.

Success measures

- An increase in the proportion of schools and education settings providing good or excellent learning experiences for children and young people in Cardiff, as judged by children and young people, and external regulatory and inspection bodies.
- Staff surveys evidence that education professionals are proud and happy to work in Cardiff and recognise the opportunities for development and progression open to them.
- Increased school leadership capacity in Cardiff, with high quality school leadership evident in all schools across the city, particularly those in areas of deprivation.
- Reduced staffing and leadership vacancies and evidence that we are attracting a range of high quality applicants for every post advertised.
- High quality governance in all Cardiff schools, reduced governor vacancies and wide recognition of the value and benefits of being a school governor.
- Evidence of successful collaboration between workforces operating across all phases of education in the city.

Goals

5. High Quality Learning Environments

There are appropriate, high quality school places for children and young people which meet the needs of Cardiff's growing and changing population. Schools provide a safe and inspiring environment for learning and are strongly connected to their communities. Learning beyond the classroom is extended through the creative use of digital technologies and through accessing the resources of the city and its wider environment.

Why this matters

Over the last five years, the quality of school buildings in some of the most deprived areas of the city have been transformed through significant investment into the school estate via the Band A of the 21st Century Schools Programme, including five new primary and two new secondary schools in the east and west of the city. At the same time, significant progress has been made to ensure learners across Cardiff can access safe learning environments that support teaching and learning, through increased targeted investment in improving the overall quality of the school estate.

Through Band A of the 21st Century Schools Programme, we have seen the development of local partnerships, a community focused schools approach to the development of new schools and new high quality learning environments. But we need to go further. Through Band B of the 21st Century Schools Programme and the new Local Development Plan investment, we have the opportunity to re-think schools and approaches to teaching and learning to enhance education for learners in Cardiff, in line with the needs of the future including the Curriculum for Wales 2022.

Learning environments will need to embrace the variety of places, ideas, and people the modern world demands. This includes the need to reflect a flexibility of space, time, people and technology that works for today and can be adapted easily in the future. Powerful learning is taking place outside of school walls. We need to respond to this by promoting and fostering different modes of acquiring knowledge and skills.

The physical health of our children and young people directly impacts on mental health and wellbeing. Through the newly built schools we will provide first class facilities for all sports and maximise outdoor education and play space where possible. We will create state of the art catering facilities that will support the offer of nutritional and healthy food, which has been identified as a priority by our young people

Climate change is one of the greatest challenges future generations will face. When developing inspiring learning environments we need to protect our natural environment. The development of new learning environments, some of which will stand for generations, must be environmentally responsible, resource efficient, and consider the energy and carbon impact. To achieve this we will explore and learn from partners how we can develop the first carbon neutral school in Wales. At the same

time, we will ensure all of our schools are environmentally friendly through monitoring and reducing energy usage and prioritising effective solutions to reduce negative impact on the natural environment.

As we continue to enhance and develop the education estate, we need to make sure we are prepared to meet the changing demographic and societal requirements of the city. Additional school places, including primary, secondary and special will be delivered through the Band B and additional targeted projects will be developed where necessary. We are also committed to continuing to meet the demand for Welsh medium schools across Cardiff, building on Welsh Governments ambitions to increase the number of Welsh speakers.

A key focus of our approach to developing 21st Century Schools is to make sure that schools are at the heart of their communities, and we will develop a Community Focussed School approach to Cardiff.

Commitments to action

We will:

- Deliver the Band B 21st Century Schools Programme including new/rebuilt primary, secondary and special schools.
- Deliver new schools to take account of population growth and economic development in the city through the Local Development Plan.
- Develop a long term plan for School Organisation that creates a blueprint for our new schools and maximises resources available.
- Deliver a Community Focused Schools Policy and approach for the city.
- Update and refresh the Council's ICT Strategy in light of the new curriculum for Wales and invest digital infrastructure, equipment and new learning technologies.
- Increase the scale of asset renewal projects and enhancements to the existing estate. The investment will improve the condition of schools and also future proof learning environments to meet the new curriculum for Wales.
- Investigate sustainable and environmentally friendly approaches to the existing estate and new builds, including the exploration of carbon neutral schools, true integration of active travel and energy saving measures.
- Meet the challenge of the changing demography across the city to ensure provision is available to meet needs, – including Faith, Welsh Medium and specialist places.
- Ensure that the design of schools encourages space to eat well and to take regular physical exercise

Success measures

- 21st Century sustainable new schools via the Band B 21st Century Schools Programme and Local Development Plan that transform education for learners, are delivered.
- Learning environments in Cardiff are equipped for learners to develop digital competence skills in line with advancements in technology, and to facilitate a broader curriculum.
- The improved condition and suitability of the school estate enables all learning environments to be good.
- Schools reflect the needs of the communities they serve and become accessible community assets as appropriate.

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CABINET MEETING: 10 OCTOBER 2019

CARDIFF EAST INDUSTRIAL STRATEGY

INVESTMENT & DEVELOPMENT (COUNCILLOR RUSSELL GOODWAY)

AGENDA ITEM: 8

Reason for this Report

1. To obtain approval of the East Cardiff Industrial Strategy and to consider the next steps for implementing a spatial strategy for the east of the city.
2. To consider the potential support for the Cardiff Parkway development in line with the Council's recently approved Economic Strategy.

Background

3. Capital Ambition, includes a commitment to *"launch a new Industrial Strategy for East Cardiff, aligned to the completion of the Eastern Bay Link"*.
4. The Council's Corporate Plan includes a priority to *"Deliver an Industrial Strategy for Cardiff East, which will support the progression of the Cardiff Parkway development."*
5. The Administration's Economic Strategy, adopted in April 2019, also includes a commitment to publish an East Cardiff Development Strategy. In particular, the Strategy notes that *"We will bring forward a new East Cardiff Development Strategy that will comprise the coastal areas to the East of the city."* The Economic Strategy also includes a commitment to *"Work with partners to deliver a new Cardiff Parkway Station at St Mellons."* Subsequently, work has been undertaken to develop a new strategy for the East of the city that reflects the need to improve economic outcomes for its residents.
6. On 28 March 2019, Cardiff Council approved a motion to declare a climate emergency. As part of this the Council has agreed to support the implementation of the Welsh Government's Low Carbon Delivery Plan, which aims to secure a carbon neutral public sector in Wales by 2030. This includes the commitment for the Council to progress a wide range of

projects in support of the existing Carbon Reduction Strategy and to further reduce carbon emissions from the Council's operations. Consequently the development of any Industrial Strategy for East Cardiff would need to consider the climate emergency declaration.

Issues

7. Economic outcomes in the east of the city lag behind the rest of Cardiff. Unemployment rates are significantly higher, as are levels of deprivation as measured by the Welsh Index of Multiple Deprivation.
8. Analysis of Cardiff by Neighbourhood Partnership area shows that in Cardiff East almost 44% of the areas of analysis fall within the 10% most deprived areas in Wales. In simple terms this means that residents of Cardiff East are over four times more likely to live in one of Wales most deprived areas than the national average.

WIMD 2014 Overall Index – Neighbourhood Partnership Areas

	10% Most Deprived area in Wales
Cardiff East	43.5%
Cardiff South West	41.2%
Cardiff South East	19.4%
City & Cardiff South	8.7%
Cardiff West	5.1%
Cardiff North	3.4%
Cardiff	17.3%

Source: Wales Index of Multiple Deprivation / Cardiff Research Centre

9. Residents of Cardiff East also suffer from levels of unemployment a third higher than the rest of the city. Indeed, if the unemployment rate in East Cardiff mirrored the rest of the city there would be an additional 500 residents in the area in employment.

Claimant Rate April 2019

	East Cardiff Wards	Rest of Cardiff
Claimant count	2,070	4,760
Claimants as a proportion of residents aged 16-64	3.6	2.7

Source: Nomis

10. In addition, the area has suffered from a lack of investment in comparison with other areas of the city. This is exemplified by the fact that the Eastern Bay Link remains incomplete. Historical under-investment has also meant that Cardiff Bay Station in Cardiff remains the train station that is furthest east in the city. Consequently, much of the east of the city suffers from poor access, especially by public transport.

11. Furthermore, whilst there has been some commercial development there has been no specific development strategy for the area. Although some development has occurred, economic growth has been hampered by natural barriers which hinder access to employment sites, most notably the mainline rail-line that bisects the industrial and residential areas of East Cardiff.
12. In order to address these issues work had been undertaken to develop a cohesive economic vision for the east of the city, focussing primarily on its potential as a location for industry. The work is also predicated on the potential and anticipated investments for the area, including the Cardiff Parkway development and the potential investment in the expanded Eastern Bay Link.
13. An initial visioning study reviewed Government and Council policies, and consulted widely with key business stakeholders, landowners, developers and academic institutions, who contributed to shaping thinking on the strengths, weaknesses, threats, opportunities challenges faced by the area. The study suggested that a Cardiff East Industrial Strategy should consider the following elements:
 - Short-Term Action Plan** - This should focus on four geographical areas that aggregate the economic cluster activities and provides the basis for partnership working with Welsh Government.
 - Medium Term Strategy** - This should be sustainable and resilient and maintain the momentum established under the short-term action plan above.
 - Longer Term Strategy** - This should be in the context of an overall strategy based on the above short and medium term strategies and should evolve and adapt to the future direction of industry.
14. Following the completion of this study further work was commissioned to explore how an East Cardiff Spatial Strategy (attached as Appendix A) could be delivered. In particular, this further study looked at the potential of land in the east Cardiff area and how the findings of the initial consultation could be realised. The East Cardiff Spatial Strategy is attached as Appendix 1.
15. The strategy analysed in more detail the current constraints and context of the East Cardiff area, including an analysis of current employment allocations, social infrastructure, economic deprivation, landscape and environmental designations, transport links, heritage, and other key physical constraints. In addition, the Future Generations and Wellbeing Act was noted as a further consideration for the development of any strategy.
16. The study identifies three phases of growth for the area. The phases focus on key developments and the strategic interventions required to support employment growth in the area. The phases are not mutually exclusive and elements of each phase can be delivered concurrently.

However, the level of infrastructure investment required to unlock development suggests that certain opportunities may take longer to deliver than others.

17. It is also important to note that the phases represent a high-level indicative vision. The phases have no formal status and any issues that would need to be considered, such as planning or environmental mitigation, would need to be considered on a case-by-case basis. Critically, the Strategy is not a Planning Policy document. Any projects or proposals without current approvals or delegations to proceed would also need to be considered on an individual basis before they can progress.
18. Each phase is outlined in detail in the report. However in summary they include:
19. Phase 1 – Filling in the gaps - Expanding from Lamby Way to the east, outlines the lowest scale of development, focussing on infill between existing employment land and remediation of landfill sites. This represents the immediate response in delivering the strategy and would not require significant work to progress. Fundamentally the majority of this phase is supported by the current Local Development Plan and land allocations. It would also be based on the enhancement of the current highway network rather than any significant new development. Progressing the phase however may require an element of land assembly.
20. Phase 2 – Expanding to the South, suggests an increased scale of development including land to the south of Wentloog Avenue, land at Pengam Moor and minor development at Trowbridge Mawr. It also proposes development of new highway links between Rover Way and A48M/A48. It should be noted that much of this phase would require further consideration in terms of planning and the detail of any transport links, as well as understanding how any new development could be resourced.
21. Phase 3 – Optimising the opportunity, outlines the potential to develop across all available land south of the railway and with land reconfiguration at Trowbridge Mawr. It also proposes a major new highway link between Rover Way and A48M/A48.
22. All phases will require supporting infrastructure to be put in place, including:
 - Environmental enhancements
 - Flood protection
 - Active travel and public transport improvements
 - Remediation works
 - Increasing capacity of the existing utilities network
23. Transport improvements are a key theme of the strategy. East Cardiff continues to suffer from the long-term non-completion of the Eastern Bay Link which creates congestion in existing communities. The Council

and Welsh Government are currently considering improvements to flood protection arrangements along the coastline in East Cardiff. There is significant potential for flood protection investment to also deliver major improvements to the arterial road network in the area.

24. In addition, East Cardiff suffers from a complete absence of accessible rail infrastructure with Cardiff Bay Station providing the most easterly station on the Cardiff rail network. There is significant potential to enhance access to rail through the exploitation of the now largely redundant freight lines that were previously used to service the Steel Works in East Cardiff. This proposal forms a core part of the Council's Cross Rail proposals recently set out in the Council's Transport Strategy White Paper. The Welsh Government and Transport for Wales have also recognised the opportunity exemplified by the recent announcement that a new station will be provided at Rover Way as part of the current South Wales Metro programme.
25. The report also notes that enhanced green infrastructure has significant potential to bring widespread benefits to Cardiff East, in line with both the Wellbeing of Future Generations Act and the Cardiff Well-Being Plan.
26. In particular, the Council wishes to establish clear policy support for 'green' energy initiatives in the area building on the economic potential of green industries outlined in the strategy. Given the existing industrial legacy, current and future investment proposals, including energy proposals, that cannot demonstrate strong green credentials will not be supported by the Council for development in this area.
27. In addition, the report also noted that given the current high levels of deprivation and socioeconomic issues across east Cardiff, there is significant need to widen the influence of the economic strategy. Investment can benefit those living in and visiting the area as well as those employed there. It suggests that specific socio-economic improvements could include:
 - Stronger links between education providers, community hubs/learning centres and employers to build skills in the future workforce, building on the Cardiff Commitment.
 - New and improved cross-area active travel links allowing access to work and skills development and linking staff to social infrastructure, open space and local retail facilities, supporting the local economy. Links may double as recreational routes and safe routes to schools.
28. Delivering environmental improvements and better access arrangements for existing communities is an important aspect of the strategy. In particular, the strategy aims to ensure that residents of existing communities in the East of Cardiff have better access to new job opportunities on their doorstep. A key project in this regard is the proposed new bridge linking the Llanrumney community to the A48 to provide improved public transport connectivity. A report will be presented to Cabinet in November setting out the plan for delivery of the bridge

including wider regeneration initiatives and amenities in the Llanrumney area.

29. In conclusion, the Strategy notes that

- A coordinated approach to development is required to develop a balanced and sustainable community and maximise benefits, both for business and for other stakeholders.
- Significant multi-modal improvements are needed to the movement infrastructure to facilitate access to work, access to services and movement of goods.
- Previously developed land has potential for sustainable reuse, particularly for renewable energy generation.
- The natural setting of Cardiff East is a vastly underused resource that could bring major benefits to the area and wider city region. Improving access to the coastline should be a priority move, creating a Cardiff Coastal Greenway.
- Non-spatial policies should be developed to support the physical growth and change, including further coordination of workplaces with education and skills providers.

30. The report also recommends that a multi-disciplinary officer working group is established to take forward a framework and delivery plan for the Spatial Strategy.

Special Economic Zones

31. The strategy sets out the need for substantial investment in infrastructure in order to realise economic opportunity. This normally places a significant burden on the public purse. The Council is keen to explore new, innovative funding mechanisms such as Tax Increment Financing where the beneficiaries which take advantage of betterment from economic growth to fund infrastructure investment. There is also scope to explore the potential of the adjacent seabed and waterfront to attract trade related investment such as new 'freeport' type facilities.

Cardiff Parkway

32. The East Cardiff Spatial Strategy clearly outlines the importance of Cardiff Parkway as an anchor project. The project comprises both a new mainline railway station and high quality business park. The commercial offer seeks to provide a lower density 'campus style' environment to complement the higher density city centre offer, and ensure that Cardiff can offer an adequate range and choice of premises for business.

33. The Parkway station itself will also be a major addition to the South Wales Metro, serving commuting traffic into Cardiff from the north east of

the city, as well as supporting the city's transport infrastructure on major event days.

34. Critical to the success of Parkway is ensuring that there is adequate investment in public infrastructure to provide access by road and active travel measures to both the rail station and the business park. In particular, a significant improvement is required to the road network to unlock the potential of the site.
35. Given the scale of the development there will be a funding requirement to invest in the necessary public infrastructure. As a result, the project sponsor has made contact with the Cardiff Capital Region City Deal to consider the use of the City Deal Investment Framework (which includes infrastructure as an investment priority) to support the required investment.
36. The City Deal Investment Framework also outlines that infrastructure investment levers include looking at new fiscal policy means. Subsequently exploratory work has been undertaken to consider the use of Tax Increment Finance to support infrastructure investment for Cardiff Parkway. This approach would be predicated on using the future business rates income for the site to finance investment in supporting infrastructure. It is proposed that the Council support the project sponsor in exploring the use of Tax Increment Finance with the Cardiff Capital Region City Deal to support the required infrastructure investment.
37. It is anticipated that a planning application for the development of the new train station will be submitted in the spring 2020 with construction expected to be completed and operational by 2023. The broader development will be delivered over a ten-year period.

Partnership Working

38. There is considerable public sector ownership in and around East Cardiff. As outlined in the East Cardiff Spatial Strategy, Cardiff Council also holds significant land interests in the area. It is proposed to seek to consolidate public owned land to ensure public partners are working collaboratively to accelerate growth and deliver improved economic outcomes for the area.

Next Steps

39. The Spatial Strategy provides an outline and vision for future development. Any and all projects outlined in the report outside of any current delegations would be subject to the usual approval processes.
40. The Strategy concludes that the next stage of work should be shaped by establishing a cross-disciplinary working group. It is recommended that this comprises a Council officer working group, reporting to a Cabinet sub-committee, to develop a delivery strategy which considers land assembly and acquisitions, phased delivery, funding, and develops a business case for public sector investment (including public transport, highway and infrastructure improvements). Further consultation and

stakeholder engagement would also be required, especially with local members, in determining any detailed plans.

41. As an immediate response, it is proposed that Phase 1 forms the basis of the Council's initial consideration of the East Cardiff area. It is recognised that there is an urgent need to respond to the economic issues outlined in this report and therefore a strategy based on current land allocations and funded infrastructure improvements is considered a prudent approach to providing initial momentum in delivering the strategy.
42. The Council will also begin to co-ordinate work with local partners in an attempt to bring forward early progress on Phases 2 and 3. This will start with work to develop a detailed plan for the area.

Local Member Consultation

43. The Cabinet Member for Investment and Development invited local members from across East Cardiff to a meeting on Friday 27th September to discuss the proposals set out in this strategy and to gain their feedback. Four local members attended the meeting and all were very supportive of the proposals and asked to remain engaged in the delivery stages as they progress.

Scrutiny Consideration

44. The Economy & Culture Scrutiny Committee considered this issue on 3 October 2019. The letter from the Chair is attached at Appendix 2.

Reason for Recommendations

45. To note the East Cardiff Industrial Strategy and to delegate authority to the Director of Economic Development, in consultation with the Cabinet Member, Investment & Development, to progress with initial allocations.
46. To endorse the exploration of Tax Increment Finance, in conjunction with the Cardiff Capital Region, to support the necessary infrastructure investment for the Parkway development.

Financial Implications

47. The Cardiff East Industrial Strategy contains a set of recommendations which will have financial consequences at a point when the implementation of said strategy is undertaken. The delivery of Phase 1 will potentially require proposals for acquiring and / or disposing of land and these proposals will need to consider value for money, affordability, funding sources and any tax implications

Legal Implications

48. As and when individual proposals within the Strategy are developed legal advice should be obtained.

49. As set out in the body of the report the Strategy has no status as a Council Planning Policy document.
50. With regards any procurement in relation to any development works and generally, further advice should be sought as necessary and be carried out in accordance with the Contract Procedure Rules and EU procurement regulations (as applicable).
51. The report refers to consultation and stakeholder engagement in determining any detailed plans for the area. Consultation gives rise to the legitimate expectation that the outcome of the consultation will be duly considered when subsequent decisions are made.
52. 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 and the report deals with all these obligations. The Council has to consider the Well-being of Future Generations (Wales) Act 2015 and how this strategy may improve the social, economic, environmental and cultural well-being of Wales.
53. 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.
54. 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: <https://www.cardiff.gov.uk/ENG/Your-Council/Strategies-plans-and-policies/Corporate-Plan/Pages/Corporate-Plan.aspx>. 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.
55. 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
56. 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>
57. The Council must also 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.
58. Section 17 of the Crime and Disorder Act 1998 also imposes a general duty on the Council, when exercising its functions, to take account of community safety dimension, with a view to reduce local crime and disorder in its area.
59. The Council must also have regard to its duties under The Active Travel (Wales) Act 2013.

RECOMMENDATIONS

Cabinet are recommended to:

- I. Approve the East Cardiff Industrial Strategy.
- II. Delegate authority to the Director of Economic Development, in consultation with the Cabinet Member for Investment and Development, the Monitoring Officer and the Section 151 officer to develop opportunities on Council owned land, including marketing land for disposal and to return to Cabinet as appropriate.
- III. To request the Leader of the Council and the Chief Executive to promote an application to the Cardiff Capital Region for an investment in the Cardiff Parkway project.

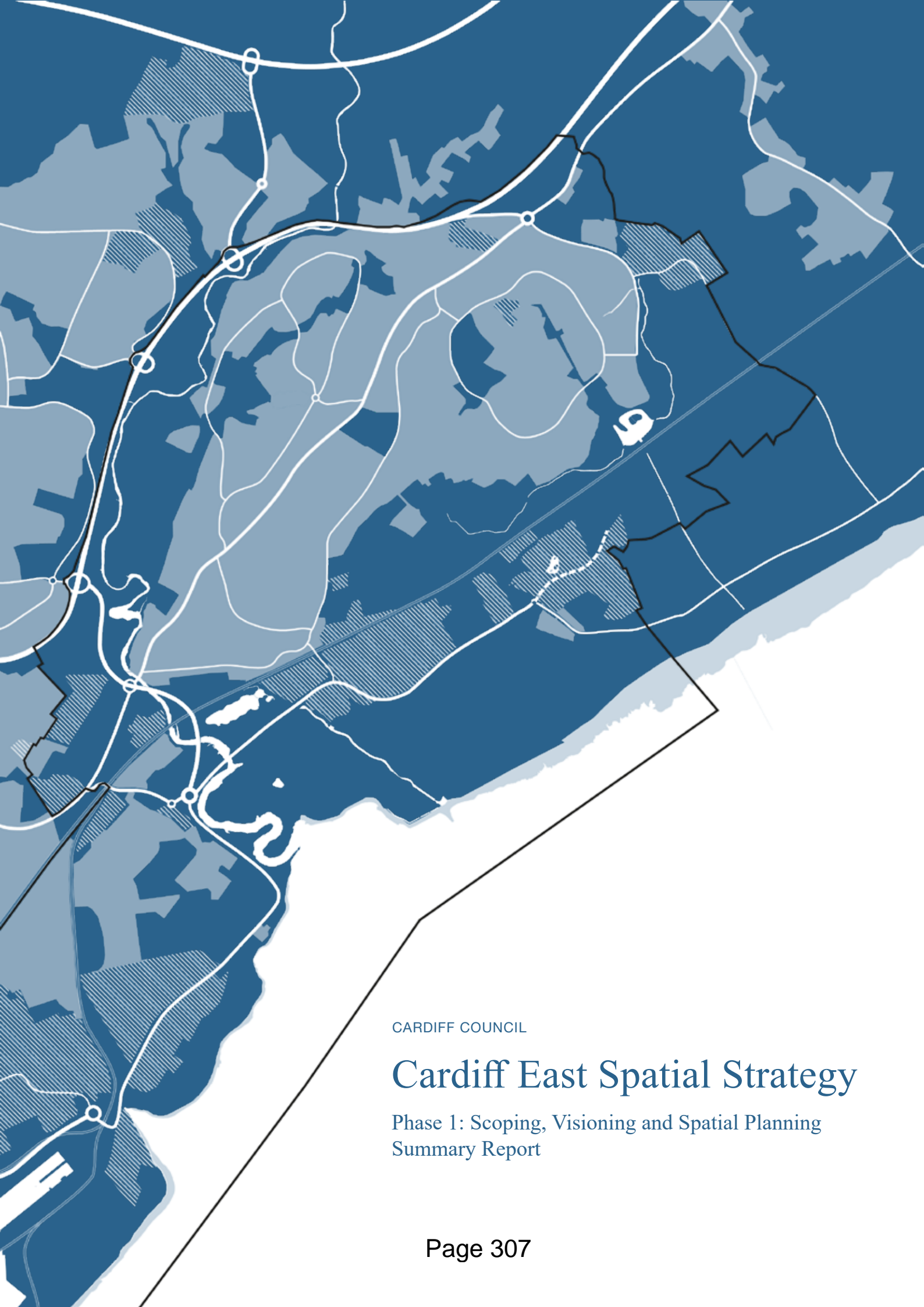
SENIOR RESPONSIBLE OFFICER	Neil Hanratty Director of Economic Development
	4 October 2019

The following appendix is attached:

Appendix 1: Cardiff East Spatial Strategy

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

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CARDIFF COUNCIL

Cardiff East Spatial Strategy

Phase 1: Scoping, Visioning and Spatial Planning
Summary Report



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Prepared by Arup on behalf of Cardiff Council.

This report takes into account the particular instructions and requirements of our client. It is not intended for and should not be relied upon by any third party and no responsibility is undertaken to any third party.

In preparing this report we are relying on information contained in reports supplied by the client and third parties, as stated throughout the document. We have relied in particular on the accuracy and completeness of such reports and accept no liability for any error or omission in this statement to the extent the same results from error or omission in the other consultants' reports.

Please note, this report is intended to be viewed and printed as an A4 double-sided document with cover page.

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1. INTRODUCTION

1.1 Towards an integrated Spatial Strategy

East Cardiff has been identified by the council as having major potential for industrial-related development. This development should be brought forward in such a way as it also delivers social, environmental and economic benefits to the communities of East Cardiff and the wider city.

PURPOSE OF THIS DOCUMENT

In 2018, BD Consulting developed the ‘Cardiff Industrial Strategy’ which identifies how “an industrial strategy for Cardiff, placed within the context of the Council’s ‘Capital Ambition’ and ‘Draft Economic Strategy - Building More & Better Jobs’ policies can contribute to the economic, social and environmental well-being through an industrial strategy that has lacked investment in the past.” The Strategy reviewed Government and Council policies and consulted with a wide range of public and private stakeholders.

This study looks at the potential of land in the east Cardiff area and explores how the findings of the Cardiff Industrial Strategy can be realised as areas for future growth, change and mitigation. It should be noted that this report has no planning status and that any necessary approvals and decisions would be made to progress the proposals outlined in the report.

CARDIFF EAST STUDY AREA

The Cardiff East area, as defined in the Cardiff Industrial Strategy 2018, runs from the River Taff eastwards to the Cardiff/Newport municipal boundary and from the Severn Estuary to the A48/A4232/Newport Road.

This report focuses on a core area running from the Port of Cardiff in the west, through to the proposed Cardiff Parkway site at the east, excluding the majority of the Butetown ward.

52,683

Approx. population of core area

23%

Population aged under 16.
Cardiff average: 19%

64%

Population aged 16 to 64.
Cardiff average: 68%

14%

Population aged over 64.
Cardiff average: 14%

Above: Population for small areas in Wales (2001 onwards), by broad age bands and gender, December 2018. StatsWales 2019. Population excludes Butetown.

33%

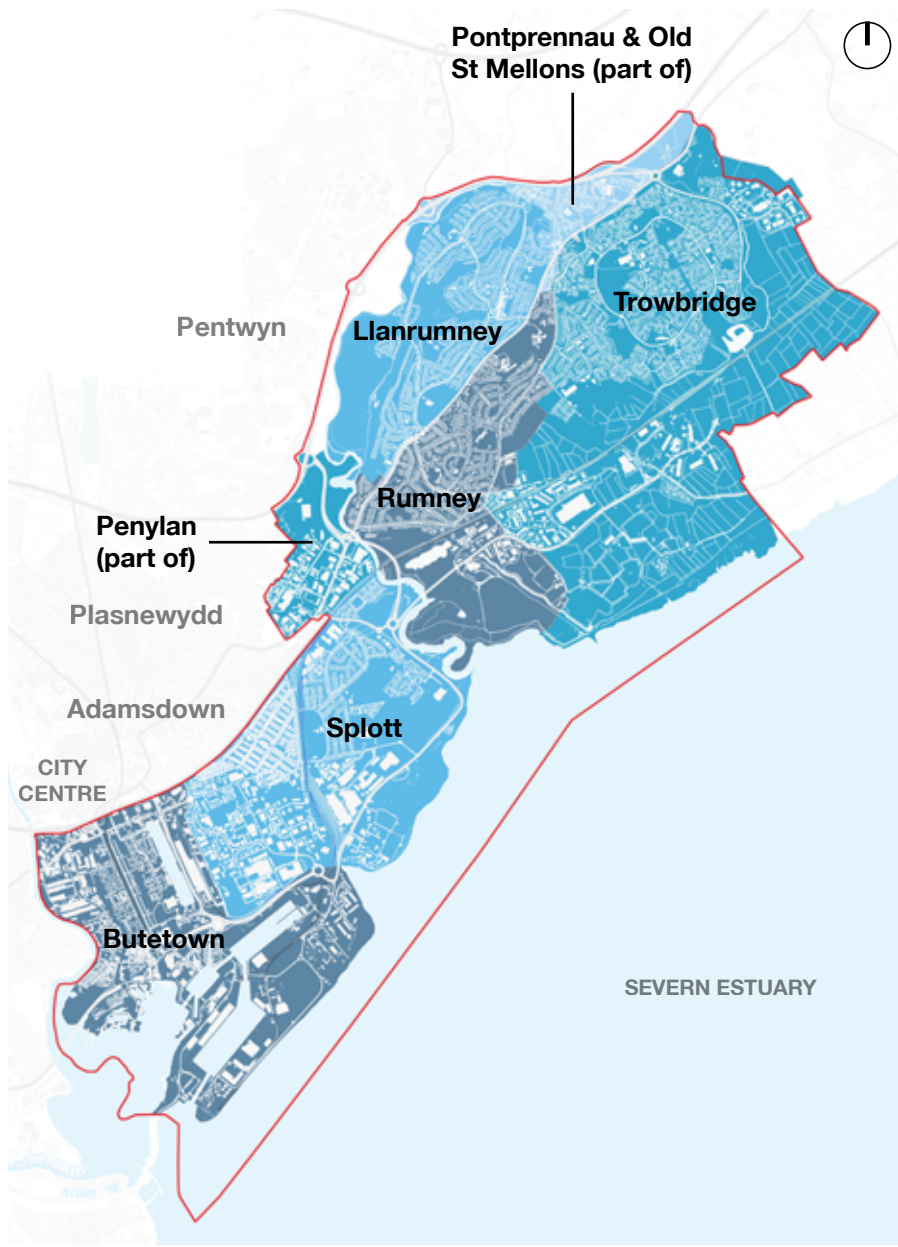
Population aged over 16 with no qualifications.
Cardiff average: 21%

Highest level of qualification (2011). Nomis, 2019. Population excludes Butetown.

7%

Employment in manufacturing.
Cardiff average: 5%

Industry (2011). Nomis, 2019. Population excludes Butetown.



1. CARDIFF EAST LOCATION

Wards lying within Cardiff East, in full or in part.

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2. POLICY CONTEXT

2.1 Strategic context

Cardiff has a strong position as the central settlement and economic powerhouse of the Cardiff Capital Region.

CARDIFF CAPITAL REGION

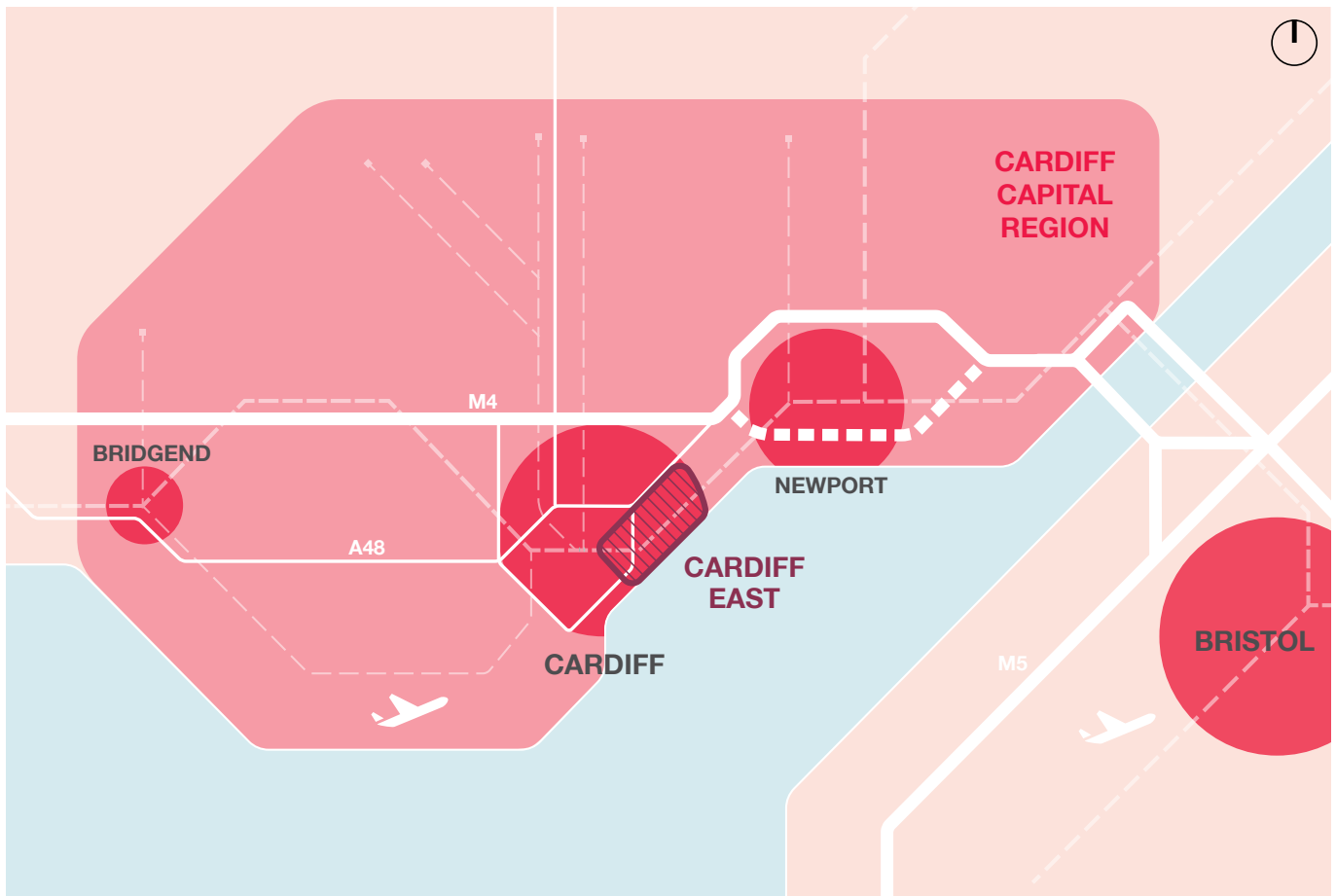
The Cardiff Capital Region (CCR) City Deal is a programme agreed in 2016 between the UK Government, the Welsh Government and the ten local authorities in South East Wales to bring about significant economic growth in the region through investment, upskilling, and improved physical and digital connectivity.

The Industrial and Economic Plan has been developed by Cardiff Capital Region Economic Growth Partnership in conjunction with CCR Regional Cabinet, to set direction, and to identify and address the priorities facing the region. The Plan is designed to be flexible, in order to better adapt and respond to the dynamic challenges the region will face over the next twenty years.

Below

2. CARDIFF CAPITAL REGION

Cardiff East holds a strategically strong location with access to the M4, A48 and mainline railway



CARDIFF DRAFT ECONOMIC STRATEGY

The approach is based on the principles of Cohesion, Leverage, Ecosystem Development, Scale and Return on Investment. The strategy identifies cross-sector collaboration and stakeholder cohesion as a central feature with target sectors including Compound Semiconductors and the Creative Economy. The need to upskill the current and future workforce is recognised, as is a need for reliable and resilient infrastructure.

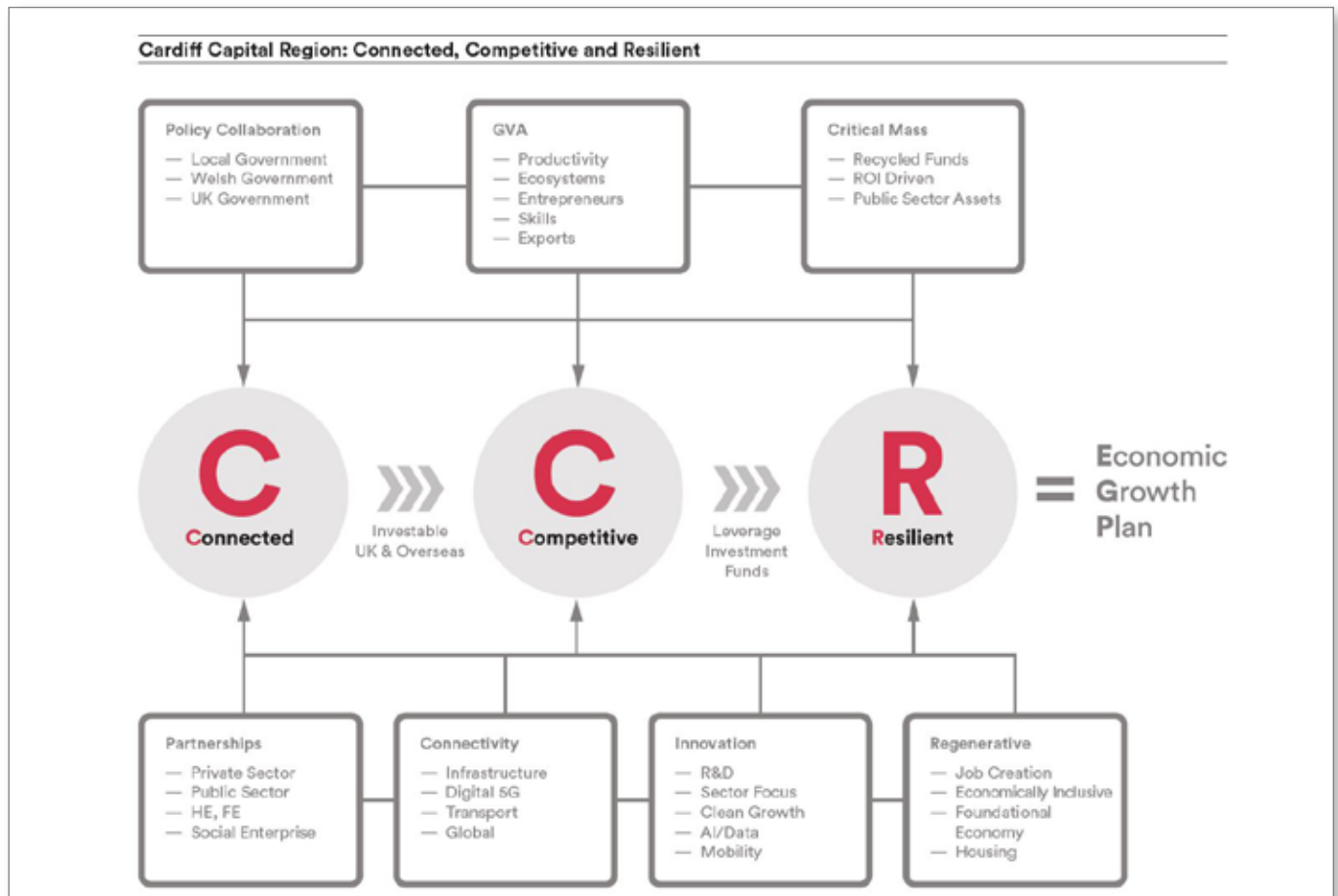
In April 2019, Cabinet resolved to approve the Draft Economic Strategy “Building More and Better Jobs”, which “sets out the Council’s vision for the city’s economy and establishes how the key development priorities will be delivered.” The Strategies and proposed projects are identified overleaf.

The Strategy seeks to encourage investment at all scales and of a variety of forms, considering the city centre and further outlying areas and recognising the role of transport in supporting business and access to work. It takes a broad view of Cardiff’s economic needs, recognising the need for inclusive growth and building a skilled workforce while recognising the need to consider wellbeing.

Below

3. CARDIFF CAPITAL REGION ECONOMIC GROWTH PLAN

Extract from Cardiff Capital Region Industrial and Economic Plan, 2018.



Below

4. CARDIFF DRAFT ECONOMIC STRATEGY - PRORITIES AND PROJECTS

Key priorities and projects affecting the Cardiff East area are highlighted.

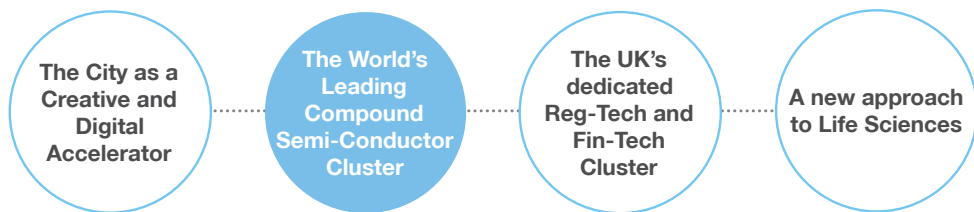
SPATIAL STRATEGY: KEY PRIORITIES



PROPOSED PROJECTS



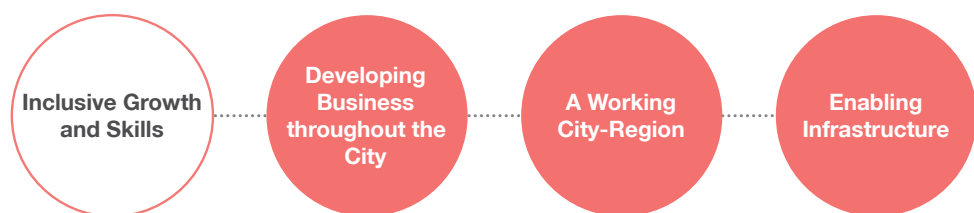
INDUSTRIAL STRATEGY: KEY PRIORITIES



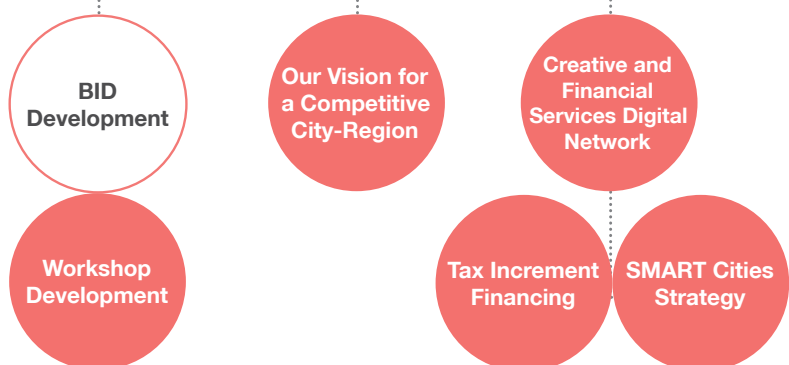
KEY PROJECTS



UNDERPINNING THEMES: KEY PRIORITIES



KEY PROJECTS



CARDIFF INDUSTRIAL STRATEGY

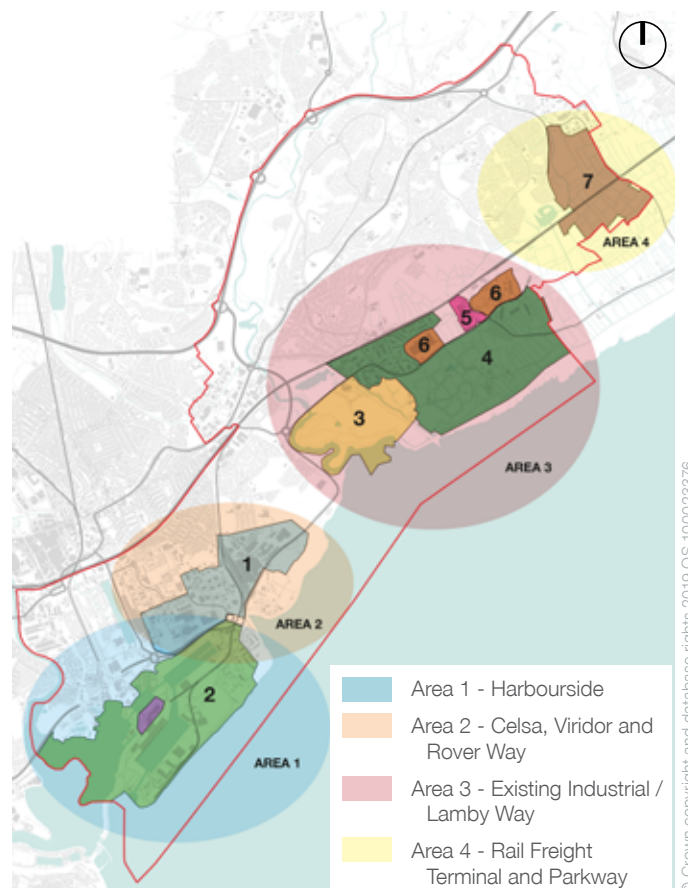
The 2018 Cardiff Industrial Strategy by BD Consulting identifies a corridor of interest in eastern Cardiff, within which are emerging themes: employment, land supply, transportation, technology, sustainable energy and industrial strategy. Cardiff East has a diversity of employment, including manufacturing, creative industries and logistics, however there is a lack of suitable sites for potential industrial investors and a need to release further tranches of land. The Strategy identifies potential for a range of sustainable energy solutions, including microgrids and district energy and heating, linked to education and skills. The Strategy structures its recommendations around four core areas and seven clusters which form the basis for an action plan:

- Area 1 - Harbourside: The area includes ABP Port of Cardiff and the Porth Teigr site. While the area has strong highway links, the Port is not linked to the rail freight terminal and there is poor public transport connectivity to the Port area. There is, however, land available.
- Area 2 - Celsa, Viridor and Rover Way: Dominated by Celsa and Viridor, the area has a strong support supply chain and benefits from the new link road. High energy prices are threats to Celsa however there is significant potential to expand existing energy generation and build a district heating network. There is little expansion land and limited connection to mainline rail infrastructure.
- Area 3 - Existing Industrial/ Lamby Way: The area has seen significant employment development but expansion is limited by flooding and remediation costs alongside limited highway and public transport accessibility. There is however renewable energy generation potential and opportunity for refurbishment of poorer quality stock.
- Area 4 - Rail Freight Terminal and Parkway: Private developers are creating a masterplan for Cardiff Parkway, including a new passenger railway station. There has been a lack of use of the rail freight terminal, due in part to the poor road connectivity.

5. CARDIFF INDUSTRIAL STRATEGY - AREAS & CLUSTERS

Information drawn from BD Consulting report.

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2.2 Planning context

The Cardiff Local Development Plan 2006-2026 identifies appropriate land uses and operations across the city.

EXISTING EMPLOYMENT LAND (EC1)

Much of Cardiff's defined Existing Employment Land lies within Cardiff East, protecting many but not all of the area's employment sites. This land identifies primary uses as a mix of B1, B2 and B8 development. These areas are protected for employment development to prevent incremental loss of land and premises. The majority of land within these areas has already been developed although some land at Wentloog Avenue remains vacant.

Areas around Newport Road and Colchester Avenue have been removed from the protection due to pressure for alternative uses.

STRATEGIC SITE - CARDIFF PARKWAY (KP2)

The Cardiff Parkway site (known in the LDP as 'South of St Mellons Business Park') is proposed for strategic employment development, linked to a new railway station and park and ride facility. A masterplan is being developed by Cardiff Parkway Developments Ltd.

SPECIAL LANDSCAPE AREA (EN3)

This policy aims to "ensure that those features of the landscape that contribute to its character, value, distinctiveness, sense of place, and quality, with particular priority given to SLAs are protected from inappropriate development. It seeks to manage and enhance this rich asset in order to maintain Cardiff's unique distinctiveness whilst helping to mitigate against climate change."

Much of the SLA area designated at Wentloog Levels is currently subject to groundworks and operations by Dawson. A comprehensive approach is needed to development in this area, though there is a significant opportunity to reinstate biodiversity across the site while incorporating employment development.

RIVER CORRIDOR (EN4)

The designation provides a framework for the Council to protect, promote and enhance the Rhymney River corridor, relating to sustainable access, social needs and natural environment. The area is subject to the River Rhymney and Nant Fawr Corridor Action Plan which aims to bring together the collection of different environments and habitats into a coherent corridor. New development within, or adjacent to the river corridors may be required to contribute to projects which help to achieve the objectives set out in the River Corridor Action Plans.

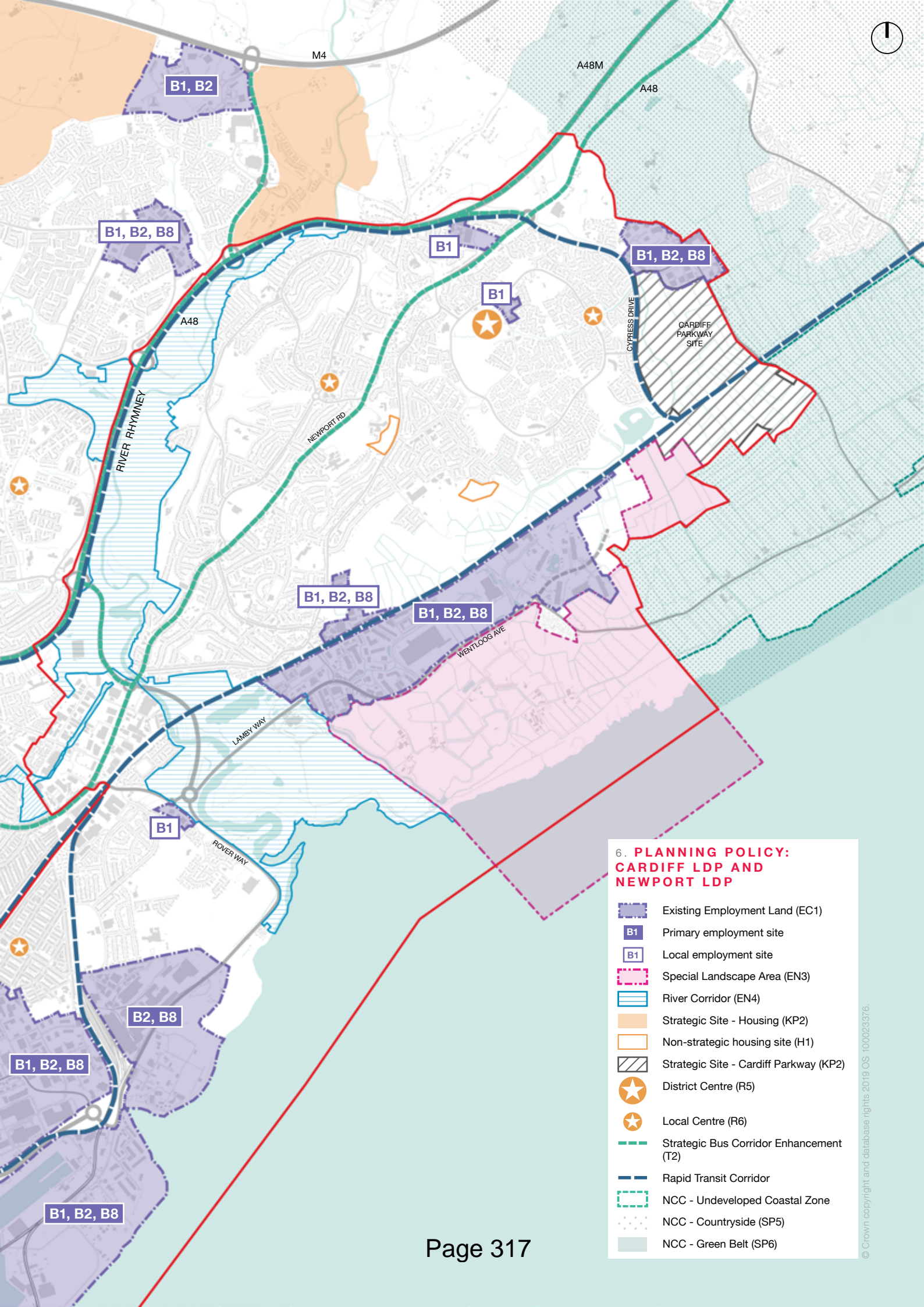
STRATEGIC RAPID TRANSIT AND BUS CORRIDORS (T2)

The Eastern Bus Corridor identifies enhancements along A4161 Newport Road, Southern Way and the A48M Trunk Road. Under this policy, "provision will be made to facilitate the functional integration of these corridors and associated services with the wider transport network including the bus network and local walking and cycling routes".

Potential Rapid Transit Corridors are identified along the railway network and A48, with alignment and interchange to be determined through further technical assessment work.

NEWPORT CITY COUNCIL ADOPTED LOCAL DEVELOPMENT PLAN (2011-2026)

Land adjacent to the study area boundary is protected under NCC's Undeveloped Coastal Zone, Countryside and Green Belt policies, which aims to protect the open, undeveloped nature of the Levels and adjacent countryside. Development at East Cardiff should have regard to these designations and the transition to open countryside.



**6. PLANNING POLICY:
CARDIFF LDP AND
NEWPORT LDP**

- Existing Employment Land (EC1)
- Primary employment site
- Local employment site
- Special Landscape Area (EN3)
- River Corridor (EN4)
- Strategic Site - Housing (KP2)
- Non-strategic housing site (H1)
- Strategic Site - Cardiff Parkway (KP2)
- ★ District Centre (R5)
- ★ Local Centre (R6)
- Strategic Bus Corridor Enhancement (T2)
- Rapid Transit Corridor
- NCC - Undeveloped Coastal Zone
- NCC - Countryside (SP5)
- NCC - Green Belt (SP6)

3. PHYSICAL CONTEXT

3.1 Location

STUDY AREA

The existing employment land around Rover Way, Lamby Way and Wentloog Avenue is considered as the starting points for geographic focus, linking to Cardiff Docks and areas straddling the mainline railway corridor.

The eastern corridor includes some of the city's key infrastructure including the Port of Cardiff, the new Viridor Waste-to-Energy plant, the Celsa Steelworks, and the Euro-freight rail terminal. The Council wishes to explore how additional employment related development could help deliver further important infrastructure improvements.

Proposals are already being brought forward by the private sector that will see a new mainline station delivered at St Mellons Business Park by 2023, to be known as Cardiff Parkway. Design works to further progress delivery of the Eastern Bay Link Road are currently being taken forward by Welsh Government.

The existing employment areas lie close to significant residential areas at Splott, Tremorfa, Trowbridge, Rumney, St Mellons and Llanrumney, however connectivity between these areas is constrained by the rail network, the River Rumney and major roads.

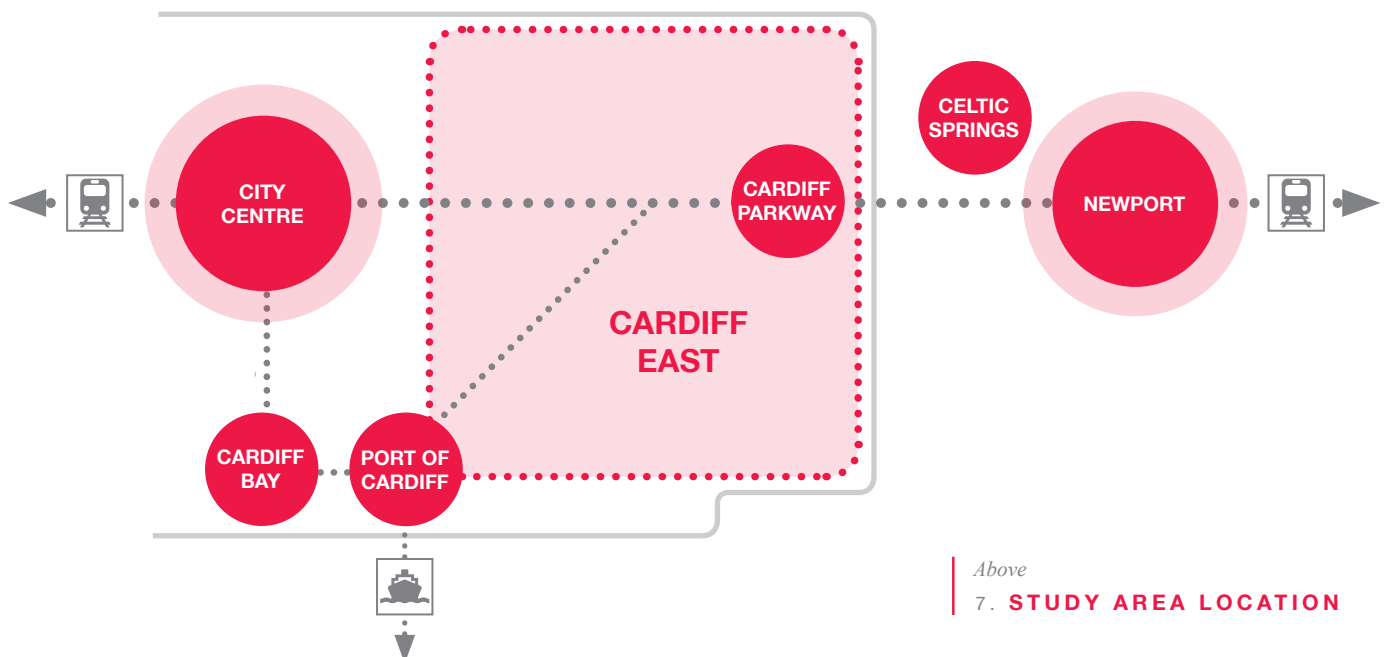
INDUSTRIAL CONTEXT

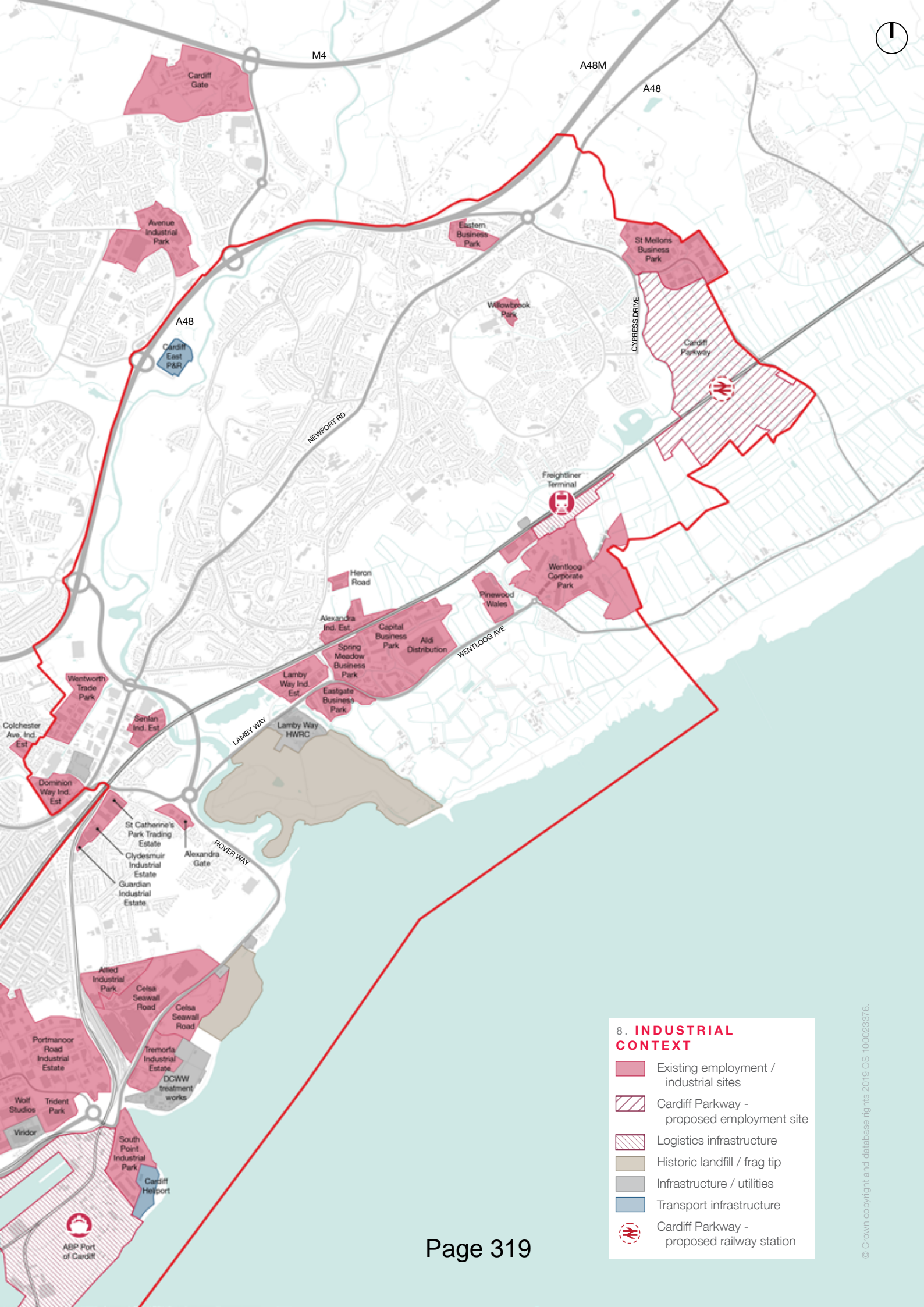
Cardiff has a low supply of available employment sites, which is further threatened by plans to redevelop and regenerate existing industrial and mixed-use areas including Dumballs Road and incremental losses at Newport Road. There will be increasing pressure on eastern Cardiff to offset these losses and provide new capacity.

The East Cardiff area has a large number of industrial and employment estates, particularly clustered around the railway lines. There have been incremental changes in use with a number of non-employment activities arising including gyms, sport and leisure activities and specialist retail; Badwolf Studios has added a significant new land use to the area, with potential for growth of related industries.

The Freightliner facility is operated as a Joint Venture by Welsh Government and Cardiff Council. The site has potential for expansion to the east if demand grows.

Access to these areas is car-orientated with poor public transport and active travel connectivity to most areas, including to neighbouring residential areas. Constrained access may reduce scope for logistics developments and use of the Freightliner facility.





8. INDUSTRIAL CONTEXT

- Existing employment / industrial sites
- Cardiff Parkway - proposed employment site
- Logistics infrastructure
- Historic landfill / frag tip
- Infrastructure / utilities
- Transport infrastructure
- M Cardiff Parkway - proposed railway station

3.2 Socio-economic context

THE WELL-BEING OF FUTURE GENERATIONS (WALES) ACT

“The Well-being of Future Generations (Wales) Act 2015 gives us the ambition, permission and legal obligation to improve our social, cultural, environmental and economic well-being.”

The Well-being of Future Generations Act requires public bodies in Wales to think about the long-term impact of their decisions, to work better with people, communities and each other, and to prevent persistent problems such as poverty, health inequalities and climate change.

The Future Generations Act defines Sustainable Development in Wales as: “The process of improving the economic, social, environmental and cultural well-being of Wales by taking action, in accordance with the sustainable development principle, aimed at achieving the well-being goals.” It sets out five ways of working needed for Public Bodies to achieve the seven well-being goals. This approach provides an opportunity for innovative thinking, reflecting the way we live our lives and what we expect of our public services.

An integrated growth plan approach could demonstrate how the seven well-being goals could be achieved.

SOCIAL INFRASTRUCTURE

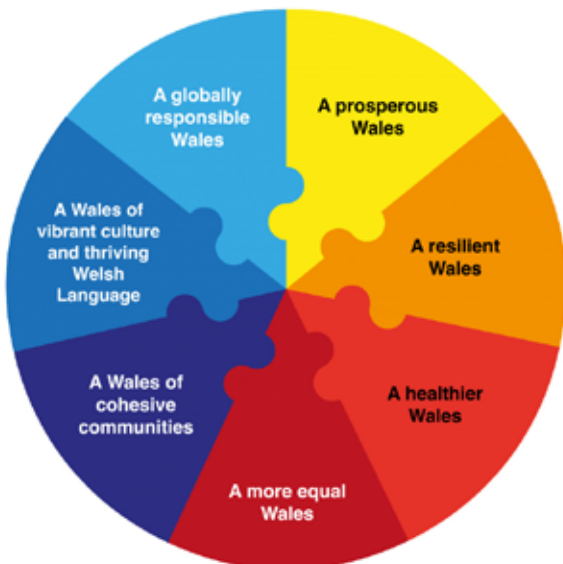
The Cardiff East area is diverse in land use and built environment, with a wide range of land uses sitting alongside and within the extensive residential communities.

The relationship between activities is more successful and symbiotic in some areas than others, with some awkward juxtapositions of housing with industrial or utility infrastructure developments. Other areas, particularly on Rumney Hill, are less diverse, with residents living much further from employment opportunities.

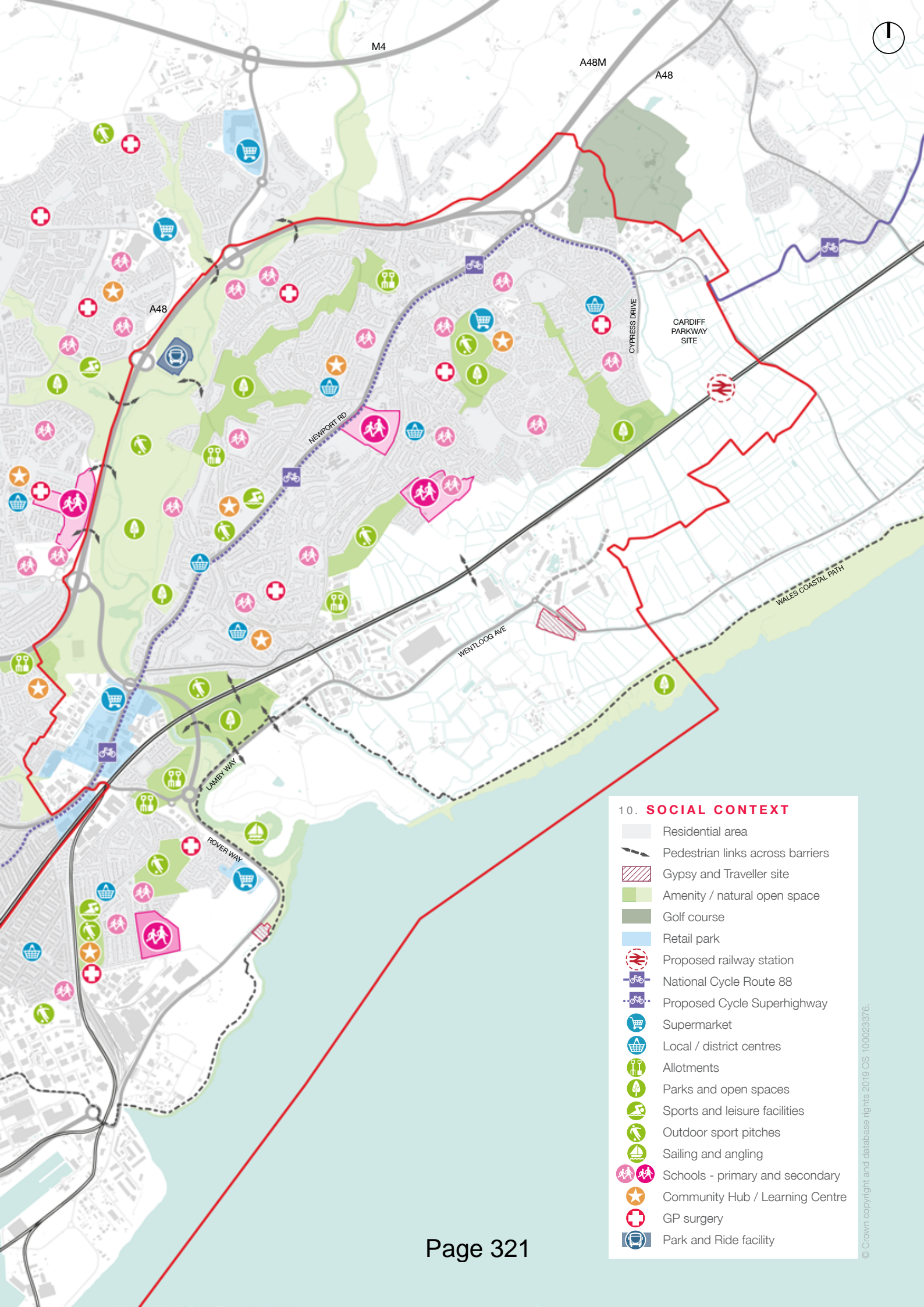
The area currently has a relatively good range of services within and close to residential areas but poor intra-area connectivity (whether by vehicle, active travel or public transport) may limit people’s access and range of choice.

Cardiff East has extensive areas of open space but much of this is either poorly accessible or of a poor quality. Llanrumney is interspersed by swathes of open space which have poor amenity value for their high maintenance requirement. In other areas, housing backs onto amenity spaces.





















Peripheral areas of open space are underused, particularly the coastline, which has potential to be a major public asset and a defining feature of the area.



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9. WELLBEING OF FUTURE GENERATIONS (WALES) ACT 2015 GOALS



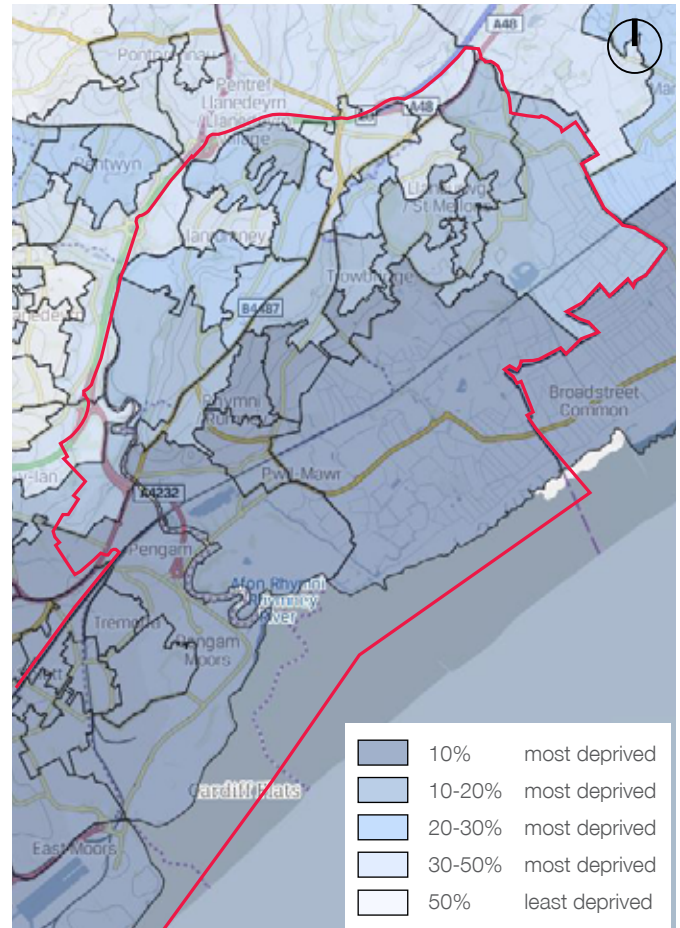
10. **SOCIAL CONTEXT**

-  Residential area
-  Pedestrian links across barriers
-  Gypsy and Traveller site
-  Amenity / natural open space
-  Golf course
-  Retail park
-  Proposed railway station
-  National Cycle Route 88
-  Proposed Cycle Superhighway
-  Supermarket
-  Local / district centres
-  Allotments
-  Parks and open spaces
-  Sports and leisure facilities
-  Outdoor sport pitches
-  Sailing and angling
-  Schools - primary and secondary
-  Community Hub / Learning Centre
-  GP surgery
-  Park and Ride facility

WALES INDEX OF MULTIPLE DEPRIVATION 2014

The Wales Index of Multiple Deprivation (WIMD) shows that significant areas of East Cardiff fall within the 20% most deprived in Wales, as part of the ‘Southern Arc’ of deprivation. Proposals and strategies that address eastern Cardiff should take into account the socio-economic issues faced by the area and consider the wider opportunities that investment can bring.

- **Access to Services** is generally relatively good to average, apart from areas around the railway line where accessibility is lower.
- **Physical environment** is generally in the lowest 10% and 20%, particularly in southern areas. The indicator considers Air Concentrations, Air Emissions, Proximity to Waste Disposal and Industrial Sites, and Flood Risk, all of which particularly affect this area of the city.
- **Housing**, a measure of overcrowding and access to central heating, is varied across the area with significant areas of relatively poor and very poor quality.
- **Health** score distribution broadly follows the overall scoring, with particularly high deprivation in Trowbridge, Tremorfa and Splott.
- **Employment** is highly varied with pockets of high deprivation but also areas falling in the lowest deprivation brackets.
- **Income deprivation** is widespread with most areas falling in the 10% and 20% most deprived.
- **Education** is quite clustered with particularly strong deprivation in Trowbridge, northern Llanrumney and Tremorfa.
- **Community safety** scores put most of the area into the 30% most deprived and above.



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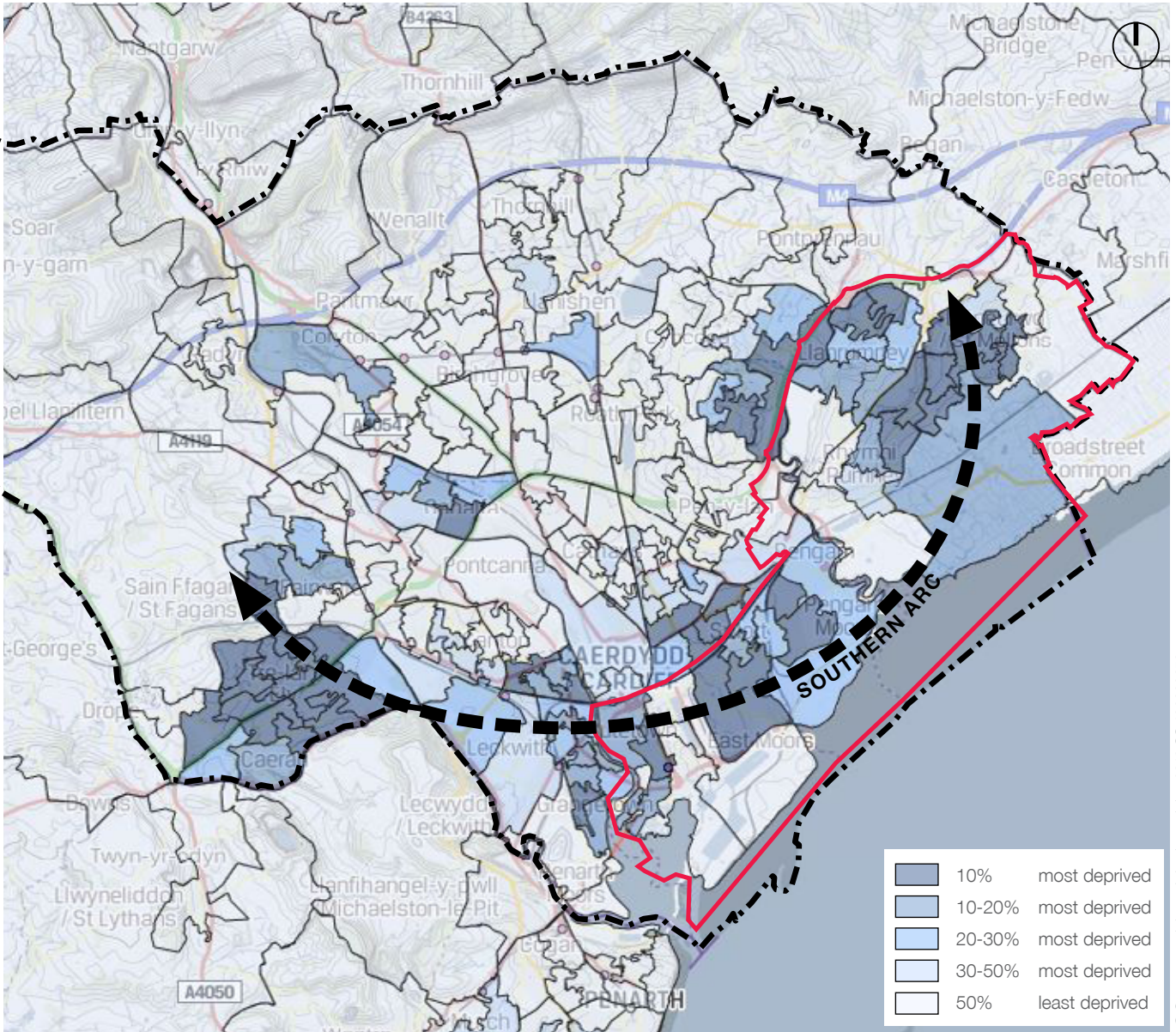
11. PHYSICAL ENVIRONMENT WIMD 2014 SCORE

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12. CARDIFF COUNCIL OVERALL WIMD 2014 SCORE

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3.3 Landscape context

LANDSCAPE CONTEXT

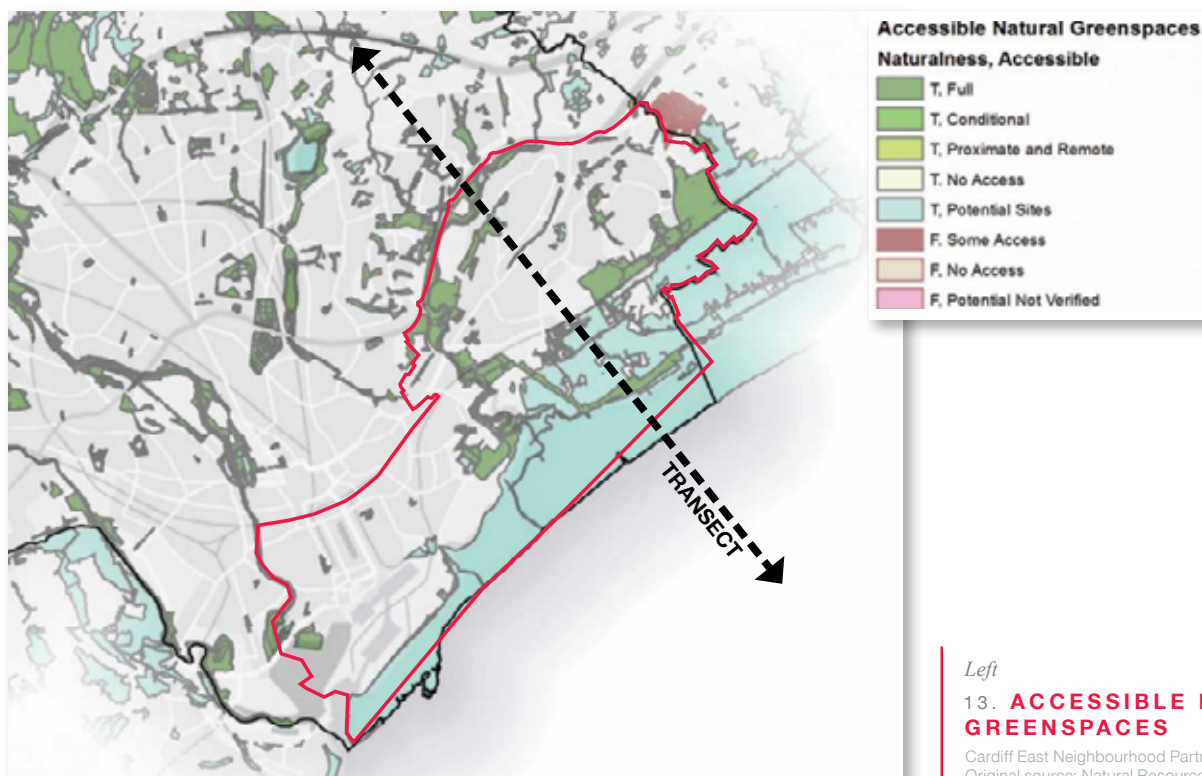
Eastern Cardiff sits within a transition between the hills to the north, at Cefn Mably and Ruperra, through to the Rhymney River Valley, to the Wentloog Levels and Severn Estuary to the south. Areas of residential and employment development interspersed by linear bands of natural landscape and major infrastructure corridors, giving the area a unique diversity.

The Wentloog Levels form part of Wales' largest area of reclaimed wet pasture, crossed by an extensive network of hedgerows and tree belts alongside drainage ditches and reens. The area is considered rich in biodiversity including many nationally rare plant and fauna species. The hand-crafted landscape retains clear historic evidence of settlement, enclosure and drainage with various Roman finds at Rumney Great Wharf.

These linear elements currently form barriers to connectivity, poorly traversed by road and pedestrian/ cycle infrastructure, but could be remodelled as movement corridors and linking spaces, forming a high-quality green infrastructure network with enhanced ecological and recreational value.

Studies by Natural Resources Wales have assessed the existing availability of accessible greenspace across Cardiff East and identified significant potential for new sites, particularly across the Wentloog Levels and along the coastline. There is additional scope to increase connectivity between habitat areas and form area-wide green corridors.

Many publically accessible areas suffer from fly-tipping and require ongoing management and maintenance. Many paths and routes require resurfacing in order to improve access.

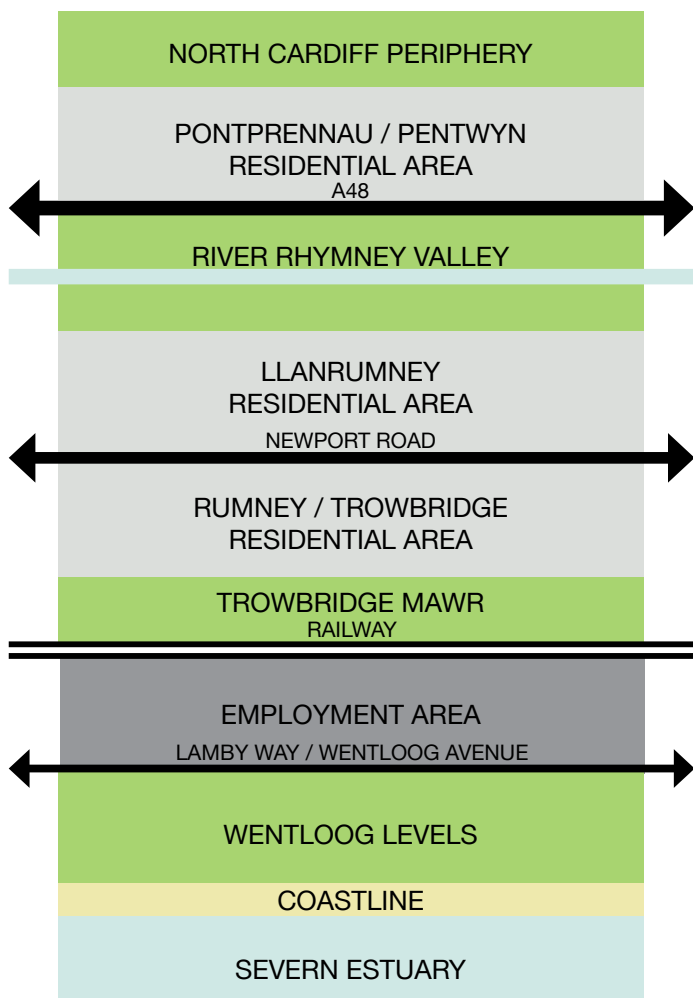


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13. ACCESSIBLE NATURAL GREENSPACES

Cardiff East Neighbourhood Partnership Area report.
Original source: Natural Resources Wales.

14. **LANDSCAPE TRANSECT**



15. **CURRENT LANDSCAPE CONTEXT**



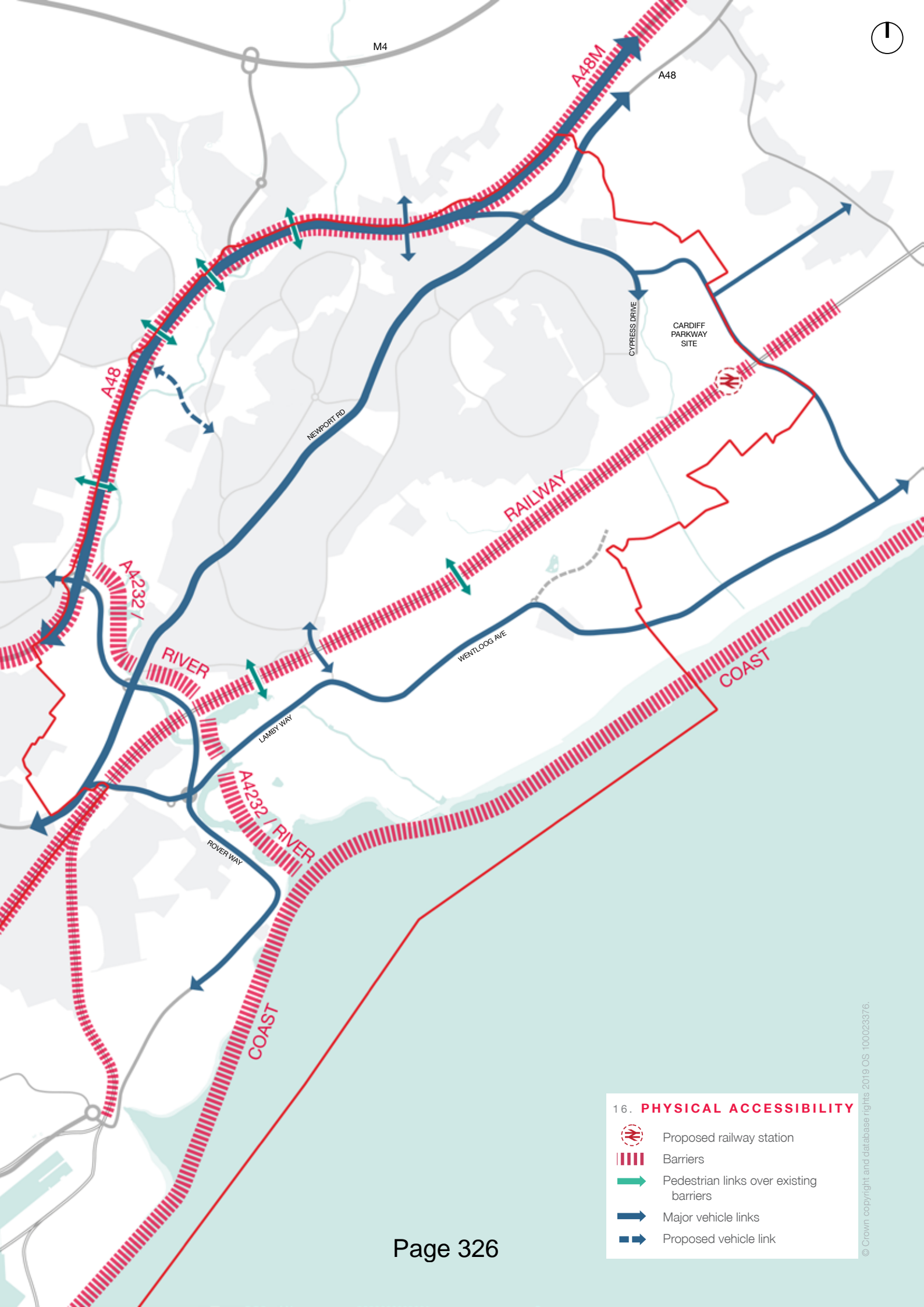
River Rhymney estuary at Rover Way








Wentloog Levels at Cardiff Parkway



Coastline at Wentloog Levels



16. **PHYSICAL ACCESSIBILITY**

-  Proposed railway station
-  Barriers
-  Pedestrian links over existing barriers
-  Major vehicle links
-  Proposed vehicle link

3.4 Transport

The area is served by major highway routes, including the A48M, A48 and A4232, although these form significant barriers to cross-movement and lack pedestrian and cycle facilities along much of the route. The proposed connection between the A48 and Ball Road would significantly increase highway connectivity between the Pentwyn/Pontprennau/Llanederyn and Llanrumney/Trowbridge/St Mellons areas.

The railway, River Rhymney and A-road network are major barriers to movement between residential and employment areas, increasing reliance on cars for access to work and limiting accessibility to the coastal area. The Wales Coastal Path provides a long distance route but has poor quality surfacing in parts, limiting amenity for cyclists, wheelchair users and other groups. The existing routes across the railway are poorly signposted and connected into the wider footpath network, reducing legibility.

Routes across the Rhymney River are limited, with access only available at Lamby Way and Newport Road, with hostile environments around highway junctions. Other routes through the area are also disconnected and poorly identified. Some highway routes lack pedestrian and cycle facilities, including the A4232 and stretches of Rover Way and Wentloog Avenue.

The Wentloog Levels area is currently poorly accessible due to the railway, effectively forming a cul-de-sac accessed from the A4232/Lamby Way roundabout. Crossing points are available to New Road and at Heol Las however these routes have limited capacity and suitability to accommodate larger vehicles. At present, the road through Wentloog Corporate Park is in private ownership but could form a valuable part of a new eastern link road.

PUBLIC TRANSPORT

Residential areas are relatively well served by public transport however most routes are arterial from the city centre and do not provide intra-area connectivity, with particular service gaps between areas east and west of the A48. The industrial areas along Rover Way and Wentloog Avenue are poorly served with only a peak time service from the city centre to Wentloog Corporate Park.

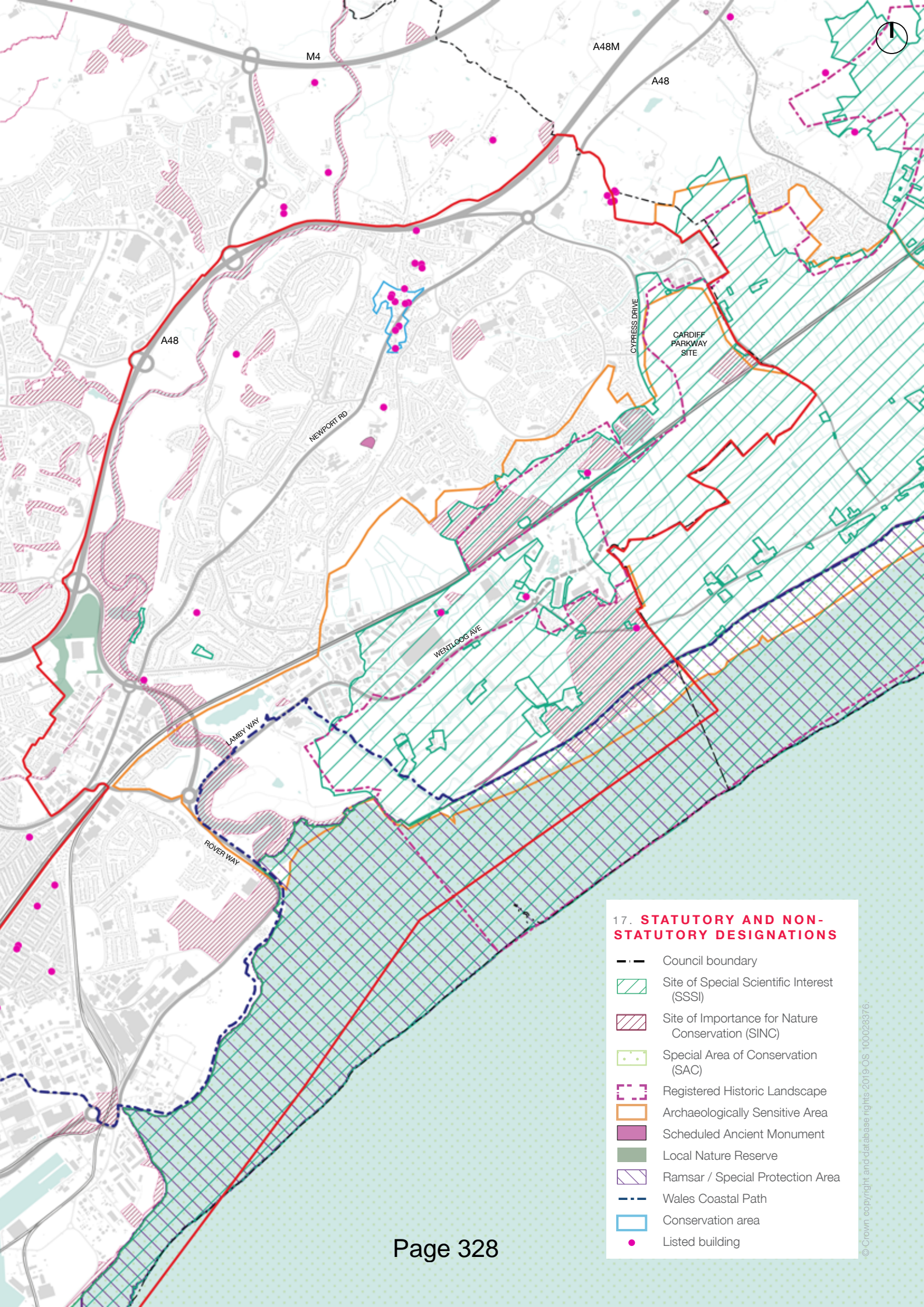
A new railway station is proposed at Cardiff Parkway, giving the area a mainline rail service. The Transport White Paper identifies the opportunity for a light rail service running along the relief lines, linking the City Centre and Cardiff Bay, through Splott/Tremorfa and on to the proposed Cardiff Parkway station.

TRANSPORT AND CLEAN AIR WHITE PAPER




The Transport and Clean Air White Paper is currently being developed on behalf of Cardiff Council. The document is a development on the 2018 Green Paper which includes six core themes: The Future of the Metro & Buses; Active Healthy City; Clean Air City; International Capital City of Business, Work and Culture; The Future for Cars; and Smart City.

One of the 'big ideas' of the Green Paper concerns "Developing the South East Corridor: A major opportunity exists to increase accessibility for residents and businesses to the east of Cardiff, one of the city's most deprived and disconnected communities. Aligned with the new Industrial Strategy for the east the city, this would include a new park and ride rail station for St Mellons, the completion of the Eastern Bay Link road, further improvement to Queen Street Station, linked to improved cycling and walking routes." This concept is being developed into specific proposals and strategies in the White Paper.

An initial outline of the transport vision was revealed by the Council in July, which included proposals for a light rail/tram line that connects central Cardiff with major population centres to the east and west, proposed to eventually terminate at a Cardiff Parkway station in the east.



17. STATUTORY AND NON-STATUTORY DESIGNATIONS

-  Council boundary
-  Site of Special Scientific Interest (SSSI)
-  Site of Importance for Nature Conservation (SINC)
-  Special Area of Conservation (SAC)
-  Registered Historic Landscape
-  Archaeologically Sensitive Area
-  Scheduled Ancient Monument
-  Local Nature Reserve
-  Ramsar / Special Protection Area
-  Wales Coastal Path
-  Conservation area
-  Listed building

3.5 Heritage and environmental designations

Eastern Cardiff is subject to a number of statutory and non-statutory designations at a national and local level of importance.

The Wentloog Levels area is protected by a number of overlapping designations for both ecological and historic value, including the Gwent Levels (Rumney and Peterstone) Site of Special Scientific Interest (SSSI) and Gwent Levels Registered Historic Landscape.

Site of Importance for Nature Conservation (SINC) designations protect specific additional habitat areas including woodland, river and stream corridors, Pengam Moors and Hendre Lake.

The built heritage is recognised through individual listed building designations and the conservation area at Old St Mellons.

The Wales Coastal Path provides a continuous footpath along the Severn and Rhymney River estuaries, providing public access to the coastline.

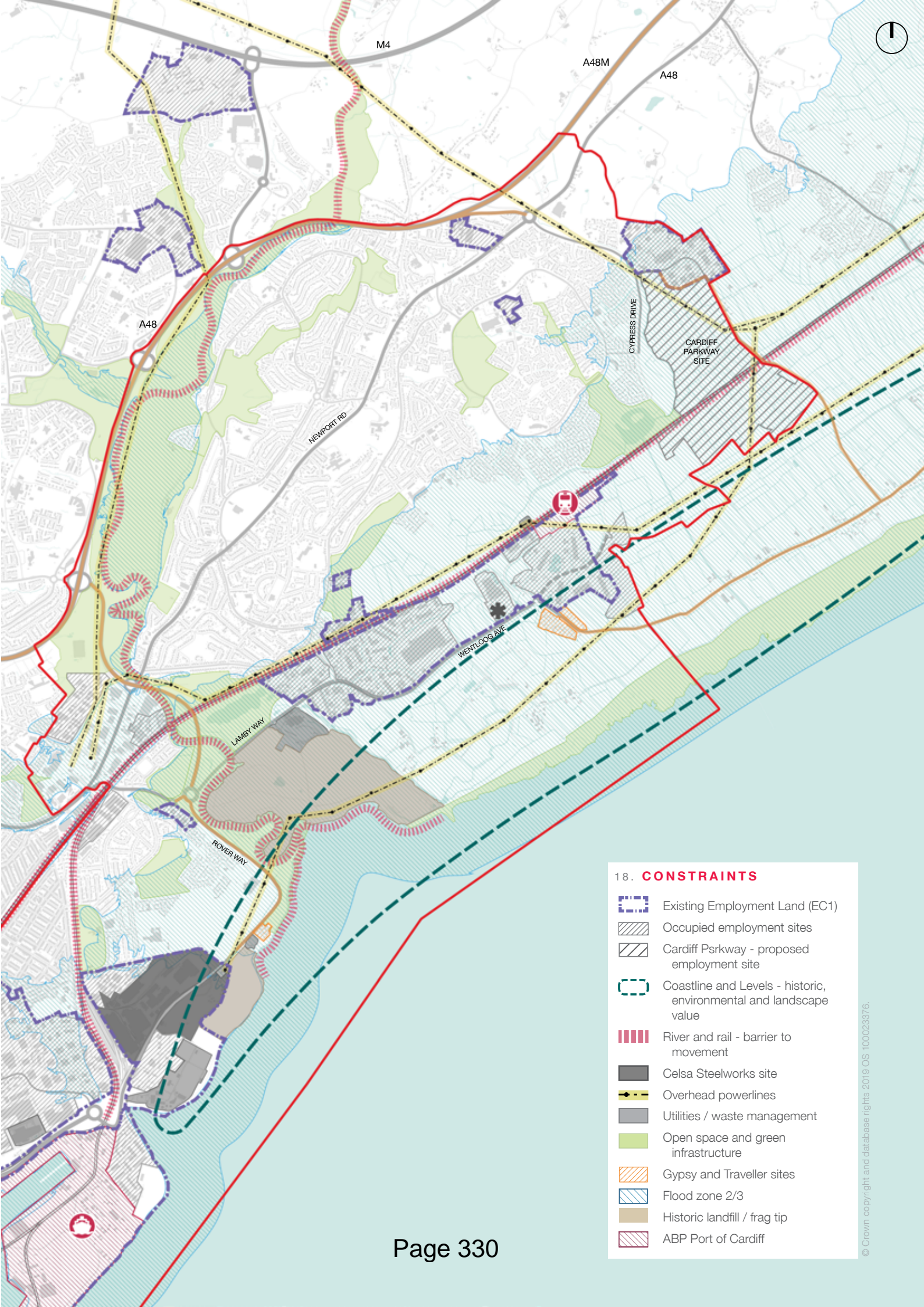
Development within the Wentloog Levels should have regard to the joint report by Cardiff Council, Countryside Council for Wales and Welsh Development Agency, "Landscape Study of Cardiff - Volume 2: Design Guidelines for the Wentloog Levels (1999).

Due to the potential for well-preserved historic finds across the Levels, development should also be informed by appropriate archaeological research and on-site investigations.








FLOOD RISK

The vast majority of the area lies within Flood Zones 2 and 3, vulnerable to coastal flooding from the Severn Estuary and fluvial flooding along the River Rhymney. Surface water flooding is an additional issue due to the low-lying flat land, sitting below residential areas on the Rumney hill.

Cardiff Council has commissioned a Coastal Defence Detailed Design and Full Business Case study to identify options to protect land around the Rhymney River estuary from flooding and erosion. The design solution has not been finalised and will be selected following a period of public consultation in 2019.



18. **CONSTRAINTS**

-  Existing Employment Land (EC1)
-  Occupied employment sites
-  Cardiff Prskway - proposed employment site
-  Coastline and Levels - historic, environmental and landscape value
-  River and rail - barrier to movement
-  Celsa Steelworks site
-  Overhead powerlines
-  Utilities / waste management
-  Open space and green infrastructure
-  Gypsy and Traveller sites
-  Flood zone 2/3
-  Historic landfill / frag tip
-  ABP Port of Cardiff

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3.6 Site summary

The plan, left, summarises the major constraints affecting development potential within the eastern Cardiff area.

- Existing Employment Land (EC1): Much of the land designated as Employment land has already been built out with few sites available.
- Cardiff Parkway: The Cardiff Parkway development is a significant opportunity for the area and may be a catalyst and anchor development for further growth, however there is no current planning consent in place for the proposals. Highway improvements will be required to facilitate the scheme but are not confirmed.
- Coastline and Levels: The Severn Estuary and Wentloog Levels area have significant historic, environmental and landscape value, protected by a number of local and national designations. Development in this area will require careful design and potentially significant negotiation with stakeholders including Natural Resources Wales. Some areas may be considered undevelopable.
- River and rail: The Rhymney River and railway are considerable barriers to pedestrian/cycle and vehicle movement, limiting access to jobs and services and reducing the potential for expansion and diversification of employment development.
- Celsa Steelworks site: The site is a major employment and has a large local supply chain, however workers and associated vehicle movements can impact traffic flows on Rover Way.
- Overhead powerlines: The powerlines have a visual impact and constrain development under and around their route.
- Open space and green infrastructure: The area has major green infrastructure corridors along the Rhymney River, and Severn Estuary/Wentloog Levels however these are poorly accessed, under promoted and lack visitor amenity.
- Utilities and waste management infrastructure: The existing sites may be undesirable neighbours for potential development due to environmental health issues, including noise, odour and air quality.
- Flood risk: The major flood risk across the east Cardiff area means significant investment is required in fluvial/tidal flood protection works and sustainable drainage in order to open up development plots.
- Historic landfill and frag tip: These two sites have some potential for redevelopment but require extensive remediation.
- ABP Port of Cardiff: The site has a major role in supporting Cardiff's economy but limits highway access towards the Bay area and blocks public access to the coastline. Further development at the site may be limited by congestion on the local highway network and poor mainline rail connectivity.

3.7 Current knowledge gaps

At present, there are a number of current knowledge gaps and unconfirmed proposals that affect the validity of the proposals within this report will impact on the delivery of employment and other growth in the Cardiff East area.

GROUND CONDITIONS AND FLOODING

- Ground conditions and potential for rehabilitation and redevelopment of Lamby Way landfill site.
- Current activities and ground conditions on land south of Wentloog Avenue.
- Coastal defence scheme not determined - extent of land protected and the footprint of the defence works are unknown.
- Technical feasibility and environmental acceptability (by NRW) of remodelling green network.

INFRASTRUCTURE

- Easements to overhead lines.
- Underground utilities - location, easements and capacity, including high-speed internet connectivity.
- Generation potential for renewable energy on Wentloog Levels.
- Potential of existing facilities to create district heating network.

DEVELOPMENT SITES

- Future growth and/or relocation plans of existing occupiers and related requirements and desirable enhancements.
- Layout, land use and delivery timescale of Cardiff Parkway. The proposed Cardiff Parkway development (including the new station, park and ride, employment development and access improvements) will anchor the far eastern edge of the East Cardiff zone. This private sector-led development will deliver transformational change and will do much to alter the perception of the area and build a more positive image in the minds of investors and residents alike.

TRANSPORT AND ACCESS

- Delivery timescale of Cardiff Parkway station and related infrastructure improvements.
- Certainty of proposals for light rail on relief lines.

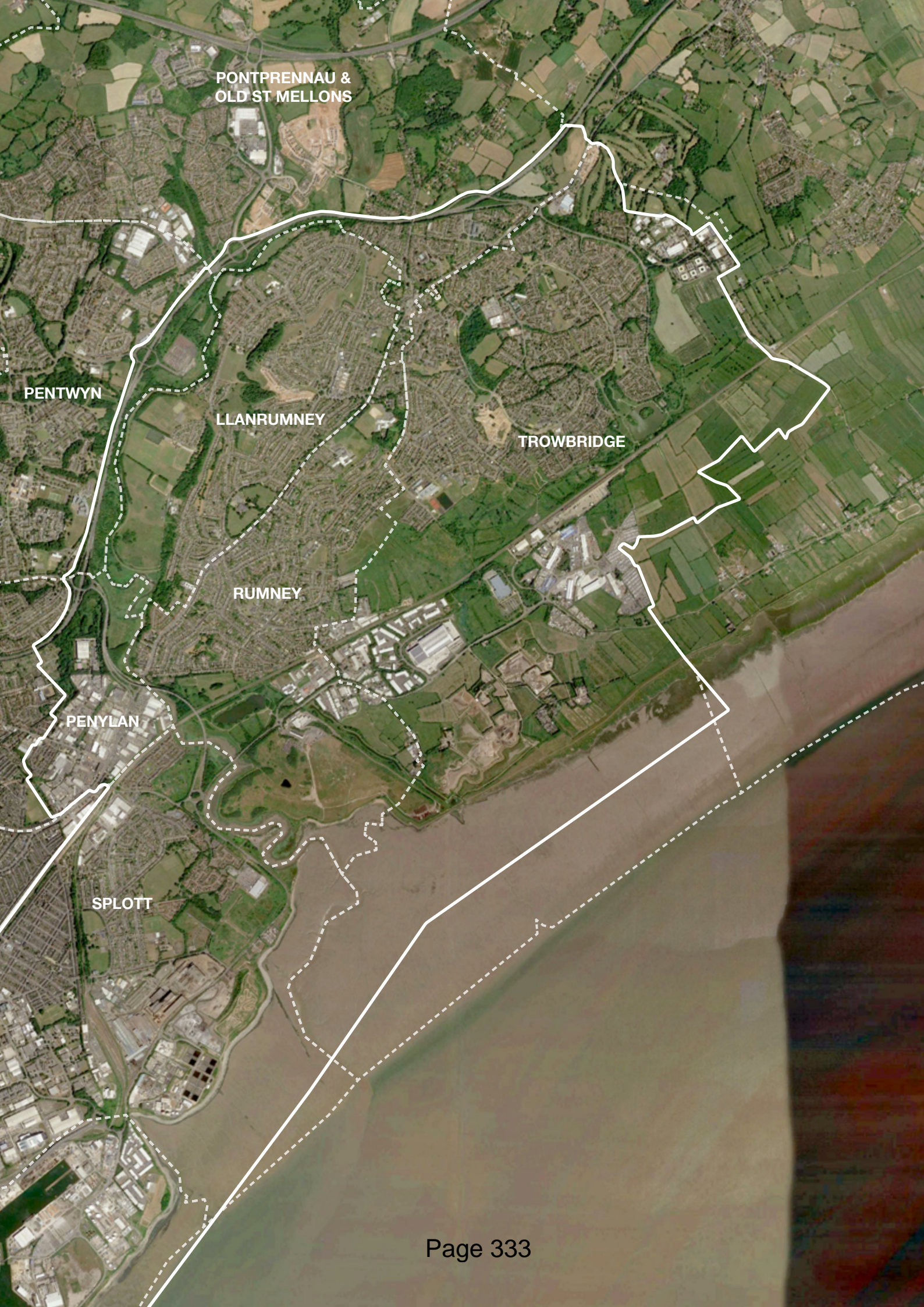
ENVIRONMENTAL

- Ecological and arboricultural value of specific sites.

TRANSPORT AND ACCESSIBILITY

- Traffic surveys, pedestrian counts and public transport user data.
- Current proposals for Eastern Link Road.

Right
19. **CARDIFF EAST - AERIAL
PHOTO**
© Google



PONTPRENNAU &
OLD ST MELLONS

PENTWYN

LLANRUMNEY

TROWBRIDGE

RUMNEY

PENYLAN

SPLOTT

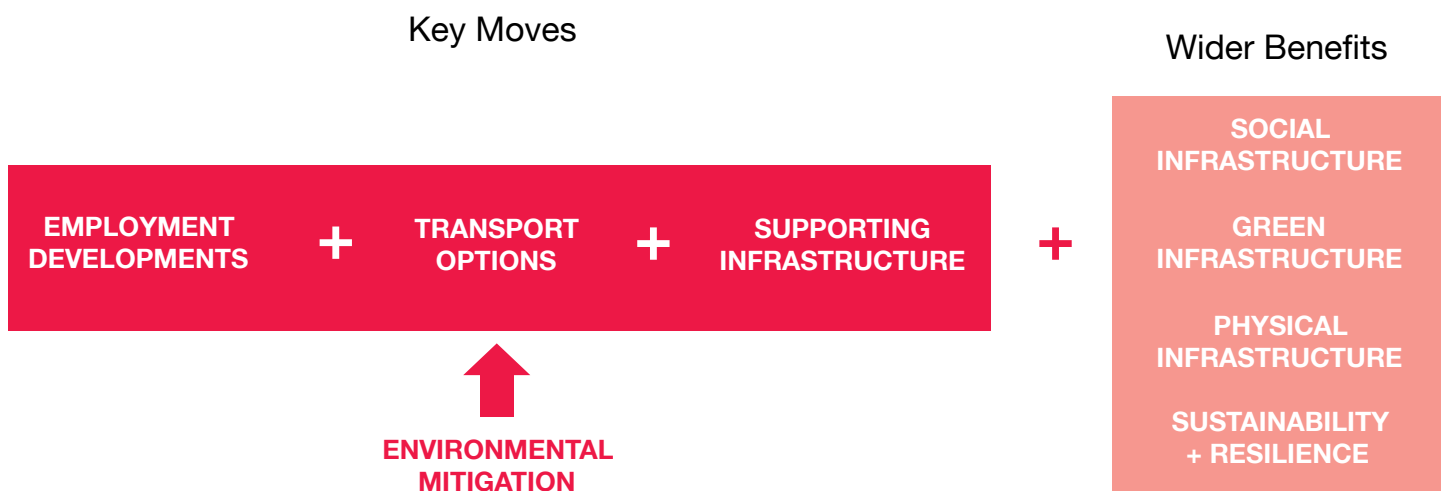
4. TOWARDS A VISION

4.1 Transforming East Cardiff

An integrated and comprehensive approach to all development across the East Cardiff area is essential to ensuring that employment expansion forms a coherent, sustainable and resilient part of the urban and social fabric.

The proposals are expressed as a series of Phases demonstrating a scale of employment growth across East Cardiff. These Phases demonstrate:

- **Key moves**, including:
 - Employment development areas and indicative land uses;
 - Transport and movement improvements; and
 - Essential supporting infrastructure.
- **Wider benefits** (discussed in Section 5), grouped into:
 - Green infrastructure;
 - Wider transport and movement opportunities;
 - Physical infrastructure; and
 - Social-economic infrastructure.





Above

20. **CARDIFF EAST
DEVELOPMENT APPROACH**

4.2 Phases of Growth

The plans in this section show potential Phases for growth of employment development and the required supporting infrastructure.

The Phases focus on key developments and strategic moves required to support employment growth in the area. Wider benefits and inclusive growth are explored in more detail in Section 5.

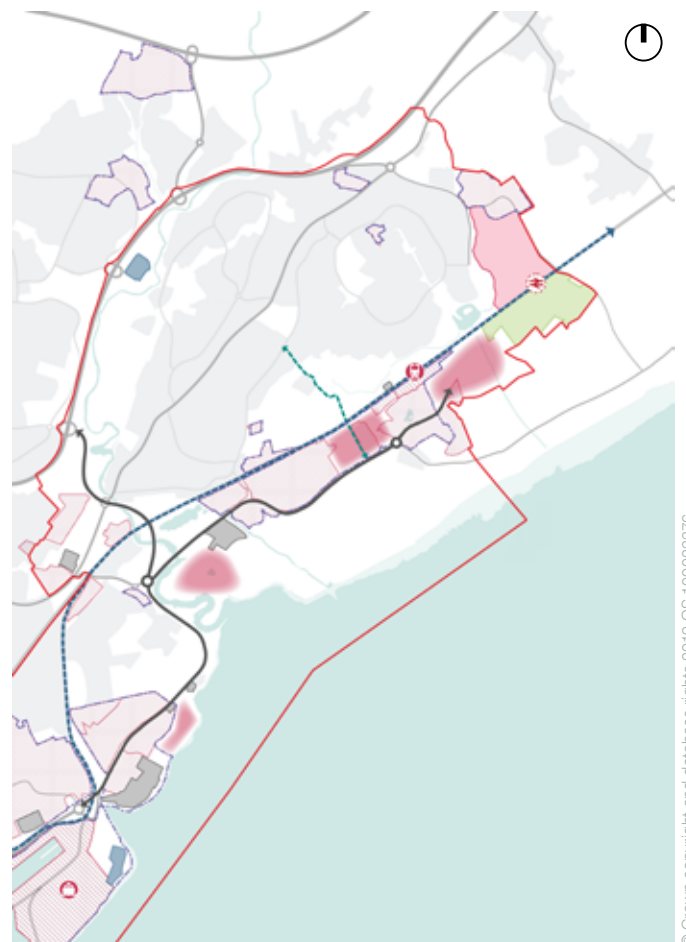
The Phases are presented as high-level concepts and may represent end positions or growth over time. These Phases are subject to feasibility. The Phases are based on the assumption of growth facilitating greater opportunity.

Phases may be developed out in whole or in part, with individual elements borrowed from other Phases. Sites shown are areas of search; plots may include areas of parking, sustainable drainage, flood protection and landscape/public realm and are not intended to represent full plot coverage. Some sites may be required for environmental mitigation; this will be determined following further technical studies. Site development should allow links through to adjacent land to facilitate future growth and redevelopment.

The identified sites have potential for a range of employment and related land uses. Indicative uses have been identified, based on neighbouring activities and prominence within the landscape, positioning smaller B2 uses on the periphery to hide larger B2 and B8 uses, avoiding 'big box' development dominating the new urban edge.

All Phases show development at Cardiff Parkway, the construction of a new mainline railway station and allow for a rapid transit corridor from Cardiff Bay to East Cardiff. This site will act as a major catalyst for regeneration and will form part of a 'dumbbell' approach to regeneration that will see major anchors in Cardiff Bay and Cardiff Parkway bookend the East Cardiff Industrial Strategy.

21. PHASE 1 - FILLING IN THE GAPS

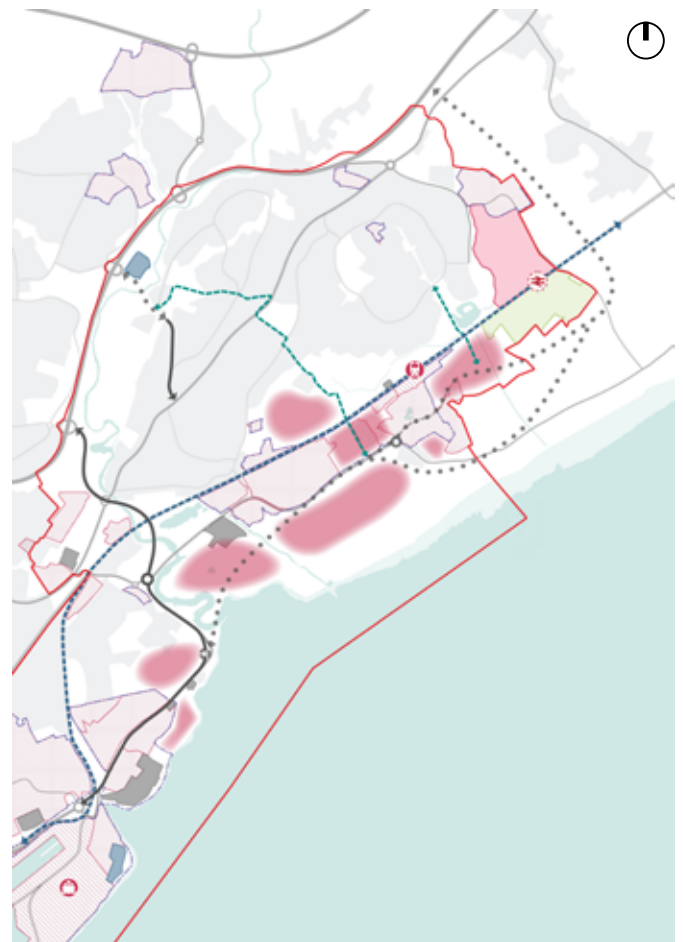
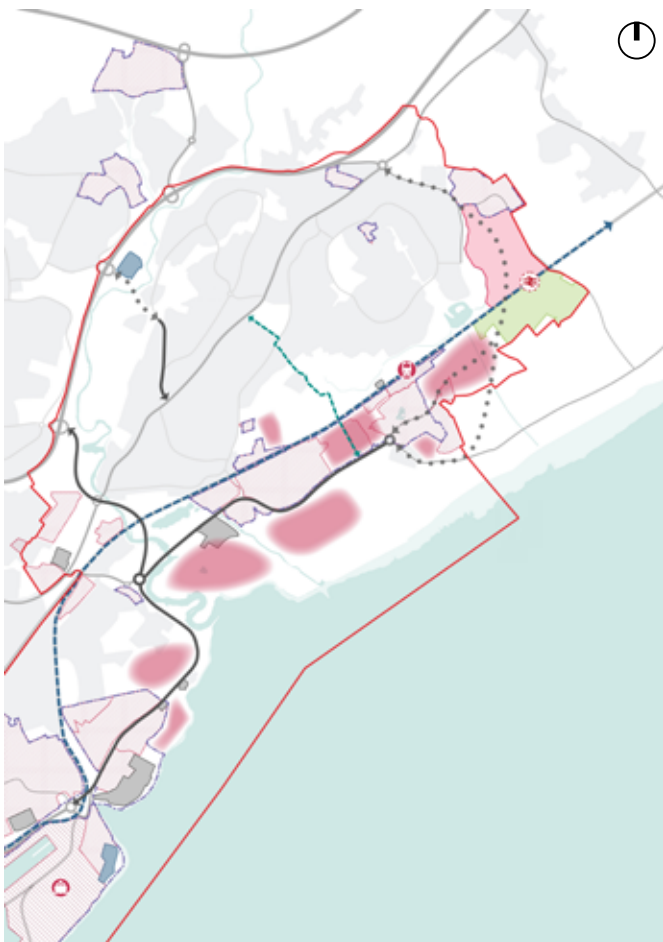


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- Low scale of development: infill between existing employment land and remediation of landfill sites.
- Enhancement of existing highway network.

22. PHASE 2 - EXPANDING TO THE SOUTH

23. PHASE 3 - OPTIMISING THE OPPORTUNITY



- Increased scale of development including land to the south of Wentloog Avenue, land at Pengam Moor and minor development at Trowbridge Mawr.
- Development of new highway links between Rover Way and A48M/A48.

- Development across all available land south of the railway and with land reconfiguration at Trowbridge Mawr.
- Major new highway link between Rover Way and A48M/A48.

Note: These Phases have no status and would be subject to all the necessary approvals and appropriate decisions.

4.3 Phase 1

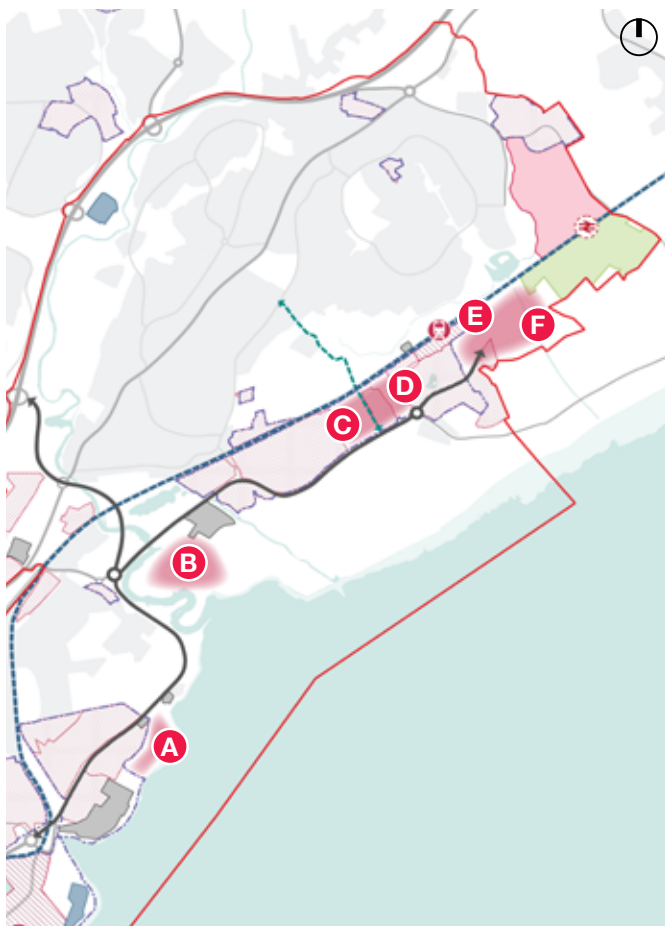
Filling in the gaps - Expanding from Lamby Way to the east

OVERVIEW

Phase 1 builds from the existing development context without releasing large areas of currently open or undeveloped land. The associated improvements to movement and accessibility are restricted to existing corridors. It also opens up opportunities to begin the development of east Cardiff from Lamby Way moving eastwards.

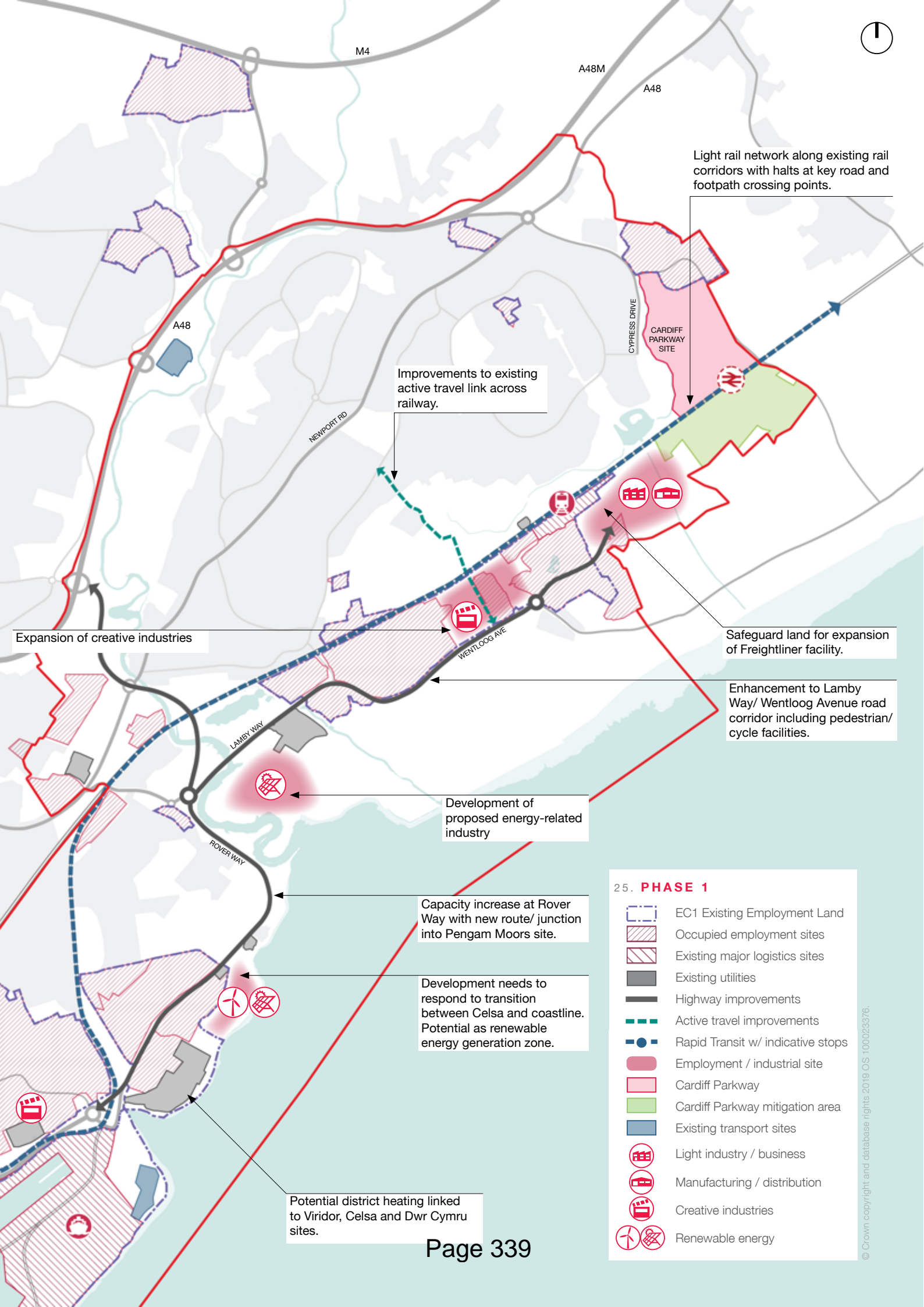
KEY MOVES

- Infill gaps within existing EC1 Existing Employment Land designated areas, notably at Wentloog Avenue/Lamby Way. Potential for a mix of employment uses including expansion of creative industries, building on Badwolf Studios.
- Opportunities for renewable energy generation on the historic landfill and frag tip sites, in line with the recently approved planning application for 32,000 panels at Lamby Way.
- Scope for remodelling existing employment areas with consideration of potential for remodelled/replacement units, parking areas and localised public realm/landscape enhancements, including consideration of sustainable drainage and biodiversity enhancements.
- Enhancements to existing highway corridors including increased road capacity and flow, improved pedestrian and cycle facilities (where appropriate), and public realm and wayfinding enhancements. Enhancements to the Rover Way route have potential to take traffic off the western end of Newport Road and reduce rat-running in the Splott and Tremorfa residential areas.
- New and enhanced pedestrian and cycle links between residential and employment areas, including alignment, route width, surfaces, lighting and wayfinding. The key route is the Trowbridge Road/ railway overbridge route which requires enhancement, promotion and realignment south of the railway.



Plot	Area (Hectares)
A	15 ha
B	29 ha
C	12 ha
D	8 ha
E	9 ha
F	36 ha

Sites shown are areas of search and approximate areas. Plots may include areas of parking, sustainable drainage, flood protection and landscape/public realm and are not intended to represent full plot coverage.



Light rail network along existing rail corridors with halts at key road and footpath crossing points.

Improvements to existing active travel link across railway.

Expansion of creative industries

Safeguard land for expansion of Freightliner facility.

Enhancement to Lambby Way/ Wentloog Avenue road corridor including pedestrian/ cycle facilities.

Development of proposed energy-related industry

Capacity increase at Rover Way with new route/ junction into Pengam Moors site.

Development needs to respond to transition between Celsa and coastline. Potential as renewable energy generation zone.

Potential district heating linked to Viridor, Celsa and Dwr Cymru sites.

25. PHASE 1

- EC1 Existing Employment Land
- Occupied employment sites
- Existing major logistics sites
- Existing utilities
- Highway improvements
- Active travel improvements
- Rapid Transit w/ indicative stops
- Employment / industrial site
- Cardiff Parkway
- Cardiff Parkway mitigation area
- Existing transport sites
- Light industry / business
- Manufacturing / distribution
- Creative industries
- Renewable energy

4.4 Phase 2

Expanding to the south

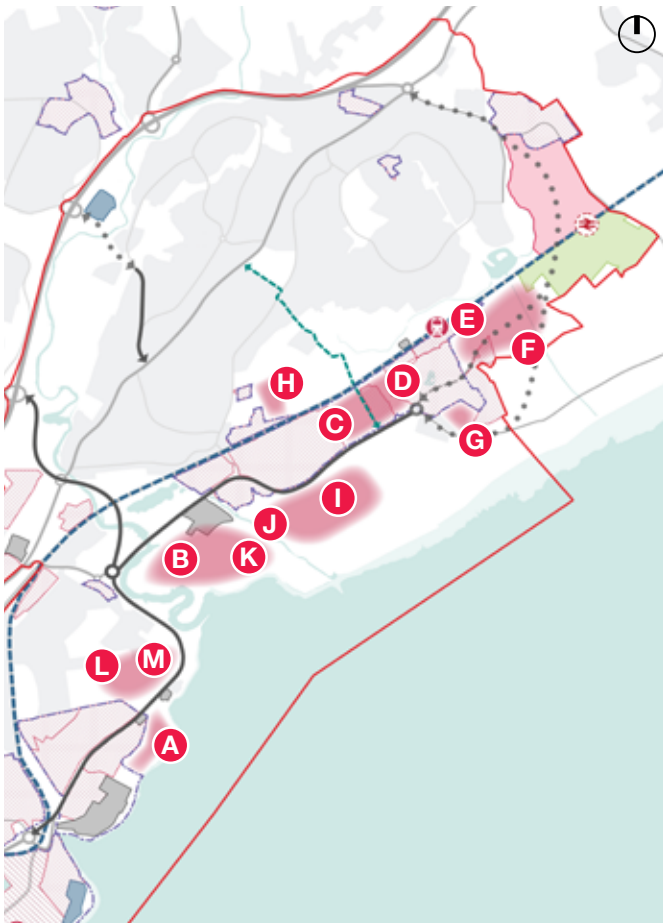
OVERVIEW

Phase 2 sees expansion into undeveloped land adjacent to existing employment areas. This expansion is supported by new highway links that improve access to work while improving potential of the land for B8 uses and expansion of operations at Freightliner.

KEY MOVES

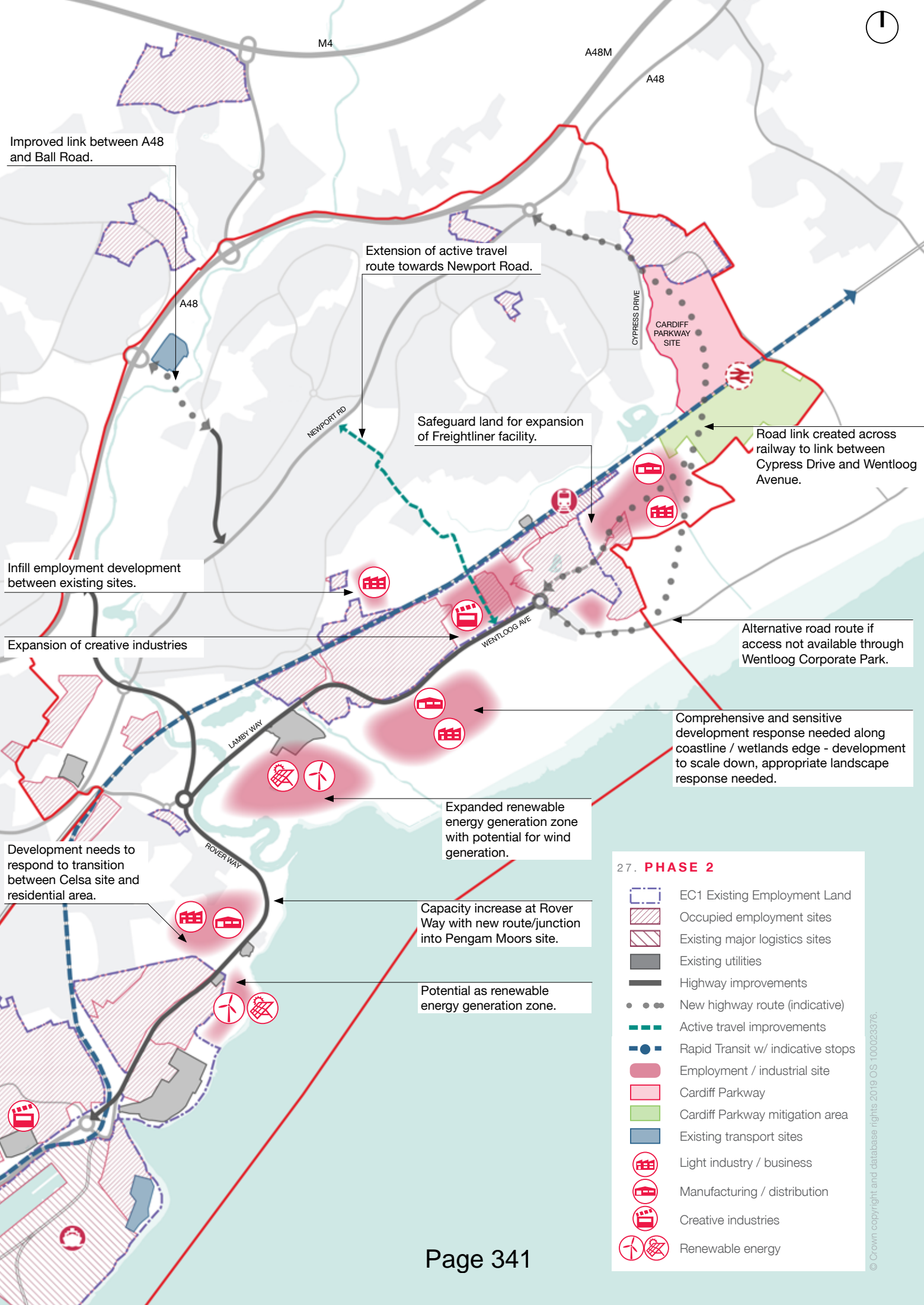
As Phase 1, plus:

- Development parcels opened up to the south of Lamby Way/Wentloog Avenue, extending (to a maximum) as far south as the existing overhead powerlines.
- Minor development at Trowbridge Mawr between existing employment sites. Development at Pengam Moor, transitioning from the Celsa site and existing employment edge towards existing residential areas.
- Creation of new highway link with the potential to relieve pressure on Newport Road and reduce rat-running in residential areas. Alignment and junctions will be subject to further feasibility and dependent on proposals for Cardiff Parkway.
- New highway link from A48 to Ball Road, improving regional connectivity to Cardiff East and local routes to Cardiff Gate and residential areas.
- Continuation of Trowbridge Road active travel corridor towards Newport Road.



Plot	Area (Hectares)
A	15 ha
B	29 ha
C	12 ha
D	8 ha
E	9 ha
F	36 ha
G	8 ha
H	7 ha
I	40 ha
J	16 ha
K	24 ha
L	7 ha
M	17 ha

Sites shown are areas of search and approximate areas. Plots may include areas of parking, sustainable drainage, flood protection and landscape/public realm and are not intended to represent full plot coverage.



Improved link between A48 and Ball Road.

Extension of active travel route towards Newport Road.

Safeguard land for expansion of Freightliner facility.

Road link created across railway to link between Cypress Drive and Wentloog Avenue.

Infill employment development between existing sites.

Expansion of creative industries

Alternative road route if access not available through Wentloog Corporate Park.

Comprehensive and sensitive development response needed along coastline / wetlands edge - development to scale down, appropriate landscape response needed.

Expanded renewable energy generation zone with potential for wind generation.

Development needs to respond to transition between Celsa site and residential area.

Capacity increase at Rover Way with new route/junction into Pengam Moors site.

Potential as renewable energy generation zone.

27. PHASE 2

- EC1 Existing Employment Land
- Occupied employment sites
- Existing major logistics sites
- Existing utilities
- Highway improvements
- New highway route (indicative)
- Active travel improvements
- Rapid Transit w/ indicative stops
- Employment / industrial site
- Cardiff Parkway
- Cardiff Parkway mitigation area
- Existing transport sites
- Light industry / business
- Manufacturing / distribution
- Creative industries
- Renewable energy

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4.5 Phase 3

Optimising the opportunity

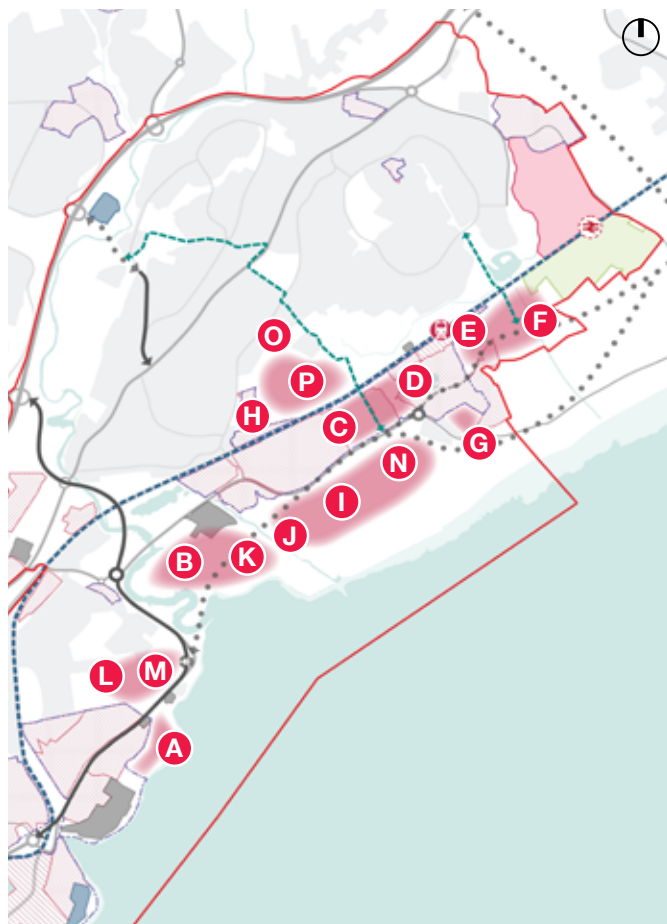
OVERVIEW

Phase 3 maximises the development opportunity at Cardiff East, balanced against the sensitive ecological and landscape context and residential amenity.

KEY MOVES

As Phase 1 and 2, plus:

- Additional development parcels opened up to the south of Lamby Way / Wentloog Avenue, extending (to a maximum) as far south as the existing overhead powerlines.
- Significant infill development at western Trowbridge Mawr on undeveloped land with wider potential for comprehensive development including relocation/redesign of the existing recreation space (11ha).
- Major road link created between A48M/A48 and Rover Way with the potential for increased highway capacity with greater benefits along existing highway corridors.
- Continuation of Trowbridge Road active travel corridor towards Ball Road and Rhymney River corridor. New active travel link across the railway at Hendre Park Lake.



Plot	Area (Hectares)
A	15 ha
B	29 ha
C	12 ha
D	8 ha
E	9 ha
F	36 ha
G	8 ha
H	7 ha
I	40 ha
J	16 ha
K	24 ha
L	7 ha
M	17 ha
N	29 ha
O	11 ha
P	29 ha

Sites shown are areas of search and approximate areas. Plots may include areas of parking, sustainable drainage, flood protection and landscape/public realm and are not intended to represent full plot coverage.



Improved link between A48 and Ball Road.

Major road link east of Cardiff Parkway linking from A48M/A48 to Wentloog Avenue - alignment and connection TBC.

Complete active travel route from Wentloog Avenue to Ball Road.

Comprehensive development across Trowbridge Mawr - sensitive response needed to adjacent housing and school and recreation space.

New active travel link across railway to Hendre Park Lake.

Alternative road routes - dependent on availability of access through Wentloog Corporate Park.

Comprehensive and sensitive development response needed along coastline / wetlands edge - development to scale down, appropriate landscape response needed.

Expanded renewable energy generation zone with potential for wind generation.

Development needs to respond to transition between Celsa site and residential area.

Direct highway link between Rover Way and Wentloog Avenue to bypass Lamby Way and existing junctions and improve pedestrian/cycle connectivity.

Capacity increase at Rover Way with new junction into Pengam Moors site.

Potential as renewable energy generation zone.

29. PHASE 3

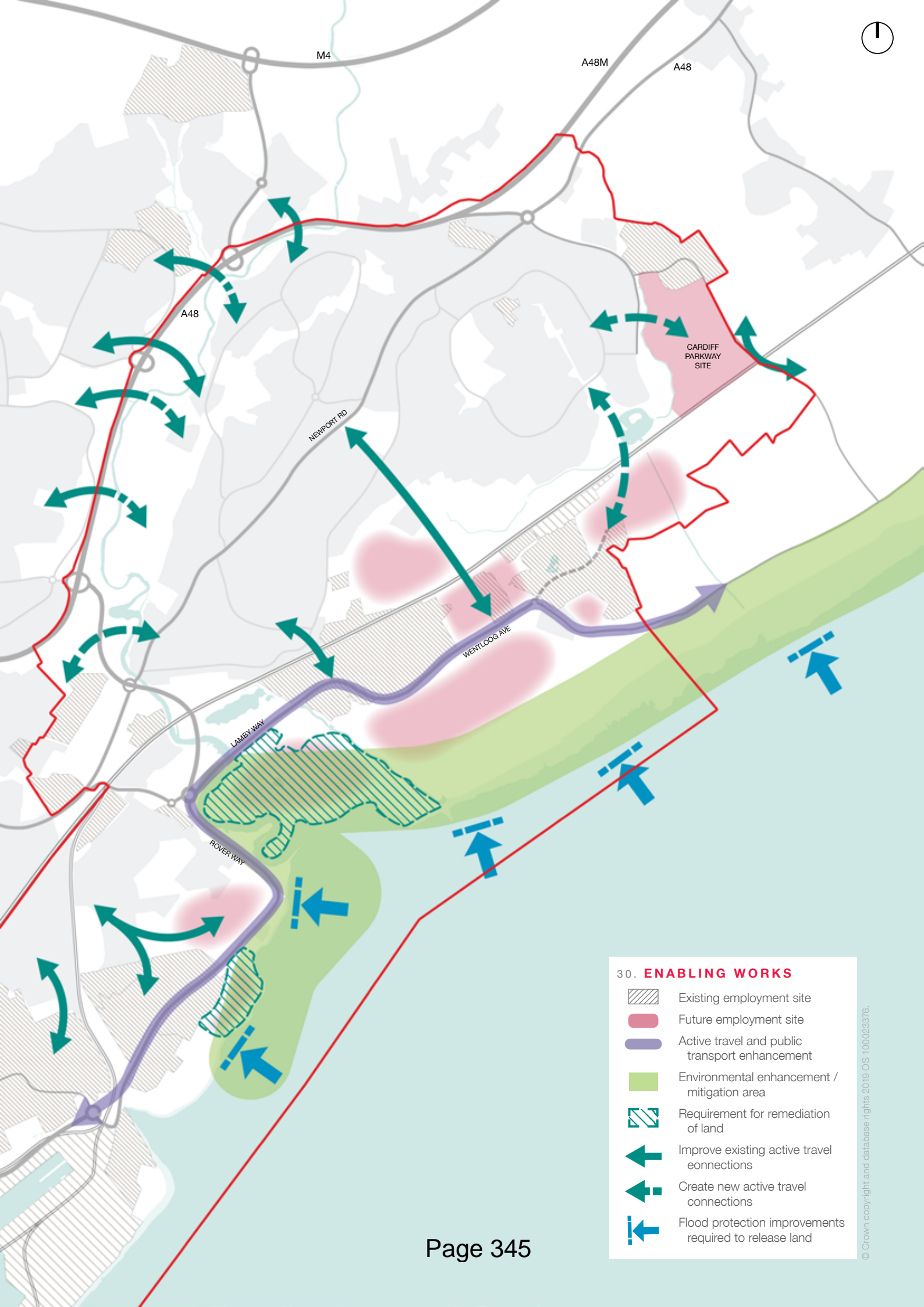
- EC1 Existing Employment Land
- Occupied employment sites
- Existing major logistics sites
- Existing utilities
- Highway improvements
- New highway route (indicative)
- Active travel improvements
- Rapid Transit w/ indicative stops
- Employment / industrial site
- Cardiff Parkway
- Cardiff Parkway mitigation area
- Existing transport sites
- Light industry / business
- Manufacturing / distribution
- Creative industries
- Renewable energy

4.6 Supporting infrastructure

OVERVIEW

Expansion of employment development at Cardiff East requires enhancements to existing road and utility infrastructure balanced against preservation of the area's valuable natural landscape.

- Environmental enhancement, habitat creation and biodiversity mitigation areas required to offset any loss of habitat and water retention areas caused by development. These could be further enhanced beyond minimum requirements, to provide leisure and recreation benefits and a net gain in biodiversity (discussed in section 5.1).
- Flood protection works are required to protect existing developed areas and release more land for development. Cardiff Council have commissioned a detailed design and full business case study of coastal and fluvial defences in the Rover Way and Lamby Way area.
- Active travel and public transport improvements required along the Rover Way/Lamby Way/Wentloog Avenue corridor to provide safe and sustainable access (current NAT bus route 10 weekday peak times only). This should be considered as an inherent part of the identified highway improvements and potential for environmental enhancement.
- Enhanced active travel links are required to facilitate inter- and intra-area travel, particularly facilitating commuting. Improvements are needed to the legibility and quality of existing routes and there may be a need for additional routes across the railway and River Rhymney. A new wayfinding system is required to support recreational and more purposeful active travel journeys.
- Remediation works may be required to facilitate development on the Lamby Way historic landfill site and the Rover Way frag tip. Extent and form of works will be dependent on the proposed land uses.
- Amendment and capacity increase to the existing utilities network, including provision of high-speed broadband to all existing and proposed employment areas.



30. ENABLING WORKS

-  Existing employment site
-  Future employment site
-  Active travel and public transport enhancement
-  Environmental enhancement / mitigation area
-  Requirement for remediation of land
-  Improve existing active travel connections
-  Create new active travel connections
-  Flood protection improvements required to release land

5. DELIVERING WIDER CITY BENEFITS

31. POTENTIAL WIDER ENHANCEMENTS



Employment development in a strong landscape setting (left: Blythe Valley Park; right: Chiswick Park)



© Hufton+Crow

left: Chiswick Park; right: Express Park, Bridgwater



Photo by Austin Distel on Unsplash

Sustainable and contemporary workplace construction

Green corridors with recreation and biodiversity enhancements

© Stig Nygaard via Flickr



Recreation and tourism potential along the river and coast (Forest Tower, Denmark)



Renewable energy generation

© Juwi Renewable Energies Limited



Energy generation - stand-alone and linked to employment development (right: Baglan Solar Energy Centre)

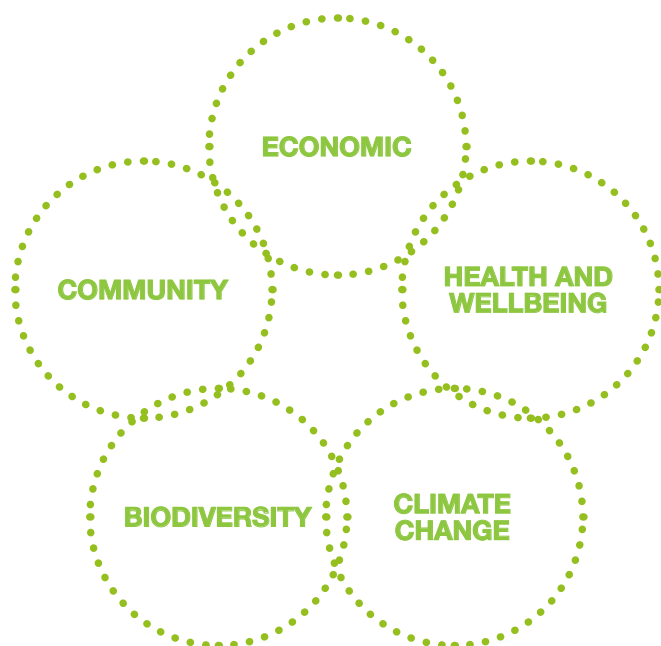
5.1 Green infrastructure

Enhanced green infrastructure has significant potential to bring widespread benefits to Cardiff East, in line with both the Wellbeing of Future Generations Act and the Cardiff Well-Being Plan. This includes direct and indirect economic benefits, supporting the aims of the Cardiff Economic Strategy.

There is an opportunity for a significant enhancement to green infrastructure in the Cardiff East area, linking from the estuary coastline to the man-made Wentloog Levels through to Rumney hill, the River Rhymney valley and the wooded ridgeline of hills behind the city.

The existing urban edge is of a limited quality and could be significantly enhanced in how it interfaces between residential, industrial and employment areas and the wider landscape. There are few green corridors that link across north-south or east-west through the Llanrumney/Rumney/Trowbridge/St Mellons residential area.

Access to the characteristic Wentloog Levels landscape is limited by a lack of public rights of way. The reenscape could be used as a structuring element for future development and movement networks.



3.2. GREEN INFRASTRUCTURE BENEFITS

Green infrastructure enhancement of this area could include:

- Enhancements to the coastal regions to create a ‘Cardiff Coastal Greenway’; a major new amenity and habitat resource for the city with increased public access to the Wales Coastal Path and improvements to amenity, alongside ecological enhancements and historic interpretation for the Rumney Great Wharf.
- Habitat creation and habitat connectivity, linking across urban areas and increasing biodiversity.
- Enhanced provision of publicly accessible spaces and routes, including formal and informal spaces, all linked into an improved Wales Coastal Path and Rhymney Trail and connections across the railway to residential areas.
- New public park at Trowbridge Mawr including biodiversity and amenity enhancements, and linking to Hendre Lake..
- Improved vegetation buffers around existing and new employment areas to reduce visual impact and improve the working environment for employees.
- Improvements to the urban edge to improve transition to green and rural spaces - could include sustainable drainage works, wildflower corridors, reinstatement of hedgerows or woodland, and waterspaces with public amenity.
- Enhancement of existing monoculture greenspaces to improve amenity, biodiversity and water management.
- Sensitive ‘green’ use of roofscape to introduce new habitat.
- Facilitation of water-based activities on the Rhymney River including access improvements and provision of moorings and pontoons. Allowance made for continued operation at Rhymney River Club.



Enhancements to the Rhyrne River Corridor: improved access along and across the river, improved drainage of playing fields.

Opportunity for new public park at Trowbridge Mawr.

Improvements to the urban edge including screening planting, boundary treatment improvements, sustainable drainage features.

Enhancements to existing reer corridors with aligned active travel routes.

Major new public space 'greenway' along the Wentlog Levels coastline.

Continued operation and potential expansion of Rhyrne River Club and facilitation of other water-based activities, including provision of pontoons.

Enhancement to Splott Beach area with increased public access and amenity alongside ecological enhancements.

Enhancement to Port of Cardiff coastal edge to provide a habitat corridor.

33. GREEN INFRASTRUCTURE

-  Existing employment site
-  Future employment site
-  Green corridors
-  Urban edge enhancements
-  Habitat creation / restoration
-  Leisure & recreation opportunities
-  Coastal access
-  New/improved active travel routes
-  Heritage interpretation
-  Water-based activity

5.2 Transport and movement

OVERVIEW

While basic multi-modal enhancements are required to support expanded economic development at Cardiff East, there is substantial scope to expand on this to widen the social and environmental benefits and deliver an inclusive 21st Century approach to movement and accessibility. This should emphasise active travel (walking and cycling) as a priority to support healthy and sustainable lifestyles and allow low-cost travel.

HIGHWAY IMPROVEMENTS

A combination of highway network improvements and Metro connectivity allows a decrease of rat-running traffic in heavily-populated areas and along Newport Road. This frees up space in the existing road corridor for a number of aesthetic and functional interventions including:

- Increase of walking and cycle provision, including Cycle Superhighway connectivity and increased provision of crossing facilities;
- Improved bus network including potential Bus Rapid Transit;
- Public realm enhancements, including SUDS provision and street greening alongside street reconfiguration and traffic management measurements.

In some areas, enhancements may be focused along primary road corridors. In areas such as Splott and Tremorfa where there is a wider spread of through-traffic there is potential for more widespread area enhancements.

Traffic management measures should be implemented concurrently with the highway improvements to take full advantage of habit-forming opportunities.

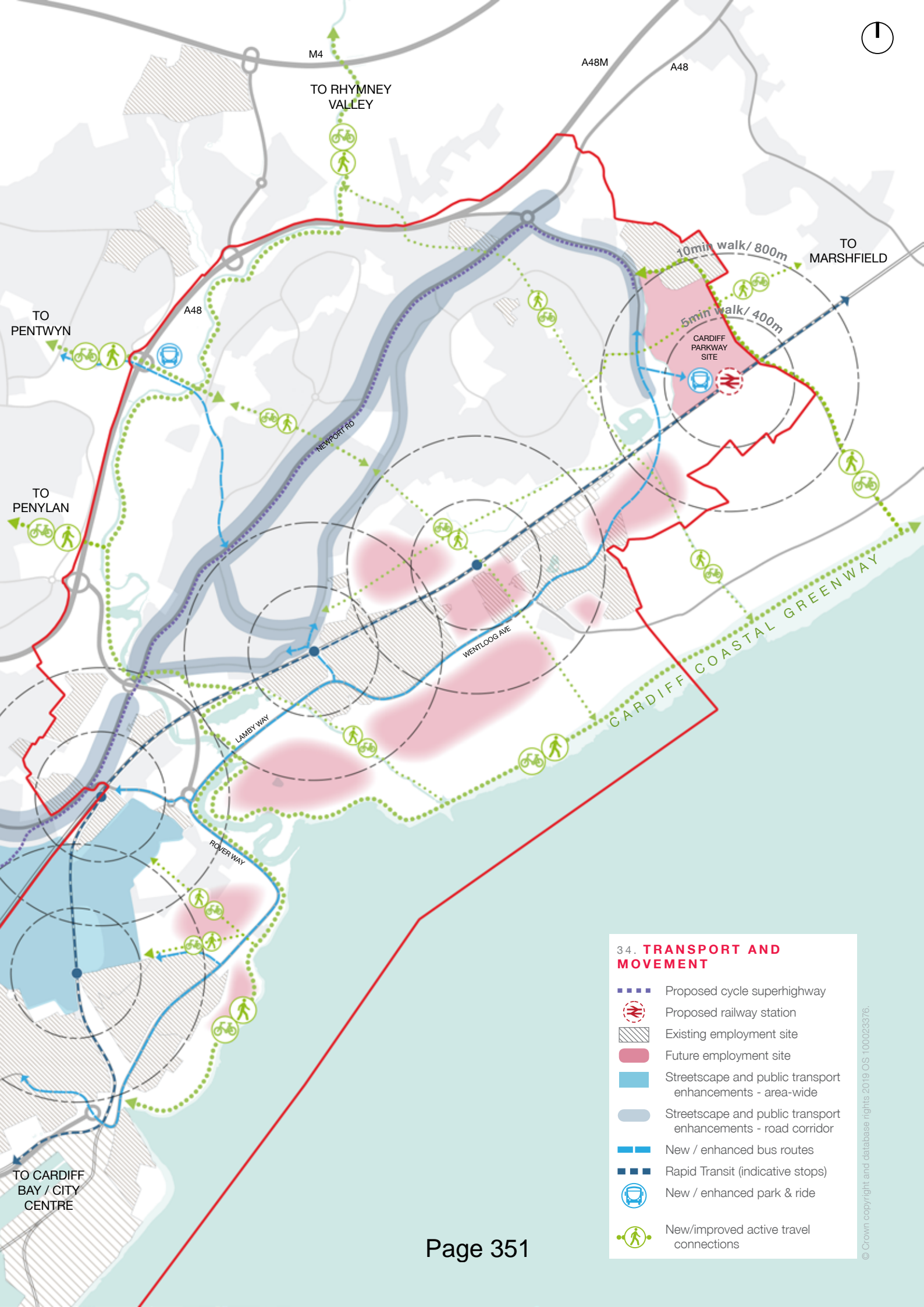
Parking standards should be reviewed to ensure sufficient but sustainable levels are provided. Charging infrastructure for electric vehicles may also be included within new and refurbished sites, facilitating use of electric private vehicles, fleets and logistics.

ACTIVE TRAVEL

- Improvements to the Wales Coastal Path, particularly resurfacing to improve route accessibility for all users.
- Construction of the proposed Cycle Superhighway C2 from the City Centre to St Mellons Business Park, with improvements to linking routes. Support for further roll-out of NextBike cycle hire.
- Enhanced active travel connections between the Lamby Way/Wentloog Avenue industrial estates, the Wales Coastal Path and residential areas, particularly existing connections across the railway from New Road, Trowbridge Road and Heol Las.
- Improved continuity of routes along and across the River Rhymney valley linking to Penylan, Llanedeyrn, Pentwyn and Pontprennau, forming recreation loops and commuter links.
- Enhanced routes and legibility across the existing urban area, particularly towards Lamby Way/Wentloog Avenue and Rover Way, the proposed Cardiff Parkway station and any future Metro stops.
- Area-wide wayfinding system linking homes, employment and local services, directing towards public transport and encouraging access to the coastal and river corridors.

PUBLIC TRANSPORT

- Development of public transport hubs connecting into any Rapid Transit links along the railway (stops shown are indicative only).
- New or re-routed bus services to Rover Way, Lamby Way and Wentloog Avenue areas, potentially connecting towards Cardiff Parkway station. Re-routing of existing St Mellons bus services towards Cardiff Parkway station.
- New or re-routed bus services between Llanedeyrn/Pentwyn and Llanrumney, using proposed Ball Road/A48 connection and connecting to Cardiff East Park and Ride.



34. TRANSPORT AND MOVEMENT

-  Proposed cycle superhighway
-  Proposed railway station
-  Existing employment site
-  Future employment site
-  Streetscape and public transport enhancements - area-wide
-  Streetscape and public transport enhancements - road corridor
-  New / enhanced bus routes
-  Rapid Transit (indicative stops)
-  New / enhanced park & ride
-  New/improved active travel connections

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5.3 Socio-economic

Given the current high levels of deprivation and socio-economic issues across eastern Cardiff, there is significant need to widen the influence of the economic strategy and bring wider societal changes. Investment can benefit those living in and visiting the area as well as those employed there, supporting a circular economy and bringing greater long-term resilience.

Specific socio-economic improvements could include:

- Stronger links between education providers, community hubs/learning centres and employers to build skills in the future workforce, building on the Cardiff Commitment.
- New and improved cross-area active travel links allowing access to work and skills development and linking staff to social infrastructure, open space and local retail facilities, supporting the local economy. Links may double as recreational routes and safe routes to schools.
- Strong public transport hubs created on key routes towards employment and city centre destinations.
- Development of a strong green infrastructure network that provides a strong setting for employment sites and supports employee wellbeing.

Other non-spatial enhancements may include:

- Addressing barriers to employment including support for on-site and locally-based childcare services, allowing greater access to work and flexible working options.
- Diversification of housing type and tenure with continued minor infill development, supporting a more mixed and balanced community.

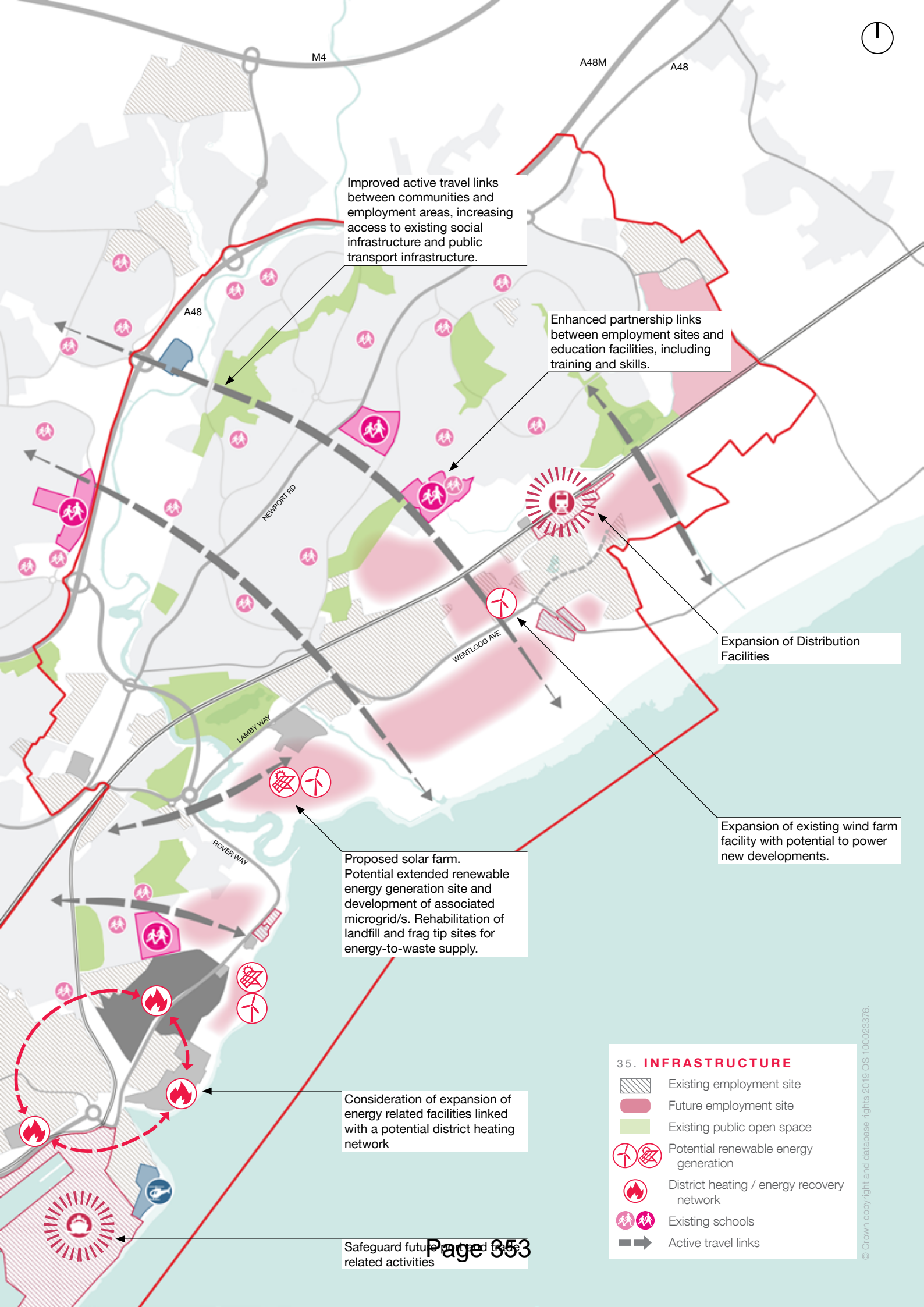
5.4 Physical infrastructure

There is significant scope to work with existing and future developments to support and supply the city's infrastructure networks, beyond its immediate needs.

The proposed solar farm at Lamby Way has potential to generate an average of 8.99 megawatts a year, powering around 2,900 homes.

Improvements could include:

- Potential district heating network to recover heat from existing and proposed industrial sites including Viridor, Celsa and Dwr Cymru sites.
- Development of a 'microgrid' linked to renewable energy installations, including potential expansion of the existing wind turbine operations at Pinewood Wales.



Improved active travel links between communities and employment areas, increasing access to existing social infrastructure and public transport infrastructure.

Enhanced partnership links between employment sites and education facilities, including training and skills.

Expansion of Distribution Facilities

Expansion of existing wind farm facility with potential to power new developments.

Proposed solar farm. Potential extended renewable energy generation site and development of associated microgrid/s. Rehabilitation of landfill and frag tip sites for energy-to-waste supply.

Consideration of expansion of energy related facilities linked with a potential district heating network

Safeguard future transport and related activities

35. INFRASTRUCTURE

- Existing employment site
- Future employment site
- Existing public open space
- Potential renewable energy generation
- District heating / energy recovery network
- Existing schools
- Active travel links

6. KEY CONCLUSIONS AND RECOMMENDATIONS

6.1 Conclusions

The opportunity exists to shape and deliver a new vision and Area Action Plan for East Cardiff. This vision should reflect an integrated approach that not only delivers the objectives of the council's economic strategy but wider community and environmental benefits as well. It is a fact that the communities of south Cardiff have the highest levels of deprivation in the city. It is recognised that estate renewal projects are underway and that the housing stock is being gradually improved and that investment has been made in new schools and leisure facilities. There is still work to be done. The approach advocated would help to accelerate and expand delivery of such projects, identify and link different sources of funding and crucially deliver different benefits on the ground.

The vision should be anchored by a co-ordinating spatial plan that communicates the scale and extent of potential growth areas, the need for improved connectivity (both East – West to the Bay and city centre and North – South to the waterside) and investment in transport and green infrastructure.

Linking community areas with the Severn Estuary foreshore and a new Cardiff Coastal Greenway will improve access to employment, support active travel and deliver health and wellbeing benefits. It would also create a city-scale resource and attraction for visitors. The Gwent Levels are a sensitive landscape but also represent a major opportunity to link Cardiff with its wider waterfront.

KEY MOVES

1. A coordinated approach to development is required to develop a balanced and sustainable community and maximise benefits, both for business and for other stakeholders.
2. Significant multi-modal improvements are needed to the movement infrastructure to facilitate access to work, access to services and movement of goods.
3. Previously developed land has potential for sustainable reuse, particularly for renewable energy generation.
4. The natural setting of Cardiff East is a vastly underused resource which could bring major benefits to the area and wider city region. Improving access to the coastline should be a priority move, creating a Cardiff Coastal Greenway.
5. Non-spatial policies should be developed to support the physical growth and change, including further coordination of workplaces with education and skills providers.
6. In developing an Area Action Plan, early engagement should take place with key partners, stakeholders and statutory bodies.

36. POTENTIAL WIDER ENHANCEMENTS - GREEN INFRASTRUCTURE AND ENVIRONMENT



Improvements to the streetscape and urban edge to increase biodiversity and resilience (left: Greener Grangetown).



Improved public access to open spaces with opportunity for new parks and Coastal Greenway.

Green walls and facade treatments

6.2 Potential policy levers

Given the potential for the area to support economic, social and environmental improvements consideration should also be given to exploring potential policy levers to support the development of the area.

TAX INCREMENT FINANCE

Much of the area covered would provide a ‘blank canvas’ for development that is ideally suited to the use of Tax Increment Finance. This is particularly pertinent given the need for infrastructure investment to unlock the full potential of the area. Consideration should be given to the use of Tax Increment Finance to unlock the potential of the area.

SPECIAL ECONOMIC ZONES

There is also the scope to explore potential post-Brexit trade levers, including the development of clearly defined free-trade zones that focus on adding value to products rather than simply acting as a tax free zone. Such an approach may be useful for sectors where there are opportunities to become part of a global supply chain, and especially in those areas where Cardiff and South East Wales have competitive strengths. Given the relatively blank canvas of the area there are opportunities to explore innovative policy solutions to mitigate both the impact of Brexit as well as exploit any potential means of exploiting trade flexibilities.

37. POTENTIAL WIDER ENHANCEMENTS - ACCESS AND MOVEMENT

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Enhanced active travel network aligned to green corridors



Wayfinding improvements.



Active travel enhancements with additional bridge links (right: Smart Way bridge)



6.3 Recommendations and Next Steps

APPROACH

The next stage of work should be shaped by cross-disciplinary working to ensure that it takes into account the extensive development context and optimises the wider benefits. It is recommended that a Cardiff Council officer working party is established across disciplines to create the brief for the next stage of work.

A masterplanning framework could be developed which draws from technical studies and informs a suite of strategies. This should be reviewed on a regular basis as part of a multi-disciplinary feedback process. The status of the document should be considered, with potential to formalise this through the planning process.

The framework should be accompanied by a delivery strategy and programme which considers land assembly and acquisitions, Phased delivery, funding, and develops a business case for public sector investment (including public transport, highway and infrastructure improvements).

Stakeholder engagement should be embedded in the process, beginning with identification of an engagement strategy. This should include representatives from land owners, operators and developers, transportation and infrastructure, as well as community representatives.

FURTHER STUDIES AND STRATEGIES

A series of technical studies and supporting strategies are required to support future development:

- **Employment strategy:** Work required to identify the scale and nature of employment space demand across the city and at Cardiff East. This should consider inclusive growth, related to the Wellbeing of Future Generations Act, and identify how to attract a mix of higher-value jobs and skills. It may also include the nature of existing employment and the evolution of this, including potential for change within existing employment areas and challenge the assumed scale of growth. The strategy should identify barriers to growth and essential interventions.
- **Digital strategy:** Providing information through the design, build, operate and maintain stages, with potential to develop a 'digital twin' for Cardiff East. The strategy should identify digital infrastructure requirements including fibre optic broadband and 5G connectivity. Other aspects may include digital economies, skills and open data sharing.
- **Transport and movement strategy:** Linked to the Transport White Paper, an area-focused study is required to identify multi-modal improvements to the existing movement network. This should include connectivity modelling and aim to optimise frequency and quality of cross-area active travel and enhancing public transport services, bearing in mind the Transport and Clean Air White Paper, the proposed Cardiff Parkway railway station and interchange, and the emerging proposals for the South Wales Metro. Detailed feasibility work is required to confirm the suitability of the proposals identified in this report. The work should address parking standards.
- **Landscape capacity assessment:** Assessment required to identify scope for new development within the existing landscape, with particular focus on location, scale and extent of larger employment developments and renewable energy sites. Assessment should also take into account potential to enhance existing developed areas.

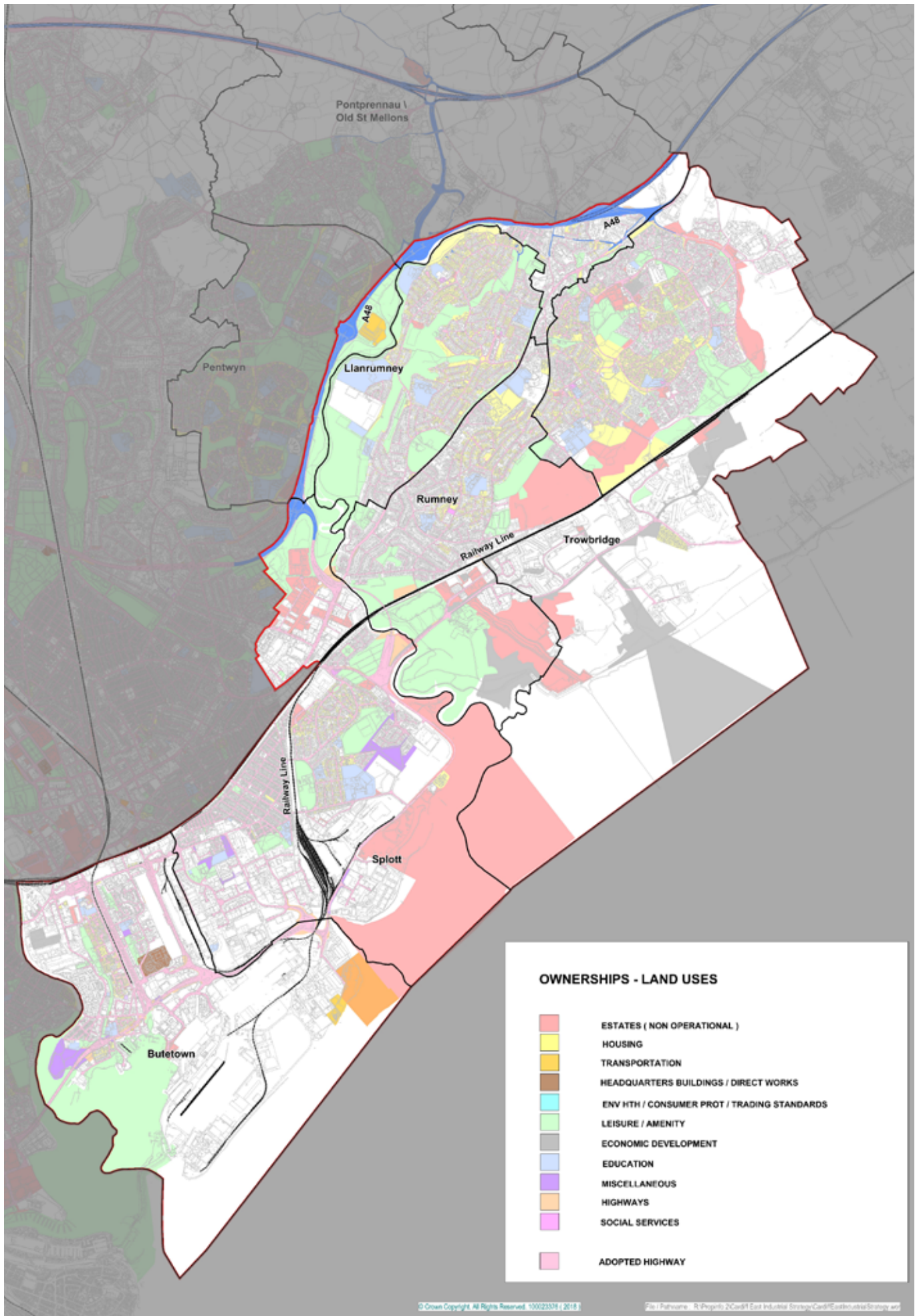
- **Green and blue infrastructure strategy:** Development required to address the special landscape and ecological context of the Wentloog Levels and look for opportunities to enhance ecological and recreational amenity. A combined approach is required taking into account ecology and biodiversity, surface water management, roofscapes, flood protection, landscape enhancement and visual mitigation, looking at existing and proposed development areas and open space areas. Work to require close liaison and collaboration with Natural Resources Wales and scoping for an Environment Statement.
- **Energy and infrastructure strategy:** Including proposed solar farm at Lamby Way, scope for expansion of the existing Viridor Energy Recovery Facility and new area-wide heat and/or energy networks, further renewable energy generation (particularly related to former landfill and frag tip sites, subject to environmental studies), links to existing heat sources, and identifying existing network capacity and service locations.
- **Design guide:** Providing area-specific design criteria for new and renovated developments including sustainable and resilient construction, visually-appropriate architecture, site layout, parking and cycle storage, access requirements and landscape approach.
- **Public realm strategy:** Opportunity to identify public realm and streetscape enhancements across employment and residential areas, linked to the transport and movement study to focus improvements on key corridors. The study could consider temporary and short-term works and consider how investment can be optimised to bring the greatest social, environmental and economic benefits to the area. The aim is to develop a suite of proposals from area-specific plans to proposals that can be implemented area-wide as part of a rolling programme.
- **Cardiff Freightliner Terminal:** More research needs to be undertaken into how Cardiff Freightliner Terminal facility can better support existing businesses in the area and help to attract new ones. For example the latter may have a logistics focus or be linked to smart manufacturing and require main freight line access for the importation of materials and the export of finished products. This research should consider the viability of expanding the site north of the railway line to enhance operational capacity.
- **Cardiff Parkway development:** Action will be required over the short, medium and long terms. The Phases set out in this report are the start of a process to investigate the potential of change in the area over time. In fact they can be conceptualised as increments of change over the short, medium and long terms. Going forward, it will be important to understand the specific land use mix proposed to ensure that a complimentary rather than competing approach is adopted in the wider East Cardiff area. There maybe some merit in approaching the Cardiff Parkway developers to see if opportunities exist to jointly shape key messages about the sites relationship with the wider East Cardiff area to mutual benefit.

Appendix A: Cardiff Council Land

There is also significant opportunity for the Council to use its own land assets to promote the development of the East Cardiff Area. The consideration of this land is outside of the scope of this study, but the Council should consider how it can maximise the impact of the use of its assets in East Cardiff to deliver this strategy.

Council land in the East Cardiff area covers a significant range of uses, from non-operational estates land (i.e. investment) to parkland and general amenities.

There is significant overlap in terms of the areas of consideration in this strategy and the overall Phases presented.



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Plan Pathways - R (Proposed) Cardiff East Industrial Strategy Card (East Industrial Strategy)

My Ref: T: Scrutiny/Correspondence/Cllr NH

Date: 4 October 2019

Councillor Russell Goodway
Cabinet Members
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Dear Councillor Goodway,

Economy & Culture Scrutiny Committee: 3 October 2019

Members have asked I pass on their thanks to you, Neil Hanratty and Jon Day for attending our meeting for pre-decision scrutiny of the report to Cabinet titled '*Cardiff East Industrial Strategy*'. Members have asked that I pass on the following comments and observations from their discussion at the Way Forward.

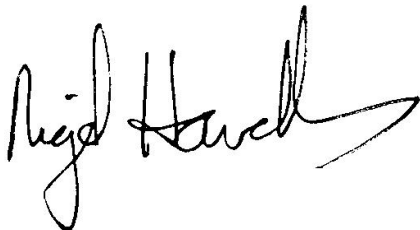
Overall, Members welcome the Cardiff East Industrial Strategy and support the recommendations to Cabinet. Members recognise the challenges facing this area, both natural barriers and the legacy of an industrial landscape. Members find it encouraging that the vision for this area includes the need to enhance the environment as well as attract industry and we agree that there is an opportunity for Cardiff to work with public and private partners to deliver a sustainable and attractive environment that includes industry. There is an opportunity to boost green tourism and wellbeing, particularly by improving the coastal zone.

Improving transport is key to the success of the Strategy; the area needs a rail link and we note that Cardiff Parkway would meet that requirement. Members note that it is anticipated that a planning application for this will be submitted in Spring 2020 and that Welsh Government has indicated it wishes to be involved. Members recognise that highway improvements are needed and that active travel routes need enhancing, including ensuring that cycle routes into Newport are improved.

Members note that the Strategy aligns to the UK Industrial Strategy, ensuring that bids to associated funding streams are in line. As discussed at Committee, this is a 20-year strategy and it is essential there is a mix of public/ private funding in order to deliver; Members note that this may require an element of public funded pump priming and that officers are exploring innovative financing solutions, including Tax Increment Financing and Free Ports.

Thank you again for attending Committee and Members look forward to scrutinising projects and plans as these come forward.

Yours sincerely,

A handwritten signature in black ink, appearing to read 'Nigel Howells', with a long horizontal flourish extending to the right.

COUNCILLOR NIGEL HOWELLS
CHAIR, ECONOMY & CULTURE SCRUTINY COMMITTEE

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



CABINET MEETING: 10 OCTOBER 2019

INTERNATIONAL SPORTS VILLAGE DEVELOPMENT STRATEGY

INVESTMENT & DEVELOPMENT (COUNCILLOR RUSSELL GOODWAY)

AGENDA ITEM: 9

Appendix 4 of this report is not for publication as it contains exempt information of the description contained in paragraphs 14 and 21 of Schedule 12A of the Local Government Act 1972.

Reason for this Report

1. To obtain Cabinet approval of a revised development strategy designed to complete the International Sports Village (ISV) project in Cardiff Bay.
2. To obtain Cabinet approval to bring forward Council owned land for development including disposal as required to secure a ring-fenced capital receipt to support delivery of the new development strategy.
3. To obtain authority to undertake a procurement process to identify a suitable commercial operator to deliver a new leisure offer at the ISV, the scope of which to potentially include the Cardiff International White Water (CIWW) Centre, in order to reduce the current operational deficit.

Background

4. *Capital Ambition* includes a commitment to :

“Set a refreshed vision for Cardiff Bay as a leisure destination, by securing a new visitor attraction, with the possible creation of a permanent “beach style” facility and revitalising the strategy for the International Sports Village”

5. The Council commenced the regeneration of the peninsula at the ISV in 1999 since when it has proved to be a complex long-term project involving extensive land reclamation and remediation works and significant infrastructure investment. During the subsequent period the Council has delivered the Cardiff International Pool and the CIWW Centre which also includes the Flowrider surfing attraction, a high-ropes experience and an outdoor climbing wall.

6. In 2012, the Council entered into a Development Agreement with Greenbank Partnership Ltd (GPL) following a market procurement exercise. GPL were, and remain, the owners and developers of the adjacent Cardiff Pointe site. The Council's principle priority was to construct a new Ice Arena to replace the one demolished to make way for the St David's 2 city-centre shopping mall which would be delivered via the Development Agreement.
7. The Development Agreement identifies two distinct development phases. Phase one related solely to the delivery of the new ice rink and associated public realm works. Phase two provides for the release of the Council owned Waterfront site for mixed-use development, but is dependent on the completion of phase one together with confirmation of the delivery of a new Snow Dome or equivalent alternative leisure attraction to be agreed by the Council (see Appendix 1).
8. Both parties had a clear understanding of the commercial challenges of delivering a new leisure development and agreed to an element of pump priming to close the gap between the cost of delivery and the value of the finished asset. The Council's preference was to contribute land. GPL's role in the partnership was to design, build, own and operate the new Ice Arena and then subsequently a new Snow Dome.
9. The cost of delivering the new Ice Arena far outweighed its anticipated commercial value. To ensure delivery of a state-of-the-art facility, the Council provided land and agreed to commute a proportion of s106 contributions and affordable housing contributions generated from the adjacent Cardiff Pointe development towards the project. GPL decided to deliver the new rink early and forward funded delivery.
10. The Council retains a significant land holding on the peninsula as illustrated by the plan attached at Appendix 2. In March 2018, Cabinet provided authority for the Council to acquire 4.32 acres of land currently occupied by the former Toys R Us retail building including a large service yard and circa 300 car parking spaces. The rationale for the acquisition was to improve the development potential of the Council's adjoining land holding known as Retail 3. The former Toys R Us lease contained a number of covenants that affected the development potential of the site.

Issues

11. The Council's partnership with GPL has coincided with significant restructuring of the property market in the UK following the global financial "crash". In particular residential and retail property markets have slowed significantly, with sales values remaining relatively stagnant over a long period of time and build cost continuing to rise year on year. As such, the development of the Cardiff Pointe residential scheme has not progressed at the pace and scale initially anticipated to the extent that proposals for the second phase of development of the Council's land, including the snow dome, have not been brought forward.

12. The Development Agreement sets out clear conditions for accessing the Waterfront site for development under phase two, including timescales for submitting alternative proposals. These timescales have not been met. GPL had been granted a significant additional period of time to submit an alternative proposal. In March 2018, the Council provided formal notification to GPL that the Development Agreement had expired. Nonetheless, as adjacent landowner, the Council continued a dialogue with GPL both with regard to the future development of the Waterfront site and the completion of the Cardiff Pointe residential scheme.
13. The Cardiff Pointe residential scheme is an important development in its own right, planned to deliver some 850 new homes in the Local Development Plan. The Council remains keen for the next phase of construction to commence as soon as possible, not least to provide the existing residents of the circa 100 occupied properties with a degree of certainty regarding the future of the site.
14. Cabinet will be aware that residents have lobbied local members to raise a number of issues relating to the consequences of the development having stalled. In particular, Cardiff Pointe operates a scheme of service charges which because development has not progressed as intended is placing a disproportionately heavy financial burden on the small number of current properties when the service charges were designed to be shared across a much larger group of properties. Uncertainty regarding surrounding development is also affecting the ability for residents to dispose of their properties, which they believe is having an adverse impact on property values. GPL has recently informed the Council that they have resolved the issues that had held back the residential development and will now progress with the next phases. They have also notified the Council of their intention to bring in a new developer to complete the scheme.
15. In order to assist with attracting a new developer to take forward the completion of the Cardiff Pointe site, the Council had been prepared to consider an off-market sale of the Waterfront site at market value to the proposed new developer on the basis that the new arrangements were put into place quickly. In March 2019, following a long period of market engagement by Greenbank, the Council set a deadline of the end of July 2019 for Greenbank to complete the sale of their land in order for the Council to progress with an off-market sale.
16. GPL has now decided to remain engaged in the future development of the site through a Joint Venture arrangement with a new development partner. Given that GPL has already had one opportunity to bring forward the development of the Waterfront site, the Council has now formally notified GPL in writing that it is no longer prepared to move forward with an off-market sale.

New Development Strategy

17. The original development strategy aimed to deliver a leisure destination on the Waterfront site. The use of the Waterfront for low value development was in some part driven by the location of the Toys R Us building adjacent

to the Retail 3 site and the restrictive covenants associated with the Toys R Us lease. The Council's acquisition of the Toys R Us lease in March 2018 has enabled the Council to eliminate the restrictive covenants and to reset the development strategy for the leisure destination. The intention now is to take advantage of the commercially valuable Waterfront site for high value residential development and to build on the existing leisure investments by clustering the new leisure developments in and around the Toys R Us site and Retail 3.

18. Appendix 3 presents the proposed new indicative masterplan for the site. The Council has undertaken informal market testing and in response has simplified the approach to ensure delivery and completion of the scheme. The key features of the development strategy are as follows:

- Olympian Drive to be removed to create an enhanced pedestrian environment at the heart of the leisure development improving safe connection between key facilities and establishing a new all year round external event space.
- As an initial step, existing surface car parking requirements will be consolidated around the entrance to the site adjacent to the existing Toy R Us surface car park. The long-term aim is to consolidate parking into a decked facility to release further land for development. The intention is for the Council to retain full control of the on-site car parking to support the long-term viability of the leisure destination.
- The Toys R Us building (circa 40k sq ft) will be retained, refurbished (inside and out) and significantly extended to create a new leisure 'box' facility. This proposal is in direct response to market feedback and aims to provide a wide range of adventure sport and leisure activities 'under one roof'. The aim is to secure a new set of attractions for Cardiff not currently available supported by a unique and bespoke food and beverage offer.
- The removal of the roundabout on Watkiss Way to make way for a new shared surface crossing to provide better connections between the new event space and CIWW, with Watkiss Way having the potential to implement controlled access during peak times.
- A new road to be provided through the development of the residential scheme on the Waterfront site linking the Cardiff Pointe residential scheme to the existing round-a-bout joining International Drive with Ferry Road eliminating the need for Olympian Drive.
- Extension of CIWW to position the entrance to the facility in direct alignment with the current alignment of Olympian Drive to provide a focal point for the new public realm and improved visibility of the facility from the main entrance to the site. This will provide an opportunity to improve the retail offer by providing street access and the café offer through panoramic views at the mezzanine level. The intension is for the extension to create space for a new attraction to enhance the commercial viability of CIWW.
- The proposed residential development on the Waterfront site will deliver a new 'destination' food & beverage promenade at ground level along the water's edge with views across Cardiff Bay. Above this

active ground floor will be a series of relatively high density apartments, medium height (circa 10 storeys) to create a new residential district befitting of its unique, high quality waterfront aspect.

- The existing Ice Rink can be extended at the rear to remove the blank wall and complete the development. A new attraction could be provided to improve the overall commercial viability and long-term sustainability of the Ice Arena. Ideally, the attraction would make use of the plant and machinery already available within the Ice Arena. The Council is prepared to consider the utilization of s106 contributions generated from the Waterfront site to support delivery of this new facility.
- There is potential to accommodate a hotel on-site.
- The Bay edge walkway will be fully retained for public use with the Council retaining current maintenance obligations.

Transport Strategy

19. Transport connectivity will become an increasingly important factor in the long-term success of the project. The site is already fairly well served by rail access, having Cogan Station within a few hundred meters of the site via Pont-y-Werin bridge. There are also regular bus services which connect the site to the city centre within around 15 minutes.
20. As footfall on site increases through the introduction of new attractions and event space, the Council will need to continue to explore ways to improve public transport provision. In particular, the proposals for a new Park & Ride facility at J33 on the M4 will provide an important means of quick access to the site from the wider region. The Council will also seek to make full use of the Bay and rivers to link the site back to the inner harbour and the city centre via water-taxi.
21. In addition to public transport, there will also be a need to provide an adequate number of on-site parking spaces in order to attract the highest quality attractions to the site and to ensure local residents are not adversely impacted. There are existing contractual obligations relating to parking provision for the International Pool and the Ice Arena that will need to be re-provided and the new attractions will require an element of additional parking subject to planning.
22. The new strategy is based on a lower total number of spaces compared to the current consented scheme and compared to other comparable leisure destinations in the UK. In particular, this is because the new development strategy will seek to maximize the opportunity of sustainable travel modes as well as the strategy no longer being based on a significant element of retail.
23. The short-term plan is to consolidate all existing parking into a new surface car park, to tidy up the undeveloped parts of the site as a short term intervention whilst new development is brought forward. This will not increase the level of parking provided. Over the longer term, as the development progresses, it is intended to consolidate all parking into a

small multi-storey car park (MSCP) to serve the leisure attractions. It is anticipated that this will be smaller than the current consented MSCP.

Financial Strategy

24. In March 2018, the Council invested in the acquisition of the Toys R Us lease to establish a freehold reversion and to consolidate its land interests in the area. The acquisition was on the basis that the capital investment would be recovered through future land disposals at ISV.
25. The development of the Waterfront site provides the opportunity to recover the costs associated with acquiring the Toys R Us site, as well as providing a premium that can be utilized to deliver the new Development Strategy as outlined in paragraph 18 above. The Council will explore the best way to bring forward the development of the site to accelerate delivery and ensure the Council delivers best consideration.
26. In addition, it is proposed to market the Toys R Us and Retail 3 sites as a consolidated leisure opportunity consisting of circa 5 acres through a procurement process to attract a leisure operator. At this stage, it is expedient to keep all options open as to the best financial approach, i.e. whether the site and building are disposed of for a capital sum; or whether they are retained under lease in return for rental income. The Council will need to understand the nature of the proposed leisure investment, the level of investment from the operator and the extent of Council support required to make it happen, before deciding on the most appropriate way forward. It is proposed to report the outcome of the process back to Cabinet in due course for final approval.
27. The Council currently operates the CIWW at ISV. The facility offers a number of high quality adventure sport attractions including: white water rafting; canoeing; surfing, climbing and high-ropes. The facility has developed a strong reputation that penetrates well beyond local, regional and national (Wales) boundaries. To assist with the attraction of significant new investment in new leisure/adventure sport attractions this report seeks authority to explore the potential for the CIWW to be included in the procurement process. In particular it offers the potential for the new leisure operator to introduce promotions, discounts and loyalty programmes that could improve the viability of all attractions on-site. It also offer the potential for improved food and beverage offers, better use of public space for promotional events as well as enabling the Council to secure long-term maintenance arrangements for new public realm. The current financial position of CIWW is set out in Confidential Appendix 4.
28. In addition to the above, there will be opportunities to secure investment in the completion of the leisure destination through targeted use of s106 contributions emanating from the development of the Waterfront site for residential purposes. In particular, the development of the Waterfront site will need to deliver a new road to enable the removal of Olympian Way, and ideally will provide a contribution towards the cost of extending the Ice Arena to accommodate additional facilities to support its long term sustainability.

29. Finally, there are some issues relating to the previous Development Agreement that need to be formally resolved including lift and shift car parking provisions relating to the Ice Arena and the International Pool and confirmation of costs relating to land remediation. These issues are also set out in Confidential Appendix 4.

Scrutiny Consideration

30. The Economy & Culture Scrutiny Committee considered this issue on 10 October 2019. The letter from the Chair of the Scrutiny Committee is attached at Appendix 5.

Reasons for Recommendation

31. To enable the completion of the International Sports Village development in Cardiff Bay.

Financial Implications

32. This report sets out the new development strategy for the International Sports Village (ISV), including a wide range of proposals as part of the wider masterplan. Whilst approval is being sought at this stage for the wider development strategy, it is anticipated that further detailed proposals will be brought to Cabinet on some of the specific elements set out in paragraph 18 in due course. More detailed financial implications will be provided as and when these detailed proposals are brought forward with clear funding strategies identified to implement these proposals.
33. At present, there is no specific funding available within the budgetary framework for the redevelopment of the International Sports Village. Any proposals brought forward must therefore be on a self-financing basis utilising capital receipts and s106 contributions generated.
34. The Council previously acquired the Toys R Us site in March 2018 to consolidate its land ownership in the area and potentially generate higher value uses and enhanced capital receipts within ISV. The cost of this acquisition was funded initially from forthcoming capital receipts with the intention to recover these through disposals at a later date. Incorporated within this report are a range of proposals, one of which is a request to market the Waterfront site at ISV for disposal, and as set out within the financial strategy, approval is being sought to ring-fence any capital receipt to offset the investment made when acquiring Toys R Us site in March 2018 as per the original intention. Any surplus receipts over and above the original acquisition value could then be utilised towards funding the proposals set out within this report.
35. Any disposal of Council land must be supported by an independent site valuation to demonstrate value for money.
36. Careful consideration must be given to the VAT implications of these proposals due to the tax status of the International Sports Village sites. The

Council opted to tax this land as part of the original International Sports Village development, with specific VAT advice provided at the time setting out a range of potential uses and categories of suitable partner organisations for these sites, as well as some restrictions in order to protect the Council's VAT partial exemption position. Further detailed VAT advice will be required on specific proposals regarding future use of this land which must be taken into account during the decision making process.

37. The report refers to an intention to utilise s106 contributions generated from the Waterfront site to fund the development of new facilities. Any s106 contributions referenced as funding sources for delivery of the financial strategy would be subject to the planning process and subsequent financial and legal agreements.
38. There will be clear revenue implications to the CIWW and Leisure Box proposals within this report. As set out in the financial strategy, the CIWW currently operates at a deficit and requires an annual Council subsidy to continue operating. This report seeks Cabinet authority to undertake a procurement process to attract a commercial operator to deliver a new leisure offer at the ISV, as well as seeking authority to include the operation of the CIWW within the scope of this procurement with a view to reducing the current operational deficit. Whilst Capital funding may be required to facilitate this on a self-financing basis, there may be potential revenue benefits which would be explored and considered as part of the procurement process. The Council will need to understand the nature of the proposed leisure investment, the level of investment from the operator and the extent of Council support required to make it happen, before deciding on the most appropriate way forward. The outcome of any procurement process will remain subject to a future Cabinet decision, the detailed financial implications of which would be provided at the time. This will need to include consideration of any T&Cs relating to the grant provided to support the construction of the facility.

Legal Implications

39. The Council has a legal obligation to obtain the best consideration reasonably obtainable from its land disposals in accordance with section 123 of the Local Government Act 1972. In regard to the procurement of works and services the Council is required to follow its Contract Standing Orders and Procurement Rules internal together with the relevant statutory procurement regulations.
40. The decision about these recommendations has to be made in the context of the Council's public sector equality duties. The Council also has to satisfy its public sector duties under the Equality 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. 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. If the recommendations in the report are accepted and when any alternative options are considered, the Council will have to consider further the equalities implication and an Equality Impact Assessment may need to be completed.

41. 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.
42. 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 2018-21:
<http://cmsprd.cardiff.gov.uk/ENG/Your-Council/Strategies-plans-and-policies/Corporate-Plan/Documents/Corporate%20Plan%202018-21.pdf>
43. The well being duty also requires the Council to act in accordance with ‘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 comprising 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 integrates 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
44. 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>
45. 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, the report and Equality Impact Assessment deals with all these obligations. The Council has to consider the Well-being of Future Guidance (Wales) Act 2015 and how this strategy may improve the social, economic, environmental and cultural well-being of Wales.

RECOMMENDATION

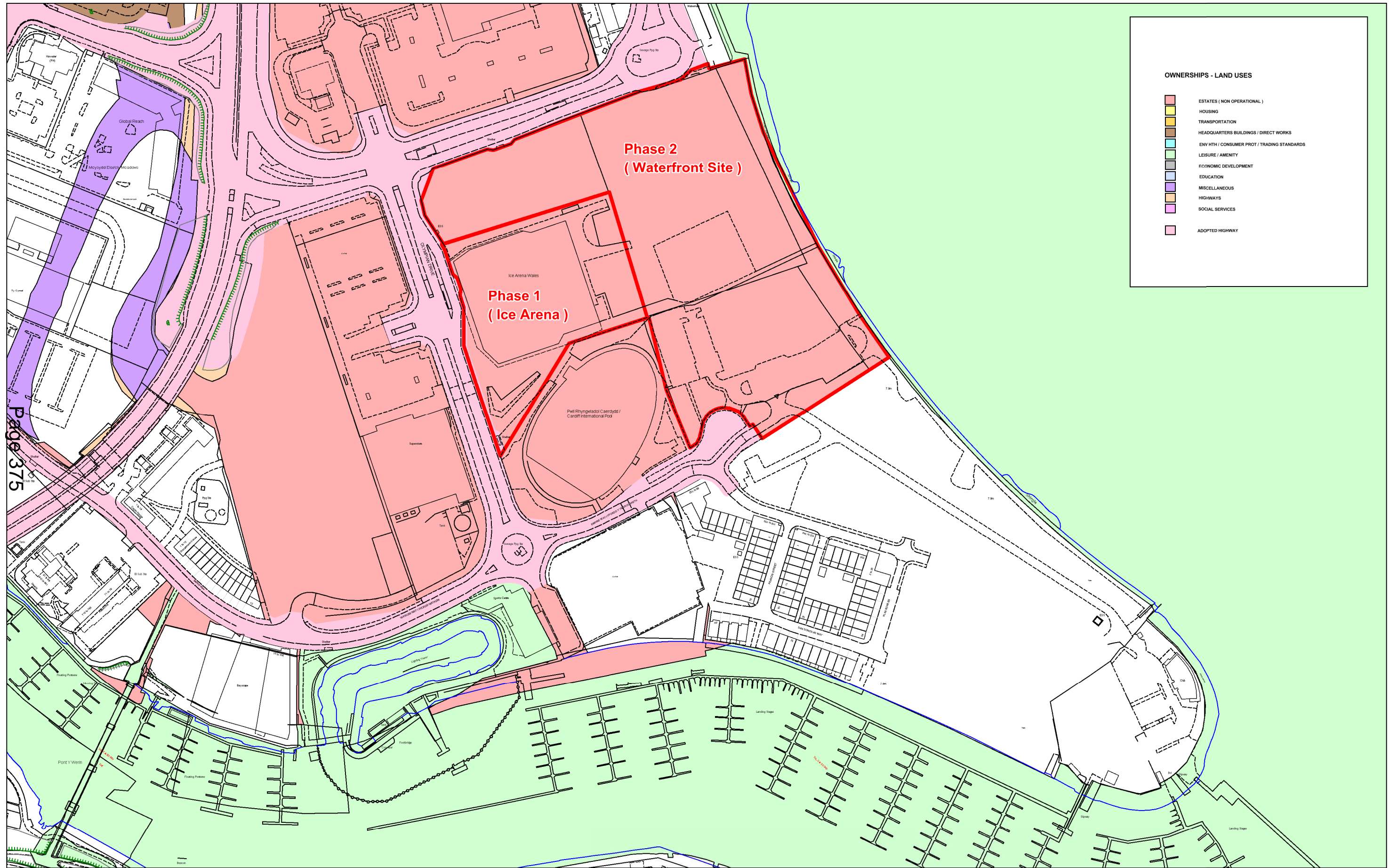
Cabinet is recommended to:

1. Approve the new development strategy for the International Sports Village.
2. Delegate authority to the Director of Economic Development in consultation with the Cabinet Member for Investment & Development and statutory officers to bring forward the development of the Waterfront site including disposal of land as required and to ring-fence any capital receipt in accordance with the financial strategy outlined in Confidential Appendix 4 and subject to an independent valuation as necessary.
3. Delegate authority to the Director of Economic Development in consultation with the Cabinet Member for Investment & Development and statutory officers to deal with all aspects of the procurement of a commercial partner to establish and operate a new leisure attraction at the International Sports Village as set out in this report and to return to Cabinet for final approval.
4. As part of (iii) above, delegate authority to the Director of Economic Development in consultation with the Cabinet Member for Investment & Development and statutory officers to include the external operation of the CIWW as part of the procurement process in accordance with the strategy set out in this report and to return to Cabinet for final approval.

SENIOR RESPONSIBLE OFFICER	Neil Hanratty Director of Economic Development
	10 October 2019

The following appendices are attached:

- Appendix 1 – Phasing plan
- Appendix 2 – Land ownership plan
- Appendix 3 – New development strategy
- Confidential Appendix 4 – Financial Strategy
- Appendix 5 – Letter from Chair of Scrutiny



OWNERSHIPS - LAND USES

- ESTATES (NON OPERATIONAL)
- HOUSING
- TRANSPORTATION
- HEADQUARTERS BUILDINGS / DIRECT WORKS
- ENV HTH / CONSUMER PROT / TRADING STANDARDS
- LEISURE / AMENITY
- ECONOMIC DEVELOPMENT
- EDUCATION
- MISCELLANEOUS
- HIGHWAYS
- SOCIAL SERVICES
- ADOPTED HIGHWAY

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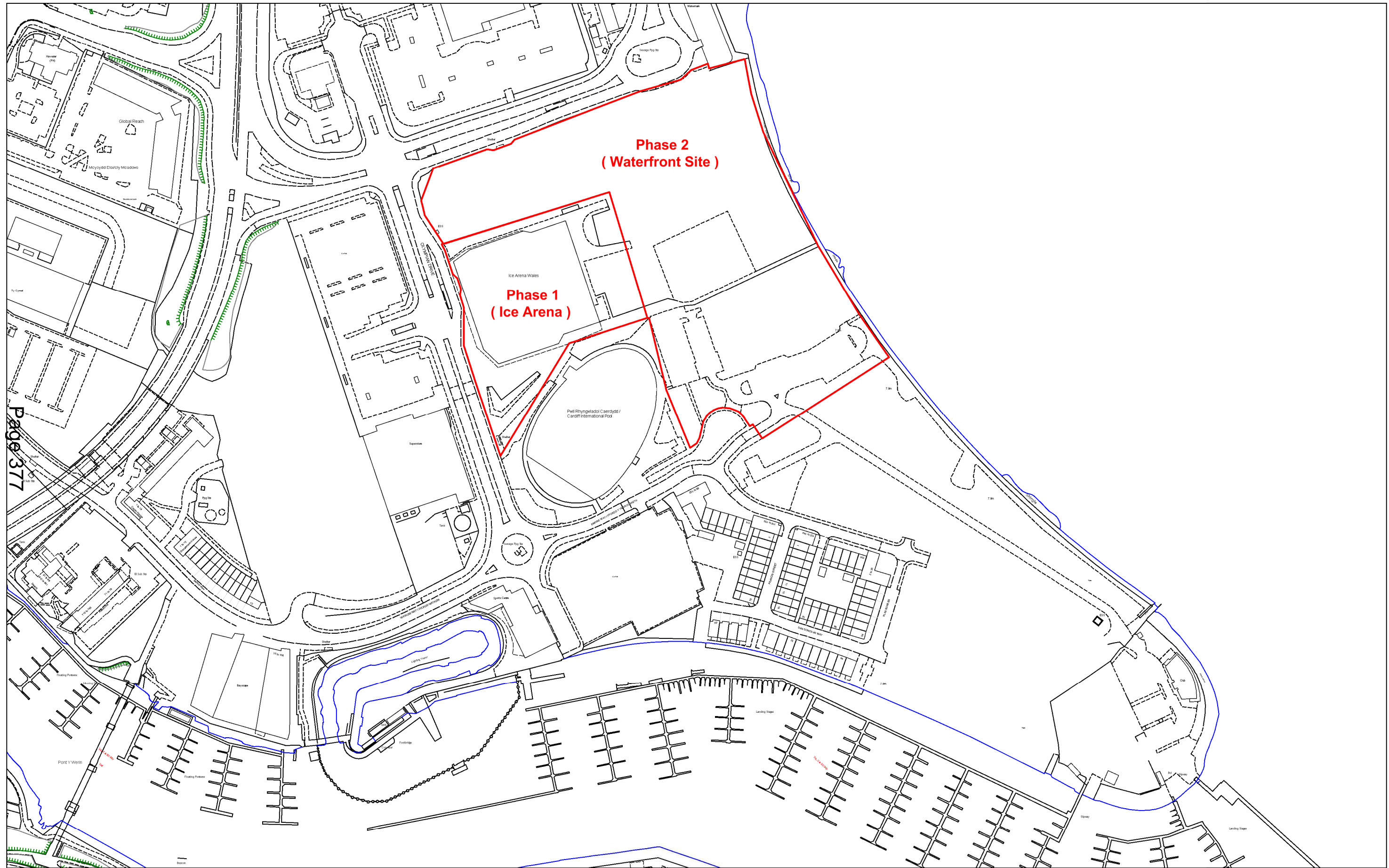
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Gweithio dros Gaerdydd, gweithio gyda'n gilydd
Working for Cardiff, working together

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Cyfarwyddwr / Director : Neil Hanratty

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Gweithio dros Gaerdydd, gweithio gyda'n gilydd
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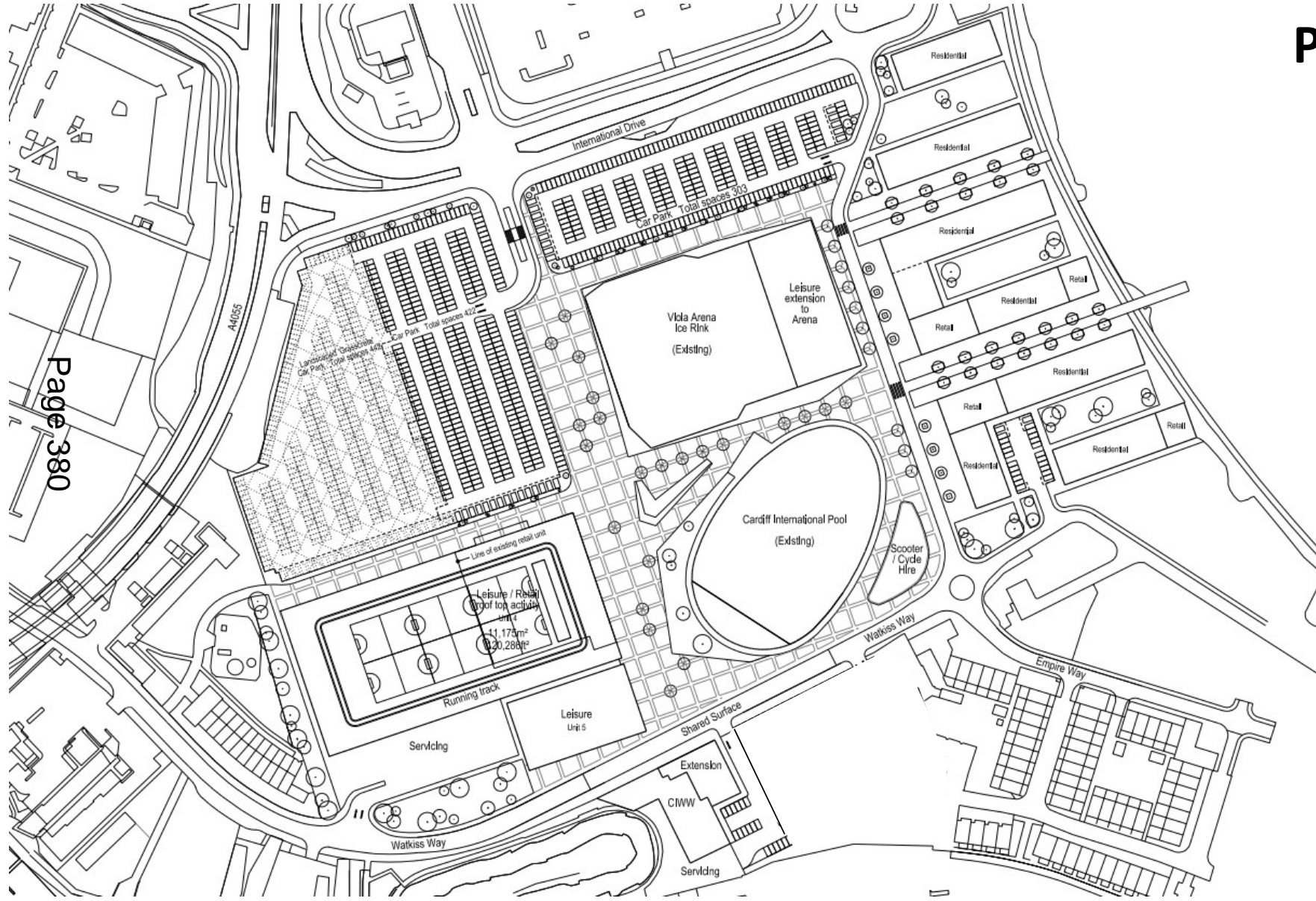
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Cyfarwyddwr / Director : Neil Hanratty

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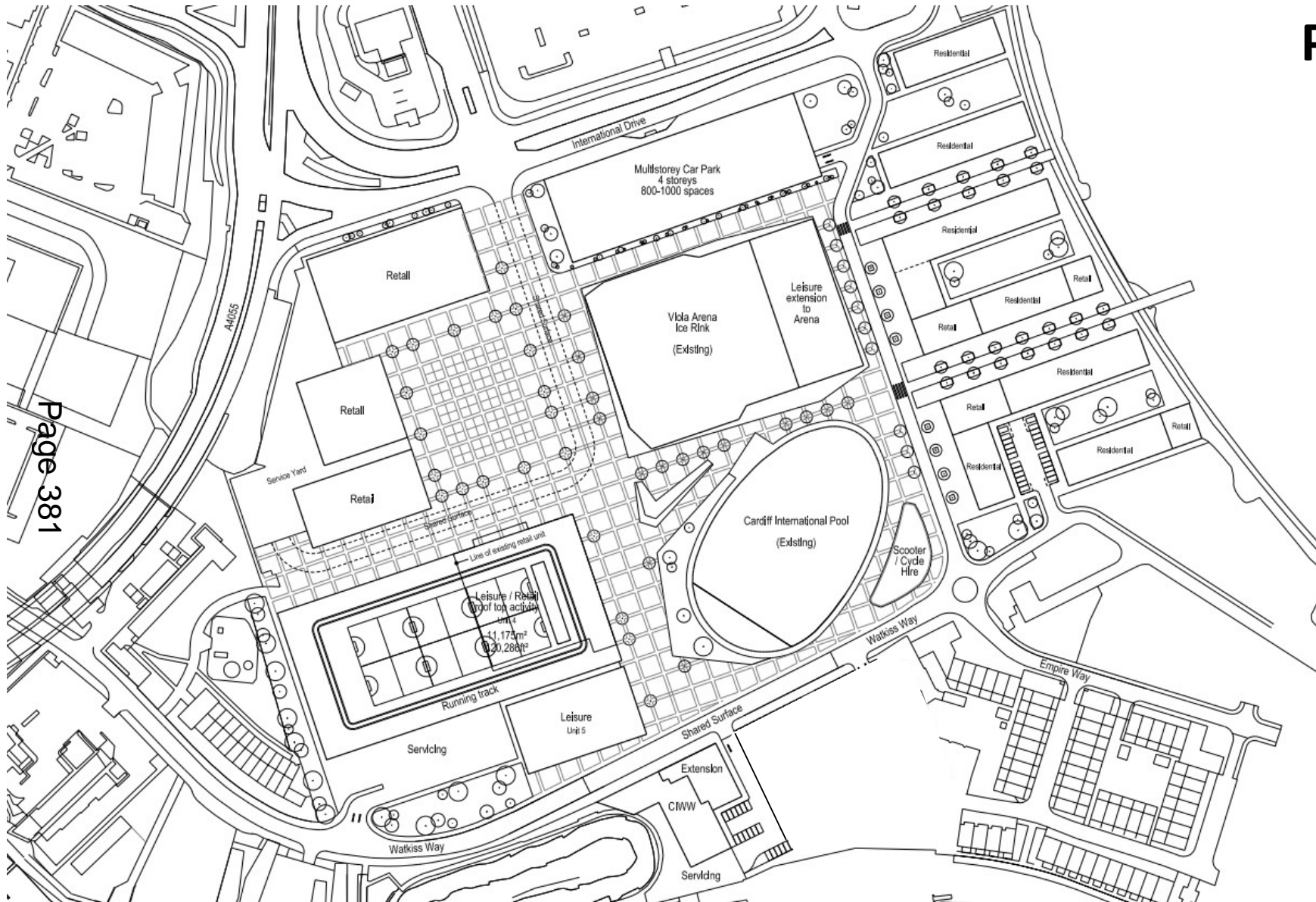
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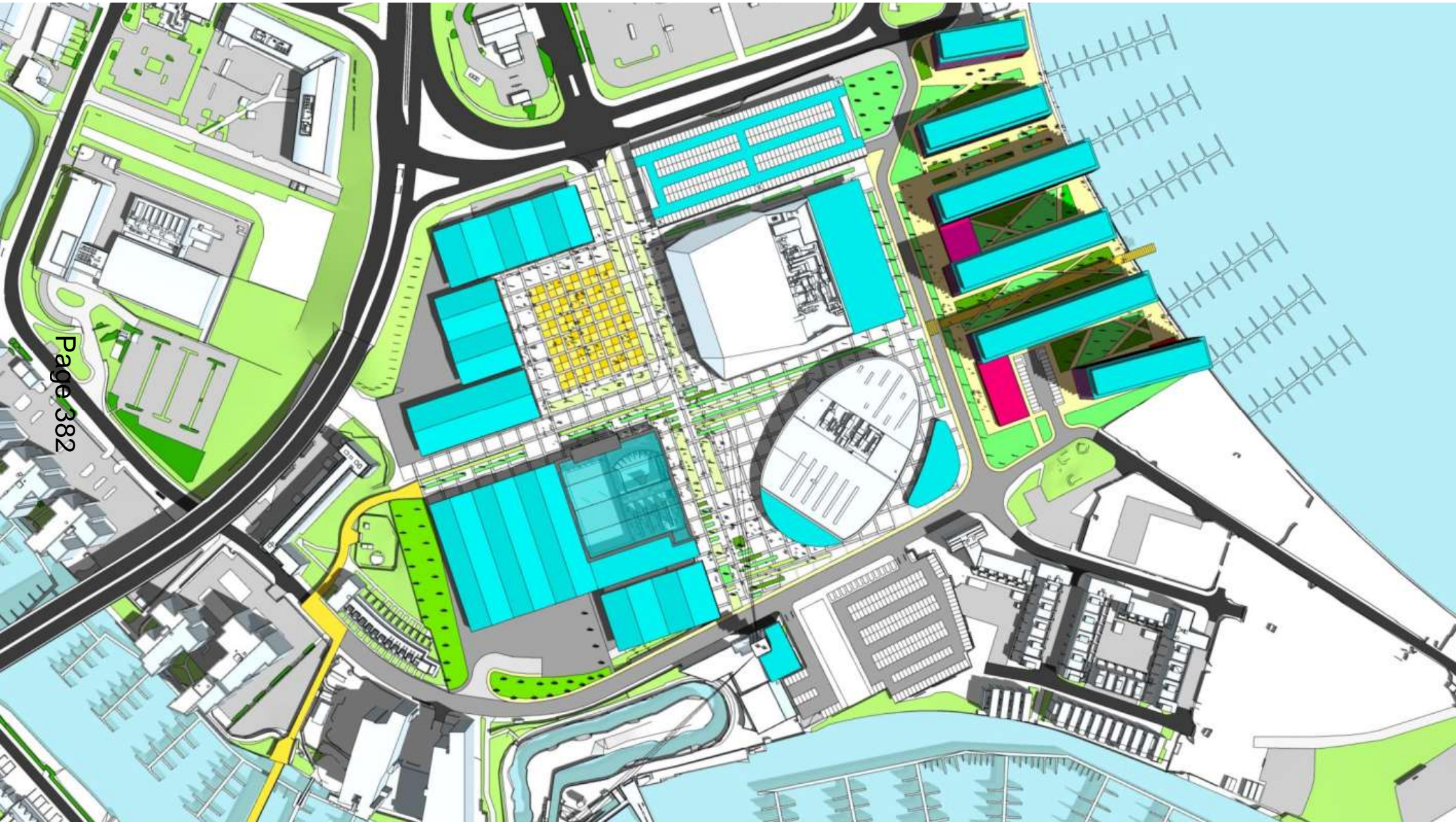
New Development Strategy

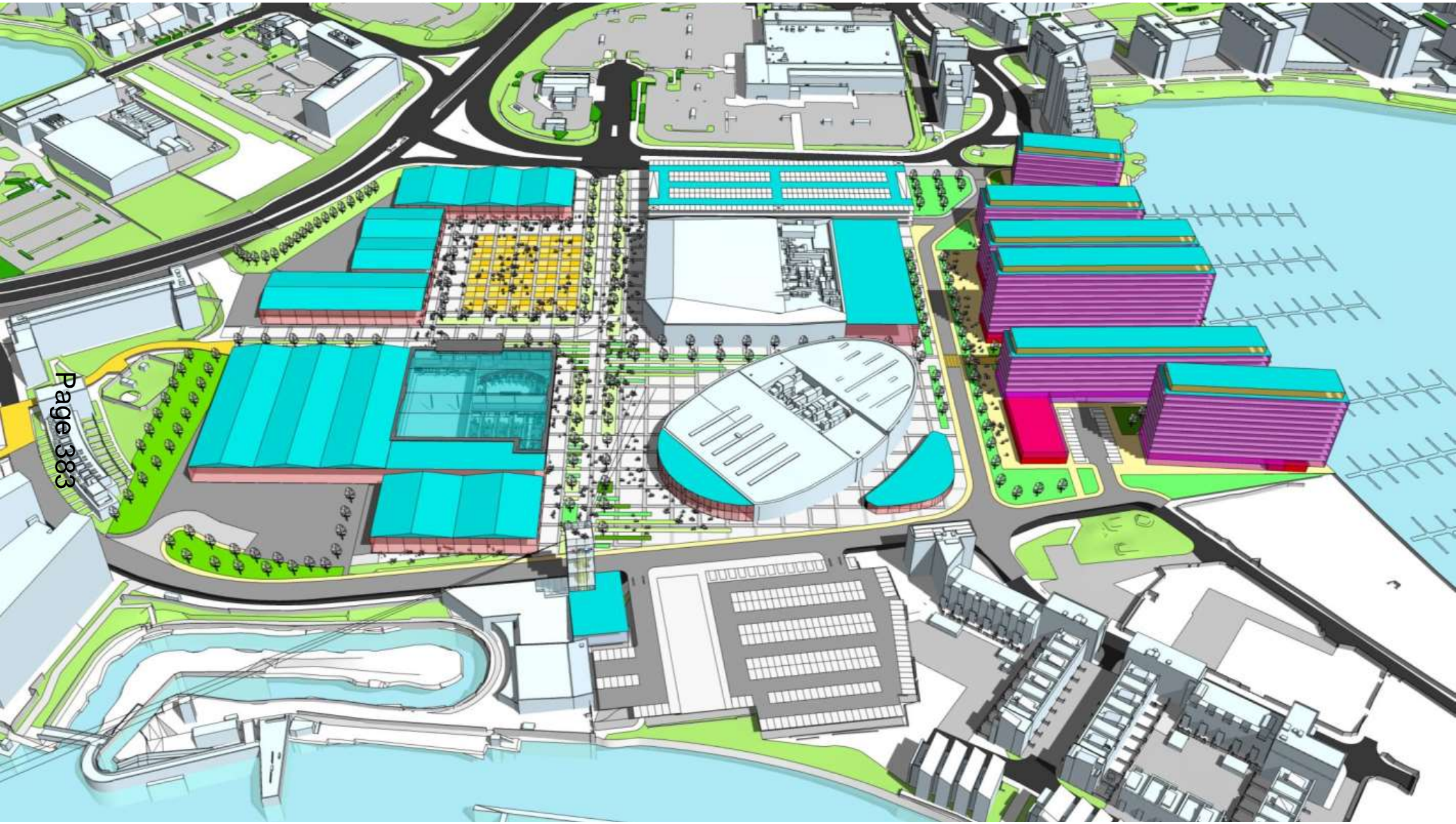
Phase One



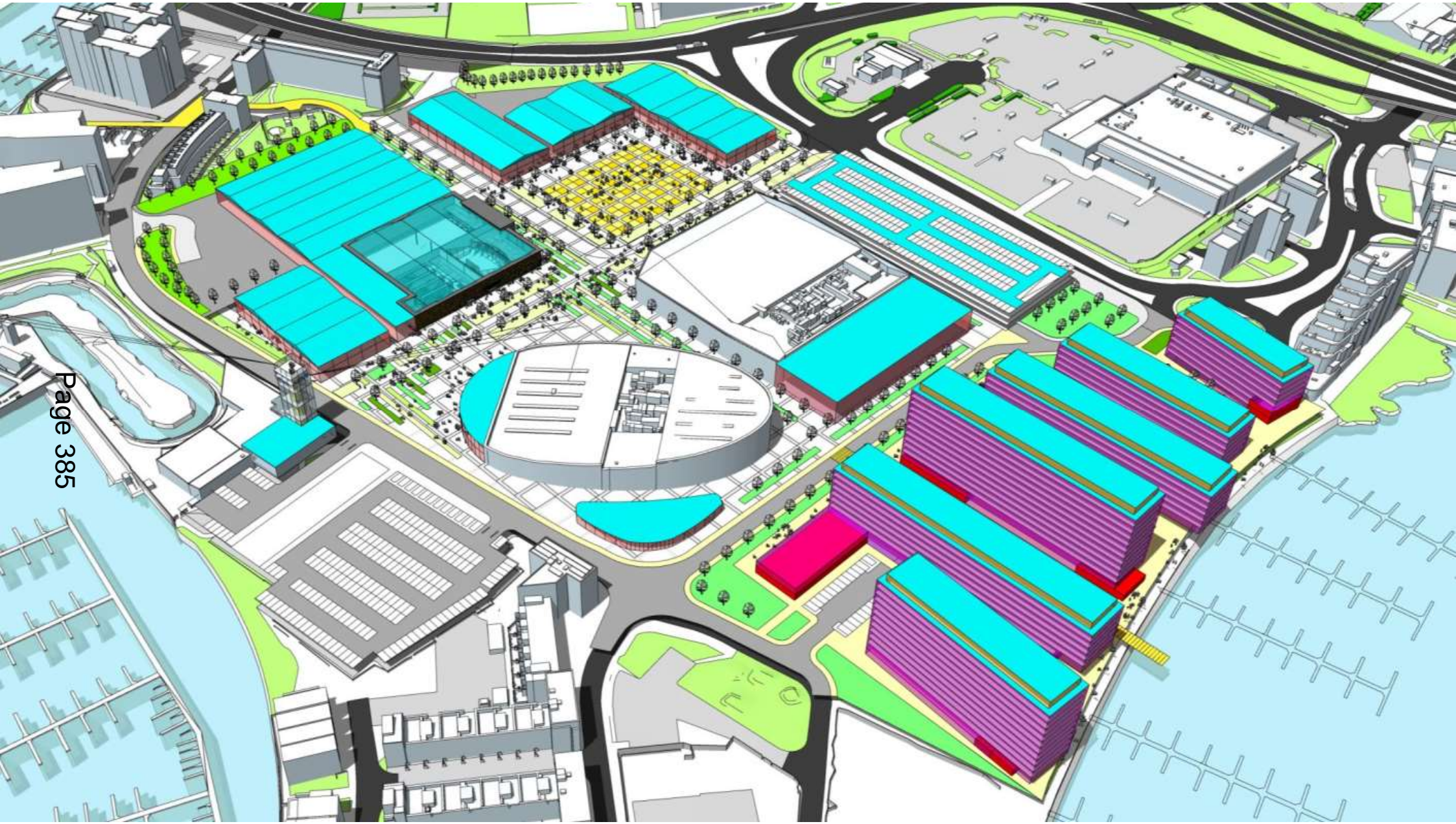
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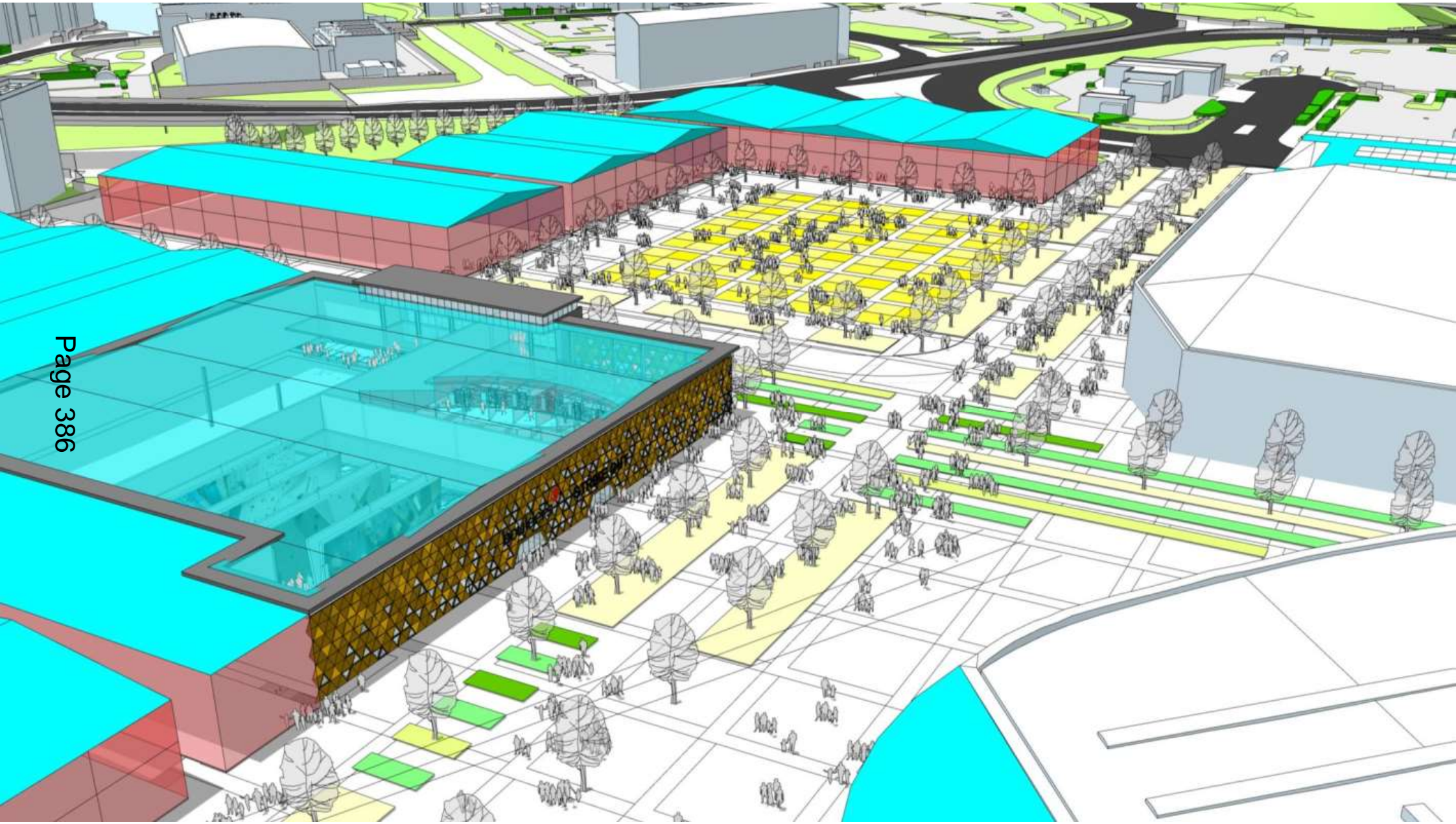














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By virtue of paragraph(s) 14, 21 of Part(s) 4 and 5 of Schedule 12A of the Local Government Act 1972.

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My Ref: T: Scrutiny/Correspondence/Cllr NH

Date: 4 October 2019

Councillor Russell Goodway
Cabinet Members
Cardiff Council
County Hall
Cardiff
CF10 4UW



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

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

Dear Councillor Goodway,

Economy & Culture Scrutiny Committee: 3 October 2019

Members have asked I pass on their thanks to you and Neil Hanratty for attending our meeting for pre-decision scrutiny of the report to Cabinet titled '*International Sports Village Development Strategy*'. Members have asked that I pass on the following comments and observations from their discussion at the Way Forward.

Overall, Members support the recommendations to Cabinet, recognising the need to utilise a pragmatic strategy to finish the ISV and ensure benefits to the surrounding communities and across Cardiff and the region.

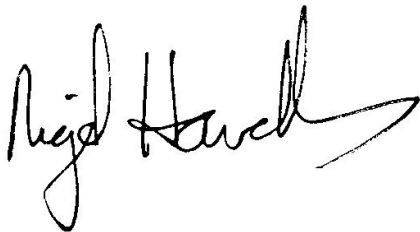
As discussed at Committee, it is critical that we apply the lessons learnt from earlier schemes regarding how best to build a sense of place and a sense of community. Members appreciate the work to date and recognise this phase is at an early stage, with discussions and negotiations to come with developers. Members would like to see these include discussions on how to best factor in appropriate, open spaces for residents to meet and interact; at the meeting, ideas mentioned included pocket parks and community buildings. Members were pleased to hear assurances that trees and greenery would be part of the development and, in our way forward discussions, reflected that the recent Dumballs Road proposals set what we regard as an appropriate benchmark regarding how to plan to integrate buildings and green, open space.

Members recognise the need to enhance the leisure offer and believe that adventure tourism products will bring economic benefits to the area; the need to boost the

transport infrastructure is appreciated and Members are pleased that public and active transport infrastructure are highlighted for improvement and enhancement.

Thank you again for attending Committee and we look forward to scrutinising proposals as these come forward.

Yours sincerely,

A handwritten signature in black ink, appearing to read 'Nigel Howells', with a stylized flourish at the end.

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

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

THIRD CARDIFF LOCAL DEVELOPMENT PLAN ANNUAL MONITORING REPORT

STRATEGIC PLANNING & TRANSPORT (COUNCILLOR CARO WILD)

AGENDA ITEM: 10

Reason for this Report

1. To outline the purpose of the Local Development Plan (LDP) Annual Monitoring Report (AMR) process and to seek the endorsement of the third Cardiff LDP AMR for submission to the Welsh Government by 31st October 2019.

Background

2. The Cardiff Local Development Plan (2006 to 2026) was formally adopted by the Council on 28th January 2016. As part of the statutory development plan process the Council is required to prepare an Annual Monitoring Report (AMR) and submit to Welsh Government by the 31st October each year after Plan adoption.
3. This is the third AMR to be prepared since the adoption of the plan and is based on the period 1st April 2018 to 31st March 2019. The AMR consists of the following sections:
 - Executive Summary
 - Introduction
 - Contextual Information – changes to policy framework at a national or local level.
 - LDP Monitoring Process – explains the monitoring process undertaken.
 - LDP Monitoring Indicators – reporting on the 107 LDP monitoring indicators which were agreed during the LDP examination process and set out in the Inspectors Report.
 - Sustainability Appraisal Monitoring – reporting on the 28 sustainability monitoring indicators.
 - Conclusions and recommendations – setting out an overall overview of all indicators and Plan performance in the first two years following adoption.

4. This is the third year the LDP has been operative and this AMR provides a 3 year position statement and provides a comparison with the baseline data provided by the first and second AMR's published in October 2017 and 2018. Importantly, the findings of this monitoring work over 3 consecutive years will help to inform the LDP review process as the Council is required to undertake a full review of the LDP 4 years after adoption in 2020.

The AMR Report

5. Overall the findings of the third AMR for year 3 are positive with the majority of the indicators shown as green indicating that most LDP policies are being implemented effectively. A summary of performance against the main Plan topics are set out below with Appendix 1 setting out the data and conclusions in more detail.
6. **Employment** – Monitoring data shows continuing strong performance. Of particular importance is data regarding net job creation - There is a requirement for 40,000 new jobs over the plan period 2006-2026. 20,900 jobs were created between 2006 and 2015 and therefore the target for the remaining plan period is 19,100 jobs or 1,750 jobs annually. Since the first AMR (16/17) the number of jobs has been steadily increasing and the latest AMR shows an increase of 6,000 jobs since April 2018.
7. **Housing** – Monitoring data shows new homes have now started to be completed on many of the LDP Strategic Sites. Specifically, there are new completions on 3 of the Strategic Sites.
 - 511 completions have been achieved at St Ederyns Village (just short of the 515 target included in the AMR);
 - 167 completions have been achieved on the North West Cardiff Strategic site, which has three separate outlets underway with more planned in the near future
 - 51 completions have been recorded on the North East Cardiff Strategic site and construction is underway at Churchlands.
8. Although these rates are below targets set out in the AMR it is now evident that the Plan-led approach is now starting to successfully drive the delivery of new homes at a level not seen for the last 10 years. The 1,444 completions in 2018/19 (43% higher than 2017/18) contrast with the previous 9 years where completions averaged 725 units per annum, with no year above 1,000 units for this period.
9. The data on housing delivery demonstrates the 'lag' between Plan adoption and homes being completed on new sites allocated in the Plan. Due to a combination of site assembly, legal and logistical factors experienced by landowners/developers along with the time required to secure the necessary planning and adoption consents, trajectories of delivery are slower than originally anticipated. This includes time spent securing the accompanying Section 106 Agreements which fully deliver the Council's aspirations as set out in the LDP. Overall, over the 13 years

between 2006 and 2019 a total of 16,521 new dwellings were built in Cardiff which represents 40% of the overall dwelling requirement.

10. However, construction has now started or is about to start on most of the strategic housing sites following the master planning and infrastructure plans approach as set out in the plan and it is therefore expected that housing completions over the remaining 7 years of the Plan period will increase significantly.
11. **Affordable Housing** - In terms of the delivery of affordable housing, the plan sets a target for the delivery of 6,646 affordable units to be provided for the 12 years between 2014 and 2026, with an interim target in the AMR to provide 1,942 affordable dwellings by 2019.
12. Monitoring data indicates that at 2019, 1,082 affordable units had been delivered which represents 25% of overall completions. Whilst this is less than the numerical target, as highlighted above it reflects the slower than anticipated progress in the strategic housing allocations being delivered. Given the low overall completion rates over previous years, it would be unrealistic in these circumstances to expect any significantly higher affordable housing contribution which inevitably reflects a percentage of the overall number of completions. As set out above, construction has now started or is about to start on most of the strategic housing sites following the master planning and infrastructure plans approach as set out in the plan and it is therefore expected that affordable housing completions over the remaining 7 years of the Plan period will increase significantly.
13. **Transportation** - Data collected in relation to travel by sustainable modes is reflecting the fluctuations as shown in past trends over the last 10 years. This demonstrates that sustainable travel trends have continued to increase over the last 10 years for both work and shopping, although for leisure and education the trends show a slight decrease.
14. There has been a positive outturn in sustainable travel over the past year, with the target 1% increase having been achieved for each of the journey purposes, with significant growth in particular evident for journeys to Work (+5.3% mode-shift). In terms of sustainable travel modes, significant progress has been made in meeting cycling targets for all journey purposes with cycling to work in particular having experienced substantial growth in the past one year period (+3.7%). Train use has very slightly declined over the past year for work and education but the 10 year trend shows a significant increase. Walking has increase over the last year for all journey purposes with a fluctuating longer term trend. Bus use has decreased for education, shopping and leisure, reflecting a longer term downward trend.
15. At this juncture, without the significant roll-out of new houses and provision of supporting sustainable transportation infrastructure, the early stage of Metro delivery together with the ongoing implementation of wider Council initiatives, it is too early to draw any firm conclusions with regard to policy delivery, particularly given that the 50:50 modal split target relates to 2026. Future AMR's will provide formal regular annual updates. However, the

masterplanning approach together with section 106 Agreements already secured will enhance the phased future provision of supporting transportation infrastructure along with other measures such as increased frequency of public transport services and provision of bus passes to new residents.

16. **Gypsy and Traveller Sites** - work is progressing the identification of sites to meet the evidenced need for permanent and transit Gypsy and Traveller sites. This has included discussions with the Welsh Government and work continues to secure appropriate outcomes. In terms of transit sites, it is considered that these would best be considered on a regional basis, requiring collaboration with neighbouring local authorities through the LDP revision process.
17. **Supplementary Planning Guidance** – Significant progress has been made in producing a programme of new Supplementary Planning Guidance (SPG) and since adoption of the LDP 18 SPGs have been approved by Council to support the policies in the adopted Plan and the Cardiff Infrastructure Plan is currently being updated.
18. **Contextual Changes** – the contextual review highlights significant changes in the national planning policy framework which has evolved significantly over the last three monitoring periods. In particular, Planning Policy Wales (PPW, Edition 10, December 2018) which in turn responds to the Well-being of Future Generations Act, 2015 have made significant changes to the high-level policy framework.

Conclusions

19. Section 7 of the AMR provides the conclusions and recommendations of this third AMR which provides a comparison with the baseline data provided by the first and second AMRs published in 2017 and 2018. The key conclusions in the third year of reporting, are that good progress is generally being made in delivering the identified targets and monitoring outcomes with the identified lag in housing delivery now showing strong signs of enhanced completions.
20. It is recommended that this AMR be submitted to the Welsh Government in accord with statutory requirements. Continued monitoring in future AMRs will help to identify any definitive trends in the performance of the Plan's strategy and policy framework.

Next Steps

21. It is a requirement that AMRs must be submitted every year to Welsh Government until any Replacement/Revised LDPs are adopted. Therefore the fourth AMR in respect of the Cardiff LDP will be presented to Cabinet at the same time next year, with the broad structure of the AMR remaining the same from year to year in order to provide ease of analysis between successive reports. This AMR, along with the previous AMRs, will help inform the Full Review of the LDP which will be considered in the near future in accordance with legislative requirements.

22. The AMR will be placed on the Council's website for information.

Scrutiny Consideration

23. The Environment Scrutiny Committee considered this report on 17 September 2019. The letter from the Chair is attached at Appendix 2.

Reason for the Recommendation

24. To comply with provisions in the Planning Compulsory Purchase Act (2004) and Welsh Government guidance which require the Council to produce an AMR for submission to the Welsh Government at the end of October each year following adoption.

Legal Implications

25. The annual monitoring of the LDP is part of the wider statutory LDP process. Section 76 of the Planning and Compulsory Purchase Act 2004 requires authorities to prepare an Annual Monitoring Report covering the preceding financial year from 1 April to 31 March. It must be submitted to the Welsh Government by 31 October each year and published on the authorities' website, in accordance with Regulation 37 of the Town and Country Planning (Local Development Plan)(Wales) Regulations 2005 (as amended). Those regulations and the LDP Manual Edition 2 August 2015 specify what the AMR is required to include. The AMR and associated documents have been prepared in accordance with the body of the report.

26. The decision about these recommendations has to be made in the context of the Council's 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.

27. 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.

28. 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 <http://cmsprd.cardiff.gov.uk/ENG/Your-Council/Strategies-plans-and-policies/Corporate-Plan/Documents/Corporate%20Plan%202018-21.pdf> 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.

29. 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.
- 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: <http://gov.wales/topics/people-and-communities/people/future-generations-act/statutory-guidance/?lang=en>

30. 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, the report and Equality Impact Assessment deals with all these obligations. The Council has to consider the Well Being of Future Generations (Wales) Act 2015 and how this strategy may improve the social, economic, environmental and cultural well-being of Wales.

Financial Implications

31. There are no direct financial implications arising from this report with the preparation of the LDP AMR being completed using existing resources.

Human Resources Implications

32. There are no HR implications for this report.

RECOMMENDATION

Cabinet is recommended to recommend that Council endorse the third AMR for submission to the Welsh Government by 31st October 2019.

SENIOR RESPONSIBLE OFFICER	ANDREW GREGORY Director of Planning, Transport & Environment
	4 October 2019

The following Appendix is attached:

Appendix 1 - Cardiff LDP 3rd Annual Monitoring Report, October 2019

Appendix 2 – Letter from Chair of Environment Scrutiny Committee

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Cardiff LDP 3rd Annual Monitoring Report

October 2019



Cardiff Local Development Plan 3rd Annual Monitoring Report 2019

**Based on data collected for period
1st April 2018 to 31st March 2019**

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4. LDP Monitoring Process	19
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• Analysis	
• Recommendations	
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Appendix 1: Table setting out summary of findings	230

1. Executive Summary

The Cardiff Local Development Plan (LDP) was adopted on 28 January 2016. As part of the statutory development plan process the Council is required to prepare an Annual Monitoring Report (AMR).

The AMR provides the basis for monitoring the effectiveness of the LDP and ultimately determines whether any revisions to the Plan are necessary. It aims to demonstrate the extent to which the LDP strategy and objectives are being achieved and whether the Plan's policies are functioning effectively. It also allows the Council to assess the impact the LDP is having on the social, economic and environmental well-being of the County and identifies any significant contextual changes that may influence plan implementation or review.

This is the third AMR to be prepared since the adoption of the Cardiff LDP and is based on data collected for the period 1st April 2018 to 31st March 2019. The first and second AMRs was published on 31st October 2017 and 31st October 2018 and provided a baseline for future comparative analysis from which successive AMRs will be able to evidence the emergence of trends.

Key Findings of the Third Annual Monitoring Process 2018-2019

Contextual Information

A summary of the relevant contextual material that has been published since the adoption of the Plan at a national, regional and local level, along with general economic trends is included in Section 3. The implications of some of the contextual changes will take place over the longer term and subsequent AMRs will continue to provide updates on relevant contextual material and give further consideration to any changes which could affect the Plan's future implementation.

Local Development Plan Monitoring – Policy Analysis

Section 5 assesses how the Plan's strategic policies and associated supporting policies are performing against the identified key monitoring targets and outcomes and whether the LDP strategy and objectives are being delivered. This has enabled the Council to make an informed judgement of the Plan's progress in delivering the targets/monitoring outcomes and policies during this monitoring period. The table below provides a visual overview of the effectiveness of policies during the monitoring period based on the traffic light rating used in the assessment:

Continue Monitoring (Green)	
Where indicators are suggesting the LDP Policies are being implemented effectively and there is no cause for review.	
Training Required (Blue)	
Where indicators are suggesting that LDP policies are not being implemented as intended and further officer or Member training is required.	
Supplementary Planning Guidance Required (Purple)	
Indicators may suggest the need for further guidance to be provided in addition to those already in the Plan.	
Further Research (Yellow)	
Where indicators are suggesting the LDP policies are not being as effective as they should, further research and investigation is required.	
Policy Review (Orange)	
Where indicators are suggesting the LDP policies are failing to implement the strategy a formal review of the Policy is required. Further investigation and research may be required before a decision to formally review is confirmed.	
Plan Review (Red)	
Where indicators are suggesting the LDP strategy is failing and a formal review of the Plan is required. This option to fully review the Plan will need to be fully investigated and undertaken following serious consideration.	

Key Findings

This is the third AMR to be prepared and provides a comparison with the baseline data provided by the first and second AMRs published in 2017 and 2018.

Overall the findings of the third AMR for year 3 are positive with the majority of the indicators shown as green indicating that most LDP policies are being implemented

effectively. A summary of performance against the main Plan topics are set out below with Appendix 1 setting out the data and conclusions in more detail.

Employment – Monitoring data shows continuing strong performance. Of particular importance is data regarding net job creation - There is a requirement for 40,000 new jobs over the plan period 2006-2026. 20,900 jobs were created between 2006 and 2015 and therefore the target for the remaining plan period is 19,100 jobs or 1,750 jobs annually. Since the first AMR (16/17) the number of jobs has been steadily increasing and the latest AMR shows an increase of 6,000 jobs since April 2018.

Housing – Monitoring data shows new homes have now started to be completed on many of the LDP Strategic Sites. Specifically, there are new completions on 3 of the Strategic Sites.

- 511 completions have been achieved at St Ederyns Village (just short of the 515 target included in the AMR);
- 167 completions have been achieved on the North West Cardiff Strategic site, which has three separate outlets underway with more planned in the near future
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Although these rates are below targets set out in the AMR it is now evident that the Plan-led approach is now starting to successfully drive the delivery of new homes at a level not seen for the last 10 years. The 1,444 completions in 2018/19 (43% higher than 2017/18) contrast with the previous 9 years where completions averaged 725 units per annum, with no year above 1,000 units for this period.

The data on housing delivery demonstrates the ‘lag’ between Plan adoption and homes being completed on new sites allocated in the Plan. Due to a combination of site assembly, legal and logistical factors experienced by landowners/developers along with the time required to secure the necessary planning and adoption consents, trajectories of delivery are slower than originally anticipated. This includes time spent securing the accompanying Section 106 Agreements which fully deliver the Council’s aspirations as set out in the LDP. Overall, over the 13 years between 2006 and 2019 a total of 16,521 new dwellings were built in Cardiff which represents 40% of the overall dwelling requirement.

However, construction has now started or is about to start on most of the strategic housing sites following the master planning and infrastructure plans approach as set out in the plan and it is therefore expected that housing completions over the remaining 7 years of the Plan period will increase significantly.

Affordable Housing - In terms of the delivery of affordable housing, the plan sets a target for the delivery of 6,646 affordable units to be provided for the 12 years between 2014 and 2026, with an interim target in the AMR to provide 1,942 affordable dwellings by 2019.

Monitoring data indicates that at 2019, 1,082 affordable units had been delivered which represents 25% of overall completions. Whilst this is less than the numerical target, as highlighted above it reflects the slower than anticipated progress in the

strategic housing allocations being delivered. Given the low overall completion rates over previous years, it would be unrealistic in these circumstances to expect any significantly higher affordable housing contribution which inevitably reflects a percentage of the overall number of completions. As set out above, construction has now started or is about to start on most of the strategic housing sites following the master planning and infrastructure plans approach as set out in the plan and it is therefore expected that affordable housing completions over the remaining 7 years of the Plan period will increase significantly.

Transportation - Data collected in relation to travel by sustainable modes is reflecting the fluctuations as shown in past trends over the last 10 years. This demonstrates that sustainable travel trends have continued to increase over the last 10 years for both work and shopping, although for leisure and education the trends show a slight decrease.

There has been a positive outturn in sustainable travel over the past year, with the target 1% increase having been achieved for each of the journey purposes, with significant growth in particular evident for journeys to Work (+5.3% mode-shift). In terms of sustainable travel modes, significant progress has been made in meeting cycling targets for all journey purposes with cycling to work in particular having experienced substantial growth in the past one year period (+3.7%). Train use has very slightly declined over the past year for work and education but the 10 year trend shows a significant increase. Walking has increase over the last year for all journey purposes with a fluctuating longer term trend. Bus use has decreased for education, shopping and leisure, reflecting a longer term downward trend.

At this juncture, without the significant roll-out of new houses and provision of supporting sustainable transportation infrastructure, the early stage of Metro delivery together with the ongoing implementation of wider Council initiatives, it is too early to draw any firm conclusions with regard to policy delivery, particularly given that the 50:50 modal split target relates to 2026. Future AMR's will provide formal regular annual updates. However, the masterplanning approach together with section 106 Agreements already secured will enhance the phased future provision of supporting transportation infrastructure along with other measures such as increased frequency of public transport services and provision of bus passes to new residents.

Gypsy and Traveller Sites - work is progressing the identification of sites to meet the evidenced need for permanent and transit Gypsy and Traveller sites. This has included discussions with the Welsh Government and work continues to secure appropriate outcomes. In terms of transit sites, it is considered that these would best be considered on a regional basis, requiring collaboration with neighbouring local authorities through the LDP revision process.

Supplementary Planning Guidance – Significant progress has been made in producing a programme of new Supplementary Planning Guidance (SPG) and since adoption of the LDP 18 SPGs have been approved by Council to support the policies in the adopted Plan and the Cardiff Infrastructure Plan is currently being updated.

Contextual Changes – the contextual review highlights significant changes in the national planning policy framework which has evolved significantly over the last three monitoring periods. In particular, Planning Policy Wales (PPW, Edition 10, December 2018) which in turn responds to the Well-being of Future Generations Act, 2015 have made significant changes to the high-level policy framework.

Sustainability Appraisal (SA) Monitoring

Section 6 expands the assessment of the performance of the LDP against the SA monitoring objectives. This provides a comparison with the baseline data provided by the first and second AMRs published in 2017 and 2018.

Conclusions

The 3rd AMR provides a comparison with the baseline data provided by the first and second AMRs published in 2017 and 2018. The key conclusions in the third year of reporting, are that good progress is generally being made in delivering the identified targets and monitoring outcomes with the identified lag in housing delivery now showing strong signs of enhanced completions.

It is recommended that this AMR be submitted to the Welsh Government in accord with statutory requirements. Continued monitoring in future AMRs will help to identify any definitive trends in the performance of the Plan's strategy and policy framework.

2. Introduction

The Annual Monitoring Report (AMR) process provides the basis for monitoring the effectiveness of the Local Development Plan (LDP) and helps inform whether any revisions to the Plan are necessary. It aims to demonstrate the extent to which the LDP strategy and objectives are being achieved and whether the Plan's policies are functioning effectively. It also allows the Council to assess the impact the LDP is having on the social, economic and environmental well-being of the County and identifies any significant contextual changes that might influence the Plan's implementation or review.

Monitoring is a continuous part of the plan making process. It provides the connection between evidence gathering, plan strategy and policy formulation, policy implementation, evaluation and plan review.

Adoption of the Cardiff Local Development Plan

Under the Planning and Compulsory Purchase Act (2004) and associated Regulations, local planning authorities (LPAs) are required to produce a LDP. The Cardiff Local Development Plan was formally adopted by the Council on 28th January 2016. The LDP provides the land use framework which forms the basis on which decisions about future development in the city, including planning applications, are based.

This is the third AMR to be prepared since the adoption of the Cardiff LDP and is based on data collected for the period 1st April 2018 – 31st March 2019.

The Requirement for Monitoring Planning and Compulsory Purchase Act 2004

The Council has a statutory obligation, under section 61 of the 2004 Act, to keep all matters under review that are expected to affect the development of its area. In addition, under section 76 of the Act, the Council has a duty to produce information on these matters in the form of an Annual Monitoring Report for submission to the Welsh Government at the end of October each year following plan adoption. The preparation of an AMR is therefore an integral part of the statutory development plan process.

In order to monitor LDP performance consistently, plans should be considered against a standard set of monitoring indicators and targets. The Welsh Government has issued regulations and guidance on the required content of AMRs.

Town and Country Planning (Local Development Plan) (Wales) (Amendment) Regulations 2015

The Town and Country Planning (Local Development Plan) (Wales) Regulations have been amended to simplify certain aspects of the local development plan procedures, however, these do not affect the LDP monitoring process. Under Regulation 37 the

AMR is required to:

- Identify policies that are not being implemented;

And for each policy:

- Identify the reasons why the policy is not being implemented;
- Identify the steps (if any) that are intended to be taken to enable the policy to be implemented;
- Explore whether a revision to the plan to replace or amend the policy is required.

In addition, the AMR is required to monitor identified core indicators by specifying:

- The housing land supply from the current Housing Land Availability Study, and;
- The number (if any) of net additional affordable and general market dwellings built in the LPA area.

These are both for the year of the AMR and for the full period since the LDP was first adopted.

Other Core Output Indicators for LDPs include:

- Total housing units permitted on allocated sites as a % of overall housing provision
- Employment land permitted (ha) on allocated sites as a % of all employment allocations
- Amount of major retail, office and leisure development (sq m) permitted within and outside established town and district centre boundaries
- The extent of primary land-won aggregates permitted in accordance with the Regional Technical Statement for Aggregates expressed as a percentage of the total capacity required as identified in the Regional Technical Statement (MTAN).

Local Development Plan Manual (Edition 2, 2015)

The LDP Manual states that aspects that are usefully included in an AMR are:

- Key findings, in the form of a 1-2 page Executive Summary.
- Significant contextual change, i.e. a review of wider strategic issues affecting the local area and the context within which the LDP operates, including the fortunes of any significant local industries, emerging national planning guidance or a significant planning application
- Sustainability monitoring related to the SA Report and integrated assessment process (see section 9.2.2).
- Strategy monitoring, to assess whether the plan is achieving its main objectives, and whether it is “on track” in terms of the level of implementation, e.g. the level of new housing development or take-up of major sites.
- Policy monitoring, to highlight any policies which are not functioning effectively, and to highlight how such issues will be addressed.
- Conclusions and recommendations; e.g. identify any improvements/changes to key parts of the plan which would need to be considered in a future review and possible plan revision. Other appropriate responses may include identifying the need for SPG or further research and evidence gathering.

The Manual states that it is not realistic or necessary for all policies to be monitored - this would lead to an unnecessarily large and complicated document. Some key areas

will need to be included consistently each year and this will be for the Authority to determine based on those elements crucial to delivering the plans strategy.

The Manual states the broad structure of the AMR should remain the same from year to year in order to provide ease of analysis between successive reports and build on preceding results. Good use of illustrative material such as charts, graphs and maps will also make the AMR more accessible.

The Manual states that it is important that the AMR has an analytical dimension. There is also merit in incorporating qualitative information from consultation with key stakeholders, for instance, the views of community leaders on their areas, and the plan makers' assessment of trends, conditions and issues driving change.

The Manual states that it is important to consider why information is needed, and to structure the analysis accordingly. The following questions may be relevant:

- What new issues have occurred in the area or in local/national policy (key recent contextual and national policy changes, future prospects)?
- How relevant, appropriate and up-to-date is the LDP strategy and its key policies and targets?
- What sites have been developed or delayed in relation to the plan's expectations on location and timing?
- What has been the effectiveness of delivering policies and in discouraging inappropriate development?

Cardiff LDP Monitoring Framework

A Monitoring Framework is provided in Chapter Six and Appendix 9 of the LDP comprising a series of 5 contextual indicators and 102 core and local indicators, with corresponding targets and triggers for further action, in relation to the Plan's strategic policies. It also indicates the linkages between the Plan objectives, strategic policies and other Plan policies. The indicators were developed in accordance with the above Welsh Government Regulations and guidance on monitoring. The Monitoring Framework forms the basis of the AMR.

Strategic Environmental Assessment Regulations (2004) and The Conservation of Habitats and Species Regulations 2010 (as amended 2011)

In addition the LDP and AMR must comply with European Directives and Regulations. The Final Sustainability Appraisal Report, January 2016 identifies a further set of indicators (26) that will be used to monitor progress on sustainability issues. Whilst interlinked, these are set out separately from the LDP Policy Monitoring Framework and have been used in the AMR to measure the environmental, economic and social impacts of the LDP.

The completion of the AMR accords with the requirements for monitoring the sustainability performance of the Plan through the Strategic Environmental Assessment Regulations (2004) and The Conservation of Habitats and Species Regulations 2010 (as amended 2011).

AMR Format and Content

The AMR has been designed to be a succinct and easily accessible document that can be used as a convenient point of reference for all strategic policy areas.

The structure of the AMR is as follows:

Section 1 Executive Summary - Provides a succinct written summary of the key monitoring findings.

Section 2 Introduction - Outlines the requirement for, the purpose and structure of the AMR.

Section 3 Contextual Information - Provides a brief overview of the relevant contextual information which, although outside the remit of the Plan, could affect the performance of the LDP policy framework. Policy specific contextual information is provided in the relevant policy analysis section, including changes to policy framework at a national or local level.

Section 4 LDP Monitoring Process - Explains the monitoring process undertaken.

Section 5 LDP Monitoring - Policy Analysis - Reports on the 107 LDP monitoring indicators which were agreed during the LDP examination process and set out in the Inspectors Report.

Section 6 Sustainability Appraisal Monitoring - Provides an assessment of the LDP's performance against the 28 SA monitoring indicators.

Section 7 Conclusions and Recommendations – Sets out an overall overview of all indicators and Plan performance in the first year following adoption.

Publication – The AMR will be published on the Council's website.

Future Monitoring

The broad structure of the AMR should remain the same from year to year in order to provide ease of analysis between successive reports. However, given that the monitoring process is dependent upon a wide range of statistical information that is sourced from both the Council and external sources, any changes to these sources could make certain indicators ineffective or out-dated. Accordingly, the monitoring framework may evolve over the Plan period and AMRs will be used as a means of identifying any such inevitable changes to the framework.

The Council is required to commence a full review of the LDP every four years after Plan adoption. A review of the LDP in advance of the formal review will only take place if the conclusions of the AMR or other exceptional circumstances indicate otherwise.

3. Contextual Changes

This section provides a brief summary of the relevant contextual material that has been published during the current monitoring period. This includes national legislation and relevant plans, policies and strategies at the national, regional and local level. Any potential overall implications for the LDP as a whole are outlined where appropriate. General economic trends which have occurred since the LDP's adoption are also set out, together with progress on key supplementary planning guidance.

Contextual information which is specific to a particular LDP policy area is provided in the relevant policy analysis section for ease of reference and is therefore not repeated here.

Legislative Changes

Planning (Wales) Act 2015

The Planning (Wales) Act received Royal Assent in July 2015 and came into force in stages between October 2015 and January 2016. It sets out a series of legislative changes to deliver reform of the planning system in Wales, to ensure that it is fair, resilient and enables development. The Act addresses 5 key objectives which includes strengthening the plan-led approach to planning. It introduces a legal basis for the preparation of a National Development Framework (NDF) and Strategic Development Plans (SDP). The NDF is a national land use plan which will set out Welsh Government's policies in relation to the development and use of land in Wales. It is anticipated that this will be produced in 2018/9 when it will replace the Wales Spatial Plan. SDPs will address cross-boundary issues at a regional level such as housing, employment and waste and must be in general conformity with the NDF. The Regulations make reference to three strategic planning areas including South East Wales. It is anticipated that Cardiff will be part of this strategic planning area, in alignment with the emerging Cardiff Capital Region City Deal proposals. LDPs will continue to have a fundamental role in the plan-led system. The Act requires LDPs to be in general conformity with the NDF and any SDP which includes all or part of the area of the authority.

The Town and Country Planning (Local Development Plan) (Wales) (Amendment) Regulations 2015

Amendments to The Town and Country Planning (Local Development Plan) (Wales) Regulations 2005 were carried out in response to the outcome of the LDP Refinement Exercise and aim to simplify certain aspects of the local development plan process.

The amended Regulations:

- Remove the statutory requirement to advertise consultation stages in the local press;
- Allow local planning authorities to make revisions to the local development plan where the issues involved are not of sufficient significance to warrant the full procedure, without going through the full revision process;
- Eliminate the need to call for and consult on alternative sites following the deposit consultation; and

- Make minor and consequential amendments.

The amended LDP Regulations came into force on 28 August 2015 and together with the related policy and guidance in Planning Policy Wales (PPW) and the revised LDP Manual aim to make the LDP process more efficient and effective (i.e. enabling swifter plan preparation and revision without imposing unnecessary prescription). The amended Regulations do not have any implications for the current LDP but will need to be considered in relation to any Plan review and will be given further consideration as necessary.

Well-being of Future Generations (Wales) Act 2015

The Well-being of Future Generations (Wales) Act gained Royal Assent in April 2015 and came into force on 1st April 2016. The Act strengthens existing governance arrangements for improving the well-being of Wales by ensuring that sustainable development is at the heart of government and public bodies. It aims to make a difference to the lives of people in Wales in relation to a number of well-being goals including improving health, culture, heritage and sustainable resource use. The Act provides the legislative framework for the preparation of Local Well-being Plans which will replace Single Integrated Plans. Given that sustainable development is the core underlying principle of the LDP (and SEA) there are clear associations between the aspirations of both the LDP and Act/Local Well-being Plans. Indeed, it is considered that the LDP evidence base, SEA/SA and AMR will inform the Council's Local Well-being Plan. Moving forward, sustainable development principles will continue to inform any review of the Plan.

Environment (Wales) Act 2016

This Act received Royal Assent in March 2016 and came into force on 21st May 2016 and sits alongside the Planning (Wales) Act 2015 and the Well-being of Future Generations (Wales) Act 2015 in promoting sustainable use, management and development of Welsh resources. The Environment (Wales) Act introduces new legislation for the environment and provides an iterative framework which ensures that managing Wales' natural resources sustainably will be a core consideration in decision-making. It requires Natural Resources Wales (NRW) to prepare a State of Natural Resources Report that provides an assessment of natural resources and considers the extent to which they are being sustainably managed. The Act also requires Welsh Government to produce a National Natural Resources Policy that sets out the priorities, risks and opportunities for managing Wales' natural resources sustainably. NRW will also produce a local evidence base (Area Statements) to help implement the priorities, risks and opportunities identified in the National Policy and set out how these will be addressed. Any subsequent implications for the LDP will be given further consideration as necessary.

Historic Environment (Wales) Act 2016

The Historic Environment (Wales) Act 2016 received Royal Assent in March 2016. The Act makes important changes to the two main UK laws that provide the legislative framework for the protection and management of the historic environment: the Ancient Monuments and Archaeological Areas Act 1979 and the Planning (Listed Buildings

and Conservation Areas) Act 1990. The Act will give more effective protection to listed buildings and scheduled ancient monuments; improve the sustainable management of the historic environment; and introduce greater transparency and accountability into decisions taken on the historic environment. While some of the Act's measures came into force in May 2016, the majority will require further secondary legislation or other preparations before they are brought into effect later in 2017 or in 2018. Any implications for the LDP will be given further consideration as necessary.

Public Health (Wales) Act 2017

The Public Health (Wales) Act 2017 received Royal Assent in July 2017. The Act makes changes to the law in Wales to improve health and prevent avoidable health harms. Some of the relevant changes in the Act include the production of a national strategy on preventing and reducing obesity and a requirement to undertake Health Impact Assessment (HIA) on key decisions.

National Planning Policy Amendments

Planning Policy Wales (Edition 10, December 2018)

Since the LDP was adopted in January 2016 Welsh Government have issued a completely revised version of Planning Policy Wales (Edition 10) in December 2018. This has been re-drafted so that the seven well-being goals and five ways of working of the Well Being of Future Generations Act 2015 is fully integrated into policy. It also puts the concept of placemaking into the heart of national planning policy in order to ensure that planning decisions consider all aspects of well-being and deliver new development which is sustainable and provides for the needs of all people.

Technical Advice Notes (TANs)

TAN 12 Design and Guidance on Site Context Analysis was updated in March 2016, TAN4 Retail and Commercial Development in November 2016 and TAN 20 Planning and the Welsh Language in October 2017. In addition a new TAN 24 The Historic Environment was published in October 2017 which replaced previous Welsh Office Circulars covering this issue. The potential implications of the changes to these TAN's for the LDP are provided in the relevant policy analysis section.

Regional Context

Cardiff Capital Region and City Deal

South-East Wales is identified as a new city-region in Wales, covering Cardiff and South-East Wales Local Authorities. As set out in the report 'Powering the Welsh Economy'¹, the Cardiff Capital Region is intended to encourage the ten local authorities and other key partners in its boundaries to work together and collaborate on projects and plans for the area. A transition board has been established although Progress remains at an early stage and at present the potential consequences for the LDP are not clear. Similarly the Authorities forming the Capital Region are continuing to work on a City Deal bid to fund projects aimed at boosting the competitiveness of

the region over the next 20 years. Of note, the City Deal document was signed by the 10 local authority leaders, Secretary of State for Wales, Chief Secretary to the Treasury and First Minister in March 2016. The progress of the Cardiff Capital Region agenda, City Deal Bid and any subsequent implications for the LDP will be given further consideration in subsequent AMRs where appropriate.

Local Context

Capital Ambition Report

This report was issued in July 2017 and sets out the Council's five-year plan for the city. It outlines the Council's vision for Cardiff to become a leading city on the world stage. The plan focuses on four main areas:

- **Working for Cardiff** - Making sure everyone who lives and works here can contribute to, and benefit from, the city's success.
- **Working for Wales** - A successful Wales needs a successful capital city.
- **Working for the future** - Managing the city's growth in a sustainable way.
- **Working for public services** - Making sure public services are delivered efficiently, effectively and sustainably in the face of rising demands and reduced budgets.

Cardiff Community Infrastructure Levy (CIL) Update

Consultation on the CIL Draft Charging Schedule commenced during the current monitoring period. As this matter has now been devolved to Welsh Government the Council is currently awaiting guidance from Welsh Government on this matter before deciding how to proceed with the next steps in the preparation process. This guidance is due to issued by Welsh Government in early 2018 The progress of the CIL and any subsequent implications for the LDP will be given further consideration in successive AMRs where appropriate.

General Economic Trends

Economic Activity

Key economic activity data for Cardiff and Wales from the LDP base date of 2006 to the current monitoring period is shown in the tables below. The data demonstrates that Cardiff has experienced improved economic performance in relation to these indicators with employment, unemployment and earnings indicators all higher than the LDP base date of 2006. However, such changes are not considered to be so significant to have any implications for the LDP. These economic indicators will be considered in subsequent AMRs and any potential implications recorded.

Economically Active – In Employment

	Cardiff	Wales
April 2006 to March 2007	66.7%	69.1%
April 2007 to March 2008	68.9%	69.3%
April 2008 – March 2009	69.5%	68.4%
April 2009 – March 2010	68.15	66.6%
April 2010 – March 2011	64.7%	66.4%
April 2011 – March 2012	65.5%	66.7%
April 2012 – March 2013	65.5%	67.6%
April 2013 – March 2014	69.4%	69.5%
April 2014 – March 2015	65.6%	69.3%
April 2015 – March 2016	69.1%	71.1%
April 2016 to March 2017	69.1%	71.4%
April 2017 to March 2018	72.0%	72.7%
April 2018 to March 2019	79.0%	76.7%

Source: Nomis

Economically Active – Unemployed

	Cardiff	Wales
April 2006 to March 2007	6.2%	5.3%
April 2007 to March 2008	6.1%	5.6%
April 2008 – March 2009	6.9%	6.8%
April 2009 – March 2010	8.7%	8.3%
April 2010 – March 2011	8.9%	8.4%
April 2011 – March 2012	9.1%	8.4%
April 2012 – March 2013	10%	8.3%
April 2013 – March 2014	8.1%	7.4%
April 2014 – March 2015	8.4%	6.8%
April 2015 – March 2016	6.7%	5.4%
April 2016 – March 2017	4.8%	4.4%
April 2017 – March 2018	6.0%	4.9%
April 2018 – March 2019	4.6%	4.5%

Source: Nomis

Gross Weekly Pay Full-Time Workers (Earnings by Residence)

	Cardiff	Wales
April 2006 to March 2007	£442.2	£414.8
April 2007 to March 2009	£453.2	£424.8
April 2008 – March 2009	£483.0	£444.6
April 2009 – March 2010	£499.3	£456.2
April 2010 – March 2011	£498.5	£455.1
April 2011 – March 2012	£495.4	£454.9
April 2012 – March 2013	£503.6	£475.3
April 2013 – March 2014	£496.4	£480.0
April 2014 – March 2015	£519.0	£487.6
April 2015 – March 2016	£534.4	£499.2
April 2016 – March 2017	£538.5	£505.9
April 2016 – March 2017	£534.4	£499.2
April 2017 – March 2018	£538.5	£505.9
April 2018 – March 2019	£536.7	£518.6

Source: Nomis

House Prices

As demonstrated in the table below, Land Registry data indicates that in general average house prices in Cardiff have increased over the current monitoring period. Average prices in 2017 at £223,081 were higher than the 2006 baseline price (£177,469). The data below shows that house prices have risen by 26% during the monitoring period.

Cardiff Average House Prices 2006 to 2018

Time Period	Average House Price
2006	£177,469
2007	£184,136
2008	£174,278
2009	£173,100
2010	£183,498
2011	£181,529
2012	£181,690
2013	£190,048
2014	£195,390
2015	£202,970
2016	£213,714
2017	£223,081
2018	£234,095

Source: Land Registry

Supplementary Planning Guidance

A number of supplementary planning guidance (SPG) documents to support key LDP policy areas have been approved during the current monitoring period. These are:

- Houses in Multiple Occupation
- Waste Collection and Storage Facilities
- Locating Waste Management Facilities
- Planning Obligations
- Tall Buildings
- Residential Design Guide
- Childcare SPG
- Planning for Health and Well-being
- Infill Design Guidance
- Residential Extensions and Alterations Guidance
- Green Infrastructure (including Technical Guidance Notes relating to Open Space, Ecology and Biodiversity, Trees, Soils, Public Rights of Way and River Corridors)
- Safeguarding Business and Industrial Land and Premises
- Food, Drink and Leisure Uses
- Archaeologically Sensitive Areas
- Managing Transportation Impacts (including Parking Standards)
- Flat Conversions
- Student Accommodation

In addition the following SPG were approved by Council on 20th June, 2019 outside the monitoring period:

- Shop Fronts and Signs Guidance

Work on other SPG is ongoing and progress on these will be reported in the next AMR.

Summary

As detailed above, new legislation and national, regional and local plans, policies and strategies have emerged during the current monitoring period, some of which may have implications for the future implementation of the LDP. Subsequent AMRs will continue to provide updates on relevant contextual material which could affect the Plan's future implementation.

4. LDP Monitoring Process

How is the LDP Monitored?

Section 5 considers the extent to which the LDP's strategy is being realised with reference to the performance of particular policies against the indicators, targets and triggers contained within the LDP monitoring framework. The structure of the section is as follows:

Strategic objective

This is the starting point for the monitoring process. The AMR replicates each of the 4 overarching LDP objectives set out below from which the LDP policies flow.

- **Objective 1** – To respond to evidenced economic needs and provide the necessary infrastructure to deliver development
- **Objective 2** – To respond to evidenced social needs
- **Objective 3** – To deliver economic and social needs in a co-ordinated way that respects Cardiff's environment and responds to the challenges of climate change
- **Objective 4** – To create sustainable neighbourhoods that form part of a sustainable city

Contextual information

Significant contextual information that has been published since the Plan's adoption is outlined where relevant to a particular strategic policy. This will enable the AMR to determine whether the performance of a policy has been affected by contextual changes. These can include new or amended legislation, national, regional and local plans, policies or strategies as well as external social and economic trends which could affect the delivery of the LDP such as economic conditions. Any such changes lie outside the remit of the LDP.

Indicators

The LDP monitoring framework contains a variety of core and local indicators which will inform policy progress and achievement. The selection of these indicators has been guided by the need to identify output indicators which are able to measure quantifiable physical activities that are directly related to the implementation of LDP policies.

Several of the core indicators are either prescribed by LDP Regulation 37 or recommended by the LDP Manual for their ability to enable an assessment of the implementation of national policy. Further core indicators were identified on the basis of their ability to provide useful information on whether the delivery of the LDP strategy is progressing as anticipated.

The local indicators supplement the core indicators and have been selected based on the availability and quality of data and their relevance to the local area. Some local contextual indicators have also been included which cover key local characteristics against which LDP policies operate.

Targets

The policy indicators are associated with corresponding targets which provide a benchmark for measuring policy implementation. Given the length of the plan period, it is necessary to incorporate 'milestone' targets to determine whether the Plan is progressing towards meeting the overall strategy. The timeframe attributed to such targets primarily relates to the anticipated delivery of development. The Council will investigate any policy that fails to meet its target. The level of consideration given to such policies within the AMR will depend on the reasons identified for the failure and the significance of the policy for the delivery of the overall plan strategy.

Triggers

Trigger levels have also been included for certain targets to more accurately help measure plan performance. They will provide an indication of when policy targets are not being met, or insufficient progress is being made towards meeting them.

Analysis

Having regard to the indicators, relevant targets, triggers and monitoring outcomes, the AMR assesses whether the Plan's policies are being implemented as intended and whether the LDP objectives and strategy are being achieved. This includes the identification and further investigation of any policy that fails to meet its target and/or has reached its trigger point. However, the fact that a policy reaches its trigger level does not automatically imply that the policy is failing. The analysis will consider whether such performance may be due to extraneous circumstances or could be justified in the context of the overall policy framework. In certain instances it has been difficult to identify meaningful trends due to the limited amount of data available and consequently some of the conclusions drawn are preliminary and will need to be verified by a longer period of monitoring. In instances where the Council has been unable to monitor an indicator or where an indicator has been superseded, an explanation will be provided in the relevant policy analysis section.

Recommendations

Taking account of the policy analysis, appropriate recommendations are provided including a statement of any necessary actions required. If policies are found to be failing the AMR will set out clear recommendations on what, if anything, needs to be done to address this.

Overall findings for each strategic objective

Finally, for each strategic objective, an overall statement of performance is provided and a conclusion made on whether that particular objective is being achieved through the combination of policies identified.

Policy Performance Traffic Light Rating

As a visual aid in monitoring the effectiveness of the Plan's strategic policies and to provide a quick reference overview of policy performance a 'traffic light' rating is included for relevant indicators as follows:

Continue Monitoring (Green)	
Where indicators are suggesting the LDP Policies are being implemented effectively and there is no cause for review.	
Training Required (Blue)	
Where indicators are suggesting that LDP policies are not being implemented as intended and further officer or Member training is required.	
Supplementary Planning Guidance Required (Purple)	
Indicators may suggest the need for further guidance to be provided in addition to those already in the Plan.	
Further Research (Yellow)	
Where indicators are suggesting the LDP policies are not being as effective as they should, further research and investigation is required.	
Policy Review (Orange)	
Where indicators are suggesting the LDP policies are failing to implement the strategy a formal review of the Policy is required. Further investigation and research may be required before a decision to formally review is confirmed.	
Plan Review (Red)	
Where indicators are suggesting the LDP strategy is failing and a formal review of the Plan is required. This option to fully review the Plan will need to be fully investigated and undertaken following serious consideration.	

Sustainability Appraisal Monitoring Framework

The Sustainability Appraisal Monitoring expands the assessment of the performance of the LDP against the Sustainability Appraisal (SA) monitoring objectives. The SA identifies 26 indicators developed to measure the environmental, economic and social impacts of the LDP. This is set out in Section 6 of the AMR.

This section provides a detailed assessment of whether the Plan's strategic policies, and associated supporting policies, are being implemented as intended and whether the LDP objectives and strategy are being achieved. Appropriate recommendations are subsequently provided, together with necessary actions to address any policy implementation issues identified through the monitoring process. Aligned with the LDP, the analysis is set out in strategic policy order.

5. LDP Monitoring Policy Analysis

Contextual Indicators

Contextual Indicators	Target	Trigger	Result 2016/17	Result 2017/2018	Result 2018/2019
Annual unemployment rate	The annual unemployment rate decreases	The annual unemployment rate increase for two or more consecutive years	5.3%	6.0%	4.6%
Percentage of population in the 100 most deprived wards in Wales	The percentage of population in the 100 most deprived wards in Wales decreases	The percentage of population in the 100 most deprived wards in Wales increases for 2 or more consecutive years	The latest Welsh Index of Multiple Deprivation data from 2015 shows that 12% of the population of Cardiff is in the 100 most deprived wards in Wales	Next update to Welsh Index planned for 2019	Next update to Welsh Index planned for 2019
Level of Police recorded crime in Cardiff	Police Recorded Crime rates decrease	Police Recorded Crime rates increase for two or more consecutive years.	In the quarter ending December 2016, crime rates were up in Cardiff (and in the South Wales force area) compared with the corresponding quarter in 2015. Crime rates in Cardiff increased from 23.08 crimes per thousand residents to 25.32	In the quarter ending December 2017, crime rates were up in Cardiff (and in the South Wales force area) compared with the corresponding quarter in 2016. Crime rates in Cardiff increased from 25.32 crimes per thousand residents to 28.33	In the quarter Ending December 2018, crime rates were down in Cardiff compared with the corresponding quarter in 2017. Crime rates in Cardiff decreased from 28.23 crimes per thousand residents to 27.72

Contextual Indicators	Target	Trigger	Result 2016/17	Result 2017/2018	Result 2018/2019
			crimes per thousand residents.	crimes per thousand residents.	crimes per thousand residents.
Percentage of adults meeting recommended guidelines for physical activity	The percentage of adults meeting recommended guidelines for physical activity increases annually over the Plan period	The percentage of adults meeting recommended guidelines for physical activity decreases for two of more consecutive years	62% of adults reported being physically active for more than 150 mins in the previous week 23% of adults reported being physically active for less than 30 mins in the previous week	58% of adults reported being physically active for more than 150 mins in the previous week 27% of adults reported being physically active for less than 30 mins in the previous week	56% of adults reported being physically active for more than 150 mins in the previous week 31% of adults reported being physically active for less than 30 mins in the previous week
Waste Reduction Rate	Waste reduction rate of 1.2% annually to 2050	The waste reduction rate falls below 1.2% for two or more consecutive years	The amount of household waste collected and generated between 2014/15 and 2015/16 increased by 3% from 170,715 to 177,457 tonnes	The amount of household waste collected and generated between 2015/16 and 2016/17 decreased by 0.3% from 177,457 to 176,952 tonnes	The amount of household waste collected and generated between 2016/17 and 2017/18 decreased by 2.3% from 176,952 to 172,852 tonnes

Objective 1 – To respond to evidenced economic needs and provide the necessary infrastructure to deliver development

Topic Area: Employment Land Permitted on Allocated Sites

Relevant LDP Policies: KP2, KP9, EC1 – EC7

Indicator reference: OB1 EC1

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
Core Employment land permitted (ha) on allocated sites as a percentage of all employment allocations.	None	None
Performance 1st AMR 1 st April 2016 to 31 st March 2017	Performance 2nd AMR 1 st April 2017 to 31 st March 2018	Performance 3rd AMR 1 st April 2018 to 31 st March 2019
Total land area of Allocations = 132ha Employment development permitted on allocated sites (April 2016 - 31 st March 2017) = 11.6ha. This equates to 9%	Total land area of Allocations = 132ha Employment development permitted on allocated sites (April 2017 – 31 st March 2018) = 2.12ha. This equates to 1.7%	Total land area of Allocations = 132ha Employment development permitted on allocated sites (April 2018 – 31 st March 2019) = 3.16ha. This equates to 2.4%

Analysis

The monitoring table below provides a breakdown of employment land permitted during the monitoring period on allocated sites.

Application No.	Proposal	Address	Site Area (ha)	Status
18/00735/MJR	Full application for Full planning application for: an office building providing business (Use Class B1) floorspace, with ancillary gym (Use Class D2),	Land at Brains Brewery and adjoining land to the south of Cardiff Central Station	2.02	Not started (Granted 11.07.18)

	Marketplace/retail (Use Class A1) and food and drink (Use Class A3) uses; a Multi-Storey Car Park (Sui Generis) with ancillary retail (Use Class A1); and public realm, access, drainage and other infrastructure works required for the delivery of Central Quay (Phase 1)			
18/01705/MJR	Erection of a Transport Interchange with an associated concourse and ancillary retail/commercial units (Use Classes A1/A2/A3), 305 residential apartments (Use Class C3), 10,318 sq m (GIA) office floorspace (Use Class B1), a 249-space car park and a cycle hub, public realm and related infrastructure and engineering works	Site of Former Marland House and NCP Car Park, Central Square,	1.14ha	No started (Granted 07.11.18 subject to S106)

The employment land permitted (ha) on allocated sites during the period 1st April 2018 to 31st March 2019 as a percentage of all employment allocations is 2.4%, slightly higher than the previous 12 months. Please note a significant area of this allocation has an existing development footprint, or has already been developed during the LDP plan period.

It is also worth noting that although the take up in terms of hectares would appear low, the schemes permitted are high density, high rise offices which have smaller land requirements.

Recommendations

No action is required at present. Continue to monitor.

Topic Area: Employment Land Take Up

Relevant LDP Policies: KP2, KP9, EC1-EC7

Indicator reference: OB1 EC2

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
Core Annual Employment land take up (based on completions) in Cardiff (including on Strategic Sites – Policy KP2)	Offices (B1) = 27,000-33,400 sqm annually. Industrial (B1 b/c, B2, B8) = 4 to 7 ha annually	Offices (B1) = Take up is more than 10% above or below the target for 2 or more consecutive years (B1b/c, B2, B8) = Take up is more than 10% above or below the target for two or more consecutive years.
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
Office Take Up (April 2016 to April 2017) = 9760 sqm Industrial Take up (April 2016 to April 2017) = 12.3 ha	Office Take Up (April 2017 to April 2018) = 14,969 sqm Industrial Take up (April 2017 to April 2018) = 0.5 ha	Office Take Up (April 2018 to April 2019) = 39,726 sqm Industrial Take up (April 2018 to April 2019) = 1.6 ha
Analysis		
<p>Office Take up is based on completions during the period April 2018 to 31st March 2019. In this period 39,726 sqm of office floorspace was completed, This floorspace was attributed to the completion of the Office and Media Centre development, at land to the north of Cardiff Central Railway Station. This is slightly above the target set. It is important to note office development at No 4 Capital Quarter is also nearing completion which comprises 11,022 sqm of office floorspace.</p> <p>Taking these figures into consideration, Cardiff's Office market is deemed to be strong, and no concerns are raised in relation to this indicator.</p> <p>Industrial Take-up is based on completions during the period April 2018 to 31st March 2019. Although falling short of the annual target there have been a number of significant industrial completions, which included a 0.9 ha development for B8 self storage at 234 Penarth Road, and 0.6 ha for a new brewery production facility/head office at Pacific Business Park, Splott.</p>		

There are also a number of current planning permissions for industrial use. The most significant developments in the pipeline being 15.4 ha of commercial development (B2 and B8 uses), on land adjacent to Longships Road and Compass Road, Cardiff Bay, and a proposed development to take up 16.5 ha of land for a Biomass Power plant, with industrial accommodation (B8 use class). Taking these factors into consideration no concerns are raised in relation to this indicator.

Recommendations

No action is required at present. Continue to monitor.

Topic Area: Loss of Employment Land

Relevant LDP Policies: KP2, EC1 – EC7

Indicator reference: OB1 EC3

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
Local Amount of employment land lost to non-employment uses in primary and local employment sites (Policy EC1)	No loss of employment land (Policy EC1) unless in accordance with Policy EC3.	No loss of employment land on EC1 protected sites, except for developments which have been considered a complimentary use under Policy EC2, or which have been considered to satisfy Policy EC3.
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
No loss of employment land occurred on EC1 protected sites except where the proposal was considered a complimentary use under Policy EC2, or which satisfied policy EC3.	No loss of employment land occurred on EC1 protected sites except where the proposal was considered a complimentary use under Policy EC2, or which satisfied policy EC3.	No loss of employment land occurred on EC1 protected sites except where the proposal was considered a complimentary use under Policy EC2, or which satisfied policy EC3.
Analysis		
<p>In relation to complimentary uses, a day nursery, a number of small scale A3 retail units and gyms were approved. A veterinary hospital was approved at Avenue Industrial Park (EC1.14) and this included a B1 element. An inflatable park was approved at Jubilee Trading Estate, East Tyndall Street as assessed against Policy EC3 has been marketed for B use class employment without success.</p> <p>It is therefore considered that Policy EC1 and Policy EC3 are functioning effectively. The council will continue to monitor this indicator to determine the effectiveness of the policy framework relating to this issues.</p>		
Recommendations		
No action is required as present. Continue to monitor.		

Topic Area: Employment Provision Cardiff Central Enterprise Zone

Relevant LDP Policies: KP2(A), KP9, EC1 – EC7

Indicator reference: OB1 EC4

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger		
Local Employment provision of Allocated Sites (KP2 (A) – Cardiff Central Enterprise Zone)	Employment densities for B1 use at least 14.5 per sqm (gross external value)	No trigger is set at present but will be revised once further details are known		
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019		
Office completions – 9760sq m Offices under construction- 23,380sq m Offices in pipeline with planning permission – 157,897sq m	Office completions – 14,969sq m Offices under construction – 42,652sq m Offices in pipeline (since April 2017) with planning permission – 13,275sq m	Office completions – 39,726 sq m Offices under construction – 42,652sq m Offices in pipeline (since April 2018) with planning permission – 49,328sq m.		
Analysis				
<p>Within the Allocated Site (KP2A) the amount of office floorspace completions has increased on the previous year with 39,726sq m of office floorspace completed. Office floorspace currently under construction are the same schemes which were under construction in the last monitoring report.</p> <p>Since April 2018 a further 49,328sq m of office floorspace is in the pipeline with planning permission.</p> <p>Please see monitoring table below for a breakdown of employment land permitted during the monitoring period on allocated sites.</p>				
Completions				
Application No.	Proposal	Address	Floorspace	Status
14/02405/MJR	DEMOLITION OF MARLAND	LAND TO THE NORTH OF	14,500	Complete

	HOUSE. MEDIA CENTRE, GROUND FLOOR RETAIL, OFFICES 14,500SQ M B1 OFFICES AND MEDIA CENTRE 25,225SQ M.	CARDIFF CENTRAL STATION		
Under Construction				
16/01749/MJR	HYBRID APPLICATION COMPRISING OF FULL DETAILED APPLICATION FOR THE PROPOSED MIXED-USE COMMERCIAL OFFICE BUILDING AT NUMBER 4 CAPITAL QUARTER AND OUTLINE APPLICATION FOR REMAINING PARTS OF WESTERN COURTYARD AT PLOT J AND L FOR RESIDENTIAL AND ASSOCIATED PUBLIC REALM AND LANDSCAPING	PLOT 1, J AND L, WESTERN COURTYARD, CAPITAL QUARTER, TYNDALL STREET, ATLANTIC WHARF	11,022 sqm	Under Construction (Granted 13/04/2017)
17/01751/MJR	31,630 sq m (GIA) 24,837sq m (GIA) OF USE CLASS B1 OFFICES OF WHICH UP TO 372 SQ M OF USE CLASS A1/A3 (RETAIL/CAFÉ) WILL BE PROVIDED AT GROUND FLOOR LEVEL WITH CAR AND	LAND NORTH OF WOOD STREET, WEST OF HAVELOCK STREET, SOUTH OF PARK STREET AND EAST OF NO.6 PARK STREET. (THE SITE ENCOMPASSES PLOTS 6 (IN PART) 7 AND 8 OF THE	31,630SQ M	Under Construction (Granted 13/09/2017)

	CYCLE PARKING AND PUBLIC REALM WORKS	CENTRAL SQUARE MASTERPLAN AREA)		
Not Started				
17/02615/MJR	HYBRID APPLICATION COMPRISING OF FULL APPLICATION FOR THE PROPOSED MIXED USE COMMERCIAL BUILDING ON THE SOUTH SITE NO.1 JOHN STREET OUTLINE APPLICATION PROPOSED MIXED USE COMMERCIAL & LEISURE HOTEL FOR THE NORTH SITE NO.2 JOHN STREET. INCLUDING ASSOCIATED PARKING, PUBLIC REALM AND LANDSCAPE WORKS.	LAND ON THE NORTH AND SOUTH SIDE OF JOHN STREET, CALLAGHAN SQUARE, BUTETOWN	13,275 sqm	Not started
18/00735/MJR	11 STOREY BUILDING WITH 25,725 SQ M PRIMARILY FOR OFFICE USE WITH GYM (D2), MARKET PLACE/RETAIL AT GROUND FLOOR	LAND AT BRAINS BREWERY AND ADJACENT TO SOUTH OF CARDIFF CENTRAL STATION	25,735 sq m	Not started
18/01705/MJR	TRANSPORT INTERCHANGE, ANCILLARY RETAIL/COMMERCIAL UNITS, RESIDENTIAL, 10,318SQ M OFFICE FLOORSPACE	SITE OF FORMER MARLAND HOUSE AND NCP CAR PARK	10,318 sq m	Not started

The data above shows Policy KP2(A) is effectively delivering the development of the multi storey high density office development in the Central Enterprise Zone with completions higher than the previous year, Pipeline applications are also higher than the previous year. The Council will continue to monitor this indicator to determine the effectiveness of the policy framework relating to this issue.

Recommendations

No action is required at present. Continue to monitor.

Topic Area: Employment Provision North West Cardiff

Relevant LDP Policies: KP2(C), KP9, EC1 – EC7

Indicator reference: OB1 EC5

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Employment provision on Allocated Sites – (KP2 C – North West Cardiff)	15,000sq m (B1 & B1(b&c))	No trigger is set at present but will be revised once further details are known.
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
15,500sq m B1(a), B1(b) & B1(c) included in planning application (ref 14/02733/MJR) approved 20/03/2017	The office development granted planning permission as part of this strategic residential led mixed use development has not yet started.	The office development granted planning permission as part of this strategic residential led mixed use development has not yet started.
Analysis		
<p>Planning permission 14/02733/MJR granted 20/03/2017 for residential led mixed use development of this strategic sites which includes the target level of B1 floorspace.</p> <p>Although not yet started, the residential development has begun. It is therefore considered that policy KP2 is functioning effectively. The Council will continue to monitor this indicator to determine the effectiveness of the policy framework relating to this issue.</p>		
Recommendations		
No action is required at present. Continue to monitor.		

Topic Area: Employment Provision North of Junction 33

Relevant LDP Policies: KP2 (D&E), KP9, EC1 – EC7

Indicator reference: OB1 EC6

Contextual Changes: There have been no significant contextual change relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Employment provision on Allocated Sites – (KP2 D&E – North of J33 & South of Creigiau)	3 ha by J33 plus 2.5ha flexible local employment space.	No trigger set at present but will be revised once further details are known.
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
6.7ha employment space including interchange included in planning application (ref 14/00852/MJR) granted 28/02/2017.	Not started.	No started.
Analysis		
<p>Planning permission 14/00852/MJR granted 28/02/2017 for the residential led mixed use development of this strategic site which includes the target level of employment floorspace. Development has not yet started.</p> <p>As the site has been granted planning permission it is considered that policy KP2 D&E is functioning effectively. The Council will continue to monitor this indicator to determine the effectiveness of this policy framework relating to this issues.</p>		
Recommendations		
No action is required at present. Continue to monitor.		

Topic Area: Employment Provision North East Cardiff

Relevant LDP Policies: KP2 (F), KP9, EC1 – EC7

Indicator reference: OB1 EC7

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Employment provision on Allocated Sites – (KP2 F – North East Cardiff)	6.5ha B1 & B1 (b&c) employment space	No trigger is set at present but will be revised once further details are known.
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
No application submitted to date	No application submitted to date	No application submitted to date
Analysis		
No application submitted to date. The Council will continue to monitor this indicator to determine the effectiveness of the policy framework relating to this issue.		
Recommendations		
No action is required at present. Continue to monitor.		

Topic Area: Employment Provision South of St Mellons Business Park

Relevant LDP Policies: KP2 (H), KP9, EC1 – EC7

Indicator reference: OB1 EC8

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Employment provision on Allocated Sites – (KP2H- South of St. Mellons Business Park)	80,000 to 90,000sq m (B1(b)/(c))	No trigger is set at present but will be revised once further details are known.
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
No application submitted to date	No application submitted to date	No application submitted to date
Analysis		
No application submitted to date. The Council will continue to monitor this indicator to determine the effectiveness of the policy framework relating to this issues.		
Recommendations		
No action is required at present.		

Topic Area: Net Job Creation

Relevant LDP Policies: KP1, KP9, EC1 – EC7

Indicator reference: OB1 EC9

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Net job creation over the remaining Plan period (Total = 40,000 over whole Plan period, 20,900 jobs created between 2006 and 2015).	19,100 by 2026 or 1,736 annually. Target is set at 1,750 jobs annually over the remaining plan period.	19,100 by 2026 or 1,736 annually. Target is set at 1,750 jobs annually over the remaining plan period.
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
Total jobs in Cardiff – 204,000 in 2015 (latest Nomisweb.co.uk figures 2015).	Total jobs in Cardiff – 208,000 in 2016 (latest Nomisweb.co.uk figures (2016).	Total jobs in Cardiff – 214,000 in 2017 (latest Nomisweb.co.uk figures, 2017).
Analysis		
<p>The total number of jobs in Cardiff has risen to 214,000 jobs, a rise of 6,000 jobs since the last AMR, and is well above target.</p> <p>It is therefore considered that KP1 is functioning effectively. The Council will continue to monitor this indicator to determine the effectiveness of the policy framework relating to this issue.</p>		
Recommendations		
No action required at present. Continue to monitor.		

Topic Area: Active A1 Retail Units within District and Local Centres

Relevant LDP Policies: R1-R8

Indicator reference: OB1 EC10

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger	
Active A1 (retail) units within District and Local Centres remaining the predominant use.	A1 units comprising 40% of all units within District & Local Centres (Base Level in 2013).	A1 units comprising less than 40% of all units within a centre.	
Performance 1st AMR 1 st April 2016 to 31 st March 2017	Performance 2nd AMR 1 st April 2017 to 31 st March 2018	Performance 3rd AMR 1 st April 2018 to 31 st March 2019	
District Centres – Average of 46% active retail units within centres. Local Centres – Average of 47% active A1 retail units within centres.	District Centres – Average of 45% active A1 retail units within centres. Local Centres – Average of 46% active A1 retail units within centres.	District Centres – Average of 44% active A1 retail units within centres. Local Centres – Average of 44% active A1 retail units within centres. For an individual breakdown see analysis section.	
Analysis			
District Centres			
District Centre	Total No of Units	No active A1 (retail) units	Percentage Active A1 (retail) units
Albany Road/Wellfield Road	199	95	48%
City Road	175	68	39%
Clifton Street	101	53	52%
Cowbridge Road East	191	86	45%
Crwys Road/Woodville Road	132	52	39%
Bute Street/James Street	63	17	27%
Merthyr Road, Whitchurch	94	50	53%
Penarth Road/Clare Road	68	33	48%
St Mellons	21	9	43%
Thornhill	7	4	57%

Whitchurch Road	122	45	37%
		Average	44%

The average percentage of active A1 retail units within District Centres is 46%. The majority of District Centres exceed the 40% target with the exception of Bute Street/James Street, Crwys Road/Woodville Road, Whitchurch Road and City Road. It is acknowledged that Bute Street/James Street has historically had a large element of restaurants/cafes given its location within Mermaid Quay, Cardiff Bay.

Crwys Road/Woodville Road, Whitchurch Road and City Road fall just below the 40% threshold. City Road has a number of student accommodation schemes currently taking place which when complete will provide ground floor retail units.

Local Centres

Local Centre	Total No of Units	No active A1 (retail) units	Percentage of Active A1 (retail) units
Birchgrove	48	22	46%
Bute Street (Loudoun Square)	12	9	75%
Cathedral Road	27	13	48%
Countisbury Avenue	35	17	47%
Caerau Lane	9	5	56%
Fairwater Green	16	8	50%
Gabalfa Avenue	15	5	33%
Grand Avenue	20	6	30%
High Street, Llandaff	34	12	35%
Maelfa, Llanedeyrn*	N/A*	N/A*	N/A*
Newport Road, Rumney	45	20	44%
Rhiwbina Village	48	25	52%
Salisbury Road	45	16	36%
Splott Road	38	14	37%
Station Road, Llanishen	28	13	46%
Station Road, Llandaff North	32	14	44%
Station Road, Radyr	14	7	50%
Tudor Street	35	15	43%
Willowbrook Drive	5	1	20%
Wilson Road	15	8	53%
		Average	44%

*Maelfa Local Centre is currently undergoing a mixed use redevelopment (Planning Application 11/1082/DCO)

The average percentage of active A1 retail units within Local Centres is 44%. The majority of Local Centres exceed the 40% target with the exception of Gabalfa Avenue, Grand Avenue, High Street Llandaff, Salisbury Road, Splott Road and

Willowbrook Drive. Grand Avenue has experienced the most significant percentage decline down from 53% to 30%, however, this was the result of previous D1 units omitted in error from the Local Centre boundary in the previous AMR.

Willowbrook Drive retail units are currently being fitted out to accommodate What Stores which will significantly lift the percentage score for this centre.

It is also significant to note, that despite remaining below the 40% threshold, since the last AMR, Gabalfa Avenue has experienced a 6% rise in active A1 retail units; High Street Llandaff has experienced a 1% rise; Salisbury Road a 3% rise and Splott Road a 4% rise in active A1 retail units.

Recommendations

No action is required at present. The majority of centres are providing a strong retail function and those centres which fall below the 40% threshold have all experienced % increases in active A1 retail units since the last AMR, demonstrating a positive upward trend in A1 occupancy rates. Continue to monitor.

Topic Area: Protected City Centre Shopping Frontages

Relevant LDP Policies: R2, R3

Indicator reference: OB1 EC11

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Proportion of protected City Centre shopping frontages with over 50% Class A1 (Shop) units.	100%	90%
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
54 of the city centres 64 Protected Shopping Frontages had over 50% Class A1 units in 2016/17.	In 2017/18, 53 of the city centres 64 Protected Shopping Frontages had 50% or more Class A1 units.	In 2018/19, 53 of the city centres 64 Protected Shopping Frontages have 50% or more Class A1 units.
Analysis		
<ul style="list-style-type: none"> • The Council's City Centre Land Use and Floor Space survey (LUFS) is undertaken each autumn. • The first Performance AMR survey undertaken in October 2016 identified that 54 out of city centres 64 Protected Shopping Frontages comprised of 50% or more Class A1 units. • It was noted at the time that the 10 Protected Shopping Frontages which were identified as falling below the 50% threshold were weaker frontages that have not historically achieved 50%, but were included as protected frontages in the LDP for their group value within the Central Shopping Area (CSA). • It was therefore recommended that 54 Protected Shopping Frontages represents the 100% target for the future monitoring of this benchmark. • The 2018/19 survey identifies that 53 out of city centres 64 Protected Shopping Frontages comprised of 50% or above Class A1 units. This represents a total of 98.1% when measured against the first AMR target of 54 frontages (100%). 		
Recommendations		
No actions are triggered.		

Topic Area: Vacancy Rates in Central Shopping Area, District and Local Centres

Relevant LDP Policies: KP10, R1-R8

Indicator reference: OB1 EC12

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
Percentage of ground floor vacant retail units in the Central Shopping Area, District and Local Centres	Vacancy level are no higher than the national UK average (10%, March 2019).	Vacancy levels rise above national UK average for more than two consecutive years.
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
District Centres – Average of 6% vacancy rate within centres. Local Centres – Average of 7% vacancy rate within centres. Central Shopping Area – vacancy rate of 13.9%.	District Centres – Average of 7% vacancy rate within centres. Local Centres – Average of 9% vacancy rate within centres. Central Shopping Area – vacancy rate of 12.2%.	District Centres – Average of 10% vacancy rate within centres. Local Centres – Average of 8% vacancy rate within centres Central Shopping Area – vacancy rate of 10.7%.

For an individual breakdown see analysis section.

Analysis			
District Centres			
<i>District Centre</i>	<i>Total No of Units</i>	<i>No vacant retail units</i>	<i>Percentage vacant retail units</i>
Albany Road/Wellfield Road	199	15	7%
City Road	175	23	13%
Clifton Street	101	10	10%
Cowbridge Road East	191	8	4%
Crwys Road/Woodville Road	132	8	6%
Bute Street/James Street	63	15	24%
Merthyr Road, Whitchurch	94	8	8%
Penarth Road/Clare Road	68	7	10%

St Mellons	21	4	19%
Thornhill	7	0	0%
Whitchurch Road	122	9	7%
		Average	10%

3 of the District Centres are above the 10% vacancy trigger; City Road (13% vacancy), Bute Street/James Street (24% vacancy) and St Mellons (19% vacancy). City Road is currently experiencing a number of redevelopment schemes for student accommodation. The frontage of numbers 191 – 209 City Road is particularly affected and accounts for the higher than average vacancy at present. On completion the schemes will be providing ground floor retail units which have the potential to significantly reduce the vacancy rate. Similarly Bute/Street James Street District Centre had a large element of restaurants/cafes given its location within Mermaid Quay, Cardiff Bay and Mermaid Quay is undergoing a programme of modernisation.

With regard to St. Mellons, there have been 2 recent applications relating to vacant units which once implemented have the potential to reduce vacancy rates.

Continue to monitor these centres for improvement next year.

Local Centres

<i>Local Centre</i>	<i>Total No of Units</i>	<i>No vacant retail units</i>	<i>Percentage vacant retail units</i>
Birchgrove	48	2	4%
Bute Street (Loudoun Square)	12	0	0%
Cathedral Road	27	2	7%
Countisbury Avenue	35	2	6%
Caerau Lane	9	2	22%
Fairwater Green	16	0	0%
Gabalfa Avenue	15	2	13%
Grand Avenue	20	2	10%
High Street, Llandaff	34	2	6%
Maelfa, Llanedeyrn*	N/A*	N/A*	N/A*
Newport Road, Rumney	45	4	9%
Rhiwbina Village	48	1	2%
Salisbury Road	45	0	0%
Splott Road	38	3	8%
Station Road, Llanishen	28	0	0%
Station Road, Llandaff North	32	2	6%
Station Road, Radyr	14	1	7%
Tudor Street	35	6	17%
Willowbrook Drive	5	2	40%
Wilson Road	15	0	0%

		Average	8%
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**Maelfa Local Centre is currently undergoing a mixed use redevelopment (Planning Application 11/1082/DCO)*

A significant number of the Local Centres meet or fall below the 9% vacancy trigger, with the exception of Caerau Lane, Gabalfa Avenue, Grand Avenue, Tudor Street and Willowbrook Drive. It is noted that Caerau Lane, Gabalfa Avenue and Grand Avenue are small centres and only have 2 vacant units each.

Tudor Street remains higher than the trigger of 9% with a vacancy rate of 17% but this represents a 4% reduction in the vacancy rate since the previous AMR.

Willowbrook Drive has the highest vacancy rate (40%) , however this is a small centre and concerns 1 unit which is soon to be occupied by What Stores which will result in this centre being fully occupied.

Improvement have also been seen in Birchgrove Local Centre where the vacancy rate has fallen from 11% to 4%; High Street, Llandaff a 3% drop in the vacancy rate and; Splott which has experienced a 10% fall in the vacancy rate.

Central Shopping Area (CSA)

The 2018/19 City Centre Land Use and Floor Space survey (LUFS) identifies a retail vacancy rate of 10.7% within the Central Shopping Area (CSA). This represents a 1.5% improvement over the previous year and is in line with national trends (of 12.2% in 2018 to 10% in 2019).

It is noted that at the time of monitoring, some of the vacancies are units that are undergoing refurbishment / changing occupiers, whilst others form part of longer term regeneration projects.

Recommendations

No action is required at present. Vacancy rates are predominantly below the required threshold. Continue to monitor.

Topic Area: Retail Development Outside Designated Centres

Relevant LDP Policies: KP10, R1, R2, R3, R4, R5, R6, R7 & R8

Indicator reference: OB1 EC13

Contextual Changes: There have been no significant contextual changes relating to this policy are during the monitoring period.

Indicator	Target	Trigger
LOCAL Number of retail developments permitted outside the Central Shopping Area and District and Local Centres not in accordance with Policy R6 and an assessment of need and strict application of the sequential test.	No retail developments permitted outside these areas (unless in accordance with Policy R6 and an assessment of need and strict application of the sequential test).	1 or more retail development permitted outside the Central Shopping Area and District and Local Centres not in accordance with Policy R6 and an assessment of need and strict application of the sequential test.
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
27 applications approved for retail development outside designated centres. 7 applications were accompanied by an assessment of need and sequential test. The remaining 20 were not accompanied by an assessment as specific circumstance did not require them.	17 applications approved for retail development outside designated centres. 3 applications were accompanied by an assessment of need and the sequential test. The remaining 14 were not accompanied by an assessment as specific circumstances did not require them.	25 applications approved for retail development outside designated centres. None of the applications were accompanied by an assessment of need and the sequential test as specific circumstance did not require them.
Analysis		
<p>25 applications for development within Use Class A were permitted outside designated centres. None of the proposals submitted an assessment of need nor demonstrated that they satisfied the sequential test as specific circumstances did not require them for the following reasons:</p> <ul style="list-style-type: none"> - In all case the floorspace was below the TAN 4 threshold or; - The retail floorspace formed part of a mixed use scheme e.g as part of a hotel extension, large scale office schemes and student accommodation or; 		

- The retail floorspace was considered complementary/ancillary in business/industrial areas or;
- The retail floorspace consisted of POD units on out of centre retail parks which were considered complementary/ancillary to the retail park and not considered retail destinations in their own right such that they would negatively impact designated centres or;
- The retail floorspace related to the change of use of premises already in commercial use and/ or in smaller shopping parades.

It is therefore considered that Policy R6 is functioning effectively. The Council will continue to monitor this indicator to determine the effectiveness of the policy framework relating to this issue.

Recommendations

No action required at present. Continue to monitor.

Topic Area: Achievement of 50:50 Modal Split

Relevant LDP Policies: KP2, KP6, KP8, T1-T9

Indicator reference: OB1 EC14

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
Local Achievement of 50:50 modal split for all journeys by 2026	Increase the sustainable travel proportion of the modal split by 1% per annum for each journey purpose: 1) Work = 45.2% (2014) 2) Education = 57.8% (2014) 3) Shopping (City Centre) = 67.1% (2014) 4) Shopping (Other) = 43.2% (2014) 5) Leisure = 58% (2014)	Failure to achieve an annual increase of 1% for each journey purpose for two or more consecutive years
Performance 1 st AMR 1 st April 2016 to 31 st March 2017	Performance 2 nd AMR 1 st April 2017 to 31 st March 2018	Performance 3 rd AMR 1 st April 2018 to 31 st March 2019
1) Work: 2014 = 45.2% 2015 = 45.0% (↓) -0.2% 2016 = 48.1% (↑) +3.1% 2) Education: 2014 = 57.8% 2015 = 50.4% (↓) -7.4% 2016 = 59.6% (↑) +9.2% 3) Shopping (City Centre): 2014 = 67.1% 2015 = 66.0% (↓) -1.1% 2016 = 67.9% (↑) +1.9% 4) Shopping (Other): 2014 = 43.2% 2015 = 41.3% (↓) -1.9% 2016 = 45.6% (↑) +4.3% 5) Leisure: 2014 = 58.0% 2015 = 54.8% (↓) -3.2%	1) Work: 2016 = 48.1% 2017 = 48.4% (↑) +0.3% 2) Education: 2016 = 59.6% 2017 = 55.9% (↓) -3.7% 3) Shopping (City Centre): 2016 = 67.9% 2017 = 64.7% (↓) -3.2% 4) Shopping (Other): 2016 = 45.6% 2017 = 38.8% (↓) -6.8% 5) Leisure: 2016 = 60.2% 2017 = 56.4% (↓) -3.8%	1) Work: 2017 = 48.4% 2018 = 53.6% (↑) +5.3% 2) Education: 2017 = 55.9% 2018 = 59.1% (↑) +3.1% 3) Shopping (City Centre): 2017 = 64.7% 2018 = 67.3% (↑) +2.6% 4) Shopping (Other): 2017 = 38.8% 2018 = 42.9% (↑) +4.2% 5) Leisure: 2017 = 56.4% 2018 = 58.8% (↑) +2.5%

2016 = 60.2% (↑) +5.4%

Analysis

There has been a positive outturn in sustainable travel over the past year, with the target 1% increase having been achieved for each of the journey purposes, with significant growth in particular evident for journeys to Work (+5.3% mode-shift).

However, as can be seen from the outturn from last year, result can vary year-on-year, therefore in order to better understand the overall trend in sustainable travel, the historic 5yr rolling average for each journey purpose has been plotted in figure 1.14.1 below –

Figure: 1.14.1

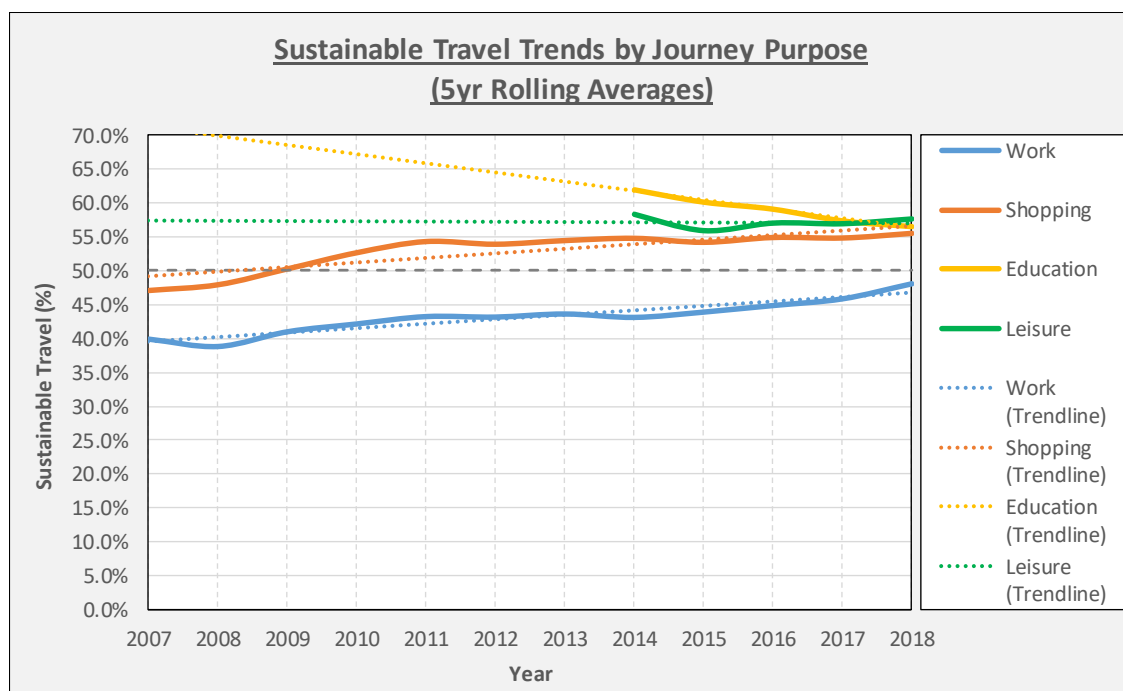


Figure 1.14.1 above demonstrates that for each of the journey purposes except for Work (commuting), the target 50:50 modal split is already being met.

Nevertheless while the overall trend for travelling sustainably for both Work and Shopping trips is increasing, Leisure has remained largely unchanged, while Education has seen a significant decrease.

Travel by mode for Leisure and Education has only been surveyed since 2014 onwards, therefore there may be insufficient data in order to reliably indicate the historic trend for these journey purposes.

It is worth being mindful that the choice to travel sustainably is subject to a number of variables, many of which are externalities outside of the Council’s direct influence. Examples of factors which may impact on mode-choice include but are not limited to – fuel prices, bus/rail fares, inflation, level of bus service provision, population trends,

congestion effects in terms of bus journey times/reliability, parking availability/charges, changes in travel patterns (e.g. the rise in internet shopping), weather conditions, public health trends, infrastructure improvements etc.

Recommendations

No action is required at present. Continue to monitor.

Topic Area: Percentage of People Walking

Relevant LDP Policies: KP2, KP6, KP8, T1-T9

Indicator reference: OB1 EC15

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
Local Percentage of people walking (all journeys)	An annual increase of journeys made on foot for each journey purpose: 1) Work = 15.9% (2014) 2) Education = 24.1% (2014) 3) Shopping (City Centre) = 16.7% (2014) 4) Shopping (Other) = 22.3% (2014) 5) Leisure = 19% (2014)	Failure to achieve an annual increase for each journey purpose for two or more consecutive years
Performance 1 st AMR 1 st April 2016 to 31 st March 2017	Performance 2 nd AMR 1 st April 2017 to 31 st March 2018	Performance 3 rd AMR 1 st April 2018 to 31 st March 2019
1) Work: 2014 = 15.9% 2015 = 16.6% (↑) +0.7% 2016 = 17.9% (↑) +1.3%	1) Work: 2016 = 17.9% 2017 = 14.0% (↓) -3.9%	1) Work: 2017 = 14.0% 2018 = 15.0% (↑) +1.0%
2) Education: 2014 = 24.1% 2015 = 22.6% (↓) -1.5% 2016 = 27.6% (↑) +5.0%	2) Education: 2016 = 27.6% 2017 = 23.3% (↓) -4.3%	2) Education: 2017 = 23.3% 2018 = 26.6% (↑) +3.3%
3) Shopping (City Centre): 2014 = 16.7% 2015 = 16.5% (↓) -0.2% 2016 = 18.4% (↑) +1.9%	3) Shopping (City Centre): 2016 = 18.4% 2017 = 16.1% (↓) -2.3%	3) Shopping (City Centre): 2017 = 16.1% 2018 = 16.9% (↑) +0.8%
4) Shopping (Other): 2014 = 22.3% 2015 = 22.2% (↓) -0.1% 2016 = 23.5% (↑) +1.3%	4) Shopping (Other): 2016 = 23.5% 2017 = 19.9% (↓) -3.6%	4) Shopping (Other): 2017 = 19.9% 2018 = 21.1% (↑) +1.2%
5) Leisure: 2014 = 19.0% 2015 = 18.9% (↓) -0.1% 2016 = 21.8% (↑) +2.9%	5) Leisure: 2016 = 21.8% 2017 = 17.8% (↓) -4.0%	5) Leisure: 2017 = 17.8% 2018 = 18.0% (↑) +0.2%

Analysis

The target increase for the proportion of journeys made on foot has been achieved for each of the journey purposes.

However, results are shown to vary-on-year, as demonstrated by the general decrease in walking between 2016/2017 and 2017/2018. Therefore, in order to better understand the overall trend in walking, the historic 5yr rolling average for each journey purpose has been plotted in figure 1.15.1 below –

Figure 1.15.1

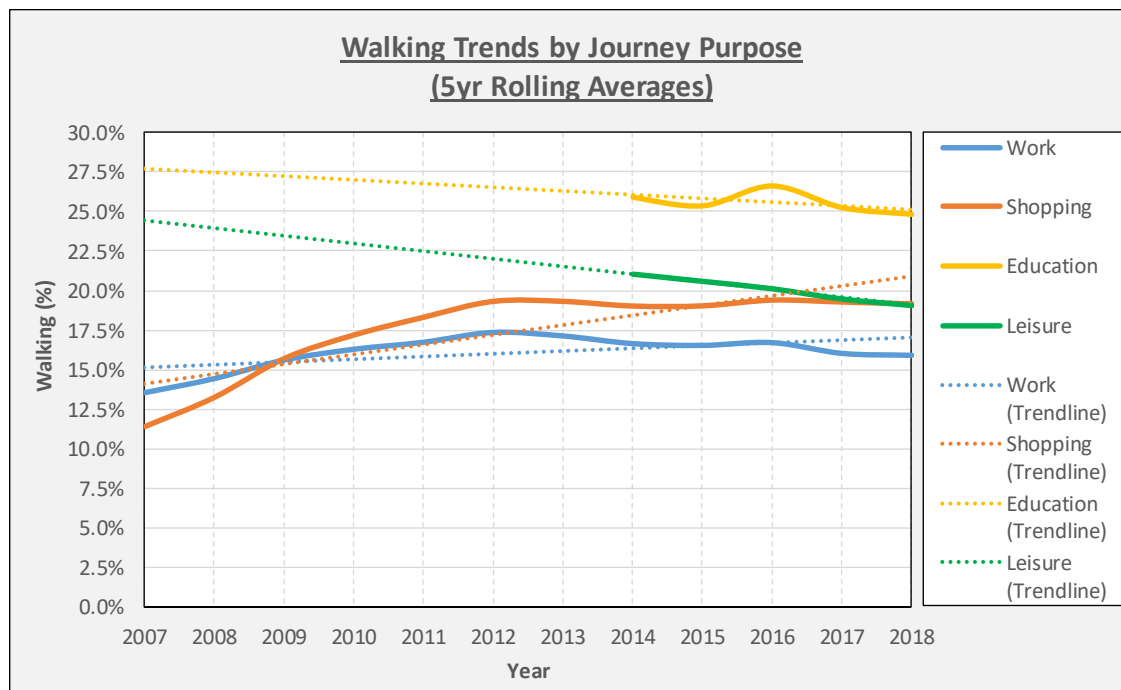


Figure 1.15.1 above demonstrates that while the overall trend for walking to Work and to Shopping is increasing, there is a decline in the proportion walking to Leisure and to Education.

However, travel by mode for Leisure and Education has only been surveyed since 2014 onwards, and as such there may be insufficient data in order to reliably indicate the historic trend for these journey purposes.

As an example of the change in levels of walking overall, the automatic count of the number of annual pedestrians crossing the Pont y Werin bridge has shown a marked increase of 14% between 2017 and 2018 (from 345,000 to 391,700).

Some of the key factors influencing the choice to walk as with sustainable travel in general, have been discussed in OB1 EC14 (Achievement of Modal Split). Nevertheless, amongst the most significant factors for walking are weather conditions and the distance travelled. For example, the weather in 2018 was generally warmer than in 2017, with average temperatures in July/August being 18°C in 2018 compared

with 16.5°C in 2017. This will likely have had a positive impact on the levels of walking for this year.

Recommendations

No action is required at present. Continue to monitor.

Topic Area: Percentage of People Cycling

Relevant LDP Policies: KP2, KP6, KP8, T1-T9

Indicator reference: OB1 EC16

Contextual Changes: Cardiff launched its successful Nextbike cycle hire scheme in May of 2018; currently comprising of 73 docking stations catering for around 500 bicycles; with around 50,000 registered users, representing on average nearly 10,000 journeys each week. Over the next year additional docking stations will be provided catering for around 1,000 bicycles. The first phase of Cycleway construction began at Senghennydd Road in March 2019, as part of route C1 (City Centre-Heath-NE Cardiff), with completion of this phase of works expected by the end of September 2019.

Indicator	Target	Trigger
Local Percentage of people cycling (all journeys)	An annual increase of journeys made by bike for each journey purpose: 1) Work = 10.6% (2014) 2) Education = 9.5% (2014) 3) Shopping (City Centre) = 5.9% (2014) 4) Shopping (Other) = 5.7% (2014) 5) Leisure = 10.1% (2014)	Failure to achieve an annual increase for each journey purpose for two or more consecutive years
Performance 1st AMR 1 st April 2016 to 31 st March 2017	Performance 2nd AMR 1 st April 2017 to 31 st March 2018	Performance 3rd AMR 1 st April 2018 to 31 st March 2019
1) Work: 2014 = 10.6% 2015 = 10.0% (↓) -0.6% 2016 = 11.3% (↑) +1.3%	1) Work: 2016 = 11.3% 2017 = 16.5% (↑) +5.2%	1) Work: 2017 = 16.5% 2018 = 20.3% (↑) +3.7%
2) Education: 2014 = 9.5% 2015 = 8.9% (↓) -0.6% 2016 = 9.6% (↑) +0.7%	2) Education: 2016 = 9.6% 2017 = 12.8% (↑) +3.2%	2) Education: 2017 = 12.8% 2018 = 14.0% (↑) +1.2%
3) Shopping (City Centre): 2014 = 5.9% 2015 = 5.9% () +0% 2016 = 6.6% (↑) +0.7%	3) Shopping (City Centre): 2016 = 6.6% 2017 = 7.8% (↑) +1.2%	3) Shopping (City Centre): 2017 = 7.8% 2018 = 12.2% (↑) +4.4%
4) Shopping (Other): 2014 = 5.7% 2015 = 5.3% (↓) -0.4%	4) Shopping (Other): 2016 = 6.0% 2017 = 6.6% (↑) +0.6%	4) Shopping (Other): 2017 = 6.6% 2018 = 9.7% (↑) +3.1%

2016 = 6.0% (↑) +0.7%		
5) Leisure: 2014 = 10.1% 2015 = 9.6% (↓) -0.5% 2016 = 10.0% (↑) +0.4%	5) Leisure: 2016 = 10.0% 2017 = 10.8% (↑) +0.8%	5) Leisure: 2017 = 10.8% 2018 = 13.9% (↑) +3.1%

Analysis

The above demonstrates once again significant growth in the proportion cycling for each of the journey purposes.

However, given that result can be variable year-on-year as discussed previously, the overall trend in cycling is presented by the historic 5yr rolling average for each journey purpose as plotted in figure 1.16.1 below –

Figure 1.16.1

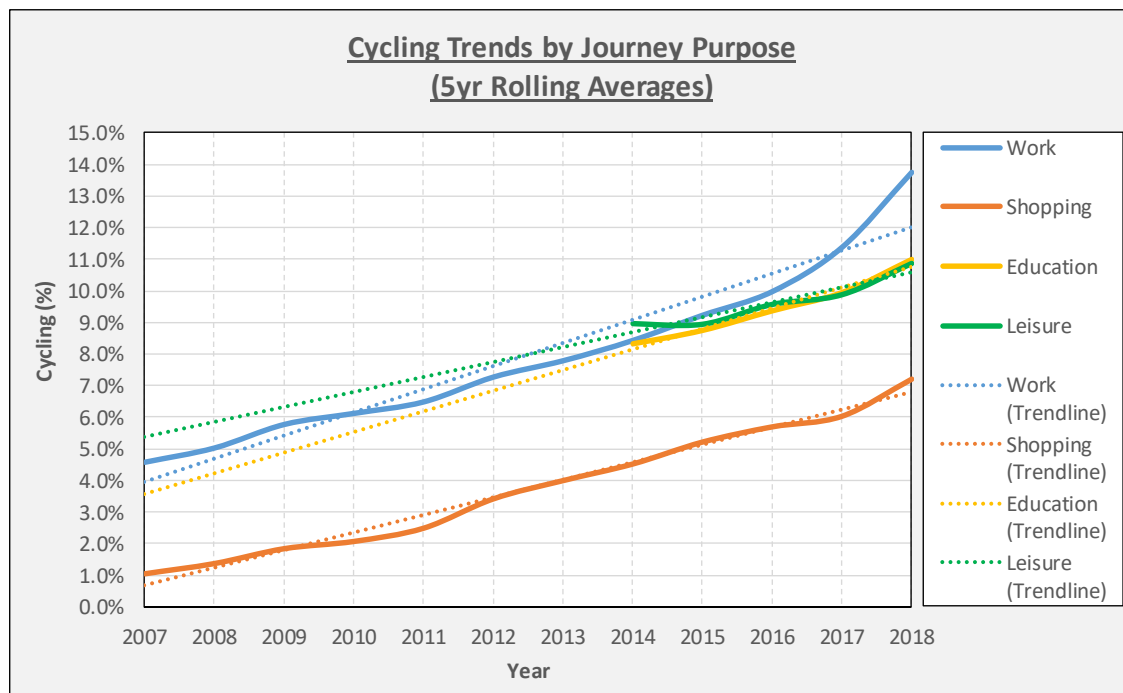


Figure 1.16.1 above confirms an overall trend of increasing numbers cycling for all journey purposes, with a marked level of growth for journeys to Work in particular.

In no small part this substantial growth in the level of cycling has been fuelled by the introduction of Cardiff’s hugely successful Nextbike cycle hire scheme in May of 2018, as illustrated in the table on figure 1.16.2 below –

Figure 1.16.2

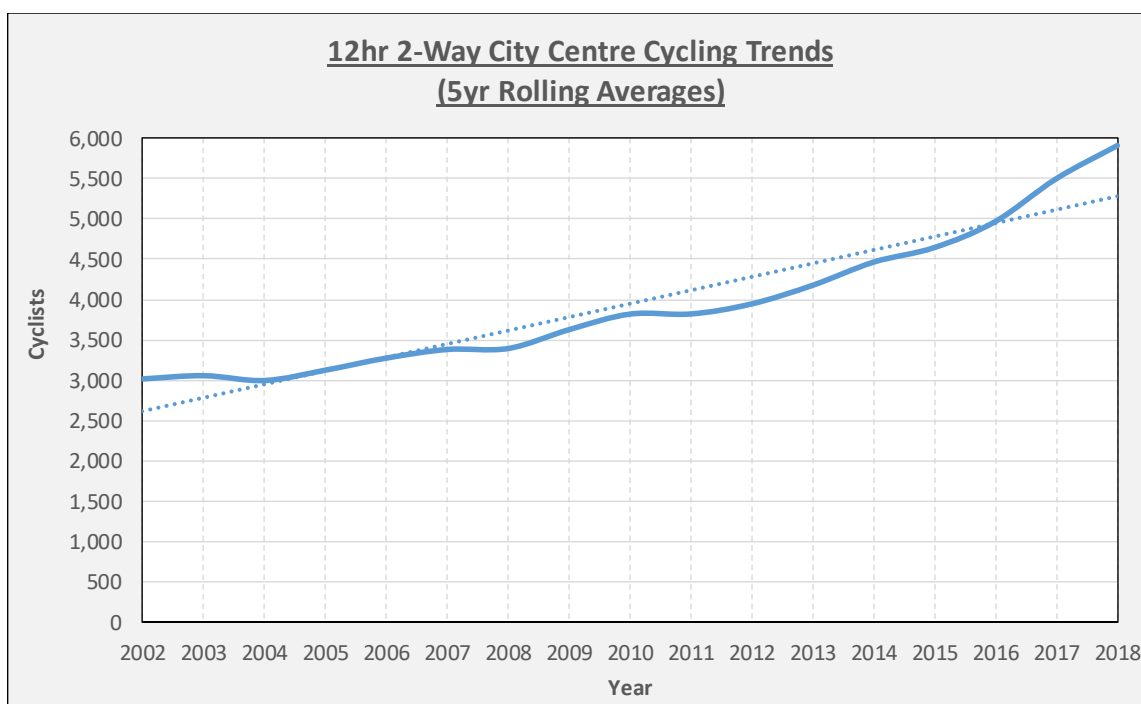
	June 2018 (250 Nextbikes)	May 2019 (500 Nextbikes)	Change
Monthly Rentals	21,148	48,854	+131%
Average Daily Rentals	705	1,576	+124%
Average Weekly Rentals	4,935	11,032	+124%
Total Rentals to-date	29,497	404,910	+375,413
Total Customers to-date	11,585	51,679	+393,325

Figure 1.16.2 above increases are also echoed in other data sources, with the proportion of pupils cycling to school based on the ‘Cardiff Schools Hands-up Survey’, having increased from 0.8% in 2007 to 4.2% in 2018, a mode-shift of 3.3% over this period (or relative increase of 300%).

Meanwhile, the automatic count of the number of annual cyclists crossing the Pont y Werin bridge has increased by a substantial 26% between 2017 and 2018 alone (from 180,600 to 228,200).

As further evidence of the increases in levels of cycle use, the 5yr rolling average trends for daily number of cyclists crossing the City Centre cordon (12hr 2-way), based on Council classified counts are provided in figure 1.16.3 below –

Figure 1.16.3



In considering Cardiff’s aspiration to double the levels of cycling between 2015 and 2026 (Draft Cycling Strategy) –

Figure 1.16.4

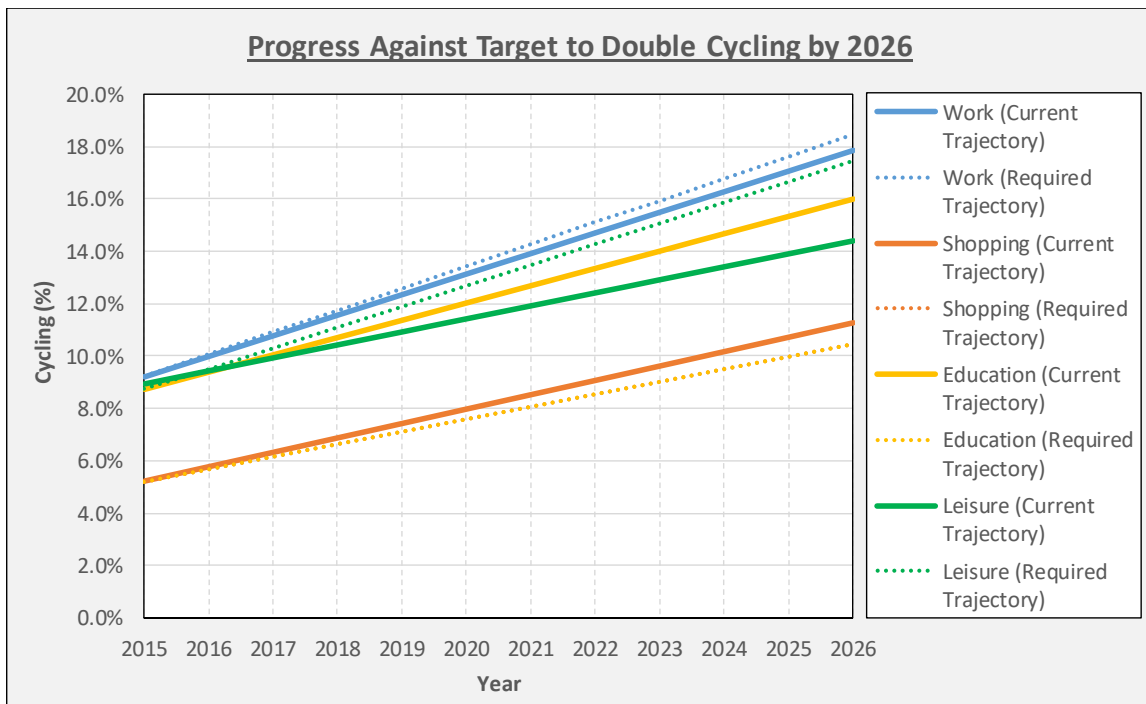


Figure 1.16.4 above demonstrates that Cardiff is on-track to achieve its aspiration for Education and Shopping trips, and close to also doing so for journeys to Work. While the current trajectory is below that of required for Leisure trips, nevertheless this continues to make good progress and shows significant year-on-year increases, with a 3.1% increase (mode-shift) from 2017.

Recommendations

No action is required at present. Continue to monitor.

Topic Area: Percentage of People Travelling by Bus

Relevant LDP Policies: KP2, KP6, KP8, T1-T9

Indicator reference: OB1 EC17

Contextual Changes: Cardiff's previous bus station closed in August of 2015, and is to be replaced by the new Transport Interchange, currently anticipated to be completed in 2023. Because of Cardiff Bus' ongoing financial concerns, some services were withdrawn (e.g. 12, 54 and X91). The Council has stepped in to financially support the retention of these services via a tendering process. A number of other remaining services have been rerouted as a result (e.g. 28/28A/28B and 52); together with a decline in service frequency/provision on some services, in particular during evenings and on Sundays (e.g. 17/18, 27, 44/45, 57/58 and 64/65). Cardiff Bus also increased its fares from February 2019.

Indicator	Target	Trigger
Local Percentage of people travelling by bus (all journeys)	An annual increase of journeys made by bus for each journey purpose: 1) Work = 11.1% (2014) 2) Education = 13% (2014) 3) Shopping (City Centre) = 29.4% (2014) 4) Shopping (Other) = 8.6% (2014) 5) Leisure = 11.2 (2014)	Failure to achieve an annual increase for each journey purpose for two or more consecutive years
Performance 1st AMR 1 st April 2016 to 31 st March 2017	Performance 2nd AMR 1 st April 2017 to 31 st March 2018	Performance 3rd AMR 1 st April 2018 to 31 st March 2019
1) Work: 2014 = 11.1% 2015 = 10.7% (↓) -0.4% 2016 = 10.0% (↓) -0.7%	1) Work: 2016 = 10.0% 2017 = 9.7% (↓) -0.3%	1) Work: 2017 = 9.7% 2018 = 10.6% (↑) +0.9%
2) Education: 2014 = 13.0% 2015 = 11.6% (↓) -1.4% 2016 = 12.8% (↑) +1.2%	2) Education: 2016 = 12.8% 2017 = 10.7% (↓) -2.1%	2) Education: 2017 = 10.7% 2018 = 10.5% (↓) -0.2%
3) Shopping (City Centre): 2014 = 29.4% 2015 = 29.4% () +0% 2016 = 26.7% (↓) -2.7%	3) Shopping (City Centre): 2016 = 26.7% 2017 = 25.3% (↓) -1.4%	3) Shopping (City Centre): 2017 = 25.3% 2018 = 23.5% (↓) -1.8%
4) Shopping (Other): 2014 = 8.6% 2015 = 8.4% (↓) -0.2%	4) Shopping (Other): 2016 = 8.9% 2017 = 7.2% (↓) -1.7%	4) Shopping (Other): 2017 = 7.2% 2018 = 7.1% (↓) -0.1%

2016 = 8.9% (↑) +0.5%

5) Leisure:
 2014 = 11.2%
 2015 = 10.8% (↓) -0.4%
 2016 = 10.5% (↓) -0.3%

5) Leisure:
 2016 = 10.5%
 2017 = 10.3% (↓) -0.2%

5) Leisure:
 2017 = 10.3%
 2018 = 10.1% (↓) -0.2%

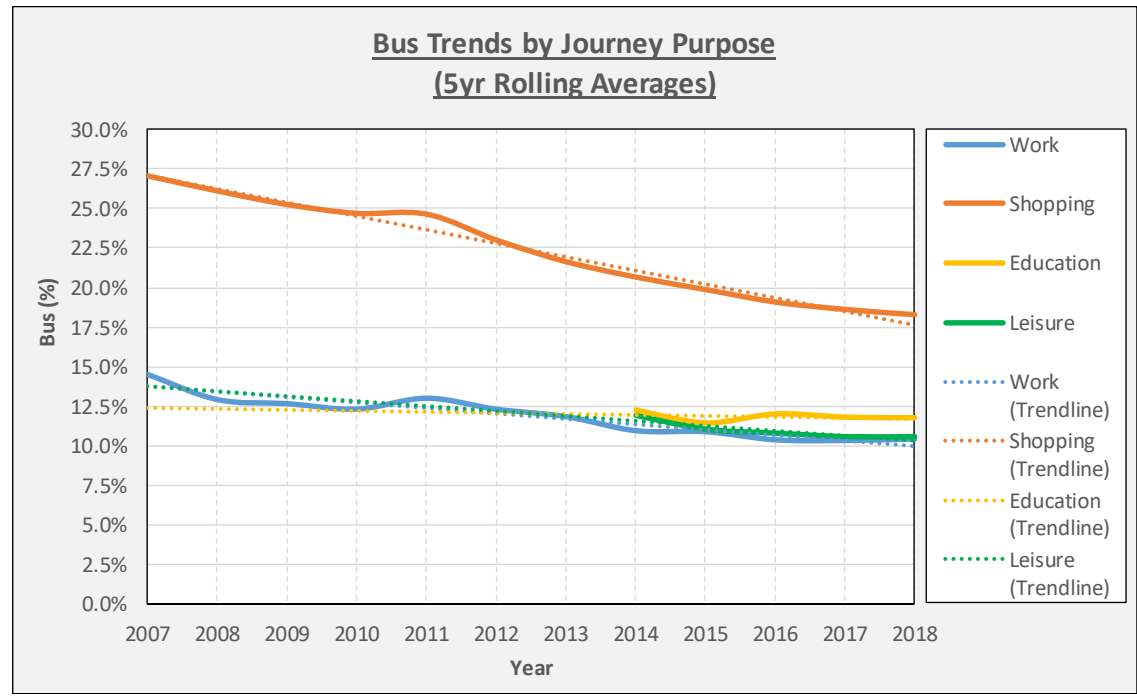
Analysis

The above demonstrates a failure to achieve the target increase for all journey purposes with the exception of Work, which has increased by 0.9% from 2017.

Moreover, because the targets were also failed to have been achieved in the previous year, the trigger (a failure to achieve an increase for two or more consecutive years) has now been activated, which as a result will require further analysis in preparation for monitoring for next year, as detailed in the recommendations below.

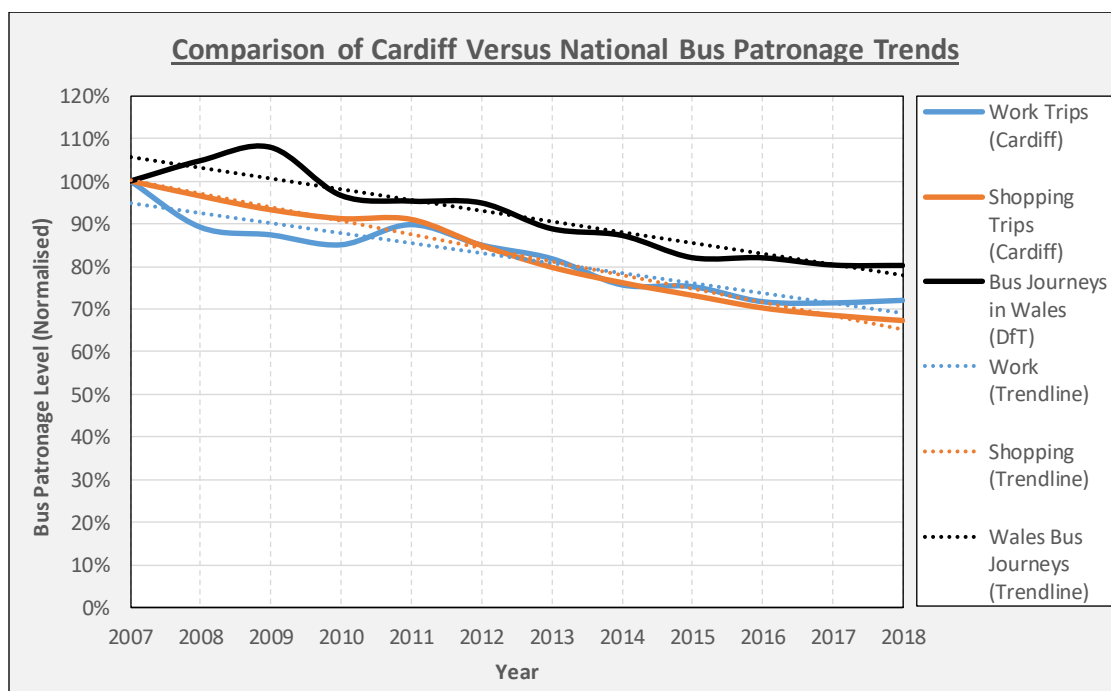
The above decline in bus use for each journey purpose, is evident when looking at the overall trend as per the historic 5yr rolling averages plotted in figure 1.17.1 below

Figure 1.17.1



Nevertheless, this decline is not specific to Cardiff, and is symptomatic of a nationwide decline in bus use, as evident when comparing the above data for Cardiff, with that for the number of journeys in Wales (as illustrated in figure 11.17.2), which shows a similar pattern of decline.

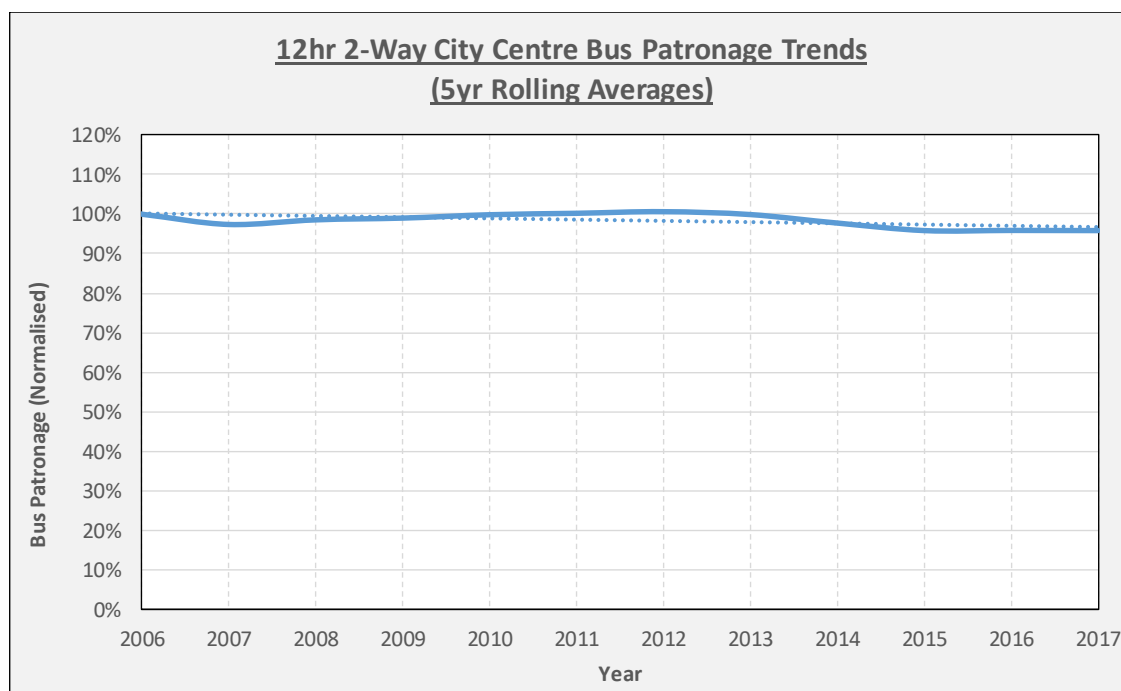
Figure 1.17.2



In response to the above, Welsh Government instructed Transport for Wales (TfW) in a letter of remit dated 30/04/2019 (<https://gov.wales/sites/default/files/publications/2019-05/remit-letter-1-april-2019-to-31-march-2020.pdf>) to undertake a 2019/2020 all-Wales pilot study working in partnership with local authorities and with bus operators, in considering how the declining national trends can be reversed. Examples of the options likely to be considered are integrated ticketing, bus priority, service and frequency enhancements etc.

While overall the numbers travelling by bus have decreased significantly over a number of years, the bus patronage within the City Centre at least has remained fairly stable over this time, as shown in figure 1.17.3 below –

Figure 1.17.3



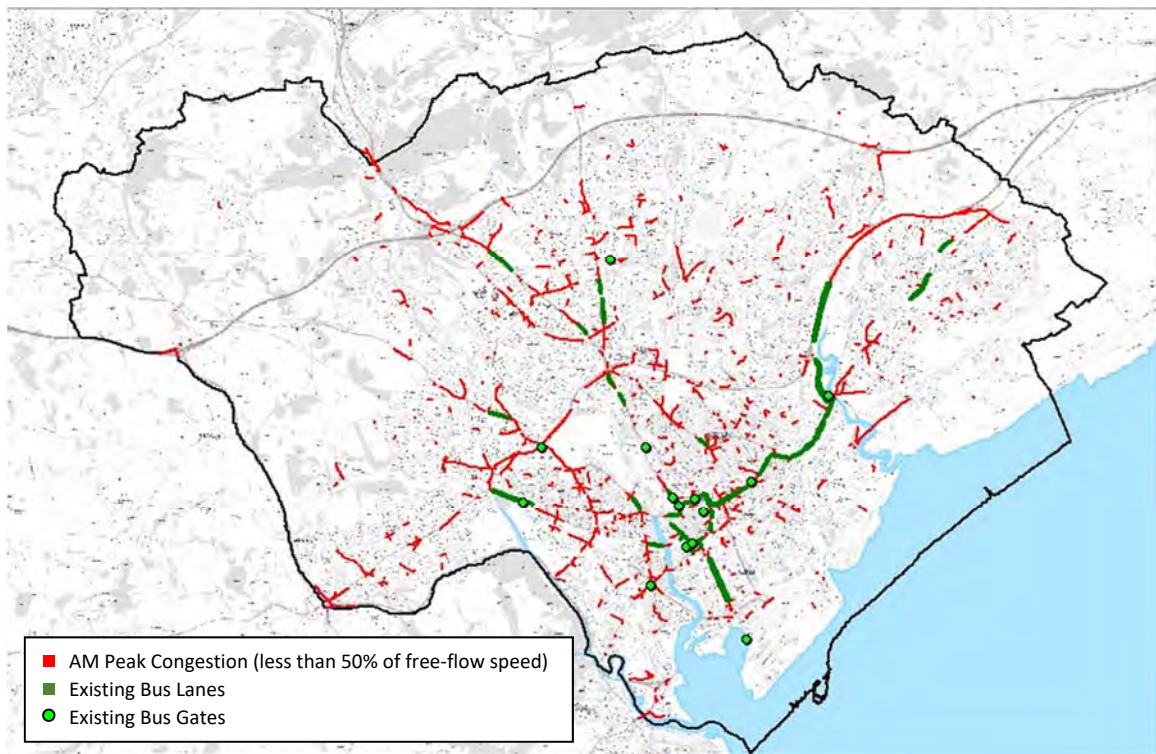
As mentioned above, because of having met the trigger this year, further more detailed consideration is now required in order to determine the underlying causes, and to identify the necessary corrective actions as appropriate, in conjunction with the methodology defined within the Transport Monitoring Framework.

Specific actions to be followed are detailed within the Recommendations below. Nevertheless, initial consideration of the factors which may have potentially contributed to the decline in bus use is provided below.

Some of the key factors influencing the choice to travel by bus are – frequency, journey times and reliability (as discussed in OB1 EC19-20) particularly in the face of increasing congestion, and fares when compared with fuel prices.

The congestion on the network during peak periods poses significant challenges to the operation of reliable and attractive bus services, as illustrated in figure 1.17.4 below

Figure 1.17.4

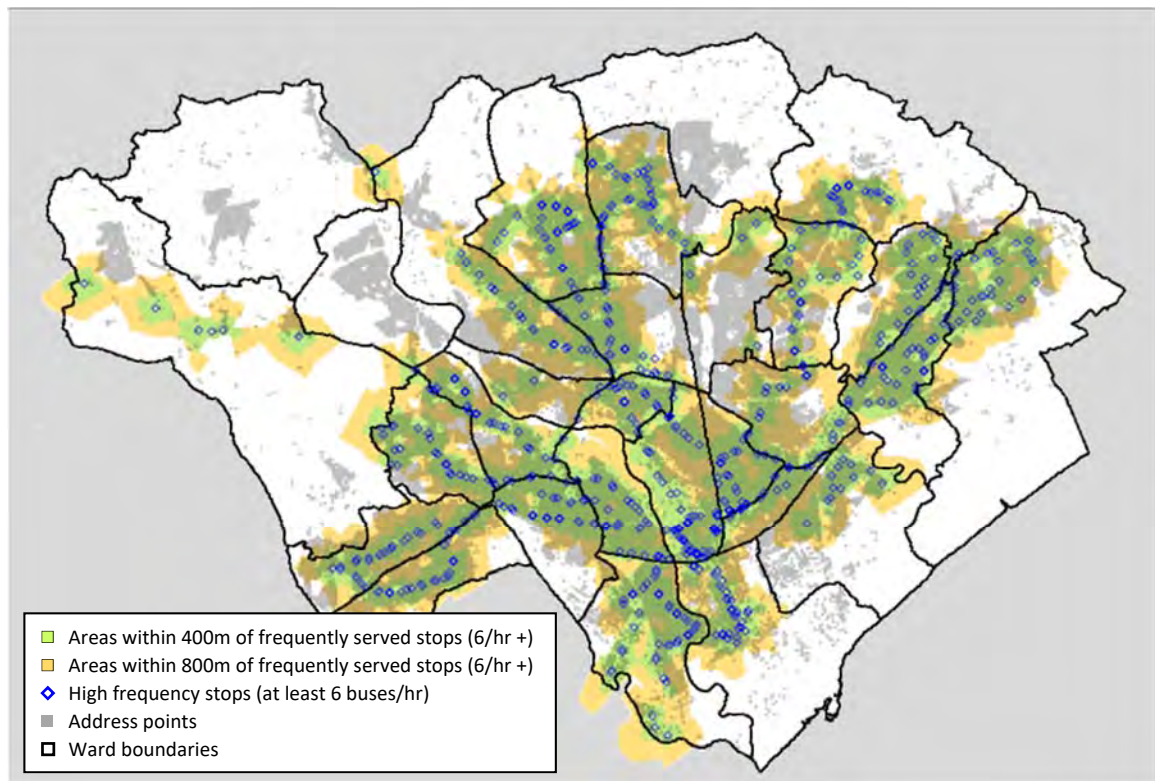


Of note, the TomTom Traffic Index indicates that the level of congestion in Cardiff has increased by 1% from 27% in 2017 to 28% by 2018, also indicating that up to 57% of time spent during the peaks is attributable to congestion. Where there is a lack of priority, buses will inevitably be caught up within this, leading to increased journey times and decreased reliability.

In recognition of this, the Council is currently considering a future strategy of 'Smart Corridors' with bus priority, providing improved management of queueing on the network, while maximising the effectiveness of existing and future bus priority.

Also a key consideration in deciding on whether or not to use the bus, is physical accessibility. The overall the level of accessibility to bus stops with high service frequency (at least 6 services per hour) within Cardiff is generally fairly good, as shown in figure 1.17.5 below –

Figure 1.17.5



The assessment of accessibility does not account for where users wish to travel to. Most services travel into the City Centre rather than cross-city.

The above also illustrates that while overall the level of provision within Cardiff is fairly good, there are notable exceptions where accessibility is poor and/or there is a lack of frequent bus services provided.

In particular the following areas are poorly served - Creigiau, St. Fagans, Pentyrch, Gwaelod-y-Garth, Radyr, Lisvane and Cyncoed; with sections of Whitchurch/Tongwynlais, Heath and Splott also evident; which correlate with low levels of bus use in these areas according to the 2011 Census; i.e. Radyr (2%), Lisvane (2%), Pentyrch (3%), Creigiau/St Fagans (4%) and Cyncoed (6%); compared with the 11% average for Cardiff overall.

Meanwhile the level of service provision is comparatively high in areas such as Ely, Llanrumney, Caerau and Pentwyn; which correlates with high levels of bus use as a result; with 22%, 19%, 18% and 17%, respectively, travelling to work by bus (according to the 2011 Census).

Furthermore, the increased congestion as discussed above, the lack of a replacement central bus station, increasing fares, and changes in bus services; will have all impacted on peoples' choice to travel by bus.

It should also be noted that there is a high proportion of concessionary travel in Wales, with 45% compared with only 22% in England and 35% in Scotland. Therefore, the overall number of fare-paying customers using bus services currently are masked

within the figures provided previously due to the high proportion of concessionary bus pass holders.

A further important consideration is public perception of and levels of satisfaction towards bus services.

When asked whether they had changed their use of certain modes in the past year, respondents to the 2018 Ask Cardiff Survey indicated that 10% had used buses more, while 11% had used buses less, resulting in a net decline in use of 1% over the last year.

When comparing the responses received between 2016 and 2018 in relation to opinions on bus services, there appears to be decreasing levels of satisfaction as evident in the table in figure 1.17.6 below –

Figure 1.17.6

Respondents very/fairly satisfied:	2016	2017	2018
Journey Times	63%	52% (↓)	45% (↓)
Public Transport Information	55%	43% (↓)	42% (↓)
Service Frequency	57%	49% (↓)	44% (↓)
Journey Time Reliability	55%	44% (↓)	40% (↓)
Condition of Bus Stops/Shelters	56%	48% (↓)	42% (↓)
Provision of Real-Time Information	50%	39% (↓)	37% (↓)
Provision of Printed Timetable	49%	42% (↓)	37% (↓)
Local Bus Services Overall	57%	45% (↓)	41% (↓)
Buses Overall	64%	53% (↓)	52% (↓)

However, the above results also mask a stark difference in views between users and non-users, with typically around a 50% level of satisfaction amongst users, compared with around 20% amongst non-users. The 2018 results comparing both are provided in the table in figure 1.17.7 below –

Figure 1.17.7

Respondents very/fairly satisfied:	Users	Non-users	Overall
Journey Times	55%	21%	45%
Public Transport Information	49%	23%	42%
Service Frequency	53%	21%	44%
Journey Time Reliability	47%	20%	40%
Condition of Bus Stops/Shelters	46%	26%	42%
Provision of Real-Time Information	39%	25%	37%
Provision of Printed Timetable	42%	22%	37%
Local Bus Services Overall	49%	18%	41%

Furthermore, the following table (figure 1.17.8) reports what improvements the public would like to see, and demonstrates that many of the priorities relate to improvements in public transport –

Figure 1.17.9

Improvements residents would like to see:	Desirable	A Priority
Reduced congestion	52%	23%
Integrated ticketing	45%	12%
Improved bus service frequency and reliability	42%	14%
More cross-city bus services	41%	12%
More bus lanes	36%	7%
Extended hours of bus operation	36%	9%
Better travel information	33%	5%
Provision of more direct bus services	30%	6%
More Park & Ride sites	21%	6%

The following table (figure 1.17.10) compares relative satisfaction between the users of the main bus operators in Cardiff, as reported in the 'Bus Passenger Survey 2018' by Passenger Focus –

Figure 1.17.10

Satisfaction by operator:	Value	Punctuality	Journey Time	Overall
Cardiff Bus	65%	76%	85%	89%
New Adventure	-	79%	93%	89%
Newport Bus	68%	72%	79%	87%
Stagecoach	62%	73%	86%	90%

The above demonstrates very good levels of satisfaction overall, but does highlight some apparent concerns over whether or not services offer value for money.

Recommendations

In response to the trigger having been activated, the following investigations will need to be undertaken in conjunction with the methodology as specified within the Transport Monitoring Framework; and in accordance with commitments made as part of the LDP Examination process –

- Accessibility Mapping
- Corridor Investigation
- Assessment of Journey Costs

Whereby the following surveys will also be undertaken –

- Junction Turning Movement / Classified Link Counts
- Bus Patronage Surveys
- Bus Journey Time / Reliability Surveys (use of VIX operator data if available)

Topic Area: Percentage of People Travelling by Train

Relevant LDP Policies: KP2, KP6, KP8, T1-T9

Indicator reference: OB1 EC18

Contextual Changes: The £5bn 15-year contract to operate the Wales and Borders franchise and to progress the South Wales Metro between 2018 and 2033, was awarded by Transport for Wales to partnership KeolisAmey in May of 2017; the responsibilities for which were transferred over from Arriva Trains Wales to the new operator 'TfW Rail' on the 14th of October 2018. TfW currently have on order a large number of replacement trains, but until such time as these become operational, existing trains are currently undergoing rebranding and refurbishment; which at times have drawn criticism over up to a quarter of the fleet being out of service at any one time due to refurbishment in combination with the need for repair.

Indicator	Target	Trigger
Local Percentage of people travelling by train (all journeys)	An annual increase of journeys made by train for each journey purpose: 1) Work = 5.8% (2014) 2) Education = 5.2% (2014) 3) Shopping (City Centre) = 10.6% (2014) 4) Shopping (Other) = 3.8% (2014) 5) Leisure = 8.7% (2014)	Failure to achieve an annual increase for each journey purpose for two or more consecutive years
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
1) Work: 2014 = 5.8% 2015 = 6.0% (↑) +0.2% 2016 = 7.6% (↑) +1.6% 2) Education: 2014 = 5.2% 2015 = 4.8% (↓) -0.4% 2016 = 5.6% (↑) +0.8% 3) Shopping (City Centre): 2014 = 10.6% 2015 = 10.1% (↓) -0.5% 2016 = 11.3% (↑) +1.2% 4) Shopping (Other): 2014 = 3.8% 2015 = 3.0% (↓) -0.8%	1) Work: 2016 = 7.6% 2017 = 6.8% (↓) -0.8% 2) Education: 2016 = 5.6% 2017 = 5.2% (↓) -0.4% 3) Shopping (City Centre): 2016 = 11.3% 2017 = 11.0% (↓) -0.3% 4) Shopping (Other): 2016 = 4.4% 2017 = 2.7% (↓) -1.7%	1) Work: 2017 = 6.8% 2018 = 6.4% (↓) -0.4% 2) Education: 2017 = 5.2% 2018 = 4.7% (↓) -0.5% 3) Shopping (City Centre): 2017 = 11.0% 2018 = 11.3% (↑) +0.2% 4) Shopping (Other): 2017 = 2.7% 2018 = 3.2% (↑) +0.5%

2016 = 4.4% (↑) +1.4%

5) Leisure:
 2014 = 8.7%
 2015 = 7.5% (↓) -0.8%
 2016 = 8.8% (↑) +1.3%

5) Leisure:
 2016 = 8.8%
 2017 = 8.3% (↓) -0.5%

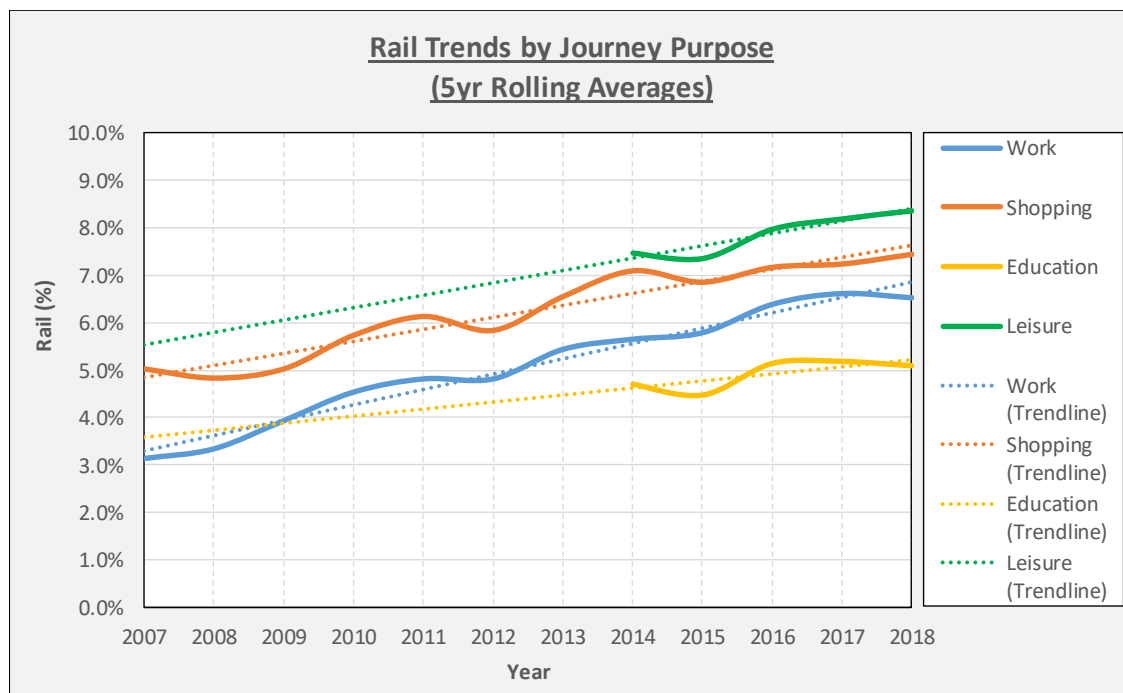
5) Leisure:
 2017 = 8.3%
 2018 = 8.5% (↑) +0.3%

Analysis

While the proportion travelling by rail for Shopping and Leisure journeys has increased from last year, the above also demonstrates a decline in the proportion for journeys to Work and Education for two consecutive years, thereby activating the trigger for this.

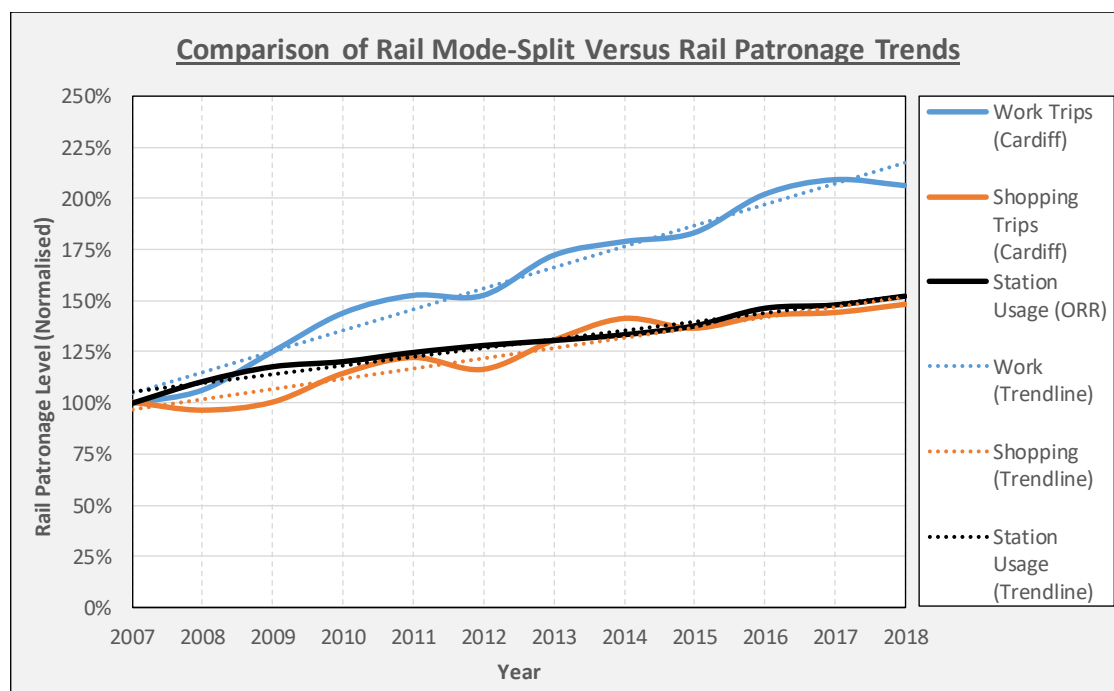
Nevertheless, looking at the overall trend in rail as presented by the historic 5yr rolling averages below, it is evident that the general trajectory for rail is actually upwards for all journeys, as provided in figure 1.18.1 below –

Figure 1.18.1



Setting the trends in figure 1.18.1 in context with station usage in Cardiff as reported each year by the ORR, it can be seen that the trend in Shopping trips closely tracks that of the overall growth in station patronage, while Work trips appear to have increased at a far higher rate, having more than doubled since 2007, as shown in figure 1.18.2 below –

Figure 1.18.2



In considering public perception towards rail services as shown in the results of the 2018 Ask Cardiff Survey in figure 1.18.3 below, it is evident that there is a general desire for improvement to be made to local train services and for the introduction of integrated ticketing –

Figure 1.18.3

Improvements residents would like to see:	Desirable	A Priority
Integrated ticketing	45%	12%
Improved local train services	41%	14%
Better travel information	33%	5%
Improved national train services	30%	4%
More Park & Ride sites	21%	6%

When asked whether they had changed their use of certain modes in the past year, respondents to the above survey indicated that 7% had used rail more, while 9% had used rail less, resulting in a net decline in use of 2% over the last year.

However, Cardiff residents account for only around 30% of all rail journeys within Cardiff, the remainder having originated from outside (2011 Census – Method of Travel to Work by OD). Therefore any decline in rail use amongst Cardiff residents does not necessarily equate to a decrease in overall rail use within Cardiff.

The ability of Cardiff residents to use the trains on the Valley Lines is limited by those travelling into Cardiff from the region, as inbound trains typically arrive at Cardiff's outlying stations already standing room only during the morning peak period.

It should be noted that the timeframe of the majority of the above analysis has largely coincided with the transitional period in the transfer of the Wales and Borders Rail Franchise, between the previous operator Arriva Trains Wales (ATW) and that of the new operator TfW Rail as part of the Metro, and as such the interpretation of any results need to be treated with an element of caution.

Nevertheless, looking further at public perceptions of rail travel, the 'National Rail Passenger Survey 2019' (Passenger Focus) enables the following comparison of user satisfaction for the rail operators in Cardiff to be made (figure 1.18.4) –

Figure 1.18.4

Satisfaction by operator:	Train Condition	Punctuality/ Reliability	Level of Crowding	Overall
TfW Rail (previously ATW)	18/19 = 64% 19/20 = 65%	18/19 = 80% 19/20 = 80%	18/19 = 70% 19/20 = 71%	18/19 = 82% 19/20 = 82%
Cross-Country	18/19 = 78% 19/20 = 78%	18/19 = 83% 19/20 = 86%	18/19 = 67% 19/20 = 63%	18/19 = 86% 19/20 = 86%
Great Western Railway	18/19 = 77% 19/20 = 83%	18/19 = 70% 19/20 = 79%	18/19 = 72% 19/20 = 74%	18/19 = 81% 19/20 = 87%

The above shows that satisfaction levels over the last year have generally remained broadly the same, with the exception of Great Western which has seen significant increases in levels of satisfaction across all domains.

As with the proportion of travel by bus (OB1 EC17), because of having met the trigger this year for two of the five monitored journey purposes by rail; further more detailed consideration will now be required in order to determine the underlying causes, and to identify the necessary corrective actions as appropriate, in conjunction with the methodology defined within the Transport Monitoring Framework; as specified in the Recommendations below.

Recommendations

In response to the trigger having been activated, the following investigations will need to be undertaken in conjunction with the methodology as specified within the Transport Monitoring Framework; and in accordance with commitments made as part of the LDP Examination process –

- Accessibility Mapping
- Corridor Investigation
- Assessment of Journey Costs

Whereby the following surveys will also be undertaken –

- Rail Patronage Surveys
- Rail Journey Time / Reliability Surveys

Topic Area: Improvement in Journey Times by Bus

Relevant LDP Policies: KP2, KP6, KP8, T1-T9

Indicator reference: OB1 EC19

Contextual Changes: The Council currently do not have access to bus monitoring data held by operators, and are therefore not able to determine bus journey times and reliability directly. Therefore, the level of bus user satisfaction of journey times and reliability as recorded in the Ask Cardiff Survey, will once again be used as a proxy, until such time that the required monitoring tools become available. Further contextual changes relating to bus use are defined in OB1 EC17, EC20 and EC21.

Indicator	Target	Trigger
Local Improvement in journey times by bus	An annual 1 percent improvement in journey times for key corridors (North West Corridor, North East Corridor, Eastern Corridor and Southern Corridor) from adoption of the Local Development Plan	Failure to achieve an annual improvement in bus journey times of 1% for two or more consecutive years
Performance 1st AMR 1 st April 2016 to 31 st March 2017	Performance 2nd AMR 1 st April 2017 to 31 st March 2018	Performance 3rd AMR 1 st April 2018 to 31 st March 2019
Public Satisfaction Regarding Bus Journey Times (Ask Cardiff Survey): 2015 = 59.8% 2016 = 62.6% (↑) +2.7%	Public Satisfaction Regarding Bus Journey Times (Ask Cardiff Survey): 2016 = 62.6% 2017 = 52.1% (↓) -10.5%	Public Satisfaction Regarding Bus Journey Times (Ask Cardiff Survey): 2017 = 52.1% 2018 = 54.7% (↑) +2.6%
Analysis		
<p>There has been a 2.6% improvement in the level of satisfaction over the past year with regard bus journeys.</p> <p>However, the current level of satisfaction is lower than that from 2015, while there was a 10.5% decline between 2016 and 2017, suggesting that the trend overall is of the level of satisfaction declining; although to what extent this relates directly to a decline in actual journey times is uncertain.</p>		
Recommendations		
No action is required at present. Continue to monitor.		

Topic Area: Improvement in Bus Journey Time Reliability

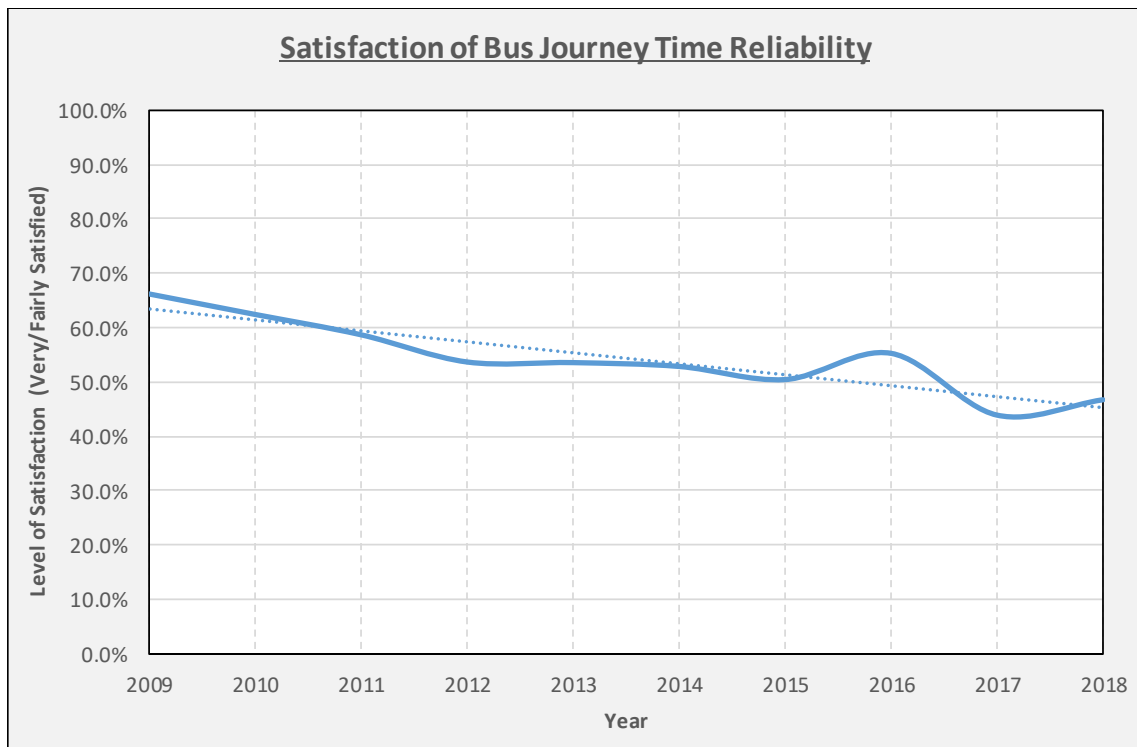
Relevant LDP Policies: KP2, KP6, KP8, T1-T9

Indicator reference: OB1 EC20

Contextual Changes: The Council currently do not have access to bus monitoring data held by operators, and are therefore not able to determine bus journey times and reliability directly. Therefore, the level of bus user satisfaction of journey times and reliability as recorded in the Ask Cardiff Survey, will once again be used as a proxy, until such time that the required monitoring tools become available. Further contextual changes relating to bus use are defined in OB1 EC17, EC19 and EC21.

Indicator	Target	Trigger
Local Improvement in bus journey time reliability	An annual 1 percent improvement in journey time reliability for key corridors (North West Corridor, North East Corridor, Eastern Corridor and Southern Corridor) from adoption of the Local Development Plan	Failure to achieve an annual improvement in bus journey time reliability of 1% for two or more consecutive years
Performance 1st AMR 1 st April 2016 to 31 st March 2017	Performance 2nd AMR 1 st April 2017 to 31 st March 2018	Performance 3rd AMR 1 st April 2018 to 31 st March 2019
Public Satisfaction Regarding Bus Journey Time Reliability (Ask Cardiff Survey): 2015 = 50.4% 2016 = 55.2% (↑) +4.8%	Public Satisfaction Regarding Bus Journey Time Reliability (Ask Cardiff Survey): 2016 = 55.2% 2017 = 43.9% (↓) -11.3%	Public Satisfaction Regarding Bus Journey Time Reliability (Ask Cardiff Survey): 2017 = 43.9% 2018 = 46.7% (↑) +2.8%
Analysis		
<p>There has been a 2.8% improvement in the level of satisfaction over the past year with regard bus journey time reliability.</p> <p>However, in considering the general trend as shown in figure 1.20.1 below, it is evident that overall there has been a decline in the level of satisfaction over time, not least marked by the considerable 11% decline between 2016 and 2017; although to what extent this relates directly to a decline in actual reliability is uncertain.</p>		

Figure 1.20.1



Recommendations

No action is required at present. Continue to monitor.

Topic Area: Delivery of Regional Transport Hub

Relevant LDP Policies: KP2, KP6, KP8, T4

Indicator reference: OB1 EC21

Contextual Changes: Demolition of Cardiff's previous bus station began on the 1st of August 2015, followed by redevelopment of Central Square by developer Rightacres. Planning approval for the new Integrated Transport Hub (now known simply as the 'Transport Interchange') was granted in March of 2017, to be built on vacant land formerly occupied by Marland House and Wood Street car park, with completion initially anticipated in December 2017. However, since this time the nature of the development has evolved significantly, with responsibility for delivery now a joint venture between Welsh Government in partnership with developer Rightacres and Legal & General, while the ultimate responsibility for operation of the new interchange having been transferred to Transport for Wales (TfW), a not-for-profit/arms-length transport company set up by Welsh Government.

Indicator	Target	Trigger
Local Delivery of a regional transport hub	A regional transport hub will be delivered by 2018	Failure to deliver a regional transport hub by 2018
Performance 1st AMR 1 st April 2016 to 31 st March 2017	Performance 2nd AMR 1 st April 2017 to 31 st March 2018	Performance 3rd AMR 1 st April 2018 to 31 st March 2019
Redevelopment of Central Square ongoing. Planning approval for the new hub granted March 2017	The council is committed to the delivery of the new hub, working in partnership with Welsh Government/TfW, Network Rail and developer Right Acres, as part of the Metro Delivery Partnership (MDP).	The Council is committed to facilitate delivery of the Transport Interchange, together with its ancillary uses and associated infrastructure. Completion of the interchange is currently anticipated to be 2023, although the bus station itself may become operational prior to this in 2021/2022.
Analysis		
The new Transport Hub/Interchange forms part of the wider Central Square redevelopment, which includes the new BBC Cymru Wales HQ catering for 1,200 staff, which is currently in the process of being fitted out, with staff anticipated to be relocated here from their existing site in Llandaff around October 2019.		

Responsibility for delivery of the new interchange now lies with Welsh Government in partnership with developer Rightacres and Legal & General, while the responsibility for the ultimate operation of the interchange rests with Transport for Wales (TfW).

The latest application for the interchange (ref: 18/01705/MJR) was considered at planning committee on 7th of November 2018, whereby a resolution to approve was given. However a decision notice to grant the application has not yet been issued, as a S106 agreement is yet to be completed, with complex negotiations to secure private sector investment still on-going.

The current proposal for the new interchange are as follows –

- 14 bus stands based on a drive-in-reverse-out (DIRO) arrangement;
- A ground floor concourse comprising 5 commercial retail units and public conveniences;
- A 6-storey office block, located above the interchange;
- Around 300 private residential apartments (PRS) to rent arranged over 22-storeys;
- A 249 space car park split over 5 levels, with 225 of these allocated to the BBC, and the remaining 24 for the office development;
- 50 cycle parking spaces provided for the offices, with 160 spaces provided for the PRS apartments, and the provision of 216 spaces for general public use (of these comprising 36 Nextbike spaces, and 60 spaces on-street);
- Significant public realm and highway improvement works.

Recommendations

No action is required at present. Continue to monitor.

Topic Area: Delivery of Sustainable Transportation Infrastructure

Relevant LDP Policies: KP2, KP6, KP8, T4

Indicator reference: OB1 EC22

Contextual Changes: Lack of available funding and suitable developer contributions, continue to be significant constraints to the delivery of LTP schemes, and in securing the sustainable infrastructure necessary to support modal shift and the delivery of the Master-planning principles set out in the LDP. Since being originally defined within the LTP, previously named strategic cycle route and walkable network programme (WNP) schemes, have since been superseded and as a result reclassified below according to the Cardiff Integrated Network Map (INM), or as part of one of Cardiff's five proposed Cycleways.

Indicator	Target	Trigger
Local Delivery of new sustainable transportation infrastructure including: Rapid Bus Corridors, Cycle Network, Transport Hubs and LTP schemes to mitigate development impacts and support modal shift	To prepare & implement a range of sustainable transport schemes including schemes identified in the Cardiff LTP which support modal shift and the delivery of the Master-planning principles set out in the LDP	Failure to deliver projects identified in LTP timeframes and/or failure to deliver sustainable key principles as referenced in OB4 SN12
Performance 1st AMR 1 st April 2016 to 31 st March 2017	Performance 2nd AMR 1 st April 2017 to 31 st March 2018	Performance 3rd AMR 1 st April 2018 to 31 st March 2019
ALL Schemes: Completed = 3 (9%) On-going = 15 (47%) On-hold = 14 (44%) TOTAL = 32	ALL Schemes: Completed = 9 (17%) On-going = 27 (52%) On-hold = 16 (31%) TOTAL = 52	ALL Schemes: Completed = 12 (20%) On-going = 32 (53%) On-hold = 16 (27%) TOTAL = 60 Multi-Modal & Transport Hubs Schemes: Completed = 1 (17%) On-going = 5 (83%) On-hold = 0 (0%) TOTAL = 6 Cycle Network & Active Travel Schemes: Completed = 5 (15%)

		<p>On-going = 17 (52%) On-hold = 11 (33%) TOTAL = 33</p> <p>Rapid Bus Corridor Schemes:</p> <p>Completed = 2 (15%) On-going = 6 (46%) On-hold = 5 (38%) TOTAL = 13</p> <p>Rail Improvement Schemes:</p> <p>Completed = 4 (50%) On-going = 4 (50%) On-hold = 0 (0%) TOTAL = 8</p>
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Analysis

Not all schemes have been able to be delivered within the timeframes originally set out, due to a lack of funding and resources, together with shifting priorities.

Nevertheless, good progress has continued to be made, with an additional 3 schemes having been delivered since reporting the 2nd AMR, together with a higher proportion of schemes whose status is on-going/completed.

Progress against LTP and LDP identified sustainable transport infrastructure schemes for the period 2015-2019, are summarised below: -

Multi-Modal & Transport Hubs Schemes:

Timeframe	Scheme	Completed?	Commentary
2015-2017	Strategic Junction Improvements - Newport Road / West Grove [LDP]	YES	Phase 1: East Grove/Howard Place = completed 05/05/16; Phase 2a: West Grove/The Parade = completed 25/08/16; Phase 2b: Newport Road/West Grove = completed 14/03/17; Phase 3: Newport Road/Fitzalan Road = completed 22/11/17
2015-2017	Strategic Cycle & Bus Improvements - Route 6 - Cowbridge Rd East/West & Ely	On-going	Cowbridge Road East Toucan completed in 2016; Ely River Bridge completed in 2017; now being progressed as part of C5 feasibility

	Bridge Roundabout		
2015-2021	Eastern Corridor Improvements [LDP]	On-going	Eastern Bay Link between Queensgate & Ocean Way opened on 15/06/17 as 'A4232 Ffordd Ewart Parkinson' with 1-year post-scheme assessment undertaken; Dedicated north-south running lane provided at the Adshel Roundabout in 2018; Eastern Corridor Study to be undertaken in 2019
2015-2026	Strategic Park & Ride - North of M4 J33 [LDP]	On-going	1,000-space P&R to be delivered as part of SSD; timeline to be agreed
2016-2021	City Centre Improvements - Bus Lanes, Bus Gates, Bus Priority & Junction Improvements [LDP]	On-going	Central Square: detailed design on-going, public consultation scheduled Autumn 2019, construction scheduled to start Jan 2020; Westgate Street (WGS): detailed design on-going, bus gate to be installed as part of Central Square scheme; Station Terrace (CCE): WelTAG Stage 2, design on-going, consultation planned for early 2020 with construction to start Spring/Summer 2020; Castle Street (CCN): Air Quality compliance target set, design tested to meet target, consultation Autumn 2019, construction scheduled to start Feb 2019 (subject to funding); Grangetown-Riverside Study: feasibility work started (due for completion Aug 2019), design work to be completed Nov 2019 for first installations in 2020-2021
2017-2022	UHW Hub	On-going	Planning approval received, designs completed

Cycle Network & Active Travel Schemes:

Timeframe	Scheme	Completed?	Commentary
2015-2016	INM Pedestrian Improvements (previously WNP) -	YES	Phase 1 completed in 2015/2016; Phase 2 completed in 2016/2017;

	Llanrumney, St Mellos and Ely & Caerau (Phase 1)		Phase 3 completed in 2017/2018
2015-2016	INM Strategic Cycle Improvements - Route 5 - Penarth Road Corridor - Phase 2	YES	Scheme completed in 2015
2015-2016	INM Strategic Cycle Improvements - Route 50 - Wood St-Leckwith Rd	YES	Scheme completed in 2015
2015-2016	INM Strategic Cycle Improvements [146] - North Cardiff Community Route (NCCR) - Phase 4	On-hold	No progress to-date
2016-2017	INM Pedestrian Improvements (previously WNP) - Splott (Phase 1), Grangetown & Llandaff North	On-going	Splott SRIC schemes implemented; Grangetown schemes identified & funded for delivery in 2019/2020; some SRIC improvements implemented in Llandaff North
2016-2017	INM Strategic Cycle Improvements [119] - Route 34 - Bute Dock Footway Shared Use	On-hold	Not currently being progressed
2016-2017	INM Strategic Cycle Improvements [120] - Route 34 - Bute East Dock-Hemingway Rd	On-hold	Not currently being progressed
2016-2017	INM Strategic Cycle Improvements [121] - Route 34 - Sanquahar/Windso r Rd	On-going	New crossing has been implemented; upgrades to cycle track being progress as part of C3
2017-2018	INM Pedestrian Improvements (previously WNP) -	On-going	Being viewed in light of NE Cardiff development

	Llanishen & Pentwyn (Phase 1)		
2017-2018	INM Pedestrian Improvements (previously WNP) - Llanrumney (Phase 2)	On-going	Being considered as part of Eastern Corridor Study
2017-2018	INM Strategic Cycle Improvements [135] - Route 9 - Pantbach Road	On-hold	No progress to-date
2017-2018	INM Strategic Cycle Improvements [26] - Route 6 - Cowbridge Rd West/Vincent Rd	On-going	Being progressed as part of C5 feasibility
2017-2018	INM Strategic Cycle Improvements [27] - Route 6 - Grand Avenue	On-going	Being progressed as part of C5 feasibility
2017-2018	INM Strategic Cycle Improvements [45A] - Route 9 - North Road between Gabalfa & St Georges Rd	YES	Scheme completed
2017-2018	INM Strategic Cycle Improvements [96B] - Route 9 - Footbridge over Western Av with Gabalfa Int.	On-hold	No progress to-date
2017-2018	INM Strategic Cycle Improvements [96C] - Route 80 - Excelsior Road, Taff Trail	On-going	Design & assessment as part of North Road Phase 2
2018-2019	City Centre Cycle Improvements - Adam Street Near Railway Bridge	On-hold	Not currently being progressed
2018-2019	City Centre Cycle Improvements -	On-going	To be considered as part of C3

	Adam Street Near USW		
2018-2019	City Centre Cycle Improvements - Churchill Way/Bridge Street	On-going	Being progressed as part of City Centre 'East' (CCE) Improvements
2018-2019	City Centre Cycle Improvements - Custom House Street Near Hope Street	On-hold	Not currently being progressed
2018-2019	City Centre Cycle Improvements - Mill Lane Contraflow	On-hold	Not currently being progressed
2018-2019	City Centre Cycle Improvements - North Road/Boulevard De Nantes to Castle Street	On-going	Being progressed as part of City Centre 'North' (CCN) Improvements
2018-2019	City Centre Pedestrian & Cycle Improvements - Mill Street/Tredegar Street	On-hold	Not currently being progressed
2018-2019	INM Pedestrian Improvements (previously WNP) - St Mellons, Ely, Caerau & Splott (Phase 2)	YES	WNP/SRIC schemes completed
2018-2019	INM Strategic Cycle Improvements - Route 35 - Central Link/Adam Street	On-hold	Not currently being progressed
2018-2019	INM Strategic Cycle Improvements - Route 50 - Plaza at Cardiff Central Rail Station	On-going	Being progressed as part of Central Square & City Centre 'West' (CCW) Improvements
2018-2019	INM Strategic Cycle Improvements - Route 6 - Castle Street	On-going	Being progressed as part of City Centre 'North' (CCN) Improvements

2018-2019	INM Strategic Cycle Improvements [21A] - Route 5 - Penarth Rd Between Bridge & Tresillian Way	On-hold	No progress to-date
2018-2021	Cardiff Cycleways C1 - Phase 1 - City Centre to UHW Heath (inc. Route 1)	On-going	Senghennydd Road - Under construction, completion expected September 2019
2018-2021	Cardiff Cycleways C2 - City Centre to St Mellons Business Park (inc. Route 3)	On-going	Design & assessment underway
2018-2021	Cardiff Cycleways C3 - City Centre to Cardiff Bay (inc. Route 34)	On-going	Design & assessment underway
2018-2021	Cardiff Cycleways C4 - City Centre to Llandaff, Danescourt & NW Cardiff	On-going	Feasibility underway
2018-2021	Cardiff Cycleways C5 - City Centre to Riverside, Ely & Caerau (inc. Route 6/50)	On-going	Feasibility underway

Rapid Bus Corridor Schemes:

Timeframe	Scheme	Completed?	Commentary
2015-2016	North East Bus Corridor - A469 Phase 1 - St Georges Road to Birchgrove Road [LDP]	On-hold	Subject to funding
2015-2016	North East Bus Corridor - A470 – Keysham Road to Birchgrove Road	YES	Delivered Q4 2016-2017
2015-2016	North East Bus Corridor - A470 – Caedelyn Road to Ty'n-y-Parc Road	On-going	Construction anticipated on-site in 2020/2021

2016-2017	North East Bus Corridor - A469 Phase 2 - Birchgrove Road to Maes-y-Coed Road	YES	Delivered in 2016/2017
2016-2022	North East Bus Corridor - A469 Phase 3 - North of Maes-y-Coed Road [LDP]	On-going	Concept designs under consideration
2016-2022	North East Bus Corridor - A470 - Gabalfa/Heath Hospital to City Centre [LDP]	On-hold	Not currently actively under consideration
2016-2026	Part-time Bus Lanes on Strategic Routes [LDP]	On-hold	Has not yet been required but may be needed where there is conflict with parking requirements
2017-2018	Eastern Bus Corridor - A48 Eastern Avenue Bus Lane Improvements Between Pentwyn Int. & Pontprennau Int. [LDP]	On-hold	Not currently actively under consideration
2017-2020	North West Bus Corridor - A4119 Llantrisant Road - Phase 2 [LDP]	On-going	Phase 2A completed in 2017; Phase 2B & 2C completed in June 2018; Phase 2D (Pen-Hill) anticipated on-site in Q4 2019/2020
2017-2021	Cardiff West/Waun Gron Interchange	On-going	Awaiting Planning Application
2017-2021	Southern Bus Corridor - Cardiff Bay Barrage Link (Vale of Glamorgan) [LDP]	On-going	Structural surveys completed; consultation completed; WelTag Stage 2 begun on Penarth Hedlands Link inc. 500 space P&R site
2017-2026	North East Bus Corridor - Bus Lane & Priority Improvements around NE Cardiff [LDP]	On-going	Options identified, awaiting planning application
2018-2023	North West Bus Corridor - A4119 Capel Llanilltern	On-hold	Not currently actively under consideration

Rail Improvement Schemes:

Timeframe	Scheme	Completed?	Commentary
2015-2017	New Platform & Building Entrance at Cardiff Central Station (Network Rail) [LDP]	YES	Opened in January 2017
2015-2017	New Platform & Building Entrance at Cardiff Queen Street Station (Network Rail) [LDP]	YES	Works completed in 2015
2015-2019	Rail Station Access, Signage & Information Improvements (TfW) [LDP]	On-going	Responsibility for delivery with TfW as part of the Metro
2016-2017	Metro Station Improvements Plan (MSIP) - Llandaf Station (TfW) [LDP]	YES	Works completed in 2017
2016-2017	Metro Station Improvements Plan (MSIP) - Radyr Station (TfW) [LDP]	YES	Works completed in 2017
2016-2020	Electrification of South Wales Great Western Mainline (TfW) [LDP]	On-going	All associated bridge works completed between 2016-2018. Installation of overhead line equipment to begin shortly. Anticipated delivery in December 2019, with 1st electric services expected in January 2020
2016-2024	Electrification of Core Valleys Lines (TfW) [LDP]	On-going	Responsibility for delivery transferred to TfW as part of the Metro
2018-2033	Metro Rail Strategy Delivery Programme [LDP]	On-going	Discussions on programme currently taking place with TfW

Recommendations

No action is required at present. Continue to monitor.

Topic Area: Central Shopping Area Protect Frontages SPG

Relevant LDP Policies: R3

Indicator reference: OB1 EC23

Contextual Changes: There have been no significant changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Central Shopping Area Protected Frontages SPG		Failure to adopt SPG within 12 months of adoption of the Plan
Performance 1st AMR 1 st April 2016 to 31 st March 2017	Performance 2nd AMR 1 st April 2017 to 31 st March 2018	Performance 3rd AMR 1 st April 2018 to 31 st March 2019
The Central Shopping Area Protected Frontages SPG is due to be issued for public consultation in March 2018.	It is proposed not to progress a Central Shopping Area Protected Shopping Frontages SPG at this time. Refer to Analysis (below).	It is proposed not to progress a Central Shopping Area Protected Shopping Frontages SPG at this time. Refer to Analysis (below).
Analysis		
<p>The number of Class A1 (Shop) uses within Protected Shopping Frontages is monitored as part of the Performance AMR (Indicator OB1 EC11). The results of this year's survey has shown that the number of frontages with 50% or more Class A1 uses remains strong at 98.1%, when measured against this indicator.</p> <p>Taking into consideration the level of detail and assessment criteria identified through LDP Policies R2 (Development in the Central Shopping Area) and R3 (Protected Shopping Frontages), in additional to further guidance that has been provided through the adopted Food, Drink and Leisure Uses SPG, it is not considered necessary to produce supplementary planning guidance relating specifically to Protected Shopping Frontages at this time.</p> <p>This position will be reviewed annually to monitor if any significant contextual changes occur in the future.</p>		
Recommendations		
<ul style="list-style-type: none"> To not to progress a Central Shopping Area Protected Shopping Frontages SPG at this time. To monitor Performance AMR 'OB1 EC11', to identify any significant contextual changes to Central Shopping Area Protected Shopping Frontages during the monitoring period. 		

Topic Area: Shop Fronts and Signs Guidance SPG

Relevant LDP Policies: KP5

Indicator reference: OB1 EC24

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Shop Fronts and Signs Guidance SPG		Failure to adopt SPG within 18 months of adoption of the Plan
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
The Shop Fronts and Signs Guidance SPG is due to be issued for public consultation in November 2017	A draft of the Shop Fronts and Signs SPG has been prepared and is currently being reviewed / finalised internally prior to being issued for public consultation.	The Shopfront Design and Signage SPG was approved by Council on 20 th June 2019.
Analysis		
Following public consultation in November / December 2018, the final draft of the Shopfront Design and Signage SPG was approved by Council on 20 th June 2019.		
Recommendations		
No action required.		

Topic Area: Protection of Employment Land and Premises SPG

Relevant LDP Policies: EC1, EC3

Indicator reference: OB1 EC25

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Protection of Employment Land and Premises for Business and Industry and Warehousing SPG		Failure to adopt SPG within 18 months of adoption of the Plan
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
The Protection of Employment Land and Premises for Business and Industry and Warehousing SPG was issued for public consultation in June 2017 and is due to be considered by Cabinet and Council for approval in October 2017	The Protection of Employment Land for Business and Industry SPG was approved in November 2017	The Protection of Employment Land for Business and Industry SPG was approved in November 2017
Analysis		
The SPG was approved by Council on 30 th November 2017 and has been taken into consideration in all planning applications determined since that date. Given this, there is no need to continue to monitor this indicator but the Council will continue to assess the effectiveness of the adopted SPG.		
Recommendations		
No action required.		

Objective 2 – To respond to evidenced social needs

Topic Area: Housing Land Supply

Relevant LDP Policies: KP1

Indicator reference: OB2 SO1

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
CORE The housing land supply taken from the current Housing Land Availability Study (TAN1)	A minimum 5 year supply of land for residential development is maintained throughout the Plan period.	Less than a 5 year supply of residential land is recorded for any year.
Performance 1st AMR 1st April 2016 to 31st March 2017		Performance 2nd AMR 1st April 2017 to 31st March 2018
The housing land supply taken from the current Joint Housing Land Availability Study (1 st April 2017) is 3.6 years.	The housing land supply taken from the current Joint Housing Land Availability Study (1 st April 2018) is 3.5 years.	1 st April 2019 Joint Housing Land availability Study currently in preparation
Analysis		
<p><u>TAN1/Residual Methodology</u></p> <p>It is important to stress that the Council believes that in reality more land is potentially available for development than the figure derived through the rigid residual methodology prescribed in TAN1 which is solely based on the LDP housing figure as opposed to taking account of past build rates. In this respect, it should be noted that the current land bank (sites over 10 units) is 24,936 dwellings which compares to 10,839 dwellings which meet the requirements of the JHLAS reporting process. Much land, while physically available in Cardiff is not eligible for inclusion in the 5-year calculation. This includes sites subject to the signing of a s106 agreement¹ (214 units) or sites with consent categorised as constrained in the C3/C4 categories (13,883 units). These categories are not eligible to be counted in the JHLAS, but could add considerably (around 4.2 years' worth of land) to the official 3.5 year supply.</p> <p>While no longer permitted, TAN1 previously allowed comparison of the current land supply with past building rates. The past build rate methodology was introduced in 1992 by PPG3 (Wales) to address instances where the residual calculation does not</p>		

¹ Where a Section 106 agreement remains unsigned for more than one year after the date of the resolution to grant planning permission

accurately reflect supply. Comparison with both the previous 10-year past building rate and 5-year building rate provide land supply figures for Cardiff of 14.5 years and 15.9 years, respectively. Whilst it is accepted that these build periods may reflect the effects of recession it nevertheless offers a useful perspective.

Students

Historically, private student accommodation was eligible for inclusion in Cardiff's 5-year land supply. This was established practice since students living in private student accommodation are included in the dwelling requirement which underlies the development plan. This form of accommodation also reduces pressure on the traditional private rented sector thereby contributing to overall stock. Revised TAN1 guidance (January 2015) introduced a condition that only dwellings within the C3 Use Class Order definition can be counted towards the supply. This restricts student accommodation from the JHLAS which is considered *Sui Generis* rather than C3. This sector has provided an important source of accommodation in Cardiff over the past 15 years and has more recently experienced a boom. To provide an indication of scale, approximately 480 student units were eligible to be included in Cardiff's 5-year supply in the 2014 JHLAS. Between 1st April 2014 and 1st April 2016 a further 1,699 additional units (2,975 bed spaces) were approved. Typically, these schemes have been built readily without experiencing the delays affecting traditional residential schemes. Current evidence shows the further strength of the student accommodation market in Cardiff.

Revised TAN1 came into effect after Cardiff's LDP had been submitted for Examination and this change of Policy had not been anticipated since it did not form part of the consultation proposals. As such, household projections within the adopted LDP, and the subsequent dwelling requirement (41,415) take into account the requirements of students living in private accommodation but new student accommodation cannot technically contribute to the supply. This issue was acknowledged by Inspectors during the LDP Examination, reported in paragraphs 4.18 & 4.19 of the Inspectors' Report. Future work will be required to address this matter of reconciling student demand and supply ahead of the Plan review process.

Short-term Delays on Strategic Sites

For the current JHLAS period (2019-2023) completion forecasts amounted to a combined contribution of 7,835 units on strategic sites. A further 4,026 units were anticipated to be completed prior to the Study, between 2015 and 2018. During this year's JHLAS process the Council has received revised forecasts for each strategic site representing a total contribution of 6,235 contribution over the period 2019-2023, resulting in a loss 1,600 units from the anticipated 5-year supply equivalent to approximately 0.5 years supply. Similarly, only 326 completions have taken place to date on strategic sites, a shortfall of 3,700 from anticipated completions over the period, representing 1.1 years. Under the residual method, any shortfall in anticipated completions is factored in to the calculation (residual requirement) thereby making it more difficult to achieve a 5-year supply.

Reasons for delays vary from site to site, but in general start dates have slipped post adoption. The Council considers that these delays are therefore at least partly responsible for the lack of a 5-year housing land supply in Cardiff, and that in reality

Cardiff is not faced with a supply issue, but a delivery challenge where the development sector is not delivering the rates previously anticipated.

National Perspective

It should be noted that the lack of a 5-year supply in Cardiff is no exception when considered within the context of Wales as a whole; many LPAs have experienced similar land supply situations, post LDP adoption. In 2013, 2014 and 2015 respectively, 18 (72%) Welsh LPAs had less than 5-years' housing land supply. The situation has not improved over time, with 19 LPAs recording a sub 5-year land supply in 2016. Average land supply across Wales also fell during this period, from 4.3 years in 2013 to 2.5 years by 2016. The widespread difficulty in demonstrating a 5-year housing land supply across Welsh LPAs is recognised by Welsh Government who have conducted research into the issues surrounding delivery. While viability appears to be a key underlying factor throughout much of Wales, other primary factors are evident in Cardiff, as described above.

Conclusion

This Council has identified several underlying reasons which it believes may be significant in considering the latest housing land availability figure set out in the 2018 JHLAS. The Council consider these technical factors distort the reality of a much healthier supply of housing land which exists in practice with a key challenge being the ability of the housing sector to effectively deliver build rates promoted during the LDP examination process. Notwithstanding the recent disapplication of paragraph 6.2 of TAN1 these factors should be taken into account where attributing weight to the 5-year supply figure for the purpose of determining planning applications.

It is considered that the Council is being proactive in following the enabling approach set out by Welsh Government, and positive dialogue is taking place with the development sector to achieve mutual objectives of delivering a plan-led approach. Continuous review of new evidence through the AMR process will help to ensure the land supply situation remains closely monitored.

Recommendations

Whilst there is clearly a 'delivery lag' following LDP adoption, the Council is liaising successfully with landowners and developers with the aim of stimulating an enhanced trajectory of provision on Strategic Sites. It is considered that this proactive and enabling approach will secure enhanced delivery rates in future years and the matter will remain an on-going priority. Future AMR's will provide regular annual updates.

Topic Area: Number of General market Dwellings Built

Relevant LDP Policies: KP1

Indicator reference: OB2 SO2

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
CORE The number of net general market dwellings built	Provide 22,555 net general market dwellings over the remaining Plan period in accordance with the cumulative 2 year targets set out below: 2016: 2,495 2018: 4,096 2020: 4,153 2022: 4,042 2024: 4,010 2026: 3,759	Failure to deliver the required number of dwellings for each 2 year period.
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
The total number of general market dwellings built during 2014/15 was 377. The total number of general market dwellings built during 2015/16 was 489. The combined total of general market dwellings built by 1st April 2016 was 866.	The total number of general market dwellings built during 2016/7 was 547. The total number of general market dwellings built during 2017/18 was 636. The combined total of general market dwellings built by 1 st April 2018 was 1,183.	The total number of general market dwellings built between 1 st April 2018 and 31 st March 2019 was 1,135. The cumulative total number of general market dwellings built to date is therefore 3,184.
Analysis		
<p>This is the third year that the LDP has been operative and this is the third AMR to be prepared. The LDP is therefore still at an early stage in its lifetime and this year's AMR provides a short term comparison to the AMR produced in 2017.</p> <p>The total cumulative target to 2018 (2016 – 2,495 + 2018 – 4,096) was 6,591 general market dwellings to be built by 1st April 2018. To date, 3,184 general market dwellings have been constructed.</p>		

It is considered that good progress has been made since the adoption of the LDP in January 2016 with the majority of Strategic Sites having planning permission and a number are well under construction. However, there are also a range of factors which impact upon the rate at which dwellings are built – in part reflective of land ownership/legal technicalities between developers and landowners and also the complexity of securing planning consents and accompanying Section 106 Agreements which fully deliver the Council’s aspirations as set out in the LDP.

Recommendations

It is not considered that the failure to deliver the required number of general market dwellings for each 2 year period would give cause for a review of the LDP. It is inevitable that there will be some ‘delivery lag’ following the adoption of the LDP and the rate of construction is increasing when compared to the previous 2 year cumulative total.

The Council is continuing to liaise with landowners and developers with the aim of stimulating an enhanced trajectory of provision on Strategic Sites, as well as developing a variety of addition windfall brownfield sites. It is hoped that this proactive and enabling approach will, over time secure enhanced delivery rates in future years and the matter will remain an on-going priority. Future AMR’s will provide regular annual updates and delivery rates will be carefully monitored.

Topic Area: Number of Affordable Dwellings Built

Relevant LDP Policies: KP1, KP2, KP4, KP13, H3

Indicator reference: OB2 SO3

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
<p>CORE The number of net additional affordable dwellings built (TAN2)</p>	<p>Provide 6,646 net affordable units over the remaining Plan period (representing an average of 22.8% of total housing provision). Expected delivery rate to meet the target set out below: 2016: 735 2018: 1,207 2020: 1,224 2022: 1,191 2024: 1,181 2026: 1,108</p>	<p>Failure to deliver the required number of dwellings for each 2 year period.</p>
<p>Performance 1st AMR 1st April 2016 to 31st March 2017</p>	<p>Performance 2nd AMR 1st April 2017 to 31st March 2018</p>	<p>Performance 3rd AMR 1st April 2018 to 31st March 2019</p>
<p>The total number of affordable dwellings provided during 2014/15 was 105.</p> <p>The total number of affordable dwellings provided during 2015/16 was 244.</p> <p>The combined total of affordable dwellings provided by 1st April 2016 was 349.</p>	<p>The total number of affordable dwellings provided during 2016/17 was 230.</p> <p>The total number of affordable dwellings provided during 2017/18 was 194.</p> <p>The combined total of affordable dwellings provided by 1st April 2018 was 424.</p>	<p>The total number of affordable dwellings provided during 2018/19 was 309.</p> <p>The total number of affordable dwellings built to date was therefore 1,082.</p>

Analysis

This is now the second year the LDP has been operative and this is the second AMR to be prepared. The LDP is therefore still at an early stage in its lifetime and this year's AMR provides a short term comparison to the AMR produced in 2017.

The total cumulative target to 2018 (2016 - 735 plus 2018 – 1,207) was 1,942 affordable dwellings to be built by 1st April 2018. To date, 1,082 affordable dwellings have been constructed.

It is considered that good progress has been made since the adoption of the LDP in January 2016 with the majority of Strategic Sites having planning permission and a number are well under construction. However, there are also a range of factors which impact upon the rate at which dwellings are built – in part reflective of land ownership/legal technicalities between developers and landowners and also the complexity of securing planning consents and accompanying Section 106 Agreements which fully deliver the Council's aspirations as set out in the LDP.

Recommendations

It is not considered that the failure to deliver the required number of general market dwellings for each 2 year period would give cause for a review of the LDP. It is inevitable that there will be some 'delivery lag' following the adoption of the LDP and the rate of construction is increasing when compared to the previous 2 year cumulative total.

The Council is continuing to liaise with landowners and developers with the aim of stimulating an enhanced trajectory of provision on Strategic Sites, as well as developing a variety of addition windfall brownfield sites. It is hoped that this proactive and enabling approach will, over time secure enhanced delivery rates in future years and the matter will remain an on-going priority. Future AMR's will provide regular annual updates and delivery rates will be carefully monitored.

Topic Area: Annual Dwellings Completions

Relevant LDP Policies: KP1

Indicator reference: OB2 SO4

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
CORE Annual dwelling completions (all dwellings)	Provide 29,201 dwellings over the remaining Plan period in accordance with the cumulative 2 year targets set out below: 2016: 3,230 2018: 5,303 2020: 5,377 2022: 5,233 2024: 5,191 2026: 4,866	Failure to deliver the required number of dwellings for each 2 year period.
Performance 1st AMR 1 st April 2016 to 31 st March 2017	Performance 2nd AMR 1 st April 2017 to 31 st March 2018	Performance 3rd AMR 1 st April 2018 to 31 st March 2019
The total number of all dwellings provided during 2014/15 was 482.	The total number of all dwellings provided during 2016/17 was 777	The total number of all dwellings built by 1 st April 2019 was 1,444.
The total number of all dwellings provided during 2015/16 was 733.	The total number of all dwellings provided during 2017/18 was 830	The total number of all dwellings built to date is 4,266.
The combined total by 1 st April 2016 was 1,215.	The combined total by 1 st April 2018 was 1,607.	
Analysis		
<p>This is now the third year the LDP has been operative and this is the third AMR to be prepared. The LDP is therefore still at an early stage in its lifetime and this year's AMR provides a short term comparison to the AMR produced in 2018.</p> <p>The total cumulative target to 2018 (2016 – 3,230 plus 2018 – 5,503) was 8,533 dwellings to be built by 1st April 2018 and to date 4,266 dwellings have been constructed.</p>		

It is considered that good progress has been made since the adoption of the LDP in January 2016 with the majority of Strategic Sites having planning permission and a number are well under construction. However, there are also a range of factors which impact upon the rate at which dwellings are built – in part reflective of land ownership/legal technicalities between developers and landowners and also the complexity of securing planning consents and accompanying Section 106 Agreements which fully deliver the Council’s aspirations as set out in the LDP.

Recommendations

It is not considered that the failure to deliver the required number of general market dwellings for each 2 year period would give cause for a review of the LDP. It is inevitable that there will be some ‘delivery lag’ following the adoption of the LDP and the rate of construction is increasing when compared to the previous 2 year cumulative total.

The Council is continuing to liaise with landowners and developers with the aim of stimulating an enhanced trajectory of provision on Strategic Sites, as well as developing a variety of additional windfall brownfield sites. It is hoped that this proactive and enabling approach will, over time secure enhanced delivery rates in future years and the matter will remain an on-going priority. Future AMR’s will provide regular annual updates and delivery rates will be carefully monitored.

Topic Area: Number of Windfall Units Completed

Relevant LDP Policies: KP1

Indicator reference: OB2 S05

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
CORE Number of windfall units completed per annum on all sites	Annual target of overall anticipated windfall contributions for the remainder of the Plan period – 488 dwellings per annum.	Delivery varies by more than 10% above or below 488 dwellings per annum for any consecutive 2 year period.
Performance 1st AMR 1 st April 2016 to 31 st March 2017	Performance 2nd AMR 1 st April 2017 to 31 st March 2018	Performance 3rd AMR 1 st April 2018 to 31 st March 2019
The total number of windfall contributions during 2016/17 was 449 dwellings.	The total number of windfall contributions during 2017/18 was 401 dwellings.	The total number of windfall contributions during 2018/19 was 737 dwellings.
Analysis		
During the monitoring period for 1 st April 2018 to 31 st March 2019, there were 737 dwellings completed which were considered 'windfall' sites as they were over 10 dwellings, were not the result of a change of use and did not form part of an LDP allocated site. The 737 completed windfall units fall outside the 10% buffer set out in the trigger. Although 737 is greater than the 10%, it is not considered to raise any concerns in terms of delivery the LDP strategy		
Recommendations		
No action is required at present. Continue to monitor.		

Topic Area: Settlement Boundaries

Relevant LDP Policies: KP3(B), EN1

Indicator reference: OB2 SO6

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
Core Number of dwellings permitted annually outside the defined settlement boundaries that does not satisfy LDP policies.	Number of dwellings permitted that are not in accordance with KP3(B)	1 or more permission that does not satisfy LDP policies
Performance 1st AMR 1 st April 2016 to 31 st March 2017	Performance 2nd AMR 1 st April 2017 to 31 st March 2018	Performance 3rd AMR 1 st April 2018 to 31 st March 2019
No applications permitted outside the settlement boundary that do not satisfy policy.	No applications permitted outside the settlement boundary that do not satisfy policy.	No applications permitted outside the settlement boundary that do not satisfy policy.
Analysis		
<p>During the 3rd monitoring period no applications were permitted outside the settlement boundary that did not satisfy policy. During the monitoring period four applications for residential development were approved of these two the principal of development had been established through a previous consent and the remaining two were considered to be policy compliant and related to conversions/development within a residential curtilage. Given this it is considered that Policy KP3(B) is functioning effectively. The Council will continue to monitor this indicator to determine the effectiveness of the policy framework relating to this issue.</p>		
Recommendations		
No action is required at present. Continue to monitor		

Topic Area: Gypsy and Traveller Accommodation Provision

Relevant LDP Policies: H7

Indicator reference: OB2 SO7

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Keep the Seawall Road site under review for potential permanent residential Gypsy and Traveller accommodation		Site is no longer categorised within Flood Risk Zone C2
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
Site is still categorised within Flood Risk Zone C2 in latest Development Advice Maps	Site is still categorised within Flood Risk Zone C2 in latest Development Advice Maps	Site is still categorised within Flood Risk Zone C2 in latest Development Advice Maps
Analysis		
<p>This site was included as an allocation for a Gypsy and Traveller site in the Deposit LDP in September 2013. However the site was deleted from the Plan at the LDP Examination in 2015 as it was located in a C2 Flood Risk Zone where highly vulnerable development such as Gypsy and Traveller sites are precluded by Welsh Government Planning Guidance. It was agreed at the LDP Examination that an indicator would be included in the Monitoring Framework to keep the site under review should the position regarding flood risk change over the lifetime of the Plan. This will ensure that the site can continue to be considered along with other sites to accommodate the need for new Gypsy and Traveller pitches.</p> <p>The status of the site in terms of flood risk remains unchanged and the site is still lies within Flood Risk Zone C2 in the latest Development Advice Maps produced by Welsh Government and Natural Resources Wales.</p> <p>A feasibility Study has been undertaken by the Council to investigate options to improve flood defences along the Rover Way Foreshore and River Rhymney. This Study recommends design options for improving the flood defences along this stretch of the coastline and has been submitted to Welsh Government for grant funding to implement the recommended works.</p>		

Welsh Government have now approved the funding and the Council is due to go out to Tender shortly for the works to be implemented. It is anticipated the flood defence works will be completed in 2022.

Recommendations

No action is required at present. Continue to monitor.

Topic Area: Gypsy and Traveller Provision – Permanent Sites

Relevant LDP Policies: H7

Indicator reference: OB2 SO8

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
<p>LOCAL Provision is made for meeting identified needs for permanent Gypsy and Traveller accommodation</p>	<ol style="list-style-type: none"> 1. Agree project management arrangements including reporting structure and representatives – July 2015 2. Agree methodology for undertaking site search and assessment – December 2015 3. Undertake Gypsy and Traveller Needs Assessment for both permanent and transit pitches in accordance with Housing (Wales) Act 2014 – February 2016 4. Undertake a site search and assessment and secure approval of findings – July 2016 5. Secure planning permission and funding (including any grant funding from Welsh Government) for identified site(s) required to meet short term need for 43 pitches by May 2017 6. Secure planning permission and funding (including any grant funding from Welsh Government) for identified site(s) 	<p>Failure to achieve these targets</p>

	required to meet long term need for 65 pitches by May 2021	
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
<p>Project management arrangements, including reporting structure and representatives have been established and a methodology for undertaking site search and assessment was approved at Cabinet in January 2016. In addition an updated Gypsy and Traveller Accommodation Assessment (GTAA) was approved by Welsh Government in November 2016.</p> <p>Cabinet in September 2016 noted that good progress has been made in undertaking a city wide search for land which could be suitable for Gypsy and Traveller sites but agreed that the assessment is not yet fully complete and there was a clear need to undertake more detailed technical investigations. At Cabinet it was agreed that it would be premature to conclude the site assessment process until these have been completed.</p> <p>Work on undertaking these more detailed technical assessments has been ongoing</p>	<p>The detailed technical assessments have now been completed and the Council is currently considering the implications of the findings of these assessments and options in terms of taking this work forward. This has included ongoing discussions with Welsh Government.</p> <p>Although this represents a delay to the agreed targets the Council recognise that it clearly has an obligation to progress the site assessment as soon as possible; however, this needs to be balanced against the need to find the best possible site for the community</p> <p>The Council also remains firmly and absolutely committed to comply with the requirements of the Housing (Wales) Act 2014.</p>	<p>The detailed technical assessments have now been completed and the Council is currently considering the implications of the findings of these assessments and options in terms of taking this work forward. This has included ongoing discussions with Welsh Government.</p> <p>Although this represents a delay to the agreed targets the Council recognise that it clearly has an obligation to progress the site assessment as soon as possible; however, this needs to be balanced against the need to find the best possible site for the community</p> <p>The Council also remains firmly and absolutely committed to comply with the requirements of the Housing (Wales) Act 2014.</p>

throughout the year. When these assessments are complete the Council will consider the findings and determine a way forward

Although this represents a delay to the agreed targets the Council recognise that it clearly has an obligation to progress the site assessment as soon as possible; however, this needs to be balanced against the need to find the best possible site for the community.

The Council also remains firmly and absolutely committed to comply with the requirements of the Housing (Wales) Act 2014.

Analysis

The Gypsy and Traveller Study is being project managed jointly by Officers from Housing and the Planning Service. Work undertaken by the Group is overseen by a Steering Group comprising senior Officers from the Housing and Planning Service and relevant Cabinet Members. The aim of the study is to identify the need for permanent and transit Gypsy and Traveller accommodation within the city and identify sites to meet this need.

Progress to date includes the completion of an updated Gypsy and Traveller Accommodation Assessment (GTAA), which was approved by the Welsh Government in November 2016. This identifies a reduced need for 72 permanent pitches in the city by 2026 (compared to a need for 108 pitches in the previous 2013 GTAA) and a regional need for a transit site of 10 pitches. Of the 72 permanent pitches 48 are required short term in the next five years compared to 43 in the previous 2013 GTAA.

In order to meet this need a comprehensive city wide search for suitable sites for Gypsy and Travellers has been undertaken using site selection criteria approved by the Council's Cabinet in January 2016. The approved site selection criteria sets out assessment criteria around three main headings relating to availability, site suitability and achievability. Availability considerations include whether the site is genuinely available long term and there are no legal issues. Site suitability considerations include a comprehensive list of policy and physical constraints, and deliverability

considerations relate to the consideration of total cost (including any abnormal costs) to ensure it does not prejudice the ability to develop the site.

To date good progress has been made with undertaking a city wide search for land which could be suitable for Gypsy and Traveller sites and Cabinet in September 2016 noted that the study had reached the point where there is a clear need to further investigate technical aspects identified in the agreed methodology. Given this Cabinet considered that it would be premature to conclude the site assessment process until these detailed technical investigations have been carried out and detailed technical investigations, particularly flood risk assessments, were commissioned to fully establish the extent of risk at this stage, along with the potential scope of mitigation measures and any other relevant site-specific technical matters. This work was carried out in liaison with Natural Resources Wales and took account of the most up to date information with regard to flood risk data.

These detailed technical assessments have now been completed and the Council is currently considering the implications of the findings of these assessments and options in terms of taking this work forward. This has included ongoing discussions with Welsh Government.

The Council recognises it has an obligation to progress the site assessment as soon as possible; however, this needs to be balanced against the need to find the best possible site for the community. I can confirm there remains a firm and absolute commitment to comply with the requirements of the Housing (Wales) Act 2014.

Progress with this will continue to be monitored and reported on in future AMR's.

Recommendations

No action is required at present. Continue to monitor.

Topic Area: Gypsy and Traveller Provision – Transit Sites

Relevant LDP Policies: H7

Indicator reference: OB2 SO9

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
<p>LOCAL Provision is made for meeting identified needs for transit Gypsy and Traveller accommodation</p>	<ol style="list-style-type: none"> 1. Agree project management arrangements including reporting structure and representatives – July 2015 2. Agree methodology for undertaking site search and assessment – December 2015 3. Undertake Gypsy and Traveller Needs Assessment for both permanent and transit pitches in accordance with Housing (Wales) Act 2014 – February 2016 4. Undertake a site search and assessment and secure approval of findings – July 2016 5. Secure planning permission and funding (including any grant funding from Welsh Government) for identified site(s) required to meet short term need for 43 pitches by May 2017 6. Secure planning permission and funding (including any grant funding from Welsh Government) for identified site(s) 	<p>Failure to achieve these targets</p>

	required to meet long term need for 65 pitches by May 2021	
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
<p>Project management arrangements, including reporting structure and representatives have been established and a methodology for undertaking site search and assessment was approved at Cabinet in January 2016. In addition an updated Gypsy and Traveller Accommodation Assessment (GTAA) was approved by Welsh Government in November 2016.</p> <p>Cabinet in September 2016 noted that good progress has been made in undertaking a city wide search for land which could be suitable for Gypsy and Traveller sites but agreed that the assessment is not yet fully complete and there was a clear need to undertake more detailed technical investigations. At Cabinet it was agreed that it would be premature to conclude the site assessment process until these have been completed.</p> <p>Work on undertaking these more detailed technical assessments has been ongoing</p>	<p>The detailed technical assessments have now been completed and the Council is currently considering the implications of the findings of these assessments and options in terms of taking this work forward. This has included ongoing discussions with Welsh Government.</p> <p>Although this represents a delay to the agreed targets the Council recognise that it clearly has an obligation to progress the site assessment as soon as possible; however, this needs to be balanced against the need to find the best possible site for the community</p> <p>The Council also remains firmly and absolutely committed to comply with the requirements of the Housing (Wales) Act 2014.</p>	<p>The detailed technical assessments have now been completed and the Council is currently considering the implications of the findings of these assessments and options in terms of taking this work forward. This has included ongoing discussions with Welsh Government.</p> <p>Although this represents a delay to the agreed targets the Council recognise that it clearly has an obligation to progress the site assessment as soon as possible; however, this needs to be balanced against the need to find the best possible site for the community</p> <p>The Council also remains firmly and absolutely committed to comply with the requirements of the Housing (Wales) Act 2014.</p>

<p>throughout the year. When these assessments are complete the Council will consider the findings and determine a way forward</p> <p>Although this represents a delay to the agreed targets the Council recognise that it clearly has an obligation to progress the site assessment as soon as possible; however, this needs to be balanced against the need to find the best possible site for the community.</p> <p>The Council also remains firmly and absolutely committed to comply with the requirements of the Housing (Wales) Act 2014.</p>		
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Analysis

The Gypsy and Traveller Study is being project managed jointly by Officers from Housing and the Planning Service. Work undertaken by the Group is overseen by a Steering Group comprising senior Officers from the Housing and Planning Service and relevant Cabinet Members. The aim of the study is to identify the need for permanent and transit Gypsy and Traveller accommodation within the city and identify sites to meet this need.

Progress to date includes the completion of an updated Gypsy and Traveller Accommodation Assessment (GTAA), which was approved by the Welsh Government in November 2016. This identifies a reduced need for 72 permanent pitches in the city by 2026 (compared to a need for 108 pitches in the previous 2013 GTAA) and a regional need for a transit site of 10 pitches. Of the 72 permanent pitches 48 are required short term in the next five years compared to 43 in the previous 2013 GTAA.

In order to meet this need a comprehensive city wide search for suitable sites for Gypsy and Travellers has been undertaken using site selection criteria approved by the Council's Cabinet in January 2016. The approved site selection criteria sets out assessment criteria around three main headings relating to availability, site suitability and achievability. Availability considerations include whether the site is genuinely available long term and there are no legal issues. Site suitability considerations include a comprehensive list of policy and physical constraints, and deliverability

considerations relate to the consideration of total cost (including any abnormal costs) to ensure it does not prejudice the ability to develop the site.

To date good progress has been made with undertaking a city wide search for land which could be suitable for Gypsy and Traveller sites and Cabinet in September 2016 noted that the study had reached the point where there is a clear need to further investigate technical aspects identified in the agreed methodology. Given this Cabinet considered that it would be premature to conclude the site assessment process until these detailed technical investigations have been carried out and detailed technical investigations, particularly flood risk assessments, were commissioned to fully establish the extent of risk at this stage, along with the potential scope of mitigation measures and any other relevant site-specific technical matters. This work was carried out in liaison with Natural Resources Wales and took account of the most up to date information with regard to flood risk data.

These detailed technical assessments have now been completed and the Council is currently considering the implications of the findings of these assessments and options in terms of taking this work forward. This has included ongoing discussions with Welsh Government.

The Council recognises it has an obligation to progress the site assessment as soon as possible; however, this needs to be balanced against the need to find the best possible site for the community. I can confirm there remains a firm and absolute commitment to comply with the requirements of the Housing (Wales) Act 2014.

Progress with this will continue to be monitored and reported on in future AMR's.

Recommendations

No action is required at present. Continue to monitor.

Topic Area: Gypsy and Traveller Provision

Relevant LDP Policies: H7

Indicator reference: OB2 SO10

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Total number of Gypsy and Traveller pitches for residential accommodation	Ensure the existing supply of pitches is maintained (Should existing pitches be no longer available alternative pitches will be sought)	Any net loss of existing Gypsy and Traveller pitch provision
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
There has been no net loss of existing Gypsy and Traveller pitch provision during the monitoring period	There has been no net loss of existing Gypsy and Traveller pitch provision during the monitoring period	There has been no net loss of existing Gypsy and Traveller pitch provision during the monitoring period
Analysis		
The latest Gypsy and Traveller Accommodation Assessment (GTAA) approved by the Welsh Government in November 2016 states that there are 80 pitches on two local authority owned sites at Shirenewton (59 pitches) and Rover Way (21 pitches). In addition there are four authorised private sites with a total of 22 pitches giving a total of 92 pitches for the County as a whole. There has been no net loss of existing Gypsy and Traveller pitch provision during the monitoring period.		
Recommendations		
No action is required at present. Continue to monitor.		

Topic Area: Dwelling Completions on Strategic Site A Cardiff Central Enterprise Zone

Relevant LDP Policies: KP2

Indicator reference: OB2 S011

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
<p>LOCAL Total annual dwelling completions of Strategic Housing Site A – Cardiff Central Enterprise Zone</p>	<p>2,150 dwellings will be delivered over the remainder of the Plan period on this Strategic Site in accordance with the 2 year cumulative delivery rates set out below. Expected delivery rates based on the JHLAS 2014 and developer intentions: 2016: 231 2018: 254 2020: 405 2022: 400 2024: 400 2026: 460</p>	<p>Failure to deliver the required number of dwellings for each 2 year period.</p>
<p>Performance 1st AMR 1st April 2016 to 31st March 2017</p>	<p>Performance 2nd AMR 1st April 2017 to 31st March 2018</p>	<p>Performance 3rd AMR 1st April 2018 to 31st March 2019</p>
<p>As at 1st April 2017 there had been no completions on Strategic Housing Site A.</p>	<p>As at 1st April 2018 there had been no completions on Strategic Housing Site A.</p>	<p>As at 1st April 2019 there were 102 completions on Strategic Housing Site A.</p>

Analysis

As at 1st April 2019, there were 102 completions on Strategic Site A so the target of 485 dwellings by 2018 has not been met. There are a number of existing residential planning permissions on this site and these are summarised below:

- 16/00504 – Old Imperial Buildings, Trade Street (102 apartments completed)
- 17/00159 – Land at Dumballs Road (109 apartments with permission but not started)
- 17/01672 – Crawshay Court, Curran Road (140 apartments with permission but not started)
- 17/02404 – Former Browning Jones & Morris, Dumballs Road (206 apartments with permission but not started)
- 18/02634 – Plot J, Capital Quarter (307 apartments with permission but not started).

Whilst it is accepted that there has been some slippage on this site, it is clear due to the number and range of consented schemes and with 102 completions by 1st April 2019, it is not envisaged that the delivery of Strategic Site A will slip beyond the Plan period. The Council will continue to monitor the delivery of this site through subsequent annual monitoring.

Recommendations

No action is required at present. Continue to monitor.

Topic Area: Dwelling Completions on Strategic Site B Gas Works, Ferry Road

Relevant LDP Policies: KP2

Indicator reference: OB2 S012

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
<p>LOCAL Total annual dwelling completions of Strategic Housing Site B – Gas Works, Ferry Road.</p>	<p>500 dwellings will be delivered over the remainder of the Plan period on this Strategic Site in accordance with the 2 year cumulative delivery rates set out below. Expected delivery rates are based on developer intentions: 2016: 0 2018: 80 2020: 140 2022: 170 2024: 110 2026: 0</p>	<p>Failure to deliver the required number of dwellings for each 2 year period.</p>
<p>Performance 1st AMR 1st April 2016 to 31st March 2017</p>	<p>Performance 2nd AMR 1st April 2017 to 31st March 2018</p>	<p>Performance 3rd AMR 1st April 2018 to 31st March 2019</p>
<p>In line with the target for this indicator, as at 1st April 2017, there had been no completions on Strategic Site B.</p>	<p>As at 1st April 2018 there had been no completions on Strategic Housing Site B.</p>	<p>As at 1st April 2019 there had been no completions on Strategic Housing Site B.</p>
<p>Analysis</p>		
<p>The agent for this site has advised that there has been some delay in marketing the site. The site was marketed in late 2016 and remediation work is scheduled to be completed by mid-2018. On this basis it is expected that development will commence in 2019/20, with the first completions coming forward in 2020. It is not envisaged that there will be any change to delivery rates thereafter.</p>		

Whilst some slippage to the delivery targets set out above is now inevitable, based on recent dialogue with the agent it is not envisaged that the delivery of Strategic Site B will slip beyond the Plan period. The Council will continue to monitor the delivery of this site through subsequent annual monitoring.

Recommendations

No action is required at present. Continue to monitor.

Topic Area: Dwelling Completions on Strategic Site C North West Cardiff

Relevant LDP Policies: KP2

Indicator reference: OB2 S013

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
<p>LOCAL Total annual dwelling completions of Strategic Housing Site C – North West Cardiff</p>	<p>5,000 dwellings will be delivered over the remainder of the Plan period on this Strategic Site in accordance with the 2 year cumulative delivery rates set out below.</p> <p>Expected delivery rates are based on developer intentions: 2016: 135 2018: 624 2020: 1,060 2022: 1,060 2024: 1,060 2026: 1,060</p>	<p>Failure to deliver the required number of dwellings for each 2 year period.</p>
<p>Performance 1st AMR 1st April 2016 to 31st March 2017</p>	<p>Performance 2nd AMR 1st April 2017 to 31st March 2018</p>	<p>Performance 3rd AMR 1st April 2018 to 31st March 2019</p>
<p>As at 1st April 2017 there had been no completions on Strategic Housing Site C.</p>	<p>As at 1st April 2018 there had been 39 completions on Strategic Housing Site C.</p>	<p>As at 1st April 2019 there had been 128 completions on Strategic Housing Site C.</p>

Analysis

Between 31st March 2018 and 1st April 2019, there were 128 completions on Strategic Site C, bringing the combined total number of completions on the site to date to 167. Whilst this is still short of the cumulative target of 759 by 2018, it is considered that significant progress has been made on this site with numerous planning applications granted (including for Reserved Matters) and approximately 70 dwellings under construction as at 1st April 2019.

The initial lag in developers getting on site is considered in part reflective of land ownership/legal technicalities between developers and landowners and also the complexity of securing planning consents and accompanying Section 106 Agreements which fully deliver the Council's aspirations as set out in the LDP. Despite this initial delay, much progress has been made since the adoption of the LDP.

Recommendations

No action is required at present. Continue to monitor.

Topic Area: Dwelling Completions on Strategic Site D North of Junction 33

Relevant LDP Policies: KP2

Indicator reference: OB2 S014

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
<p>LOCAL Total annual dwelling completions of Strategic Housing Site D – North of Junction 33</p>	<p>2,000 dwellings will be delivered over the remainder of the Plan period on this Strategic Site in accordance with the 2 year cumulative delivery rates set out below. Expected delivery rates are based on developer intentions: 2016: 110 2018: 240 2020: 300 2022: 400 2024: 450 2026: 500</p>	<p>Failure to deliver the required number of dwellings for each 2 year period.</p>
<p>Performance 1st AMR 1st April 2016 to 31st March 2017</p>	<p>Performance 2nd AMR 1st April 2017 to 31st March 2018</p>	<p>Performance 3rd AMR 1st April 2018 to 31st March 2019</p>
<p>As at 1st April 2017 there had been no completions on Strategic Housing Site D.</p>	<p>As at 1st April 2018 there had been no completions on Strategic Housing Site D.</p>	<p>As at 1st April 2019 there had been no completions on Strategic Housing Site D.</p>

Analysis

As at 1st April 2019 there had been no completions on this strategic site and so the delivery target of 350 units by 2018, as originally anticipated has not been met.

As with several strategic sites, the initial lag is considered in part reflective of land ownership/legal technicalities between developers and landowners and also the complexity of securing planning consents and accompanying Section 106 Agreements which fully deliver the Council's aspirations as set out in the LDP. There has however been significant progress since adoption, an Outline planning application was granted for up to 1,500 dwellings (14/00852) and a Reserved Matters application was approved for 374 dwellings (18/00696).

Recommendations

No action is required at present. Continue to monitor.

Topic Area: Dwelling Completions on Strategic Site E South of Creigiau

Relevant LDP Policies: KP2

Indicator reference: OB2 S015

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Total annual dwelling completions of Strategic Housing Site E – South of Creigiau	650 dwellings will be delivered over the remainder of the Plan period on this Strategic Site in accordance with the 2 year cumulative delivery rates set out below. Expected delivery rates are based on developer intentions: 2016: 150 2018: 300 2020: 200	Failure to deliver the required number of dwellings for each 2 year period.
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
As at 1 st April 2017 there had been no completions on Strategic Housing Site E.	As at 1 st April 2018 there had been no completions on Strategic Housing Site E.	As at 1 st April 2019 there had been no completions on Strategic Housing Site E.
Analysis		
As at 1 st April 2018 there have been no completions at Strategic Site E and so the delivery target of 450 units by 2018, as originally anticipated has not been met. Planning Applications have not yet been submitted for South of Creigiau, however, during recent consultation for the Cardiff JHLAS the site agent confirmed that technical work is on-going and an application is being targeted in the near future. At this stage, it is not envisaged that the delivery of South of Creigiau will slip beyond the Plan period. The Council will continue to monitor progress at Land South of Creigiau and will endeavour to process any forthcoming application efficiently, preventing unnecessary delay to the delivery of the site.		
Recommendations		
No action is required at present. Continue to monitor.		

Topic Area: Dwelling Completions on Strategic Site F North East Cardiff

Relevant LDP Policies: KP2

Indicator reference: OB2 S016

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
<p>LOCAL Total annual dwelling completions of Strategic Housing Site F – North East Cardiff</p>	<p>4,500 dwellings will be delivered over the remainder of the Plan period on this Strategic Site in accordance with the 2 year cumulative delivery rates set out below. Expected delivery rates are based on developer intentions: 2016: 180 2018: 1,197 2020: 808 2022: 808 2024: 808 2026: 699</p>	<p>Failure to deliver the required number of dwellings for each 2 year period.</p>
<p>Performance 1st AMR 1st April 2016 to 31st March 2017</p>	<p>Performance 2nd AMR 1st April 2017 to 31st March 2018</p>	<p>Performance 3rd AMR 1st April 2018 to 31st March 2019</p>
<p>As at 1st April 2017 there had been no completions on Strategic Housing Site F.</p>	<p>As at 1st April 2018 there had been no completions on Strategic Housing Site F</p>	<p>As at 1st April 2019 there had been no completions on Strategic Housing Site F.</p>

Analysis

While the delivery target of 1,377 units by 2018, as originally anticipated, has not been met, to date, 51 dwellings have been completed at Land off Cefn Mabley Road. There are a number of consented and live applications on the site which are summarised below:

- 14/02891 (Outline Application) for up to 1,000 dwellings
- 18/00012 (Reserved Matters) Phase 1A Plas Ty Draw for 45 dwellings – with planning permission and currently under construction
- 18/02906 (Reserved Matters) Phase 1B for 26 dwellings currently being considered.
- 19/01113 (Reserved Matters) Phase 3 Parish Reach for 271 dwellings currently being considered.

It is clear that progress is gradually being made with reserved matters being approved and a number of dwellings on Phase A1 nearing completion. It is considered that delivery rates will significantly increase over the next year due to land ownership issues being resolved and further Reserved Matters application due to be approved.

As with several strategic sites, the initial lag is considered in part reflective of land ownership/legal technicalities between developers and landowners and also the complexity of securing planning consents and accompanying Section 106 Agreements which fully deliver the Council's aspirations as set out in the LDP. The Council will continue to monitor progress at North East Cardiff and will endeavour to process any forthcoming

Recommendations

No action is required at present. Continue to monitor.

Topic Area: Dwelling Completions on Strategic Site G East of Pontprennau Link Road

Relevant LDP Policies: KP2

Indicator reference: OB2 S017

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
<p>LOCAL Total annual dwelling completions of Strategic Housing Site G – East of Pontprennau Link Road</p>	<p>1,300 dwellings will be delivered over the remainder of the Plan period on this Strategic Site in accordance with the 2 year cumulative delivery rates set out below. Expected delivery rates are based on developer intentions: 2016: 140 2018: 375 2020: 285 2022: 270 2024: 200 2026: 30</p>	<p>Failure to deliver the required number of dwellings for each 2 year period.</p>
<p>Performance 1st AMR 1st April 2016 to 31st March 2017</p>	<p>Performance 2nd AMR 1st April 2017 to 31st March 2018</p>	<p>Performance 3rd AMR 1st April 2018 to 31st March 2019</p>
<p>As at 1st April 2017 there had been no completions on Strategic Housing Site G.</p>	<p>As at 1st April 2018 there had been 174 completions on Strategic Housing Site G.</p>	<p>As at 1st April 2019 there were 337 completions on Strategic Housing Site G.</p>
<p>Analysis</p>		
<p>In total 511 dwellings have been completed on Strategic Housing Site G to date, which is just below the target of 515 by 1st April 2018. Although the target has just been missed, there is considerable progress on this site with approximately 180 further dwellings under construction as at 1st April 2019. There are a number of</p>		

planning applications which have been consented to date and are summarised below:

- 13/00578 (Outline application) for up to 1020 dwellings
- 14/02556 (Reserved Matters) granted planning permission for 452 dwellings.
- 17/00488 (Reserved Matters) granted planning permission for 130 dwellings.
- 17/01787 (Reserved Matters) granted planning permission for 244 dwellings.

Despite a slight lag in the initial start date of construction, the rates of annual delivery remain broadly aligned to those in the LDP. The Council will continue to monitor the delivery of this site through annual monitoring.

Recommendations

No action is required at present. Continue to monitor.

**Topic Area: Affordable Dwelling Completions on Strategic Site A
Cardiff Central Enterprise Zone**

Relevant LDP Policies: KP2, KP13

Indicator reference: OB2 S018

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
<p>LOCAL Annual affordable dwelling completions of Strategic Housing Site A – Cardiff Central Enterprise Zone</p>	<p>430 affordable dwellings will be delivered over the remainder of the Plan period on this Strategic Site in accordance with the 2 year cumulative delivery rates set out below. Expected delivery rates are based on the JHLAS 2014 and developer intentions: 2016: 47 2018: 50 2020: 81 2022: 80 2024: 80 2026: 92</p>	<p>Failure to deliver the required number of dwellings for each 2 year period.</p>
<p>Performance 1st AMR 1st April 2016 to 31st March 2017</p>	<p>Performance 2nd AMR 1st April 2017 to 31st March 2018</p>	<p>Performance 3rd AMR 1st April 2018 to 31st March 2019</p>
<p>As at 1st April 2017 there had been no affordable completions on Strategic Housing Site A</p>	<p>As at 1st April 2018 there had been no affordable completions on Strategic Housing Site A.</p>	<p>As at 1st April 2019 there were no affordable completions on Strategic Housing Site A.</p>
<p>Analysis</p>		
<p>The above figures have been amended from the original to accurately reflect a 20% brownfield affordable housing contribution across the Plan period.</p>		

As at 1st April 2019, there were none affordable completions on Strategic Site A so the target of 485 dwellings by 2018 has not been met. There are a number of existing residential planning permissions on this site and these are summarised below:

- 16/00504 – Old Imperial Buildings, Trade Street (102 apartments completed)
- 17/00159 – Land at Dumballs Road (109 apartments with permission but not started)
- 17/01672 – Crawshay Court, Curran Road (140 apartments with permission but not started)
- 17/02404 – Former Browning Jones & Morris, Dumballs Road (206 apartments with permission but not started)
- 18/02634 – Plot J, Capital Quarter (307 apartments with permission but not started).

Whilst it is accepted that there has been some slippage on this site, it is clear due to the number and range of consented schemes, it is not envisaged that the delivery of Strategic Site A will slip beyond the Plan period. The Council will continue to monitor the delivery of this site through subsequent annual monitoring.

Recommendations

No action is required at present. Continue to monitor.

**Topic Area: Affordable Dwelling Completions on Strategic Site B
Gas Works, Ferry Road**

Relevant LDP Policies: KP2, KP13

Indicator reference: OB2 S019

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
<p>LOCAL Annual affordable dwelling completions of Strategic Housing Site B – Gas Works, Ferry Road</p>	<p>100 affordable dwellings will be delivered over the remainder of the Plan period on this Strategic Site in accordance with the 2 year cumulative delivery rates set out below. Expected delivery rates are based on developer intentions: 2016: 0 2018: 16 2020: 28 2022: 34 2024: 22 2026: 0</p>	<p>Failure to deliver the required number of dwellings for each 2 year period.</p>
<p>Performance 1st AMR 1st April 2016 to 31st March 2017</p>	<p>Performance 2nd AMR 1st April 2017 to 31st March 2018</p>	<p>Performance 3rd AMR 1st April 2018 to 31st March 2019</p>
<p>In line with the target for this indicator, as at 1st April 2017, there had been no completions on Strategic Site B.</p>	<p>As at 1st April 2018 there had been no affordable completions on Strategic Housing Site B.</p>	<p>As at 1st April 2019 there were no affordable completions on Strategic Housing Site A.</p>
<p>Analysis</p>		
<p>The agent for this site has advised that there has been some delay in marketing the site. The site was marketed in late 2016 and remediation work was scheduled to be completed by mid-2018. On this basis it is expected that development will commence in 2019/20, with the first completions coming forward in 2020. It is not envisaged that there will be any change to delivery rates thereafter.</p>		

Whilst some slippage to the delivery targets set out above is now inevitable, based on recent dialogue with the agent it is not envisaged that the delivery of Strategic Site B will slip beyond the Plan period. The Council will continue to monitor the delivery of this site through subsequent annual monitoring.

Recommendations

No action is required at present. Continue to monitor.

Topic Area: Affordable Dwelling Completions on Strategic Site C North West Cardiff

Relevant LDP Policies: KP2, KP13

Indicator reference: OB2 S020

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
<p>LOCAL Annual affordable dwelling completions of Strategic Housing Site C – North West Cardiff</p>	<p>1,500 affordable dwellings will be delivered over the remainder of the Plan period on this Strategic Site in accordance with the 2 year cumulative delivery rates set out below. Expected delivery rates are based on developer intentions: 2016: 41 2018: 187 2020: 318 2022: 318 2024: 318 2026: 318</p>	<p>Failure to deliver the required number of dwellings for each 2 year period.</p>
<p>Performance 1st AMR 1st April 2016 to 31st March 2017</p>	<p>Performance 2nd AMR 1st April 2017 to 31st March 2018</p>	<p>Performance 3rd AMR 1st April 2018 to 31st March 2019</p>
<p>As at 1st April 2017 there had been no Affordable completions on Strategic Housing Site C.</p>	<p>As at 1st April 2018 there had been no affordable completions on Strategic Housing Site C.</p>	<p>As at 1st April 2019 there were no affordable completions on Strategic Housing Site C.</p>

Analysis

As at 1st April 2019 there had been no affordable completions on Strategic Housing Site C and so the target of 228 affordable units by 2018, as originally anticipated has not been met. The initial lag in developers getting on site is considered in part reflective of land ownership/legal technicalities between developers and landowners and also the complexity of securing planning consents and accompanying Section 106 Agreements which fully deliver the Council's aspirations as set out in the LDP.

Despite this initial delay, much progress has been made since the adoption of the LDP. Planning permissions have now either been consented, or received for in excess of 7,000 units (summarised below), and construction is well underway on the site as at 1st April 2019.

It is considered that despite the delay, delivery rates on Strategic Site C will ramp up to remain broadly aligned with the rates agreed in the LDP. Completion rates of 400+ unit's p.a. are anticipated by 2020 and 530+ unit's p.a. by 2022. Accordingly, at this stage it is envisaged that the delivery of 5,000 units at Strategic Site C will not slip beyond the beyond the Plan period. The Council will continue to monitor the delivery of this site through annual monitoring.

Recommendations

No action is required at present. Continue to monitor.

Topic Area: Affordable Dwelling Completions on Strategic Site D North of Junction 33

Relevant LDP Policies: KP2, KP13

Indicator reference: OB2 S021

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
<p>LOCAL Total annual dwelling completions of Strategic Housing Site D – North of Junction 33</p>	<p>603 affordable dwellings will be delivered over the remainder of the Plan period on this Strategic Site in accordance with the 2 year cumulative delivery rates set out below. Expected delivery rates are based on developer intentions: 2016: 100 2018: 100 2020: 100 2022: 100 2024: 100 2026: 103</p>	<p>Failure to deliver the required number of dwellings for each 2 year period.</p>
<p>Performance 1st AMR 1st April 2016 to 31st March 2017</p>	<p>Performance 2nd AMR 1st April 2017 to 31st March 2018</p>	<p>Performance 3rd AMR 1st April 2018 to 31st March 2019</p>
<p>As at 1st April 2017 there had been no Affordable completions on Strategic Housing Site D.</p>	<p>As at 1st April 2018 there had been no affordable completions on Strategic Housing Site D.</p>	<p>As at 1st April 2019 there were no affordable completions on Strategic Housing Site D.</p>

Analysis

As at 1st April 2018 there had been no affordable completions on this strategic site and so the delivery target of 200 affordable units by 2018, as originally anticipated has not been met.

As with several strategic sites, the initial lag is considered in part reflective of land ownership/legal technicalities between developers and landowners and also the complexity of securing planning consents and accompanying Section 106 Agreements which fully deliver the Council's aspirations as set out in the LDP. There has however been significant progress since adoption, an Outline planning application was granted for up to 1,500 dwellings (14/00852) and a Reserved Matters application was approved for 374 dwellings (18/00696).

Recommendations

No action is required at present. Continue to monitor.

Topic Area: Affordable Dwelling Completions on Strategic Site E South of Creigiau

Relevant LDP Policies: KP2, KP13

Indicator reference: OB2 S022

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
<p>LOCAL Total annual affordable dwelling completions of Strategic Housing Site E – South of Creigiau</p>	<p>195 affordable dwellings will be delivered over the remainder of the Plan period on this Strategic Site in accordance with the 2 year cumulative delivery rates set out below. Expected delivery rates are based on developer intentions: 2016: 150 2018: 300 2020: 200</p>	<p>Failure to deliver the required number of dwellings for each 2 year period.</p>
<p>Performance 1st AMR 1st April 2016 to 31st March 2017</p>	<p>Performance 2nd AMR 1st April 2017 to 31st March 2018</p>	<p>Performance 3rd AMR 1st April 2018 to 31st March 2019</p>
<p>As at 1st April 2017 there had been no completions on Strategic Housing Site E.</p>	<p>As at 1st April 2018 there had been no completions on Strategic Housing Site E.</p>	<p>As at 1st April 2019 there were no affordable completions on Strategic Housing Site E.</p>
<p>Analysis</p>		
<p>The above figures have been amended from the original to accurately reflect a 20% brownfield affordable housing contribution across the Plan period. As at 1st April 2019 there have been no completions at Strategic Site E and so the delivery target of 450 units by 2018, as originally anticipated has not been met. Planning Applications have not yet been submitted for South of Creigiau, however, during recent consultation for the Cardiff JHLAS the site agent confirmed that technical work is on-going and an application is being targeted in the near future.</p>		

At this stage, it is not envisaged that the delivery of South of Creigiau will slip beyond the Plan period. The Council will continue to monitor progress at Land South of Creigiau and will endeavour to process any forthcoming application efficiently, preventing unnecessary delay to the delivery of the site.

Recommendations

No action is required at present. Continue to monitor.

Topic Area: Affordable Dwelling Completions on Strategic Site F North East Cardiff

Relevant LDP Policies: KP2, KP13

Indicator reference: OB2 S023

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
<p>LOCAL Total annual affordable dwelling completions of Strategic Housing Site F – North East Cardiff (West of Pontprennau)</p>	<p>1,350 affordable dwellings will be delivered over the remainder of the Plan period on this Strategic Site in accordance with the 2 year cumulative delivery rates set out below. Expected delivery rates are based on developer intentions: 2016 : 54 2018: 359 2020: 242 2022: 242 2024: 243</p>	<p>Failure to deliver the required number of dwellings for each 2 year period.</p>
<p>Performance 1st AMR 1st April 2016 to 31st March 2017</p>	<p>Performance 2nd AMR 1st April 2017 to 31st March 2018</p>	<p>Performance 3rd AMR 1st April 2018 to 31st March 2019</p>
<p>As at 1st April 2017 there had been no completions on Strategic Housing Site F.</p>	<p>As at 1st April 2018 there had been no completions on Strategic Housing Site F.</p>	<p>As at 1st April 2019 there were no affordable completions on Strategic Housing Site F.</p>

Analysis

As with several strategic sites, the initial lag in completed dwellings is considered in part reflective of land ownership/legal technicalities between developers and landowners and also the complexity of securing planning consents and accompanying Section 106 Agreements which fully deliver the Council's aspirations as set out in the LDP.

In terms of the planning status of the site, there are two extant outline consents for part of the site, known as Churchlands (1,000 units and 1,200 units respectively) while during the recent (2017) JHLAS, the agent confirmed that contracts have exchanged between landowners and developers are keen to progress the development of the North East Cardiff. An outline application for the bulk of the land and a full planning application for a part of the site are anticipated shortly, which should accelerate delivery now the land issues have been resolved.

The Council will continue to monitor progress at North East Cardiff and will endeavour to process any forthcoming

Recommendations

No action is required at present. Continue to monitor.

Topic Area: Affordable Dwelling Completions on Strategic Site G East of Pontprennau Link Road

Relevant LDP Policies: KP2, KP13

Indicator reference: OB2 S024

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
<p>LOCAL Total annual affordable dwelling completions of Strategic Housing Site G – East of Pontprennau Link Road</p>	<p>390 affordable dwellings will be delivered over the remainder of the Plan period on this Strategic Site in accordance with the 2 year cumulative delivery rates set out below. Expected delivery rates are based on developer intentions: 2016: 42 2018: 113 2020: 86 2022: 81 2024: 60</p>	<p>Failure to deliver the required number of dwellings for each 2 year period.</p>
<p>Performance 1st AMR 1st April 2016 to 31st March 2017</p>	<p>Performance 2nd AMR 1st April 2017 to 31st March 2018</p>	<p>Performance 3rd AMR 1st April 2018 to 31st March 2019</p>
<p>As at 1st April 2017 there had been no affordable completions on Strategic Housing Site G.</p>	<p>As at 1st April 2018 there had been 39 affordable housing completions on Strategic Housing Site G.</p>	<p>As at 1st April 2019 there were 94 affordable completions on Strategic Housing Site F.</p>

Analysis

To date there have been 133 affordable housing completions at Strategic Site G and so the delivery target of 155 affordable units by 2018, as originally anticipated has not been met. However, construction across various phases of the site is well underway and despite a slight lag in the initial start date of construction, the rates of annual delivery remain broadly aligned to those in the LDP.

The Council will continue to monitor progress at North East Cardiff and will endeavour to process any forthcoming

Recommendations

No action is required at present. Continue to monitor.

Topic Area: Changes in Market Value of Property

Relevant LDP Policies: KP13, H3

Indicator reference: OB2 SO25

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Changes in market value of property in Cardiff on Greenfield and Brownfield areas	Provide 6,646 affordable units over the remaining Plan period based on achieving 30% on Greenfield sites and 20% on Brownfield sites. Expected delivery rate to meet the target set out below: 2016: 735 2018: 1,207 2020: 1,224 2022: 1,191 2024: 1,181 2026: 1,108	An increase or decrease of 10% of market values of properties in Cardiff on Greenfield and Brownfield areas
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
Data not available for 2016/17.	Data not available for 2017/18.	Data not available for 2018/19.
Analysis		
It is not considered that this indicator provides a useful assessment of the performance of the LDP and is not something that the Plan could seek to have any significant influence over.		
Recommendations		
As the data is not readily available it is suggested that the indicator is deleted and not monitored in future Annual Monitoring Reports.		

Topic Area: Flexibility Allowance

Relevant LDP Policies: KP1

Indicator reference: OB2 SO26

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Need for release of additional housing land identified in the flexibility allowance	To ensure sufficient land is brought forward for development in accordance with the Plan strategy and to maintain a minimum 5 year supply of land as set out in the JHLAS.	Build rates exceed the anticipated number of completions as set out in indicator OB2 SO4 by the 1st Plan review i.e. more than 13,910 dwellings completed between 2014 - 2020
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
Build rates have not exceeded the anticipated number of completions as set out in Indicator OB2 S04 for the first 2 year period to 1 st April 2016.	Build rates have not exceeded the anticipated number of completions as set out in Indicator OB2 S04.	Build rates have not exceeded the anticipated number of completions as set out in Indicator OB2 S04.
Analysis		
As set out in paragraph 4.25 of the Cardiff Local Development Plan, the LDP tests of soundness required that LDPs are sufficiently flexible to positively respond to a change in circumstances. However, as expected the need to release additional land is not necessary as build rates have not exceed the anticipated number of completions as set out in Indicator OB2 S04.		
Recommendations		
No action is required at present. Continue to monitor.		

Topic Area: Affordable Housing SPG

Relevant LDP Policies: KP13, H3

Indicator reference: OB2 SO27

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Affordable Housing SPG		Failure to adopt SPG within 6 months of adoption of the Plan
Performance 1st AMR 1 st April 2016 to 31 st March 2017	Performance 2nd AMR 1 st April 2017 to 31 st March 2018	Performance 3rd AMR 1 st April 2018 to 31 st March 2019
Detailed supplementary guidance relating to affordable housing incorporated in the Planning Obligations SPG which was approved by the Council in January 2017	Detailed supplementary guidance relating to affordable housing incorporated in the Planning Obligations SPG which was approved by the Council in January 2017	Detailed supplementary guidance relating to affordable housing incorporated in the Planning Obligations SPG which was approved by the Council in January 2017
Analysis		
Detailed supplementary guidance relating to affordable housing provision has been incorporated in the Planning Obligations SPG which was approved by the Council on 26 th January 2017. Given this, there is no need to continue to monitor this indicator but the Council will continue to assess the effectiveness of the adopted SPG.		
Recommendations		
No action required.		

Topic Area: Houses in Multiple Occupation SPG

Relevant LDP Policies: H5

Indicator reference: OB2 SO28

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Houses in Multiple Occupation SPG		Failure to adopt SPG within 6 months of adoption of the Plan
Performance 1st AMR 1 st April 2016 to 31 st March 2017	Performance 2nd AMR 1 st April 2017 to 31 st March 2018	Performance 3rd AMR 1 st April 2018 to 31 st March 2019
The Houses in Multiple Occupation SPG was approved in January 2017	The Houses in Multiple Occupation SPG was approved in January 2017	The Houses in Multiple Occupation SPG was approved in January 2017
Analysis		
The SPG was approved by Council on 26 th January 2017 and has been taken into consideration in all planning applications determined since that date. Given this, there is no need to continue to monitor this indicator but the Council will continue to assess the effectiveness of the adopted SPG.		
Recommendations		
No action required.		

Topic Area: Planning Obligations SPG

Relevant LDP Policies: KP7

Indicator reference: OB2 SO29

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Planning Obligations SPG		Failure to adopt SPG within 12 months of adoption of the Plan
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
The Planning Obligations SPG was approved in January 2017	The Planning Obligations SPG was approved in January 2017	The Planning Obligations SPG was approved in January 2017
Analysis		
The SPG was approved by Council on 26 th January 2017 and has been taken into consideration in all planning applications determined since that date. Given this, there is no need to continue to monitor this indicator but the Council will continue to assess the effectiveness of the adopted SPG.		
Recommendations		
No action required.		

Topic Area: Community Facilities and Residential Development
SPG

Relevant LDP Policies: C1

Indicator reference: OB2 SO30

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Community Facilities and Residential Development SPG		Failure to adopt SPG within 18 months of adoption of the Plan
Performance 1st AMR 1 st April 2016 to 31 st March 2017	Performance 2nd AMR 1 st April 2017 to 31 st March 2018	Performance 3rd AMR 1 st April 2018 to 31 st March 2019
Detailed supplementary guidance relating to community facilities and residential development has been incorporated in the Planning Obligations SPG which was approved by the Council in January 2017	Detailed supplementary guidance relating to community facilities and residential development has been incorporated in the Planning Obligations SPG which was approved by the Council in January 2017	Detailed supplementary guidance relating to community facilities and residential development has been incorporated in the Planning Obligations SPG which was approved by the Council in January 2017
Analysis		
Detailed supplementary guidance relating to community facilities and residential development has been incorporated in the Planning Obligations SPG which was approved by the Council on 26th January 2017. Given this, there is no need to continue to monitor this indicator but the Council will continue to assess the effectiveness of the adopted SPG.		
Recommendations		
No action required.		

Topic Area: Childcare Facilities SPG

Relevant LDP Policies: C1

Indicator reference: OB2 SO31

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Childcare Facilities SPG		Failure to adopt SPG within 18 months of Plan adoption
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
The Childcare Facilities SPG was issued for public consultation in June 2017 and is due to be considered by Cabinet and Council for approval in October 2017	The Childcare Facilities SPG was approved in November 2017	The Childcare Facilities SPG was approved in November 2017
Analysis		
The SPG was approved by Council on 30 th November 2017 and has been taken into consideration in all planning applications determined since that date. Given this, there is no need to continue to monitor this indicator but the Council will continue to assess the effectiveness of the adopted SPG.		
Recommendations		
No action required.		

Topic Area: Planning for Health and Wellbeing SPG

Relevant LDP Policies: C6

Indicator reference: OB2 SO32

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
Local Health SPG		Failure to adopt SPG within 18 months of Plan adoption
Performance 1st AMR 1 st April 2016 to 31 st March 2017	Performance 2nd AMR 1 st April 2017 to 31 st March 2018	Performance 3rd AMR 1 st April 2018 to 31 st March 2019
The Planning for Health and Wellbeing SPG issued for public consultation in June 2017 and is due to be considered by Cabinet and Council for approval in October 2017	The Planning for Health and Wellbeing SPG was approved in November 2017	The Planning for Health and Wellbeing SPG was approved in November 2017
Analysis		
The SPG was approved by Council on 30 th November 2017 and has been taken into consideration in all planning applications determined since that date. Given this, there is no need to continue to monitor this indicator but the Council will continue to assess the effectiveness of the adopted SPG.		
Recommendations		
No action required.		

Topic Area: Gypsy and Traveller Sites SPG

Relevant LDP Policies: H8

Indicator reference: OB2 SO33

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Gypsy and Traveller Sites SPG		Failure to adopt SPG within 18 months of adoption of the Plan
Performance 1st AMR 1 st April 2016 to 31 st March 2017	Performance 2nd AMR 1 st April 2017 to 31 st March 2018	Performance 3rd AMR 1 st April 2018 to 31 st March 2019
The Gypsy and Traveller Sites SPG is due to be issued for public consultation in March 2018	Further work will be undertaken to assess the deliverability or otherwise of SPG preparation, and if so, the appropriate timescale.	Further work will be undertaken to assess the deliverability or otherwise of SPG preparation, and if so, the appropriate timescale.
Analysis		
At the current juncture, the need to prepare this guidance will be more fully assessed as the existing policy framework is considered sufficient and appropriate. Further work will be undertaken to assess the deliverability or otherwise of SPG preparation, and if so, the appropriate timescale.		
Recommendations		
No action is required at present. Continue to monitor.		

Objective 3 – To deliver economic and social needs in a co-ordinated way that respects Cardiff’s environment and responds to the challenges of climate change

Topic Area: Flood Risk

Relevant LDP Policies: KP3(A), KP3(B), KP5, KP15, KP16, KP18, EN14

Indicator reference: OB3 EN1

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
Core Amount of development (by TAN15 paragraph 5.1 development category) permitted in C1 floodplain area not meeting all TAN 15 tests	No permissions granted for highly vulnerable development within C1 floodplain area that does not meet TAN 15 tests	1 application permitted for development in any 1 year that does not meet TAN 15 tests
Performance 1st AMR 1 st April 2016 to 31 st March 2017	Performance 2nd AMR 1 st April 2017 to 31 st March 2018	Performance 3rd AMR 1 st April 2018 to 31 st March 2019
No applications were permitted in C1 Floodplain areas that did not meet all TAN 15 tests	2 applications was permitted in C1 Floodplain areas that did not meet all TAN 15 tests	2 applications was permitted in C1 Floodplain areas that did not meet all TAN 15 tests
Analysis		
<p>During the 3rd monitoring period 30 applications for highly vulnerable development were permitted in Zone C1 and 2 of these were permitted that did not meet all TAN15 tests.</p> <p>Both these applications related to the conversion and extension of existing and adjoining properties in the Riverside area of the city to flats and Natural Resources Wales had objected stating the depth of flooding at ground floor level would be greater than 600 metres and therefore did not meet the tolerable limits set out in TAN15 (Section A1.14). In determining these applications the Council considered that it would be unreasonable to refuse planning permission on this issue as the proposed flats would be maisonette units with no bedrooms at ground floor, and occupants would be able to seek refuge at first floor level during a flood event. Furthermore, there would be no increase in the potential total number of occupants as the proposed number of bedrooms would be the same as the total amount of bedrooms in the existing dwelling.</p>		

Given this it is considered these two applications raise particular issues that need separate consideration and are not related to the performance of Policy EN14 which is functioning effectively as evidenced by the fact that flood risk has been considered as a key consideration in all the applications submitted for highly vulnerable development in Zone C1.

Recommendations

No action is required at present. Continue to monitor.

Topic Area: Flood Risk

Relevant LDP Policies: KP3(A), KP3(B), KP5, KP15, KP16, KP18, EN14

Indicator reference: OB3 EN2

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
Core Amount of development (by TAN15 paragraph 5.1 development category) permitted in C2 floodplain areas	No permissions granted for highly vulnerable development within C2 floodplain area	1 application permitted for development in any 1 year
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
No applications permitted in C2 floodplain Areas.	No applications permitted in C2 floodplain Areas.	No applications permitted in C2 floodplain Areas.
Analysis		
During the 2 nd monitoring period no applications for highly vulnerable development were permitted in Zone C2 without flood mitigation measures which were confirmed as appropriate through advice provided by NRW. Given this it is considered that Policy EN14 is functioning effectively. The Council will continue to monitor this indicator to determine the effectiveness of the policy framework relating to this issue.		
Recommendations		
No action is required at present. Continue to monitor		

Topic Area: Water Quality

Relevant LDP Policies: KP15, KP16, KP18, EN4, EN10, EN11 & EN14

Indicator reference: OB3 EN3

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Percentage of water bodies of good status	No planning consents granted planning permission contrary to the advice of Natural Resources Wales and/or Dŵr Cymru (Welsh Water)	1 application permitted for development in any 1 year
Performance 1st AMR 1 st April 2016 to 31 st March 2017	Performance 2nd AMR 1 st April 2017 to 31 st March 2018	Performance 3rd AMR 1 st April 2018 to 31 st March 2019
No applications have been approved contrary to the advice of Natural Resources Wales and/or Dŵr Cymru (Welsh Water)	No applications have been approved contrary to the advice of Natural Resources Wales and/or Dŵr Cymru (Welsh Water)	No applications have been approved contrary to the advice of Natural Resources Wales and/or Dŵr Cymru (Welsh Water)
Analysis		
No applications have been approved contrary to the advice of Dwr Cymru / Welsh Water or Natural Resources Wales concerning status of water bodies.		
Recommendations		
No action is required at present. Continue to monitor.		

Topic Area: Water Quality

Relevant LDP Policies: KP15, KP16, KP18, EN4, EN10, EN11 & EN14

Indicator reference: OB3 EN4

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Number of permissions granted where there is a known risk of deterioration in status	No planning consents granted planning permission contrary to the advice of Natural Resources Wales and/or Dŵr Cymru (Welsh Water)	1 application permitted for development in any 1 year
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
No applications have been approved contrary to the advice of Natural Resources Wales and/or Dŵr Cymru (Welsh Water)	No applications have been approved contrary to the advice of Natural Resources Wales and/or Dŵr Cymru (Welsh Water)	No applications have been approved contrary to the advice of Natural Resources Wales and/or Dŵr Cymru (Welsh Water)
Analysis		
No applications have been approved contrary to the advice of Dwr Cymru / Welsh Water or Natural Resources Wales concerning status of water bodies.		
Recommendations		
No action is required at present. Continue to monitor.		

Topic Area: Water Quality

Relevant LDP Policies: KP15, KP16, KP18, EN4, EN10, EN11 & EN14

Indicator reference: OB3 EN5

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Number of permissions incorporating measures designed to improve water quality where appropriate	No planning consents granted planning permission contrary to the advice of Natural Resources Wales and/or Dŵr Cymru (Welsh Water)	1 application permitted for development in any 1 year
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
No applications have been approved contrary to the advice of Natural Resources Wales and/or Dŵr Cymru (Welsh Water)	No applications have been approved contrary to the advice of Natural Resources Wales and/or Dŵr Cymru (Welsh Water)	No applications have been approved contrary to the advice of Natural Resources Wales and/or Dŵr Cymru (Welsh Water)
Analysis		
No applications have been approved contrary to the advice of Dwr Cymru / Welsh Water or Natural Resources Wales concerning measures to improve water quality.		
Recommendations		
No action is required at present. Continue to monitor.		

Topic Area: Water Quality and Quantity

Relevant LDP Policies: KP18, EN11 & EN14

Indicator reference: OB3 EN6

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Number of planning permissions granted contrary to the advice of the water supplier concerning adequate levels of water quality and quantity and waste water provision	No planning consents issued where there is an objection concerning provision of water quality and quantity and waste water from water supplier	1 application permitted for development in any 1 year
Performance 1st AMR 1 st April 2016 to 31 st March 2017	Performance 2nd AMR 1 st April 2017 to 31 st March 2018	Performance 3rd AMR 1 st April 2018 to 31 st March 2019
No planning consents issued where there is an outstanding objection from the water supplier	No planning consents issued where there is an outstanding objection from the water supplier	No planning consents issued where there is an outstanding objection from the water supplier
Analysis		
No applications have been approved where there is an outstanding objection from Dwr Cymru / Welsh Water concerning provision of water quality and quantity and waste water from water supplier.		
Recommendations		
No action is required at present. Continue to monitor.		

Topic Area: Green Wedge

Relevant LDP Policies: KP3(A): Green Wedge, EN1: Countryside Protection

Indicator reference: OB3 EN7

Contextual Changes: There have been no significant contextual changes relating to the policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL The number of inappropriate developments permitted within the Green Wedge that do not satisfy LDP policies.	No inappropriate developments granted planning permission contrary to policies KP3 (A) and EN1.	No inappropriate developments granted planning permission contrary to policies KP3 (A) and EN1.
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
No applications permitted in the Green Wedge that do not satisfy policy.	No applications permitted in the Green Wedge that do not satisfy policy.	No applications permitted in the Green Wedge that do not satisfy policy.
Analysis		
During the 3 rd monitoring period no applications for inappropriate development were permitted. It is considered that all the relevant applications approved during the monitoring period were either considered to be policy compliant and not impact on the openness of the Green Wedge or the principal of development had been established through a previous consent. Given this it is considered that Policy KP3(A) is functioning effectively. The Council will continue to monitor this indicator to determine the effectiveness of the policy framework relating to the issue.		
Recommendations		
No action is required at present. Continue to monitor.		

Topic Area: Special Landscape Areas

Relevant LDP Policies: EN3: Landscape

Indicator reference: OB3 EN8

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
Core The number of planning permissions granted contrary to Policy EN3 which would cause unacceptable harm to Special Landscape Areas	No development granted planning permission contrary to Policy EN3 which would cause unacceptable harm to Special Landscape Areas	1 application permitted for development in any 1 year
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
No applications permitted within a Special Landscape Area that does not satisfy policy.	No applications permitted within a Special Landscape Area that does not satisfy policy	No applications permitted within a Special Landscape Area that does not satisfy policy
Analysis		
During the 3 rd monitoring period ten relevant applications were approved on land within a Special Landscape Area. Of these applications all were considered to be policy compliant/compliant subject to conditions/recommendations or the principle of development had previously been established. Given this it is considered that the policy framework relating to this issue is functioning effectively and the Council will continue to monitor this indicator to determine the effectiveness of this policy framework.		
Recommendations		
No action is required at present. Continue to monitor		

Topic Area: Ancient Semi-Natural Woodland

Relevant LDP Policies: EN8: Trees, Woodlands and Hedgerows

Indicator reference: OB3 EN9

Contextual Changes: There have been no significant contextual changes relating to the policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Ancient Semi-Natural Woodland	No inappropriate developments granted planning permission contrary to Policy EN8.	1 application permitted for development in any 1 year
Performance 1st AMR 1 st April 2016 to 31 st March 2017	Performance 2nd AMR 1 st April 2017 to 31 st March 2018	Performance 3rd AMR 1 st April 2018 to 31 st March 2019
No applications permitted within areas of Ancient Semi Natural Woodland that do not satisfy policy.	No applications permitted within areas of Ancient Semi Natural Woodland that do not satisfy policy.	No applications permitted within areas of Ancient Semi Natural Woodland that do not satisfy policy.
Analysis		
During the 3 rd monitoring period two relevant applications were permitted on areas of ancient semi natural woodland and were considered to be policy compliant/ compliant subject to conditions recommendations placed on the approval.		
Recommendations		
No action is required at present. Continue to monitor.		

Topic Area: SSSI's and SINCI's

Relevant LDP Policies: EN1-8

Indicator reference: OB3 EN10

Contextual Changes: There have been no significant contextual changes relating to the policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL The number of planning permissions granted on SSSI or SINC designated areas.	No planning permissions granted permission that would result in an unacceptable impact which could not be mitigated against on an SSSI or SINC that does not satisfy LDP policies	1 application permitted for development in any 1 year
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
No applications were permitted on SSSIs and SINCs that do not satisfy policy	No applications were permitted on SSSIs and SINCs that do not satisfy policy	No applications were permitted on SSSIs and SINCs that do not satisfy policy
Analysis		
During the 3 rd monitoring period no applications were permitted on SSSI or SINC designated areas that were not policy compliant/compliant subject to conditions /recommendations placed on the application.		
Recommendations		
No action is required at present. Continue to monitor.		

Topic Area: Environment

Relevant LDP Policies: EN1 – EN8

Indicator reference: OB3 EN11

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
Core Number of planning applications granted which have an adverse effect on the integrity of a Natura 2000 site	Ensure protection of European designated sites as required by paragraph 5.3.9 in Planning Policy Wales, Annex 3 in TAN 5 and policies.	No applications were permitted on Natura 2000 sites that do not comply with policy.
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
No applications were permitted on Natura 2000 sites that do not comply with policy.	No applications were permitted on Natura 2000 sites.	No applications were permitted on Natura 2000 sites.
Analysis		
During the 3 rd monitoring period there were no relevant applications on Natura 2000 sites.		
Recommendations		
No action is required at present. Continue to monitor		

Topic Area: Natural Environment

Relevant LDP Policies: EN1– EN8

Indicator reference: OB3 EN12

Contextual Changes: There have been no contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Number of planning applications granted which would result in detriment to the favourable conservation status of EU protected species in their natural range or significant harm to species protected by other statute	No application granted permission that would result in detriment to the maintenance of the favourable conservation status of EU protected species in their natural range or significant harm to species protected by other statute	1 application permitted contrary to the advice of NRW or the authority's ecologist
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
No developments have been permitted contrary to the advice of NRW or the authority's ecologist.	No developments have been permitted contrary to the advice of NRW or the authority's ecologist.	No developments have been permitted contrary to the advice of NRW or the authority's ecologist.
Analysis		
During the monitoring period of the relevant applications approved it is considered that no applications were approved contrary to the advice of NRW or the authority's Ecologist. Approved applications were policy compliant/policy compliant subject to conditions/recommendations placed on the permission.		
Recommendations		
No action is required at present. Continue to monitor.		

Topic Area: Open Space Provision

Relevant LDP Policies: KP16, KP18, C5

Indicator reference: OB3 EN13

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Achievement of functional open space requirement across Cardiff as set out in Policy C5	2.43 Ha functional open space per 1,000 population	Less than 2.43 Ha functional open space per 1,000 population
Performance 1st AMR 1 st April 2016 to 31 st March 2017	Performance 2nd AMR 1 st April 2017 to 31 st March 2018	Performance 3rd AMR 1 st April 2018 to 31 st March 2019
Latest figures show 1.18 ha of functional open space per 1,000 population in Cardiff. For all types of open space the equivalent figure is 7.44 ha of open space per 1,000 population.	Latest figures show 1.16 ha of functional open space per 1,000 population in Cardiff. For all types of open space the equivalent figure is 8.07 of open space per 1,000 population.	Latest figures show 1.15 ha of functional open space per 1,000 population in Cardiff. For all types of open space the equivalent figure is 8.10 of open space per 1,000 population.
Analysis		
<p>The latest survey of open space shows that the baseline figure for the Third Annual Monitoring Report is 1.15 ha of functional open space per 1,000 population in Cardiff compared to an equivalent figure of 1.18 ha in the first Annual Monitoring Report. This figure increases if you include educational playing fields to 1.86 functional open space per 1,000 population in Cardiff and if you include all types of open space (functional amenity open space) the equivalent figure is 8.10 ha of open space per 1,000 population, well in excess of the indicator target and a rise of 9% when compared to 2016/17.</p> <p>Although there has been a very marginal decrease in the figure since the first Annual Monitoring Report significant additional functional open space will be provided in conjunction with the large strategic housing sites which are at the very early stages of development or are yet to commence. Once significant progress has been made on these sites it is anticipated that the amount of functional open space per 1,000 population will increase over and above the baseline figure identified above.</p>		
Recommendations		
No action is required at present. Continue to monitor.		

Topic Area: Air Quality

Relevant LDP Policies: EN13

Indicator reference: OB3 EN14

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Number of Air Quality Management Areas	No more than 4 current AQMA in action	One or more additional AQMA
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
There are currently 4 AQMA's within Cardiff meaning there has been no change in the number of AQMA's during the monitoring period	There are currently 4 AQMA's within Cardiff meaning there has been no change in the number of AQMA's during the monitoring period	There are currently 4 AQMA's within Cardiff meaning there has been no change in the number of AQMA's during the monitoring period
Analysis		
<p>There are currently four established AQMAs within Cardiff:</p> <ol style="list-style-type: none"> 1. Cardiff City Centre- declared 1st April 2013 2. Llandaff- declared 1st April 2013 3. Stephenson Court- declared 1st December 2010 4. Ely Bridge- declared 1st Feb 2007 <p>Each of these AQMAs was declared as a result of road-traffic derived Nitrogen Dioxide. There is one action plan in place for Ely Bridge AQMA and interim Action Plans have prepared for Cardiff City Centre, Llandaff and Stephenson Court AQMAs.</p> <p>These recommend that further monitoring is undertaken and set out measures to improve air quality in these areas. Such measures include Environmental Health Officers working closely with Planning Officers to advise on any development with the potential for detrimental impacts on air quality, requesting Air Quality Assessments and applying conditions where necessary and working to reduce traffic and emissions through implementation of the Transport and Clean Air Green Paper.</p>		
Recommendations		
No action is required at present. Continue to monitor.		

Topic Area: Open Space SPG

Relevant LDP Policies: C4, C5

Indicator reference: OB3 EN15

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Open Space SPG		Failure to adopt SPG within 6 months of adoption of the Plan
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
The Green Infrastructure SPG, incorporating guidance on open space was issued for public consultation in June 2017 and is due to be considered by Cabinet and Council for approval in October 2017	The Green Infrastructure SPG, incorporating guidance on open space was approved in November 2017	The Green Infrastructure SPG, incorporating guidance on open space was approved in November 2017
Analysis		
The Open Space SPG has been incorporated in the Green Infrastructure SPG which was approved by Council on 30 th November 2017 and has been taken into consideration in all planning applications determined since that date. Given this, there is no need to continue to monitor this indicator but the Council will continue to assess the effectiveness of the adopted SPG.		
Recommendations		
No action is required.		

Topic Area: Public Rights of Way and Development SPG

Relevant LDP Policies: T1

Indicator reference: OB3 EN16

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Public Rights of Way and Development SPG		Failure to adopt SPG within 18 months of adoption of the Plan
Performance 1st AMR 1 st April 2016 to 31 st March 2017	Performance 2nd AMR 1 st April 2017 to 31 st March 2018	Performance 3rd AMR 1 st April 2018 to 31 st March 2019
The Green Infrastructure SPG, incorporating guidance on public rights of way was issued for public consultation in June 2017 and is due to be considered by Cabinet and Council for approval in October 2017	The Green Infrastructure SPG, incorporating guidance on public rights of way was approved in November 2017	The Green Infrastructure SPG, incorporating guidance on public rights of way was approved in November 2017
Analysis		
The Public Rights of Way and Development SPG has been incorporated in the Green Infrastructure SPG which was approved by Council on 30 th November 2017 and has been taken into consideration in all planning applications determined since that date. Given this, there is no need to continue to monitor this indicator but the Council will continue to assess the effectiveness of the adopted SPG.		
Recommendations		
No action is required.		

Topic Area: Trees and Development SPG

Relevant LDP Policies: EN8

Indicator reference: OB3 EN17

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Trees and Development SPG		Failure to adopt SPG within 18 months of adoption of the Plan
Performance 1st AMR 1 st April 2016 to 31 st March 2017	Performance 2nd AMR 1 st April 2017 to 31 st March 2018	Performance 3rd AMR 1 st April 2018 to 31 st March 2019
The Green Infrastructure SPG, incorporating guidance on trees and development was issued for public consultation in June 2017 and is due to be considered by Cabinet and Council for approval in October 2017	The Green Infrastructure SPG, incorporating guidance on trees and development was approved in November 2017	The Green Infrastructure SPG, incorporating guidance on trees and development was approved in November 2017
Analysis		
The Trees and Development SPG has been incorporated in the Green Infrastructure SPG which was approved by Council on 30 th November 2017 and has been taken into consideration in all planning applications determined since that date. Given this, there is no need to continue to monitor this indicator but the Council will continue to assess the effectiveness of the adopted SPG.		
Recommendations		
No action is required.		

Topic Area: Biodiversity SPG

Relevant LDP Policies: EN5, EN6, EN7

Indicator reference: OB3 EN18

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Biodiversity SPG		Failure to adopt SPG within 18 months of adoption of the Plan
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
The Green Infrastructure SPG, incorporating guidance on biodiversity was issued for public consultation in June 2017 and is due to be considered by Cabinet and Council for approval in October 2017	The Green Infrastructure SPG, incorporating guidance on biodiversity was approved in November 2017	The Green Infrastructure SPG, incorporating guidance on biodiversity was approved in November 2017
Analysis		
The Biodiversity SPG has been incorporated in the Green Infrastructure SPG which was approved by Council on 30 th November 2017 and has been taken into consideration in all planning applications determined since that date. Given this, there is no need to continue to monitor this indicator but the Council will continue to assess the effectiveness of the adopted SPG.		
Recommendations		
No action is required.		

Topic Area: Flooding SPG

Relevant LDP Policies: EN14

Indicator reference: OB3 EN19

Contextual Changes: The requirements of the SPG have changed significantly from those originally foreseen, giving rise to the need for extensive additional technical work resulting from the forthcoming implementation of schedule 3 of the Flood Water and Management Act 2010 which will make sustainable drainage mandatory for certain types of development.

Indicator	Target	Trigger
LOCAL Flooding SPG		Failure to adopt SPG within 12 months of adoption of the Plan
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
The Flooding SPG is due to be issued for public consultation in March 2018.	The draft Flooding SPG is being prepared prior to being reviewed and finalised internally and issued for public consultation	The draft Flooding SPG is being prepared prior to being reviewed and finalised internally and issued for public consultation
Analysis		
<p>The Council adopted the LDP on the 28th of January 2016. The intention was that the SPG should have been adopted by the end of January 2017.</p> <p>However, progress on the document has been delayed due to the extensive additional technical work which has been required in preparing the guidance due to the implementation of schedule 3 of the Flood Water and Management Act 2010 (commenced on the 7th January 2019) which made sustainable drainage mandatory for certain types of development, in combination with limitations of workloads and staffing capacity.</p> <p>Preparatory work on the SPG is ongoing prior to it being reviewed and finalised internally and issued for public consultation. An update on this will be provided in 4th AMR in 2019.</p>		
Recommendations		
No action is required.		

Topic Area: Natural Heritage Network SPG

Relevant LDP Policies: KP16, EN3 - EN8

Indicator reference: OB3 EN20

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Natural Heritage Network SPG		Failure to adopt SPG within 12 months of adoption of the Plan
Performance 1st AMR 1 st April 2016 to 31 st March 2017	Performance 2nd AMR 1 st April 2017 to 31 st March 2018	Performance 3rd AMR 1 st April 2018 to 31 st March 2019
The Green Infrastructure SPG, incorporating guidance on the natural heritage network was issued for public consultation in June 2017 and is due to be considered by Cabinet and Council for approval in October 2017	The Green Infrastructure SPG, incorporating guidance on the natural heritage network was approved in November 2017	The Green Infrastructure SPG, incorporating guidance on the natural heritage network was approved in November 2017
Analysis		
The Natural Heritage Network SPG has been incorporated in the Green Infrastructure SPG which was approved by Council on 30 th November 2017 and has been taken into consideration in all planning applications determined since that date. Given this, there is no need to continue to monitor this indicator but the Council will continue to assess the effectiveness of the adopted SPG.		
Recommendations		
No action is required.		

Topic Area: Archaeologically Sensitive Areas SPG

Relevant LDP Policies: EN14

Indicator reference: OB3 EN21

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Archaeologically Sensitive Areas SPG		Failure to adopt SPG within 18 months of adoption of the Plan
Performance 1st AMR 1 st April 2016 to 31 st March 2017	Performance 2nd AMR 1 st April 2017 to 31 st March 2018	Performance 3rd AMR 1 st April 2018 to 31 st March 2019
The Archaeologically Sensitive Areas SPG is due to be issued for public consultation in March 2018.	Consultation on the Archaeologically Sensitive Areas SPG was undertaken in November/December 2018 and was approved in July 2018.	Consultation on the Archaeologically Sensitive Areas SPG was undertaken in November/December 2018 and was approved in July 2018.
Analysis		
The SPG was approved by Council on 19 th July 2018 and has been taken into consideration in all planning applications determined since that date. Given this, there is no need to continue to monitor this indicator but the Council will continue to assess the effectiveness of the adopted SPG.		
Recommendations		
No action is required.		

Objective 4 – To create sustainable neighbourhoods that form part of a sustainable city

Topic Area: Renewable Energy

Relevant LDP Policies: EN12

Indicator reference: OB4 SN1

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL The number and capacity of renewable energy developments permitted	An increase in the number of renewable energy schemes permitted	No increase in the number of renewable energy schemes permitted for two or more consecutive years
Performance 1st AMR 1 st April 2016 to 31 st March 2017	Performance 2nd AMR 1 st April 2017 to 31 st March 2018	Performance 3rd AMR 1st April 2018 to 31 st March 2019
No notable renewable energy schemes were permitted during the monitoring period.	5 planning applications were granted during the year which incorporated solar energy amounting to 0.05MW in total	1 planning application was granted for a 9.5 MW biomass plant at Rover Way and 9 planning applications were granted during the year which incorporated solar energy amounting to 0.52 MW in total
Analysis		
<p>In many respects, it is considered that there is relatively limited scope for renewable energy in Cardiff. Unlike some other local authorities in Wales, Cardiff has no Strategic Search Areas (TAN8) thereby restricting the potential for harnessing large-scale onshore wind power. With regards to other technologies, Cardiff is a relatively small area with much of its land already developed. Outside the urban areas, topography, environmental constraints plus relatively high land values constrain opportunities for medium-large renewable energy generation. There are however exceptions, within the former docklands two notable schemes are already in operation including an Energy Recovery Facility in Splott (30MW) and more recently a biomass plant in Tremorfa (2MW). Planning permission was also granted in June 2018 for a biomass plant at Rover Way (9.5MW) and just outside the current monitoring period in May 2019 for a 8.7 MW Solar Farm on the former Lamby Way tip. Also during the year 9 applications were granted planning permission which incorporated Solar energy amounting to 0.52 MW in total.</p>		

It should also be noted that under the provisions of The Town and Country Planning (General Permitted Development) (Amendment) (Wales) Order 2012, householders and businesses benefit from 'permitted development' rights relating to microgeneration/small-scale renewable energy technologies. Given the extent of these rights, it is inevitable that many small-scale renewable energy schemes will take place in Cardiff without the need for obtaining planning permission. Subsequently, holistic monitoring of renewable energy developments is not possible and certain developments will not be captured by this monitoring indicator.

Recommendations

No action required at present. Continue to monitor.

Topic Area: Waste Management Capacity

Relevant LDP Policies: KP12, W1

Indicator reference: OB4 SN2

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Maintain a sufficient amount of land and facilities to cater for Cardiff's waste capacity	Maintain a sufficient capacity to cater for Cardiff's waste (to be confirmed at a regional level in accordance with TAN21)	No trigger
Performance 1st AMR 1 st April 2016 to 31 st March 2017	Performance 2nd AMR 1 st April 2017 to 31 st March 2018	Performance 3rd AMR 1 st April 2018 to 31 st March 2019
A sufficient amount of land and facilities are available to cater for Cardiff's waste capacity	A sufficient amount of land and facilities are available to cater for Cardiff's waste capacity	A sufficient amount of land and facilities are available to cater for Cardiff's waste capacity
Analysis		
<p>TAN21 and its associated regional monitoring reports are used to monitor whether each region has enough capacity to manage its waste arisings and anticipate when additional regional capacity will be needed. Cardiff is part of the South East Wales Region. The latest regional monitoring report available is the 'Waste Planning Monitoring Report: South East Wales' published in April 2016. This concluded that there is no further need for landfill capacity within the South East Wales region and that any proposals for further residual waste treatment should be carefully assessed to ensure that the facility would not result in over-provision.</p> <p>Waste developments of significance that were granted permission within the monitoring period are as follows:</p> <ul style="list-style-type: none"> • A metals recycling facility at Tremorfa Industrial Estate; • A hazardous waste transfer facility at Lamby Way Industrial Estate. <p>Therefore, it is considered that policies KP12 and W1 are functioning effectively. The Council will continue to monitor this indicator to determine the effectiveness of the policy framework relating to this issue.</p>		
Recommendations		
No action required at present. Continue to monitor.		

Topic Area: Household Waste Recycling

Relevant LDP Policies: KP12, W1, W2

Indicator reference: OB4 SN3

Contextual Changes: There have been no contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Amount of household waste recycled	Minimum Overall Recycling - 58% by 2016, 64% by 2020 and 70% by 2025. Maximum Landfill = n/a by 2016, 10% by 2020 and 5% by 2025	Minimum Overall Recycling - 58% by 2016, 64% by 2020 and 70% by 2025. Maximum Landfill = n/a by 2016, 10% by 2020 and 5% by 2025
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
The amount of household waste recycled in 2015/16 was 58.2% and amount sent to landfill was 7.5%	The amount of household waste recycled in 2016/17 was 58.1% and amount sent to landfill was 1.6%	The amount of household waste recycled in 2016/17 was 58.3% and amount sent to landfill was 1%
Analysis		
<p>Latest figures produced by Welsh Government show that the household recycling rate in 2017/18 was 58.3% which met the target set out above. This rate continues a general upward trend over the last few years as rates in 2013/14 were 49.7%. Only 1% of household waste was sent to landfill in 2017/18 which is below the 10% target for 2020 set out above. This percentage represents a significant reduction from 2012/13 when 39% was sent to landfill.</p> <p>Therefore, it is considered that policies KP12, W1 and W2 are functioning effectively in this regard. The Council will continue to monitor this indicator to determine the effectiveness of the policy framework relating to this issue.</p>		
Recommendations		
No action is required at present. Continue to monitor.		

Topic Area: Waste Management Applications

Relevant LDP Policies: KP12, W1, W2

Indicator reference: OB4 SN4

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Applications received for waste management uses on B2 sites	Maintain a sufficient range and choice of waste management facilities	1 or more applications refused in any 1 year
Performance 1st AMR 1 st April 2016 to 31 st March 2017	Performance 2nd AMR 1 st April 2017 to 31 st March 2018	Performance 3rd AMR 1 st April 2018 to 31 st March 2019
No applications for waste management uses on B2 land refused	No applications for waste management uses on B2 land refused	No applications for waste management uses on B2 land refused
Analysis		
<p>During the monitoring period, no applications for waste management uses on B2 land were refused.</p> <p>Therefore, it is considered that policies KP12 and W2 are functioning effectively in this regard. The Council will continue to monitor this indicator to determine the effectiveness of the policy framework relating to this issue.</p>		
Recommendations		
No action is required at present. Continue to monitor.		

Topic Area: Landbank of Crushed Rock Reserves

Relevant LDP Policies: KP11

Indicator reference: OB4 SN5

Contextual Changes: There have been no contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Maintain a minimum 10 year landbank of crushed rock reserves	10 year supply	Less than 10 year supply
Performance 1st AMR 1 st April 2016 to 31 st March 2017	Performance 2nd AMR 1 st April 2017 to 31 st March 2018	Performance 3rd AMR 1 st April 2018 to 31 st March 2019
More than 10 year supply maintained throughout the plan period	More than 10 year supply maintained throughout the plan period	More than 10 year supply maintained throughout the plan period
Analysis		
<p>The most recent published data on the landbank is the SWRAWP Annual Report 2017, published in January 2019. This states that Cardiff has a landbank of 25 years based on a 3 year average of sales (2015-2017) and 32 years based on a 10 year average of sales (2008-2017). Data for the Annual Report 2018 is currently being collated. The Council cannot publish information on rates of sales in relation to reserves in an uncollated format due to the need to protect the commercial confidentiality of operators.</p> <p>Given that there would be a landbank in excess of 10 years at the end of the plan period in 2026, it is considered that mineral policies are functioning effectively. The Council will continue to monitor this indicator to determine the effectiveness of the policy framework relating to this issue.</p>		
Recommendations		
No action is required at present. Continue to monitor.		

Topic Area: Sand Wharf Protection Areas

Relevant LDP Policies: KP11, M6

Indicator reference: OB4 SN6

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Amount of development within Sand Wharf Protection Area	No permanent development which would prejudice the ability to land marine dredged sand and gravel will be permitted within the safeguarded sand wharfs which is contrary to Policy M6	1 application permitted for development in any 1 year
Performance 1st AMR 1 st April 2016 to 31 st March 2017	Performance 2nd AMR 1 st April 2017 to 31 st March 2018	Performance 3rd AMR 1 st April 2018 to 31 st March 2019
No applications permitted within the Sand Wharf Protection Area	No applications permitted within the Sand Wharf Protection Area	No applications permitted within the Sand Wharf Protection Area
Analysis		
During the monitoring period no applications were permitted within the Sand Wharf Protection Area. It is, therefore, considered that policy M6 is functioning effectively. The Council will continue to monitor this indicator to determine the effectiveness of the policy framework relating to this issue.		
Recommendations		
No action is required at present. Continue to monitor.		

Topic Area: Mineral Safeguarding Areas

Relevant LDP Policies: KP11, M7

Indicator reference: OB4 SN7

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Amount of development permitted within a mineral safeguarding area	No permanent sterilising development as defined in MPPW/MTAN1 will be permitted within a Mineral Safeguarding Area which is contrary to Policy 7 of the Plan	1 application permitted for development in any 1 year
Performance 1st AMR 1 st April 2016 to 31 st March 2017	Performance 2nd AMR 1 st April 2017 to 31 st March 2018	Performance 3rd AMR 1 st April 2018 to 31 st March 2019
No permanently sterilising developments permitted contrary to policy M7	No permanently sterilising developments permitted contrary to policy M7	No permanently sterilising developments permitted contrary to policy M7
Analysis		
<p>During the monitoring period 3 applications located within the limestone safeguarding area were approved:</p> <ul style="list-style-type: none"> • An application to extend a changing rooms and sports pavilion, installation of a footpath, exercise stations, MUGA and play area. This would not be considered permanently sterilising development; • An application for ground works in order to create a new grassed public open space. This would not be considered permanently sterilising development; • An application to renew a previous planning permission to convert two barns – one to residential and one to stables. The two buildings which would be converted fall outside of the safeguarding area, but parts of the curtilage surrounding the proposed stables are within it. Given that the principle of the development had been established through a previous consent and that the residential use would be outside of the safeguarding area, it is not considered that this would sterilise the limestone safeguarding area. <p>It is, therefore, considered that policy M7 is functioning effectively. The Council will continue to monitor this indicator to determine the effectiveness of the policy framework relating to this issue.</p>		
Recommendations		
No action is required at present. Continue to monitor.		

Topic Area: Mineral Permissions

Relevant LDP Policies: M2

Indicator reference: OB4 SN8

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Number of planning permissions permitted for extraction of aggregate mineral not in line with Policy M2	0 Planning permissions permitted	1 application permitted for development in any 1 year
Performance 1st AMR 1 st April 2016 to 31 st March 2017	Performance 2nd AMR 1 st April 2017 to 31 st March 2018	Performance 3rd AMR 1 st April 2018 to 31 st March 2019
No applications permitted for extraction of aggregate not in line with Policy M2	No applications permitted for extraction of aggregate not in line with Policy M2	No applications permitted for extraction of aggregate not in line with Policy M2
Analysis		
<p>Planning application no. 15/01953/MJR for an extension to the south east of Creigiau Quarry was approved in December 2018. The extension area is identified as a 'preferred area' of resource suitable for the future working of limestone under Policy M1 of the LDP. The application also made provision for the relinquishment of reserves in the more environmentally sensitive southern and western parts of the existing quarry in line with Policy M3 of the LDP. Therefore, it is considered that the application was permitted in accordance with the aims of Policy M2.</p> <p>No applications were permitted for the extraction of aggregate which were not considered to accord with Policy M2.</p>		
Recommendations		
No action required at present. Continue to monitor.		

Topic Area: Mineral Buffer Zones

Relevant LDP Policies: M4

Indicator reference: OB4 SN9

Contextual Changes: There have been no contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Number of planning permissions for inappropriate development e.g. dwellings/mineral working, permitted in Minerals Buffer Zones contrary to policy M4	1 planning permission permitted	1 application permitted for development in any on year
Performance 1st AMR 1 st April 2016 to 31 st March 2017	Performance 2nd AMR 1 st April 2017 to 31 st March 2018	Performance 3rd AMR 1 st April 2018 to 31 st March 2019
No applications for inappropriate development permitted within the Minerals Buffer Zones	No applications for inappropriate development permitted within the Minerals Buffer Zones	No applications for inappropriate development permitted within the Minerals Buffer Zones
Analysis		
<p>During the monitoring period five applications were approved for development within a buffer zone:</p> <ul style="list-style-type: none"> • An application to extend a changing rooms and sports pavilion, installation of a footpath, exercise stations, MUGA and play area. This would not be considered permanently sterilising development; • Change of use of an industrial unit from B8 to a D1 veterinary clinic. This would occupy an existing commercial building within the buffer zone and would not be considered a 'sensitive development'; • An application to increase the number of children cared for at an existing nursery within the Buffer Zone. As the nursery is an existing 'sensitive development' within the buffer zone, it is not considered that an increase in the number of children would have an additional impact upon the buffer zone; 		

- Change of use of an industrial unit from D2 to a gym. This would occupy an existing commercial unit within the buffer zone and would not be considered a 'sensitive development';
- An application to erect four trade counter units and two A1/A3 units within an existing industrial estate. Only part of the site falls within the buffer zone. The proposed buildings would occupy existing allocated industrial land and the proposed uses would not be considered 'sensitive development'.

Therefore, no applications for inappropriate development were permitted within the Minerals Buffer Zones. It is, therefore, considered that policy M4 is functioning effectively. The Council will continue to monitor this indicator to determine the effectiveness of the policy framework relating to this issue.

Recommendations

No action is required at present. Continue to monitor.

Topic Area: Prohibition Orders on dormant Mineral Sites

Relevant LDP Policies: M3

Indicator reference: OB4 SN10

Contextual Changes: There have been no contextual changes relating to this policy area during the monitoring period.

_Indicator	Target	Trigger
LOCAL Number of prohibition orders issued on dormant sites	Ensure that those dormant sites deemed not likely to be re-worked in the future (as part of the annual review) are served with prohibition orders	LPA fails to serve prohibition orders on sites that are deemed not likely to be re-worked in the future
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
No prohibition orders served in the monitoring period. Work has progressed in securing the closure of southern and western parts of Creigiau Quarry in line with M3	No prohibition orders served in the monitoring period. Work has progressed in securing the closure of southern and western parts of Creigiau Quarry in line with M3	No prohibition orders served in the monitoring period.
Analysis		
<p>The Council has not served any prohibition orders within the monitoring period.</p> <p>Planning application 15/01953/MJR for an extension to the south east area of Creigiau Quarry was granted permission in December 2018. The proposal included the relinquishment of southern and western parts of the quarry in line with policy M3 'Quarry Closures and Extension Limits'.</p> <p>Further research and investigation into the appropriateness of serving prohibition orders should be carried out. The Council will continue to monitor this indicator to determine the effectiveness of the policy framework relating to this issue.</p>		
Recommendations		
Further research on prohibition orders is required. Continue to monitor.		

Topic Area: Historic Environment

Relevant LDP Policies: KP 17: Built Heritage, EN9: Conservation of the Historic Environment

Indicator reference: OB4 SN11

Contextual Changes: There have been no contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Number of applications permitted contrary to Policy EN9 that would adversely affect Scheduled Ancient Monuments, registered historic parks and gardens, Listed Buildings or Conservation Areas	No developments permitted over the course of the Plan where there is an outstanding objection from statutory heritage advisors or that would adversely affect Scheduled Ancient Monuments, registered historic parks and gardens, Listed Buildings or Conservation Areas	1 application permitted for development in any 1 year where there is an outstanding objection from statutory heritage advisors
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
No developments have been permitted with an outstanding objection from statutory heritage advisors.	No developments have been permitted with an outstanding objection from statutory heritage advisors.	No developments have been permitted with an outstanding objection from statutory heritage advisors.
Analysis		
During the monitoring period all the relevant applications received on historic environment assets were considered to be policy compliant/policy compliant subject to conditions/recommendations placed on the permission. No applications were permitted with an outstanding objection from statutory heritage advisors.		
Recommendations		
No action is required at present. Continue to monitor.		

Topic Area: Delivery of Strategic Site Infrastructure

Relevant LDP Policies: KP2(A-H), KP4 and KP6

Indicator reference: OB4 SN12

Contextual Changes: There have been no significant changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
<p>LOCAL</p> <p>Delivery of each key principle from the Strategic Sites Masterplanning Framework as embedded in the LDP to ensure delivery of key infrastructure including sustainable transportation interventions, social and community facilities, together with any other key Masterplanning requirements.</p>	<p>Failure of any key principles being effectively delivered in accordance with details which are approved through the Development Management process (e.g. S106 obligations & planning conditions).</p>	<p>1 (or more) key principles not delivered.</p>
<p>Performance 1st AMR 1st April 2016 to 31st March 2017</p>	<p>Performance 2nd AMR 1st April 2017 to 31st March 2018</p>	<p>Performance 3rd AMR 1st April 2018 to 31st March 2019</p>
<p>2017: Outline planning permission(s) have been granted at Strategic Sites:</p> <p>C: (North West Cardiff), F: (North East Cardiff – West of Pontprennau) and G: (East of Pontprennau Link Road).</p> <p>Associated S106 agreements are linked to infrastructure provision identified through policies KP2(A-H).</p> <p>To date, construction work has only commenced at</p>	<p>2018: Outline planning permission has been granted at Strategic Sites:</p> <p>C: North West Cardiff (x4) D: Land North of Junction 33 F: North East Cardiff G: East of Pontprennau Link Road (x2)</p> <p>Full and/or Reserved Matters have been granted at sites:</p> <p>A: Central Enterprise Zone C: North West Cardiff (x3)</p>	<p>2019: Outline planning permission has been granted at Strategic Sites:</p> <p>C: North West Cardiff (x4) D: Land North of Junction 33 F: North East Cardiff G: East of Pontprennau Link Road (x2)</p> <p>Full and/or Reserved Matters have been granted at sites:</p> <p>A: Central Enterprise Zone C: North West Cardiff (x3) F: North East Cardiff</p>

<p>Site G and the delivery of infrastructure provision identified through the associated S106 agreements will be monitored as schemes progress over the coming years.</p>	<p>G: East of Pontprennau Link Road (x4)</p> <p>Construction work has commenced at sites:</p> <p>A: Central Enterprise Zone C: North West Cardiff G: East of Pontprennau Link Road.</p> <p>The S106 Agreements for each of the Strategic Sites are linked to the infrastructure provision identified through LDP Policies KP2(A-H).</p> <p>The delivery of infrastructure provision is monitored as schemes progress and is summarised in Appendix 2 of the Cardiff Infrastructure Plan (Edition 2, Spring 2018).</p>	<p>G: East of Pontprennau Link Road (x4)</p> <p>Construction work has commenced at sites:</p> <p>A: Central Enterprise Zone C: North West Cardiff (x3) F: North East Cardiff G: East of Pontprennau Link Road (x2)</p> <p>The S106 Agreements for each of the Strategic Sites are linked to the infrastructure provision identified through LDP Policies KP2(A-H).</p> <p>The delivery of strategic site infrastructure is now being monitored through a series of bespoke monitoring documents that form part of the wider Cardiff Infrastructure Plan (see below).</p>
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Analysis

The LDP Strategic Sites are at their early stages of development, with initial phases being constructed at sites A (Central Enterprise Zone), C (North West Cardiff), F (North East Cardiff) and G (East of Pontprennau Link Road).

In order to monitor ongoing progress at each of the strategic sites in terms of planning consents, development activity and infrastructure provision, a series of bespoke monitoring documents have been produced. These documents form part of the wider Cardiff Infrastructure Plan and will be regularly updated to track progress on each of the sites. They are available to view on the Planning pages of the Council's website at www.cardiff.gov.uk/planning > Major Development Activity Monitoring.

Recommendations

- Continue to monitor the delivery of Strategic Site infrastructure provision through regular updates of the 'Strategic Site Monitoring Documents'.
- No actions are triggered under the third year of performance monitoring.

Topic Area: Cardiff Infrastructure Plan

Relevant LDP Policies: KP6

Indicator reference: OB4 SN13

Contextual Changes: There have been no significant changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
<p>LOCAL</p> <p>Preparing an annual Infrastructure Plan and Infrastructure Plan Delivery Report update.</p>	<p>Update the Infrastructure Plan and Infrastructure Plan Delivery Report annually to reflect the latest available information with regard to key infrastructure, costs/funding and estimated timescales.</p>	<p>Failure to update the Infrastructure Plan and Infrastructure Plan Delivery Report annually.</p>
<p>Performance 1st AMR 1st April 2016 to 31st March 2017</p>	<p>Performance 2nd AMR 1st April 2017 to 31st March 2018</p>	<p>Performance 3rd AMR 1st April 2018 to 31st March 2019</p>
<p>The 2016 version of the Cardiff Infrastructure Plan was published in September. The 2017 version is being prepared in advance of completion later in the year.</p>	<p>The 2018 update of the Cardiff Infrastructure Plan has recently been completed and is due to be published in the autumn.</p>	<p>The 2019 update of the Infrastructure Plan is being undertaken. As part of this update, a series of new Strategic Site Monitoring Documents have been produced, which have been published on the Council's website.</p>
<p>Analysis</p> <ul style="list-style-type: none"> • A review / update of the Cardiff Infrastructure Plan is undertaken on an annual basis. • As part of the 2019 review/update, a series of bespoke 'Strategic Site Monitoring Documents' have been produced to monitor ongoing progress in terms of planning consents, development activity and infrastructure provision at each of the Strategic Sites. These documents have recently been published on the Council's website. 		
<p>Recommendations</p> <ul style="list-style-type: none"> • No actions are triggered under the third year of performance monitoring. 		

Topic Area: Managing Transportation Impacts SPG

Relevant LDP Policies: T5

Indicator reference: OB4 SN14

Contextual Changes: There have been no contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
Local Design and Parking Guidance SPG (incorporating Access, Circulation and Parking Requirements SPG and sustainable design guidance)	To deliver the SPG	Failure to adopt SPG within 6 months of adoption of the Plan
Performance 1st AMR 1 st April 2016 to 31 st March 2017	Performance 2nd AMR 1 st April 2017 to 31 st March 2018	Performance 3rd AMR 1 st April 2018 to 31 st March 2019
In 2016-2017, the Draft SPG was in the process of being finalised in preparation for consultation. Progress on the document having been delayed due to extensive additional technical work required in preparing the guidance, in combination with limitations of workloads and staffing capacity.	Consultation on the SPG was undertaken between November and December 2017. The SPG was subsequently adopted, having been approved by Council on the 19 th of July 2018.	The SPG was approved by Council on the 19 th of July 2018.
Analysis		
<p>The Council recommended to approve the 'Managing Transport Impacts SPG' (which incorporates the Design and Parking Guidance) on July 19th 2018. This document will now be considered in the determination of all subsequent planning applications.</p> <p>A commitment has been made to Council, to review the newly adopted SPG on at least a biennial basis, with the SPG serving as a 'live' working document, to be amended in response to changing approaches within Transport Policy.</p>		
Recommendations		
No action required.		

Topic Area: Waste Management Facilities SPG

Relevant LDP Policies: W1, W2

Indicator reference: OB4 SN15

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Locating Waste Management Facilities SPG		Failure to adopt SPG within 12 months of adoption of the Plan
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
The Locating Waste Management Facilities SPG was approved in January 2017	The Locating Waste Management Facilities SPG was approved in January 2017	The Locating Waste Management Facilities SPG was approved in January 2017
Analysis		
The SPG was approved by Council on 26 th January 2017 and has been taken into consideration in all planning applications determined since that date. Given this, there is no need to continue to monitor this indicator but the Council will continue to assess the effectiveness of the adopted SPG.		
Recommendations		
No action is required.		

Topic Area: Infill Sites Design Guidance SPG

Relevant LDP Policies: KP5

Indicator reference: OB4 SN16

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Infill Sites Design Guidance SPG		Failure to adopt SPG within 18 months of adoption of the Plan
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
The Infill Sites Design Guidance SPG was issued for public consultation in June 2017 and is due to be considered by Cabinet and Council for approval in October 2017	The Infill Sites Design Guidance SPG was approved in November 2017	The Infill Sites Design Guidance SPG was approved in November 2017
Analysis		
The Infill Sites Design Guidance SPG was approved by Council on 30 th November 2017 and has been taken into consideration in all planning applications determined since that date. Given this, there is no need to continue to monitor this indicator but the Council will continue to assess the effectiveness of the adopted SPG.		
Recommendations		
No action is required		

Topic Area: Tall Buildings SPG

Relevant LDP Policies: KP5

Indicator reference: OB4 SN17

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Tall Buildings SPG		Failure to adopt SPG within 18 months of adoption of the Plan
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
The Tall Buildings SPG was approved in January 2017	The Tall Buildings SPG was approved in January 2017	The Tall Buildings SPG was approved in January 2017
Analysis		
The SPG was approved by Council on 26 th January 2017 and has been taken into consideration in all planning applications determined since that date. Given this, there is no need to continue to monitor this indicator but the Council will continue to assess the effectiveness of the adopted SPG.		
Recommendations		
No action is required.		

Topic Area: Householder Design Guidance SPG

Relevant LDP Policies: KP5

Indicator reference: OB4 SN18

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Householder Design Guidance SPG		Failure to adopt SPG within 18 months of adoption of the Plan
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
The Residential Design Guidance SPG was approved in January 2017	The Residential Design Guidance SPG was approved in January 2017	The Residential Design Guidance SPG was approved in January 2017
Analysis		
The SPG has been renamed Residential Design Guidance SPG and was approved by Council on 26 th January 2017 and has been taken into consideration in all planning applications determined since that date. Given this, there is no need to continue to monitor this indicator but the Council will continue to assess the effectiveness of the adopted SPG.		
Recommendations		
No action is required		

Topic Area: Public Art SPG

Relevant LDP Policies: KP5

Indicator reference: OB4 SN19

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Public Art SPG		Failure to adopt SPG within 18 months of adoption of the Plan
Performance 1st AMR 1 st April 2016 to 31 st March 2017	Performance 2nd AMR 1 st April 2017 to 31 st March 2018	Performance 3rd AMR 1 st April 2018 to 31 st March 2019
The Public Art SPG is due to be issued for public consultation in March 2018.	The draft Public Art SPG is currently in preparation prior to being reviewed and finalised internally before being issued for public consultation.	It is proposed not to progress a Public Art SPG at this time. Refer to Analysis (below).
Analysis		
<p>Having reviewed the previous public art SPG, it is considered that through the related policies in the Local Development Plan and other existing (Cardiff Public Art Strategy) and recently produced (Public Art Protocol) public art guidance, there is not a need to produce an updated public art SPG at this time.</p> <p>This position will be reviewed annually to monitor if any significant contextual changes occur in the future.</p>		
Recommendations		
<ul style="list-style-type: none"> • Not to progress a Public Art SPG at this time. • To continue to monitor public art to identify any significant contextual changes during the monitoring period. 		

Topic Area: Food, Drink and Leisure Uses SPG

Relevant LDP Policies: R8

Indicator reference: OB4 SN20

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Food Drink and Leisure Uses and Premises for Eating, Drinking and Entertainment in Cardiff City Centre SPG		Failure to adopt SPG within 18 months of adoption of the Plan
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
The SPG was issued for public consultation in June 2017 and is due to be considered by Cabinet and Council for approval in October 2017.	The SPG was approved in November 2017	The SPG was approved in November 2017
Analysis		
The SPG was approved by Council on 30 th November 2017 and has been taken into consideration in all planning applications determined since that date. Given this, there is no need to continue to monitor this indicator but the Council will continue to assess the effectiveness of the adopted SPG.		
Recommendations		
No action required		

Topic Area: Waste Collection and Storage Facilities SPG

Relevant LDP Policies: W1, W2

Indicator reference: OB4 SN21

Contextual Changes: There have been no significant contextual changes relating to

Indicator	Target	Trigger
LOCAL Waste Collection and Storage Facilities SPG		Failure to adopt SPG within 18 months of adoption of the Plan
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
The Waste Collection and Storage Facilities SPG was approved in October 2016	The Waste Collection and Storage Facilities SPG was approved in October 2016	The Waste Collection and Storage Facilities SPG was approved in October 2016
Analysis		
The SPG was approved by Council on 20 th October 2016 and has been taken into consideration in all planning applications determined since that date. Given this, there is no need to continue to monitor this indicator but the Council will continue to assess the effectiveness of the adopted SPG.		
Recommendations		
No action is required		

Topic Area: Flat Conversions SPG

Relevant LDP Policies: H5

Indicator reference: OB4 SN22

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Design Guidance and Standards for Flat Conversions SPG		Failure to adopt SPG within 12 months of adoption of the Plan
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
The Design Guidance and Standards for Flat Conversions SPG is due to be issued for public consultation in March 2018	A draft of the Design Guidance and Standards for Flat Conversions SPG has been prepared and is currently being reviewed / finalised internally prior to being issued for public consultation	The Flat Conversions SPG was approved in March 2019
Analysis		
The SPG was approved by Council on 28 th March 2019 and has been taken into consideration in all planning applications determined since that date. Given this, there is no need to continue to monitor this indicator but the Council will continue to assess the effectiveness of the adopted SPG.		
Recommendations		
No action is required		

Topic Area: Renewable Energy Assessments SPG

Relevant LDP Policies: EN12

Indicator reference: OB4 SN23

Contextual Changes: There have been no significant contextual changes relating to this policy area during the monitoring period.

Indicator	Target	Trigger
LOCAL Renewable Energy Assessments SPG		Failure to adopt SPG within 12 months of adoption of the Plan
Performance 1st AMR 1st April 2016 to 31st March 2017	Performance 2nd AMR 1st April 2017 to 31st March 2018	Performance 3rd AMR 1st April 2018 to 31st March 2019
The Renewable Energy Assessments SPG is due to be issued for public consultation in March 2018	The draft Renewable Energy Assessment SPG is being prepared prior to being reviewed and finalised internally and issued for public consultation	The draft Renewable Energy Assessment SPG is being prepared prior to being reviewed and finalised internally and issued for public consultation
Analysis		
<p>The Council adopted the LDP on the 28th of January 2016. The intention was that the SPG should have been adopted by the end of January 2017.</p> <p>However, progress on the document has been delayed due to the technical nature of the document and the need to assess the implications of new renewable technologies and evolving national guidance on renewables, in combination with limitations of workloads and staffing capacity.</p> <p>Preparatory work on the SPG is ongoing prior to it being reviewed and finalised internally and issued for public consultation. An update on this will be provided in 4th AMR in 2020.</p>		
Recommendations		
<p>Prioritise resources to the delivery of the SPG as per the above timescales, to ensure adoption in 2020.</p>		

6. Sustainability Appraisal Monitoring

Methodology

The Sustainability Appraisal monitoring expands the assessment of the performance of the LDP against the Sustainability Appraisal (SA) Monitoring Objectives. The data collated includes a mix of qualitative and quantitative data with a commentary in the latter column to describe the progress and provide a recommendation.

Indicators may have been amended where there is a data gap to allow for similar information to be collated, the text is italicised to identify indicators where a change has been made. There is also overlap with some LDP indicators, these indicators are marked in bold and coloured green for clarity. This is intended to provide an indication of how the LDP monitoring and SA monitoring are interlinked. A brief commentary is provided although reference should be made to Section 5 LDP Policy Analysis for additional information.

There are a number of SA indicators where information is not published annually, for example those based on the census. The purpose of the monitoring framework is to review changes on an annual basis, as a consequence these are not necessarily going to be useful moving forward in terms of future monitoring. They have however been retained in order to provide a baseline, further work will be undertaken in time for the next AMR to determine whether alternative sources of information are available.

The traffic light rating system used for the LDP Monitoring Indicators has not been taken forward for use with the SA Monitoring. Many of the SA objectives are aspirational. In addition, the LDP alone would not be the only factor that would need to be considered in achieving their aims. The SA Monitoring does not include targets as such, unlike the LDP monitoring, it would therefore prove difficult to interpret the commentary into a traffic light rating. This is the third SA monitoring to be undertaken since the adoption of the LDP and it provides a comparison with the baseline data outlined in the 2017 and 2018 AMRs. Where applicable the direction of change compared to the first and second SA monitoring is included adjacent the data for this monitoring period. This will be utilised to assess the LDPs progression towards meeting the identified sustainable development indicators.

Information contained in the SA monitoring framework in the main relates to a wide range of data produced internally, by various departments of the Council and externally from other organisations. Where data has been sourced externally, a footnote is provided to ensure the data source is easily identifiable.

SA objective	Indicator	Target	Data	Commentary
1. Help deliver equality of opportunity and access for all	The percentage of population in the 100 most deprived wards in Wales	Reduction	12% is the 2015 baseline	The latest Welsh Index of Multiple Deprivation data from 2015 shows that 12% of the population of Cardiff is in the 100 most deprived wards in Wales
	The number of net additional affordable dwellings built	6,646 net affordable units over the remaining Plan period (representing an average of 22.8% of total housing provision)	1,082 (↑)	From 2014/15 to 2018/19 a total of 1,082 affordable dwellings were completed leaving a residue of 5,564 dwellings to be completed over the remaining 7 years to 2026.
	Total number of Gypsy and Traveller pitches for residential accommodation	Net increase	No increase	Work ongoing to identify new site for Gypsy and Traveller pitches.

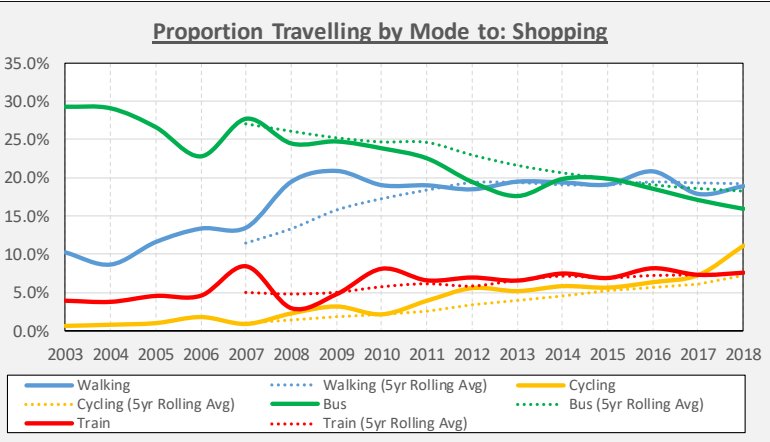
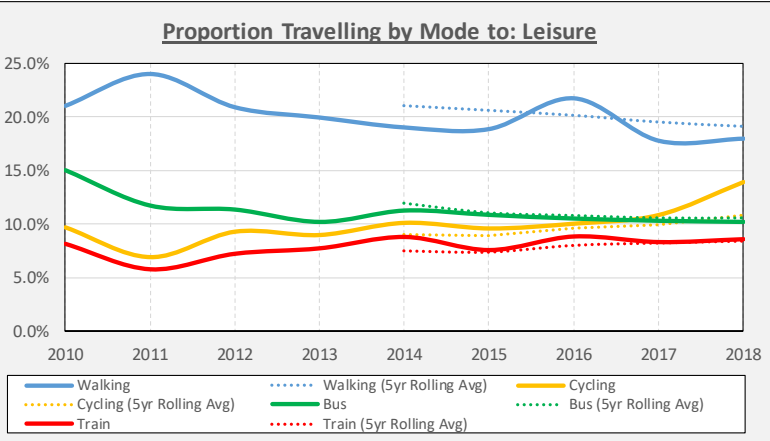
SA objective	Indicator	Target	Data	Commentary
2. Maintain and improve air quality	NO2 levels	40µgm ³	Exceedance's of the 40µgm ³ within the declared AQMAs	The 2015 nitrogen dioxide Council monitoring data shows a number of sites representative of relevant exposure with exceedances of the 40µgm ³ annual mean objective. These sites are predominantly contained within the declared AQMAs. However, there are two monitoring locations (Station Terrace & Ocean Way) which are not located within AQMAs, but it should be noted that annual exceedances are not out of character for these sites and are in locations not representative of relevant exposure.
3. Protect and enhance biodiversity, flora and fauna	Number and extent of designated sites of importance (SACs, SPAs, SSSIs, Ramsars, LNRs and SINCs, ancient woodland)	No loss of area	No loss of area	It is considered that there has been no loss of area as a result of applications permitted within the monitoring period. It is considered that all relevant applications permitted during the monitoring period were policy compliant/compliant subject to conditions/recommendations placed on the permission
	Condition of SSSIs	No reduction in condition	No reduction in condition	It is considered that there has been no reduction in the condition of SSSIs as a result of applications permitted within the monitoring period. It is considered that all relevant applications permitted during the monitoring period were policy compliant/compliant subject to conditions/recommendations placed on the permission.

SA objective	Indicator	Target	Data	Commentary																																																																																	
	Extent of Local Biodiversity Action Plan priority habitats	No reduction in extent		Local Biodiversity Action Plans are not currently being progressed. To be updated once a replacement has been established.																																																																																	
4. Reduce emissions of greenhouse gases that cause climate change and adapt to its effects	Traffic volumes (vehicle-km)	n/a	2015 = 2,927 2016 = 2,978 (↑) +1.7% 2017 = 2,920 (↓) -1.9% 2018 = 2,999 (↑) +2.7%	<p>According to DfT published road traffic statistics data, there has been a significant 2.7% increase in the volume of road traffic between 2017 and 2018, from 2,920 to 2,999 million vehicle-km.</p> <p>Examining the longer term trends as presented in figure SA4.1.1 below, it is clear that historically traffic volumes have been increasing, but that these dipped between around 2008 and 2012, likely due to the economic downturn –</p> <p>Figure SA4.1.1</p> <table border="1"> <caption>Cardiff Traffic Volume Trends (Estimated from Graph)</caption> <thead> <tr> <th>Year</th> <th>Absolute Values (million vehicle-km)</th> <th>Rolling Averages (million vehicle-km)</th> </tr> </thead> <tbody> <tr><td>1993</td><td>2,450</td><td>2,450</td></tr> <tr><td>1994</td><td>2,500</td><td>2,500</td></tr> <tr><td>1995</td><td>2,550</td><td>2,550</td></tr> <tr><td>1996</td><td>2,600</td><td>2,600</td></tr> <tr><td>1997</td><td>2,650</td><td>2,650</td></tr> <tr><td>1998</td><td>2,700</td><td>2,700</td></tr> <tr><td>1999</td><td>2,750</td><td>2,750</td></tr> <tr><td>2000</td><td>2,700</td><td>2,700</td></tr> <tr><td>2001</td><td>2,750</td><td>2,750</td></tr> <tr><td>2002</td><td>2,800</td><td>2,800</td></tr> <tr><td>2003</td><td>2,850</td><td>2,850</td></tr> <tr><td>2004</td><td>2,900</td><td>2,900</td></tr> <tr><td>2005</td><td>2,850</td><td>2,850</td></tr> <tr><td>2006</td><td>2,900</td><td>2,900</td></tr> <tr><td>2007</td><td>2,950</td><td>2,950</td></tr> <tr><td>2008</td><td>2,900</td><td>2,900</td></tr> <tr><td>2009</td><td>2,850</td><td>2,850</td></tr> <tr><td>2010</td><td>2,800</td><td>2,800</td></tr> <tr><td>2011</td><td>2,850</td><td>2,850</td></tr> <tr><td>2012</td><td>2,800</td><td>2,800</td></tr> <tr><td>2013</td><td>2,850</td><td>2,850</td></tr> <tr><td>2014</td><td>2,900</td><td>2,900</td></tr> <tr><td>2015</td><td>2,950</td><td>2,950</td></tr> <tr><td>2016</td><td>2,900</td><td>2,900</td></tr> <tr><td>2017</td><td>2,920</td><td>2,920</td></tr> <tr><td>2018</td><td>2,999</td><td>2,999</td></tr> </tbody> </table>	Year	Absolute Values (million vehicle-km)	Rolling Averages (million vehicle-km)	1993	2,450	2,450	1994	2,500	2,500	1995	2,550	2,550	1996	2,600	2,600	1997	2,650	2,650	1998	2,700	2,700	1999	2,750	2,750	2000	2,700	2,700	2001	2,750	2,750	2002	2,800	2,800	2003	2,850	2,850	2004	2,900	2,900	2005	2,850	2,850	2006	2,900	2,900	2007	2,950	2,950	2008	2,900	2,900	2009	2,850	2,850	2010	2,800	2,800	2011	2,850	2,850	2012	2,800	2,800	2013	2,850	2,850	2014	2,900	2,900	2015	2,950	2,950	2016	2,900	2,900	2017	2,920	2,920	2018	2,999	2,999
Year	Absolute Values (million vehicle-km)	Rolling Averages (million vehicle-km)																																																																																			
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SA objective	Indicator	Target	Data	Commentary																																												
				<p>However, since 2012 traffic volume has been increasing, and has now returned to almost the level of the historic high experienced in 2014.</p> <p>In setting the above in context with the other UK Core Cities, as presented in the table in figure SA4.1.2 below; while Birmingham, Leeds and Glasgow may have far higher volumes of traffic flow than Cardiff, nevertheless it is evident that Cardiff has experienced the highest level of recent growth of any of these –</p> <p>Figure SA4.1.2</p> <table border="1"> <thead> <tr> <th>Core City:</th> <th>2017</th> <th>2018</th> <th>Change (Rank)</th> </tr> </thead> <tbody> <tr> <td>Birmingham</td> <td>5,826</td> <td>5,850</td> <td>0.4% (5th)</td> </tr> <tr> <td>Bristol</td> <td>2,356</td> <td>2,323</td> <td>-1.4% (10th)</td> </tr> <tr> <td>Cardiff</td> <td>2,920</td> <td>2,999</td> <td>2.7% (1st)</td> </tr> <tr> <td>Glasgow</td> <td>3,632</td> <td>3,615</td> <td>-0.5% (7th)</td> </tr> <tr> <td>Leeds</td> <td>6,736</td> <td>6,719</td> <td>-0.3% (6th)</td> </tr> <tr> <td>Liverpool</td> <td>2,205</td> <td>2,175</td> <td>-1.4% (9th)</td> </tr> <tr> <td>Manchester</td> <td>2,694</td> <td>2,662</td> <td>-1.2% (8th)</td> </tr> <tr> <td>Newcastle</td> <td>1,750</td> <td>1,784</td> <td>1.9% (2nd)</td> </tr> <tr> <td>Nottingham</td> <td>1,534</td> <td>1,559</td> <td>1.6% (3rd)</td> </tr> <tr> <td>Sheffield</td> <td>2,664</td> <td>2,705</td> <td>1.5% (4th)</td> </tr> </tbody> </table> <p>In considering the effect of the above increase in traffic upon Cardiff's network, according to TomTom's Traffic Index; congestion in the city has increased by 1% in the past year, with</p>	Core City:	2017	2018	Change (Rank)	Birmingham	5,826	5,850	0.4% (5 th)	Bristol	2,356	2,323	-1.4% (10 th)	Cardiff	2,920	2,999	2.7% (1 st)	Glasgow	3,632	3,615	-0.5% (7 th)	Leeds	6,736	6,719	-0.3% (6 th)	Liverpool	2,205	2,175	-1.4% (9 th)	Manchester	2,694	2,662	-1.2% (8 th)	Newcastle	1,750	1,784	1.9% (2 nd)	Nottingham	1,534	1,559	1.6% (3 rd)	Sheffield	2,664	2,705	1.5% (4 th)
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				<p>a total of 28% of total travel time now accounted for by congestion, and up to 57% during peak times specifically, in recognition that increased traffic congestion results in increased emissions and reduced air quality.</p> <p>Meanwhile, in comparing Cardiff with the other regional authorities as shown in the table in figure SA4.1.3 below, it can be seen that only Torfaen has experienced a higher level of traffic growth than Cardiff –</p> <p>Figure SA4.1.3</p> <table border="1"> <thead> <tr> <th>Regional Authority:</th> <th>2017</th> <th>2018</th> <th>Change (Rank)</th> </tr> </thead> <tbody> <tr> <td>Blaenau Gwent</td> <td>411</td> <td>409</td> <td>-0.5% (10th)</td> </tr> <tr> <td>Bridgend</td> <td>1,383</td> <td>1,407</td> <td>1.7% (3rd)</td> </tr> <tr> <td>Caerphilly</td> <td>1,146</td> <td>1,148</td> <td>0.2% (8th)</td> </tr> <tr> <td>Cardiff</td> <td>2,920</td> <td>2,999</td> <td>2.7% (2nd)</td> </tr> <tr> <td>Merthyr Tydfil</td> <td>406</td> <td>413</td> <td>1.7% (4th)</td> </tr> <tr> <td>Monmouthshire</td> <td>1,466</td> <td>1,483</td> <td>1.2% (6th)</td> </tr> <tr> <td>Newport</td> <td>1,949</td> <td>1,946</td> <td>-0.2% (9th)</td> </tr> <tr> <td>Rhondda Cynon Taf</td> <td>2,113</td> <td>2,148</td> <td>1.7% (5th)</td> </tr> <tr> <td>Torfaen</td> <td>615</td> <td>641</td> <td>4.2% (1st)</td> </tr> <tr> <td>Vale of Glamorgan</td> <td>1,042</td> <td>1,051</td> <td>0.9% (7th)</td> </tr> </tbody> </table>	Regional Authority:	2017	2018	Change (Rank)	Blaenau Gwent	411	409	-0.5% (10 th)	Bridgend	1,383	1,407	1.7% (3 rd)	Caerphilly	1,146	1,148	0.2% (8 th)	Cardiff	2,920	2,999	2.7% (2 nd)	Merthyr Tydfil	406	413	1.7% (4 th)	Monmouthshire	1,466	1,483	1.2% (6 th)	Newport	1,949	1,946	-0.2% (9 th)	Rhondda Cynon Taf	2,113	2,148	1.7% (5 th)	Torfaen	615	641	4.2% (1 st)	Vale of Glamorgan	1,042	1,051	0.9% (7 th)
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	% of people walking, cycling, travelling by bus and train for	n/a	Work – Walking: 2016 = 17.9%	Historic trends for walking, cycling, bus, and train for the main journey purposes are provided in figures SA4.2.1-4 below, based on results of the Ask Cardiff Survey –																																												

SA objective	Indicator	Target	Data	Commentary
	each journey purpose		2017 = 14.0% (↓) -3.9% 2018 = 15.0% (↑) +1% Cycling: 2016 = 11.3% 2017 = 16.5% (↑) +5.2% 2018 = 20.3% (↑) +3.8% Bus: 2016 = 10.0% 2017 = 9.7% (↓) - 0.3% 2018 = 10.6% (↑) +0.9% Train: 2016 = 7.6% 2017 = 6.8% (↓) - 0.8% 2018 = 6.4% (↓) - 0.4% Education – Walking: 2016 = 27.6% 2017 = 23.3% (↓) -4.3%	<p>Figure SA4.2.1</p> <p>Figure SA4.2.2</p>

SA objective	Indicator	Target	Data	Commentary
			<p>2018 = 26.6% (↑) +3.3%</p> <p>Cycling: 2016 = 9.6% 2017 = 12.8% (↑) +3.2%</p> <p>2018 = 14.0% (↑) +1.2%</p> <p>Bus: 2016 = 12.8% 2017 = 10.7% (↓) -2.1%</p> <p>2018 = 10.5% (↓) -0.2%</p> <p>Train: 2016 = 5.6% 2017 = 5.2% (↓) - 0.4%</p> <p>2018 = 4.7% (↓) - 0.5%</p> <p>Shopping (City Centre) –</p> <p>Walking: 2016 = 18.4% 2017 = 16.1% (↓) -2.3%</p> <p>2018 = 16.9% (↑) +0.8%</p>	<p>Figure SA4.2.3</p>  <p>Figure SA4.2.4</p> 

SA objective	Indicator	Target	Data	Commentary
			Cycling: 2016 = 6.6% 2017 = 7.8% (↑) +1.2% 2018 = 12.2% (↑) +4.4% Bus: 2016 = 26.7% 2017 = 25.3% (↓) -1.4% 2018 = 23.5% (↓) -1.8% Train: 2016 = 11.3% 2017 = 11.0% (↓) -0.3% 2018 = 11.3% (↑) +0.3% Shopping (Other) – Walking: 2016 = 23.5% 2017 = 19.9% (↓) -3.6% 2018 = 21.1% (↑) +1.2% Cycling: 2016 = 6.0%	<p>As discussed for OB1 EC17-18, there has been a continued decline in Bus use across all journey purposes, and a small decline in the proportion of journeys to Work and Education made by Train, albeit that the trend for rail overall has been increasing.</p> <p>Meanwhile, having previously dipped, the proportion of those Walking has recently increased, while Cycling continues to experience significant year-on-year growth.</p> <p>In consideration of the sustainable modes used the most for each journey purpose; Cycling is most prominent for journeys to Work, while Bus is the most utilised for City Centre Shopping. Meanwhile Walking represents the largest majority of sustainable journeys for Shopping Elsewhere, for Education and for Leisure.</p>

SA objective	Indicator	Target	Data	Commentary
			2017 = 6.6% (↑) +0.6% 2018 = 9.7% (↑) +3.1% Bus: 2016 = 8.9% 2017 = 7.2% (↓) - 1.7% 2018 = 7.1% (↓) - 0.1% Train: 2016 = 4.4% 2017 = 2.7% (↓) - 1.7% 2018 = 3.2% (↑) +0.5% Leisure – Walking: 2016 = 21.8% 2017 = 17.8% (↓) -4.0% 2018 = 18.0% (↑) +0.2% Cycling: 2016 = 10.0% 2017 = 10.8% (↑) +0.8%	

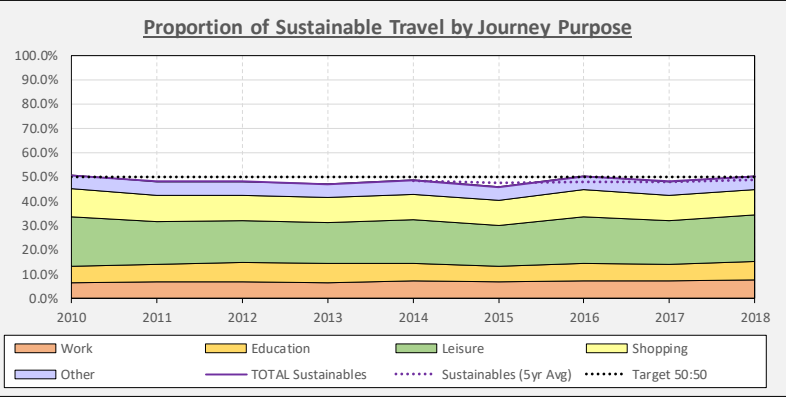
SA objective	Indicator	Target	Data	Commentary
			2018 = 13.9% (↑) +3.1% Bus: 2016 = 10.5% 2017 = 10.3% (↓) -0.2% 2018 = 10.1% (↓) -0.2% Train: 2016 = 8.8% 2017 = 8.3% (↓) - 0.5% 2018 = 8.5% (↑) +0.2%	
	No. residents working in Cardiff, no. people commuting out of Cardiff, no. people commuting into Cardiff	n/a	Residents Working in Cardiff: 2015 = 131,400 2016 = 139,500 (↑) +6% 2017 = 139,600 () +0% 2018 = 157,400 (↑) +12% Residents Commuting Out of Cardiff: 2015 = 34,000	<p>According to data from the Annual Population Survey as published by Welsh Government, there are currently 255,700 people working in Cardiff, representing a substantial 12% increase from the 228,400 of the previous year.</p> <p>Of this total, around 157,400 are resident in Cardiff (with a similar 12% increase between 2017 and 2018), with the remaining 98,300 having travelled in from outside (all modes), compared with 88,800 the previous year, i.e. an increase of 11%.</p> <p>Meanwhile, around 30,300 residents currently commute outside of the authority, this represents a 7% decrease from 32,600 recorded in 2017.</p>

SA objective	Indicator	Target	Data	Commentary																																																				
			2016 = 27,700 (↓) -19% 2017 = 32,600 (↑) +18% 2018 = 30,300 (↓) -7%	The number and proportion of those travelling into Cardiff to work, by origin, is provided in the table in figure SA4.3.1 below – Figure SA4.3.1																																																				
			Commuting into Cardiff from Outside: 2015 = 84,400 2016 = 89,700 (↑) +6% 2017 = 88,800 (↓) -1% 2018 = 98,300 (↑) +11%	<table border="1"> <thead> <tr> <th>Origin:</th> <th>2017</th> <th>2018</th> <th>Change</th> </tr> </thead> <tbody> <tr> <td>Blaenau Gwent</td> <td>1,100 (0.5%)</td> <td>1,900 (1%)</td> <td>+73% (↑)</td> </tr> <tr> <td>Bridgend</td> <td>7,100 (3%)</td> <td>8,200 (3%)</td> <td>+15% (↑)</td> </tr> <tr> <td>Caerphilly</td> <td>11,600 (5%)</td> <td>16,400 (6%)</td> <td>+41% (↑)</td> </tr> <tr> <td>Cardiff (Internal)</td> <td>139,600 (61%)</td> <td>157,400 (62%)</td> <td>+13% (↑)</td> </tr> <tr> <td>Merthyr Tydfil</td> <td>2,900 (1%)</td> <td>2,900 (1%)</td> <td>0% ()</td> </tr> <tr> <td>Monmouthshire</td> <td>2,800 (1%)</td> <td>2,100 (1%)</td> <td>-25% (↓)</td> </tr> <tr> <td>Newport</td> <td>7,200 (3%)</td> <td>8,400 (3%)</td> <td>+17% (↑)</td> </tr> <tr> <td>Rhondda Cynon Taf</td> <td>18,900 (8%)</td> <td>22,000 (9%)</td> <td>+16% (↑)</td> </tr> <tr> <td>Vale of Glamorgan</td> <td>21,600 (10%)</td> <td>22,200 (9%)</td> <td>+3% (↑)</td> </tr> <tr> <td>Torfaen</td> <td>3,500 (2%)</td> <td>2,900 (1%)</td> <td>-17% (↓)</td> </tr> <tr> <td>TOTAL From Region (excl. Cardiff)</td> <td>76,700 (34%)</td> <td>87,000 (34%)</td> <td>+13% (↑)</td> </tr> <tr> <td>TOTAL From Outside Region</td> <td>12,100 (5%)</td> <td>11,300 (4%)</td> <td>-7% (↓)</td> </tr> </tbody> </table>	Origin:	2017	2018	Change	Blaenau Gwent	1,100 (0.5%)	1,900 (1%)	+73% (↑)	Bridgend	7,100 (3%)	8,200 (3%)	+15% (↑)	Caerphilly	11,600 (5%)	16,400 (6%)	+41% (↑)	Cardiff (Internal)	139,600 (61%)	157,400 (62%)	+13% (↑)	Merthyr Tydfil	2,900 (1%)	2,900 (1%)	0% ()	Monmouthshire	2,800 (1%)	2,100 (1%)	-25% (↓)	Newport	7,200 (3%)	8,400 (3%)	+17% (↑)	Rhondda Cynon Taf	18,900 (8%)	22,000 (9%)	+16% (↑)	Vale of Glamorgan	21,600 (10%)	22,200 (9%)	+3% (↑)	Torfaen	3,500 (2%)	2,900 (1%)	-17% (↓)	TOTAL From Region (excl. Cardiff)	76,700 (34%)	87,000 (34%)	+13% (↑)	TOTAL From Outside Region	12,100 (5%)	11,300 (4%)	-7% (↓)
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				<table border="1"> <tr> <td>TOTAL Commuting In</td> <td>88,800 (39%)</td> <td>98,300 (38%)</td> <td>+11% (↑)</td> </tr> <tr> <td>TOTAL Working in Cardiff</td> <td>228,400 (100%)</td> <td>255,700 (100%)</td> <td>+12% (↑)</td> </tr> </table> <p>As can be seen from figure SA4.3.1 above, in total there are now 87,000 (34%) travelling into Cardiff from elsewhere in the Southeast Wales region, representing a substantial 13% increase from last year.</p> <p>The most significant flows from the region (in ranked order) are from the following – Vale of Glamorgan (22,000 or 9%), Rhondda Cynon Taf (22,000 or 9%), Caerphilly (16,400 or 6%), Newport (8,400 or 3%), and Bridgend (8,200 or 3%).</p> <p>While the volume has increased significantly from - Blaenau Gwent (+73%), Caerphilly (+41%), Newport (+17%), Rhondda Cynon Taf (16%), and Bridgend (15%); meanwhile the volume has decreased from - Monmouthshire (-25%) and Torfaen (-17%).</p>	TOTAL Commuting In	88,800 (39%)	98,300 (38%)	+11% (↑)	TOTAL Working in Cardiff	228,400 (100%)	255,700 (100%)	+12% (↑)
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	Modal split	At least 50% of all trips on Cardiff's transport network made by sustainable modes by the end of the Plan period in 2026	Absolute Values: 2015 = 46.0% 2016 = 50.3% (↑) +4.3% 2017 = 48.1% (↓) -2.2%	<p>Travel by mode is recorded each year in the Ask Cardiff Survey for the following journey purposes – Work, Education, Shopping (City Centre), Shopping (Other), and Leisure.</p> <p>However this does not take into account business-related journeys, escort journeys which are not education based, or journeys for personal business. Therefore, in order to account for these unobserved journey purposes, it is necessary to infill with</p>								

SA objective	Indicator	Target	Data	Commentary
			2018 = 50.4% (↑) +2.3% 5yr Rolling Averages: 2015 = 47.6% 2016 = 48.0% (↑) + 0.4% 2017 = 48.0% () +0% 2018 = 48.7% (↑) +0.7%	<p>data from the National Travel Survey (NTS), as published annually by the DfT in Table NTS0409.</p> <p>This same NTS dataset is also used to relatively proportion each journey purpose such as to arrive at a single figure for use of sustainable modes for all journeys.</p> <p>The resulting figures show that as of 2018, 50.4% of all journeys are now being made by sustainable modes, a 2.3% increase from 2017.</p> <p>While the 50% mode-split target may appear to have already been met in terms of the absolute value, nevertheless the 5yr rolling average indicates that Cardiff still has some way to go in achieving this, with 48.7% of all journeys being made by sustainable modes.</p> <p>It should be noted that significant efforts shall be required in order to achieve and maintain the 50:50 by 2026, in the face of the increased pressure from a 12% rise in population projected between 2016 and 2026, and with a corresponding growth in the number of trips; as increasing the numbers of people travelling sustainably may not in itself be enough if car use rises disproportionately to this.</p> <p>A breakdown of the proportions of total trips which travel sustainably by each journey purpose, based on the methodology described previous, is provided in the table in figure SA4.4.1 below –</p>

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				<p data-bbox="1227 272 1451 308">Figure SA4.4.2</p>  <p data-bbox="1227 756 2132 871">Figure SA4.4.2 above demonstrates that the largest proportion of sustainable journeys is for Leisure (18.9%), followed by Shopping (10.7%), Work (7.9%), Education (7.5%) and 'Other' (6%).</p> <p data-bbox="1227 898 2132 1050">Currently only 'Other' trips (comprising 'Business', 'Other Escorting' and 'Personal') are failing to achieve the 50% sustainable target, at only 25%. This is in spite of 'Other' trips accounting for a significant 21% of the overall demand.</p> <p data-bbox="1227 1077 2132 1273">It should also be noted that the above figures relate to the average across the day. However levels of sustainable travel varies during the day, yet the greatest pressures are known to occur during commuter peak periods, when a higher proportion of movements are made by car.</p>

SA objective	Indicator	Target	Data	Commentary
				Hence the peaks should be the main period targeted for interventions, in particular during the AM, where the dominant flow is inbound towards the centre of Cardiff.
	Delivery of transport infrastructure as part of key strategic sites	As per the LDP and site masterplans	<p>S106 Transport Funding Contributions (subject to schedule) for the key strategic sites are given as follows –</p> <p>SSA. Cardiff Central Enterprise Zone:</p> <p>18/01705/ MJR – Cardiff Transport Interchange (now being delivered by TfW)</p> <p>SSC. NW Cardiff:</p>	<p>Construction works are on-going and initial occupation underway at SSF. Churchlands in NE Cardiff ('Plas Ty Draw' in Lisvane), SSC. Plasdŵr in NW Cardiff ('Goitre Fach', 'Parc Plymouth' north of Llantrisant Road, and 'Cae St Fagans' south of Pentreban Road). However, apart from construction of the new signalised junction arrangement with associated bus lane nearing completion at Pentwyn Road/Ty-Draw Road, otherwise no significant infrastructure is in place as of yet in relation to these.</p> <p>Meanwhile, construction and occupation of SSG. St Edeyrns ('St Edeyrns Village') is at a more advanced stage, with the following infrastructure currently having been delivered –</p> <ul style="list-style-type: none"> • New toucan crossing facilities on the north and south arms of the A4232 Pentwyn Link/Heol Pontprennau Roundabout; • The provision of a shared cycle footway on the western side of the A4232 Pentwyn Link between the A48 and Heol Pontprennau Roundabout; • Access road built to 'spine road' standard, including provision for a future outbound bus lane leading to the Heol Pontprennau Roundabout; • 40mph speed limit imposed on the A4232 Pentwyn Link; • Temporary bus turning circle and new bus stops operational, in use by service X59 (CGBP).

SA objective	Indicator	Target	Data	Commentary
			14/02157/ MJR – Land North & South of Llantrisant Road £605,000	In total, the following sustainable infrastructure and initiatives have been agreed to be delivered as part of the S106 agreements for the key strategic sites. These will help to reduce greenhouse gas emissions through encouraging modal shift from private car to sustainable travel modes –
			14/02733/ MJR – Plasdŵr £26.03 million	SSA. Cardiff Central Enterprise Zone 18/01705/MJR - Transport Interchange: <ul style="list-style-type: none"> • Integrated Transport Hub, based on 14 bus stands with DIDO arrangement (subject to imminent signing off S106) • 50x office cycle parking spaces; 160x apartment cycle parking spaces; and a total of 216x public cycling parking spaces, including 36x Nextbike spaces and 60x spaces on-street (subject to imminent signing off S106)
			16/00106/ MJR - Goitre Fach Farm £1.29 million	SSC. NW Cardiff
			14/02188/ MJR - South of Pentrebane £1.33 million	14/02157/MJR - Land North & South of Llantrisant Road: <ul style="list-style-type: none"> • Cycle parking, including at Radyr Station • 3x new priority access junctions on Newport Road, with footways, cycleways & crossing facilities • New 3m wide eastbound bus lane on Llantrisant Road with associated bus stops • New traffic signal control junction at Llantrisant Road/Heol Isaf, with Toucan facilities on all arms, bus
			SSD. North of J33:	

SA objective	Indicator	Target	Data	Commentary
			<p>14/00852/D CO – North of J33 £2.25 million</p> <p>SSF. NE Cardiff:</p> <p>14/02891/ MJR – Churchland s £1.6-1.7 million</p> <p>SSG. St Edeyrns:</p> <p>13/00578/D CO – St Edeyrns £2.79 million</p>	<p>lane on southern arm, and associated footways & cycleways</p> <ul style="list-style-type: none"> • New raised roundabout with zebra crossing on Llantrisant Road • 2x new Toucan crossing facilities • Subsidy to provide extension to existing bus services for 2 years between Danescourt and Clos Parc Radyr • Provision of 1-year free bus pass & £50 cycle voucher to first residential occupiers <p>14/02733/MJR - Plasdŵr:</p> <ul style="list-style-type: none"> • New traffic control junction at Llantrisant Road/Crofft-yGenau, with Toucan facilities on all arms (J1) • New tabled zebra crossing on Rhydlafer Drive, with footway widening & shared use • Safeguarding of corridor for the provision of northbound bus lane on Crofft-y-Genau Road • Spine-road treatment on Crofft-y-Genau Road • New traffic control access junction on Llantrisant Road, with cycle feeder lanes & dropped kerbs (J2) • Safeguarding of land for the provision of a northbound bus lane at the southern arm to J2 • New traffic control junction at Llantrisant Road/Clos Park Radyr, with formal crossings to link cycle tracks & cycle feeder lanes (J3) • New northbound bus lane at the southern arm to J3

SA objective	Indicator	Target	Data	Commentary
				<ul style="list-style-type: none"> • 3x new priority access junctions on Llantrisant Road, with crossing facilities, footways, cycleways, shared use & raised tables (J4-6) • New traffic control junction at Pentrebane Road/Waterhall Road, with associated bidirectional 3m wide cycle lanes & Toucan crossings on all arms (J11) • New segregated cycling facility between Amethyst Road and J11 • 2x new priority access junctions on Pentrebane Road, with associated bidirectional 3m wide cycle lanes, crossing facilities & dropped kerbs (J12-13) • Safeguarding of land for the provision of a southbound bus lane at the northern arm to J12 • Realignment of Crofft-y-Genau Road into Pentrebane Road, providing cyclist & pedestrian access to St Brides Road (J14) • Stopping up of Pentrebane Road, with provision of shared use link • ANPR traffic gate to limit tidal flow access to Crofft-y-Genau Road • 2x new priority access junctions on Crofft-y-Genau Road, with associated ANPR traffic gate & access flared for bus movements (J15-16) • Bridge Road 270m southbound bus lane, shared cycle footway & signalised junction with Llantrisant Road • Cardiff Road/Fairwater Road upgrade of traffic signals • Cardiff Road cycling & bus stop improvements between Ely Road and Fairwater Road

SA objective	Indicator	Target	Data	Commentary
				<ul style="list-style-type: none"> • Provision of segregated off-road cycleway on disused rail line • 90m Southbound bus lane on Fairwater Road approach to St Fagans Road • Heol Isaf pedestrian & cycle improvements • Llantrisant Road segregated cycleway on southern side between Danescourt Station and Cardiff Road • 300m eastbound bus lane & shared cycle footway on southern side of St Fagans Road • St Fagans Road safety improvements • 100m westbound bus lane on Waun-Gron Road • A48 Western Avenue/Waun-Gron Road junction improvements • Amethyst Road cycle street between Plasmawr Road and Keyston Road • Cardiff Road northbound bus lane improvements at Western Avenue junction • East-West cycle primary route, Llandaff • New traffic control junction at Llantrisant Road/Danescourt Road East • New traffic control junction at Llantrisant Road/Danescourt Road West • Llantrisant Road shared cycleway footway between Danescourt Road East/West • Llantrisant Road shared cycleway footway between Waterhall Road and Heol Aradur • Pwllmelin Road and Fairwater Road traffic calming & cycling improvements • Radyr Court Road traffic calming of cycle route

SA objective	Indicator	Target	Data	Commentary
				<ul style="list-style-type: none"> • Radyr Court Road pedestrian & cycling safety and access improvements, with zebra crossing on Bridge Road • Radyr Court Road upgrade of cycle link to Llantrisant Road • Western Avenue to Ely Roundabout southbound traffic pre-signals • Western Avenue/Ely Road (East) junction Toucan crossing • Western Avenue to Waun-Gron Road shared cycle footway on west side • Cardiff Road/Palace Road junction, pedestrian & traffic calming improvements • Provision of £12 million bus subsidies, to provide services linking the development, Pentrebane, Radyr, Cardiff City Centre (via Llantrisant Road & Pentrebane Road), Pontyclun/Talbot Green, Heath Hospital, J33 Park & Ride, Cardiff West Interchange, Cardiff Bay (via Ely Mill), and Whitchurch (via Llandaff) <p>16/00106/MJR - Goitre Fach Farm:</p> <ul style="list-style-type: none"> • Cycle parking • New traffic signal access junction at Llantrisant Road with Toucan & Puffin crossing facilities • Realignment of segregated cycleway on Llantrisant Road • New public transport, pedestrian & cycle facilities along Llantrisant Road • New raised crossing facility on Llantrisant Road

SA objective	Indicator	Target	Data	Commentary
				<ul style="list-style-type: none"> • New spine-road with 2x 2m wide footway, 3m wide segregated cycleway, and 6.3m wide carriageway • Bus contribution to Llantrisant Road (subject to occupation) • Cycling measures on A4119 between Waterhall Road roundabout and Penhill Road • Provision of 1-year free bus pass & £50 cycle voucher to first residential occupiers <p>14/02188/MJR - South of Pentrebane:</p> <ul style="list-style-type: none"> • New Pentrebane Road priority access junction to accommodate safe & convenient 2-way bus movement, with associated footway & cycle provision • Provision of bus stop & bus turning circle, with 3m wide segregated cycleways, 2m wide footways & 6.1m carriageways to promote sustainable travel • Secure cycle parking, including covered cycle parking at Fairwater Station & at key bus stops • Improvements to Llantrisant Road & Pentrebane Road as part of the North West Corridor programme • Bus contribution (in accordance with trigger points & instalments) • Provision of 1-year free bus pass & £50 cycle voucher to first residential occupiers <p>SSD. North of J33</p> <p>14/00852/DCO - North of J33:</p>

SA objective	Indicator	Target	Data	Commentary
				<ul style="list-style-type: none"> • 1,000 space Park & Ride facility, with 3/4 (750 spaces) accessed from J33 & 1/4 (250 spaces) accessed from A4119; Initial Phase 1 to be 500 spaces • Bus gate between the M4 and Llantrisant Road • The provision of bus services serving the car park for a period of 3 years, providing a minimum service frequency of four buses per hour between 07:00-19:00, utilising £2.25 million bus service contribution • New junctions on Llantrisant Road, including crossing facilities, associated cycle & footway provision, and bus lanes • On-site public transport infrastructure, bus & cycle lanes <p>SSF. NE Cardiff</p> <p>14/02891/MJR – Churchlands:</p> <ul style="list-style-type: none"> • Widening of Pentwyn Road to provide an eastbound bus lane between Peppermint Drive and Pentwyn Drive • New signaled junction on Pentwyn Drive • New cycle route (1) to be provided linking site A48 Eastern Avenue via Meadow Close • New cycle route (2) to be provided along Cyncoed Road • Bus improvements on A48 Eastern Avenue (between Pentwyn & Pontprennau) & A4232 Pentwyn Link (northbound to J33) • Provision of bus services linking to Heath Hospital

SA objective	Indicator	Target	Data	Commentary
				<ul style="list-style-type: none"> • Provision of bus service linking to City Centre via Cardiff East Park & Ride • Phase 2 bus priority infrastructure • Phase 3 bus priority infrastructure <p>S.S.G. St Edeyrns</p> <p>13/00578/DCO - St Edeyrns:</p> <ul style="list-style-type: none"> • Provision of missing link to Rhymney Trail, south of A48 between Pentwyn Link Interchange and development, including upgrade of A48 subway • Cycle parking spaces • Investigation & provision of a northbound bus lane on A4232 • Bus service extension from the development to City Centre serving Church Road and St Mellons Road • Investigation & provision of bus service extension on A48 from A4232 • A scheme to demonstrate effective operation of Heol Pontpennau Roundabout, including bus priority measures, Toucan crossing facilities, and associated pedestrian & cyclist provision • Spine-road treatment on access road, including the provision of bus lane • Widening of existing footways linking the Toucan crossing and Heol Pontpennau signalised crossing

SA objective	Indicator	Target	Data	Commentary
				<ul style="list-style-type: none"> • Scheme to provide shared path south of Heol Pontprennau Roundabout, providing direct traffic-free link to A48 Interchange with Church Road • Scheme to reduce the speed limit on Pentwyn Link towards J30 from 50mph to 40mph • Scheme to prevent vehicular through access via St Mellons Road and Bridge Road, with the provision of bus gates at both ends • Provision of a new bridge across the River Rumney for pedestrians & cyclists to St Mellons
	Permissions granted for highly vulnerable development in C1 and C2 flood risk areas	0	2	<p>Two applications were granted for highly vulnerable development in C1 flood risk areas that did not meet all TAN15 tests.</p> <p>Both these applications related to the conversion and extension of existing and adjoining properties in the Riverside area of the city to flats and Natural Resources Wales had objected stating the depth of flooding at ground floor level would be greater than 600 metres and therefore did not meet the tolerable limits set out in TAN15 (Section A1.14). In determining these applications the Council considered that it would be unreasonable to refuse planning permission on this issue as the proposed flats would be maisonette units with no bedrooms at ground floor, and occupants would be able to seek refuge at first floor level during a flood event. Furthermore, there would be no increase in the potential total number of occupants as the proposed number of</p>

SA objective	Indicator	Target	Data	Commentary
				<p>bedrooms would be the same as the total amount of bedrooms in the existing dwelling.</p> <p>Given this it is considered these two applications raise particular issues that need separate consideration and are not related to the performance of Policy EN14 which is functioning effectively as evidenced by the fact that flood risk has been considered as a key consideration in all the applications submitted for highly vulnerable development in Zone C1.</p>
5. Protect and enhance historic and cultural heritage	Number of listed buildings, conservation areas, etc.	No reduction	No reduction	There has been no reduction in the number of local, national or international designations as a result of applications approved during the monitoring period. It is considered that all relevant applications permitted during the monitoring period were policy compliant/compliant subject to conditions/recommendations placed on the permission.
6. Help deliver the growth of a sustainable and diversified economy	Net job creation over the remaining Plan period	40,000 net additional jobs over plan period, 20,900 between 2006 and 2015	24,000 since 2009 (↑)	Total jobs in Cardiff - 2014,000 in 2016 (latest Nomisweb.co.uk figures, May 2017). This compares to an equivalent figure from 2009 of 190,000 jobs in Cardiff which represents an 24,000 increase in jobs over that period.
7. Improve health and well-being	Delivery of community infrastructure as part of key development sites			As of August 2019, planning permission(s) have been granted at Strategic Sites C (North West Cardiff), D (North of Junction 33), F (North East Cardiff – West of Pontprennau) and G (East of Pontprennau Link Road). Associated S106 agreements link to infrastructure provision identified through policies KP2 (A-H). To date, construction work has commenced at Sites C, D, F, and G and the delivery of infrastructure provision identified through the associated S106 agreements will be monitored as

SA objective	Indicator	Target	Data	Commentary																																																															
				schemes progress over the coming years.																																																															
	% of journeys made by walking/cycling	Increase	<p>Work: 2015 = 26.6% 2016 = 29.2% (↑) +2.6% 2017 = 30.6% (↑) +1.4% 2018 = 35.3% (↑) +4.7%</p> <p>Education: 2015 = 31.5% 2016 = 37.2% (↑) +5.7% 2017 = 36.1% (↓) -1.1% 2018 = 40.6% (↑) +4.5%</p> <p>Shopping (City Centre): 2015 = 22.4% 2016 = 25.0% (↑) +2.6% 2017 = 23.9% (↓) -1.1% 2018 = 29.2% (↑) +5.3%</p> <p>Shopping (Other):</p>	<p>The proportion of journeys made by active travel modes (i.e. walking and cycling) for each journey purpose is presented in the table in figure SA4.5.1 below –</p> <p>Figure SA4.5.1</p> <table border="1"> <thead> <tr> <th rowspan="2">Journey Purpose</th> <th colspan="2">Walking</th> <th colspan="2">Cycling</th> <th colspan="3">Walking & Cycling</th> </tr> <tr> <th>2017</th> <th>2018</th> <th>2017</th> <th>2018</th> <th>2017</th> <th>2018</th> <th>Change</th> </tr> </thead> <tbody> <tr> <td>Work</td> <td>14%</td> <td>15%</td> <td>17%</td> <td>20%</td> <td>31%</td> <td>35%</td> <td>+4.7%</td> </tr> <tr> <td>Education</td> <td>23%</td> <td>27%</td> <td>13%</td> <td>14%</td> <td>36%</td> <td>41%</td> <td>+4.5%</td> </tr> <tr> <td>Shopping (CC)</td> <td>16%</td> <td>17%</td> <td>8%</td> <td>12%</td> <td>24%</td> <td>29%</td> <td>+5.3%</td> </tr> <tr> <td>Shopping (Other)</td> <td>20%</td> <td>21%</td> <td>7%</td> <td>10%</td> <td>26%</td> <td>31%</td> <td>+4.3%</td> </tr> <tr> <td>Leisure</td> <td>18%</td> <td>18%</td> <td>11%</td> <td>14%</td> <td>29%</td> <td>32%</td> <td>+3.3%</td> </tr> <tr> <td>ALL Journeys</td> <td>18%</td> <td>19%</td> <td>9%</td> <td>11%</td> <td>27%</td> <td>30%</td> <td>+3.2%</td> </tr> </tbody> </table> <p>The above demonstrates a general increase in the proportion of journeys being made by walking and cycling, both individually and combined, and across each of the journey purposes; the increase ranging between 3.3% and 4.7%.</p> <p>The possible reasons for the above changes in walking and cycling are provided for OB1 EC14 and OB1 EC15, respectively.</p>	Journey Purpose	Walking		Cycling		Walking & Cycling			2017	2018	2017	2018	2017	2018	Change	Work	14%	15%	17%	20%	31%	35%	+4.7%	Education	23%	27%	13%	14%	36%	41%	+4.5%	Shopping (CC)	16%	17%	8%	12%	24%	29%	+5.3%	Shopping (Other)	20%	21%	7%	10%	26%	31%	+4.3%	Leisure	18%	18%	11%	14%	29%	32%	+3.3%	ALL Journeys	18%	19%	9%	11%	27%	30%	+3.2%
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SA objective	Indicator	Target	Data	Commentary
			2015 = 27.5% 2016 = 29.5% (↑) +2.0% 2017 = 26.5% (↓) -3.0% 2018 = 30.8% (↑) +4.3% Leisure: 2015 = 28.5% 2016 = 31.8% (↑) +3.3% 2017 = 28.6% (↓) -3.2% 2018 = 31.9% (↑) +3.3% All Journeys: 2015 = 24.8% 2016 = 28.0% (↑) +3.2% 2017 = 27.1% (↓) -0.9% 2018 = 30.3% (↑) +3.2%	
	Percentage of population in the 100 most deprived wards	Reduction	28%	The latest Welsh Index of Multiple Deprivation data from 2015 shows that 28% of the population of Cardiff is in the 100 most deprived wards in Wales for physical environment.

SA objective	Indicator	Target	Data	Commentary
	in Wales in the 10% most deprived wards in Wales for physical environment			
8. Protect and enhance the landscape	Achievement of functional open space requirements	2.43ha per 1,000 population	1.15 ha per 1,000 population (↓)	Latest figures show 1.15 ha of functional open space per 1,000 population in Cardiff. For all types of open space the equivalent figure is 8.10 ha of open space per 1,000 population.
	Special Landscape Areas	Five SLAs designated by plan adoption	Five SLAs designated	Five SLAs have been designated at: <ul style="list-style-type: none"> • St Fagans Lowlands and the Ely Valley • Garth Hill and Pentyrch Ridges • Fforest Fawr and Caerphilly Ridge • Wentloog Levels • Flat Holm
9. Use natural resources efficiently and safeguard their quality	Percent of housing on previously developed land	60%	57.8% (↓)	For the year 2018/19 57.8% of housing was on previously developed land.
	Average density of new development		146.6 dwellings per hectare (↑)	For 2018/19 the average density of new housing development in Cardiff was 146.6 dwellings per hectare.
	Area of contaminated land cleared up	>0	N/A	Presently no data is available to monitor this indicator. Will re-assess position in next monitoring report.

SA objective	Indicator	Target	Data	Commentary
10. Respond to demographic changes in a sustainable way	Total population	n/a	364,268 (↑)	The latest Mid Year estimate for Cardiff produced by Office of National Statistics shows that Cardiff has a population of 364,268 in 2018.
	No. homes in Cardiff	45,400 net additional homes by 2026	16,521 completed 2006 to 2019 (↑)	Since the base date of the Plan in 2006 16,521 dwellings have been completed leaving 24,894 to be completed (excluding the 4,000 homes flexibility allowance).
11. Minimise waste, increase re-use & recycling	Waste reduction rate	Reduction per household	-2.3% (↑)	The amount of household waste collected and generated between 2016/17 and 2017/18 decreased by 2.3% from 176,952 to 172,852 tonnes.

7. Conclusions

This is the third AMR to be prepared since the adoption of the Cardiff LDP and provides a comparison of the baseline data for 2017 and 2018 AMRs. The key conclusion is that good progress is being made in delivering the identified targets/ monitoring outcomes and policies.

Welsh Government procedural guidance 'Local Development Plans Wales (Edition 2 2015), (para 4.3) sets out seven questions that the AMR should address. The issues included in these questions have been considered throughout the AMR as part of the analysis of the monitoring data.

- What new issues have occurred in the area or in local/national policy (key recent contextual and national policy changes, future prospects)?
- How relevant, appropriate and up-to-date is the LDP strategy and its key policies and targets?
- What sites have been developed or delayed in relation to the plan's expectations on location and timing?
- What has been the effectiveness of delivering policies and in discouraging inappropriate development?

This section concludes the findings of the monitoring process and directly responds to the LDPW questions, ensuring that the procedural guidance is fully addressed.

What new issues have occurred in the area or in local/national policy (key recent contextual and national policy changes, future prospects)?

Section 3 contains contextual information outlining the changes to national planning policy guidance and technical advice which have taken place over the monitoring period. This section outlines the changes which have occurred over the last twelve to the national planning policy framework set out in the Planning Policy Wales (PPW, Edition 10, December 2018), which in turn responds to Well-being of Future Generations Act 2015. This signals a fresh way of addressing the key strategic issues in preparing an LDP.

How relevant, appropriate and up-to-date is the LDP strategy and its key policies and targets?

The evidence collected through the AMR process indicates that progress is being made with the implementation of the spatial strategy and it remains sound at this time.

Section 5 provides a detailed assessment of how the Plan's strategic policies, and associated supporting policies, are performing against the identified key monitoring targets and outcomes and whether the LDP strategy and objectives are being delivered. This has enabled the Council to make an informed judgement of the Plan's progress in delivering the targets/monitoring outcomes and policies during this monitoring period. The table below provides a visual overview of the effectiveness of the Plan's policies during the monitoring period based on the traffic light rating used in the assessment:

Continue Monitoring (Green)	81
Where indicators are suggesting the LDP Policies are being implemented effectively and there is no cause for review.	
Training Required (Blue)	0
Where indicators are suggesting that LDP policies are not being implemented as intended and further officer or Member training is required.	
Supplementary Planning Guidance Required (Purple)	0
Indicators may suggest the need for further guidance to be provided in addition to those already in the Plan.	
Further Research (Yellow)	26
Where indicators are suggesting the LDP policies are not being as effective as they should, further research and investigation is required.	
Policy Review (Orange)	0
Where indicators are suggesting the LDP policies are failing to implement the strategy a formal review of the Policy is required. Further investigation and research may be required before a decision to formally review is confirmed.	
Plan Review (Red)	0
Where indicators are suggesting the LDP strategy is failing and a formal review of the Plan is required. This option to fully review the Plan will need to be fully investigated and undertaken following serious consideration.	

What sites have been developed or delayed in relation to the plan's expectations on location and timing?

The analysis demonstrates that there are no policy indicator targets / monitoring outcomes which are causing concerns over policy implementation (red traffic light

rating). There are, however, a number which are not currently being achieved but with no corresponding concerns over policy implementation (yellow traffic light rating). Further investigation has determined that there are justified reasons for the performance recorded and this is not representative of any fundamental issues with the implementation of the policy framework or strategy at this time. The most significant findings in relation to these are set out in the key findings below.

Key Findings

This is the third AMR to be prepared and provides a comparison with the baseline data provided by the first and second AMRs published in 2017 and 2018.

Overall the findings of the third AMR for year 3 are positive with the majority of the indicators shown as green indicating that most LDP policies are being implemented effectively. A summary of performance against the main Plan topics are set out below with Appendix 1 setting out the data and conclusions in more detail.

Employment – Monitoring data shows continuing strong performance. Of particular importance is data regarding net job creation - There is a requirement for 40,000 new jobs over the plan period 2006-2026. 20,900 jobs were created between 2006 and 2015 and therefore the target for the remaining plan period is 19,100 jobs or 1,750 jobs annually. Since the first AMR (16/17) the number of jobs has been steadily increasing and the latest AMR shows an increase of 6,000 jobs since April 2018.

Housing – Monitoring data shows new homes have now started to be completed on many of the LDP Strategic Sites. Specifically, there are new completions on 3 of the Strategic Sites.

- 511 completions have been achieved at St Ederyns Village (just short of the 515 target included in the AMR);
- 167 completions have been achieved on the North West Cardiff Strategic site, which has three separate outlets underway with more planned in the near future
- 51 completions have been recorded on the North East Cardiff Strategic site and construction is underway at Churchlands.

Although these rates are below targets set out in the AMR it is now evident that the Plan-led approach is now starting to successfully drive the delivery of new homes at a level not seen for the last 10 years. The 1,444 completions in 2018/19 (43% higher than 2017/18) contrast with the previous 9 years where completions averaged 725 units per annum, with no year above 1,000 units for this period.

The data on housing delivery demonstrates the ‘lag’ between Plan adoption and homes being completed on new sites allocated in the Plan. Due to a combination of site assembly, legal and logistical factors experienced by landowners/developers along with the time required to secure the necessary planning and adoption consents, trajectories of delivery are slower than originally anticipated. This includes time spent securing the accompanying Section 106 Agreements which fully deliver the Council’s aspirations as set out in the LDP. Overall, over the 13 years between 2006 and 2019 a total of 16,521 new dwellings were built in Cardiff which represents 40% of the overall dwelling requirement.

However, construction has now started or is about to start on most of the strategic housing sites following the master planning and infrastructure plans approach as set out in the plan and it is therefore expected that housing completions over the remaining 7 years of the Plan period will increase significantly.

Affordable Housing - In terms of the delivery of affordable housing, the plan sets a target for the delivery of 6,646 affordable units to be provided for the 12 years between 2014 and 2026, with an interim target in the AMR to provide 1,942 affordable dwellings by 2019.

Monitoring data indicates that at 2019, 1,082 affordable units had been delivered which represents 25% of overall completions. Whilst this is less than the numerical target, as highlighted above it reflects the slower than anticipated progress in the strategic housing allocations being delivered. Given the low overall completion rates over previous years, it would be unrealistic in these circumstances to expect any significantly higher affordable housing contribution which inevitably reflects a percentage of the overall number of completions. As set out above, construction has now started or is about to start on most of the strategic housing sites following the master planning and infrastructure plans approach as set out in the plan and it is therefore expected that affordable housing completions over the remaining 7 years of the Plan period will increase significantly.

Transportation - Data collected in relation to travel by sustainable modes is reflecting the fluctuations as shown in past trends over the last 10 years. This demonstrates that sustainable travel trends have continued to increase over the last 10 years for both work and shopping, although for leisure and education the trends show a slight decrease.

There has been a positive outturn in sustainable travel over the past year, with the target 1% increase having been achieved for each of the journey purposes, with significant growth in particular evident for journeys to Work (+5.3% mode-shift). In terms of sustainable travel modes, significant progress has been made in meeting cycling targets for all journey purposes with cycling to work in particular having experienced substantial growth in the past one year period (+3.7%). Train use has very slightly declined over the past year for work and education but the 10 year trend shows a significant increase. Walking has increase over the last year for all journey purposes with a fluctuating longer term trend. Bus use has decreased for education, shopping and leisure, reflecting a longer term downward trend.

At this juncture, without the significant roll-out of new houses and provision of supporting sustainable transportation infrastructure, the early stage of Metro delivery together with the ongoing implementation of wider Council initiatives, it is too early to draw any firm conclusions with regard to policy delivery, particularly given that the 50:50 modal split target relates to 2026. Future AMR's will provide formal regular annual updates. However, the masterplanning approach together with section 106 Agreements already secured will enhance the phased future provision of supporting transportation infrastructure along with other measures such as increased frequency of public transport services and provision of bus passes to new residents.

Gypsy and Traveller Sites - work is progressing the identification of sites to meet the evidenced need for permanent and transit Gypsy and Traveller sites. This has included discussions with the Welsh Government and work continues to secure appropriate outcomes. In terms of transit sites, it is considered that these would best be considered on a regional basis, requiring collaboration with neighbouring local authorities through the LDP revision process.

Supplementary Planning Guidance – Significant progress has been made in producing a programme of new Supplementary Planning Guidance (SPG) and since adoption of the LDP 18 SPGs have been approved by Council to support the policies in the adopted Plan and the Cardiff Infrastructure Plan is currently being updated.

Contextual Changes – the contextual review highlights significant changes in the national planning policy framework which has evolved significantly over the last three monitoring periods. In particular, Planning Policy Wales (PPW, Edition 10, December 2018) which in turn responds to the Well-being of Future Generations Act, 2015 have made significant changes to the high-level policy framework.

Sustainability Appraisal (SA) Monitoring

Section 6 expands the assessment of the performance of the LDP against the SA monitoring objectives. This provides a comparison with the baseline data provided by the first and second AMRs published in 2017 and 2018.

Conclusions:

1. Submit the 2019 third AMR to the Welsh Government by 31 October 2019 in accord with statutory requirements. Publish the AMR on the Council's website.
2. Continue to monitor the Plan through the preparation of successive AMRs. Close monitoring will be necessary to determine the effectiveness of the Plan's spatial strategy and policy framework particularly in relation to housing delivery including strategic housing site allocations, the delivery of affordable housing and the progress on strategic employment sites.
3. Prepare the 2020 fourth AMR, report to Council and submit to the Welsh Government by the required deadline, 31 October 2020.

Appendix 1: Table setting out summary of findings

Objective 1 –To respond to evidenced economic needs and provide the necessary infrastructure to deliver development

		Page
OB1 EC1	Employment land permitted (ha) on allocated as a percentage of all employment allocations	25
OB1 EC2	Annual employment land take up in Cardiff	27
OB1 EC3	Amount of employment land lost to non-employment uses in primary and local employment sites	29
OB1 EC4	Employment provision on allocated sites KP2 (A)	30
OB1 EC5	Employment provision on allocated sites KP2 (C)	34
OB1 EC6	Employment provision on allocated sites KP2 (D & E)	35
OB1 EC7	Employment provision on allocated sites KP2 (F)	36
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OB1 EC10	Active A1 units within District & Local Centres remaining in predominant use	39
OB1 EC11	Proportion of protected City Centre shopping frontages with over 50% Class A1 units	42
OB1 EC12	Percentage of ground floor vacant retail units in the Central Shopping Area, District & Local Centres	43
OB1 EC13	Number of retail developments permitted outside of the Central shopping area and District Centres not in accordance with Policy R6	46
OB1 EC14	Achievement of 50:50 modal split for all journeys by 2026	48
OB1 EC15	% of people walking	51
OB1 EC16	% of people cycling	54
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OB1 EC18	% of people travelling by train	66
OB1 EC19	Improvement in journey times by bus	70
OB1 EC20	Improvement in bus journey time reliability	71
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Ref: RDB/RP/CW/17.09.2019

26 September 2019

Councillor Caro Wild,
Cabinet Member for Strategic Planning & Transport,
County Hall,
Atlantic Wharf,
Cardiff CF10 4UW.



Dear Councillor Wild,

Environmental Scrutiny Committee – 17th September 2019

On behalf of the Environmental Scrutiny Committee I would like to thank you and the officers for attending the Committee meeting on Tuesday 17th September 2019 to discuss the item on the 'Third Cardiff Local Development Plan Annual Monitoring Report'. The comments and observations made by Members on the areas relevant to your portfolio of responsibility are set out in this letter.

- **New Jobs** - During the meeting I commented on the 20,900 new jobs that have been created in Cardiff during the period of the current Local Development Plan, and asked for clarification on the type of positions created and where these have been sited geographically. An officer explained that the employment information used in the Annual Monitoring Report had been drawn from wider national statistics, and that the Planning Service didn't currently hold employment data in that level of detail. He suggested that Economic Development might hold information that might answer my question. I would be grateful if you could liaise with Economic Development to see if they hold details on the type and location of the 20,900 new jobs created during the Local Development Plan, and if the information exists to share this with the Committee.
- **Physical Activity** – This Committee is concerned that measures contained within the Annual Monitoring Report suggest that in the last three years the level of physical activity has declined. For example, in 2016/17 23% of adults reported being physically active for less than 30

minutes in the previous week; this increased to 31% in 2018/19. Members asked what the point of the Local Development Plan was if people aren't getting healthier, and would like you to explain how the Local Development Plan can be used to reverse this trend.

- **Affordable Housing** – The Annual Monitoring Report explains that 40% of the housing completions set out against the Local Development Plan have been achieved, while only 25% of the affordable housing allocation has been completed – this appears to have created a 15% lag between the two targets. Members were concerned by this, particularly as 75% of the affordable housing target now needs to be delivered in less than seven years. To counter this, Members would like some assurance that progress will be made in the next few years to significantly increase the number of affordable properties provided in Cardiff. It would also be appreciated if you could provide the Committee with a breakdown of the different types of affordable housing that have been delivered within the current plan, along with the types of delivery model used, for example, social rented housing; affordable rented housing; shared ownership; help to buy and shared equity.
- **Education Travel** – The Annual Monitoring Report shows a gradual decline in the number of sustainable travel journeys for education, stating that trips for '*education has seen a significant decrease*'. This is supported by Figure: 1.14.1 on page 49 of the Annual Monitoring Report which presents a steady decline in this area. Members believe that this is a concern since school traffic is significantly adding to congestion in Cardiff at the beginning and end of every school day. Members would like to understand what the Council proposes to do to reverse this trend and increase the number of sustainable journeys to and from school.
- **Student Accommodation** – During the meeting there was some debate around planning decisions for student accommodation in the city. Some Members questioned the temporary change of use planning status that had been applied for and granted on some student developments in

Cardiff – this meant that, on a temporary basis, the accommodation could now be occupied by other residents, i.e. not students. They were concerned that a precedent had been set, meaning that other developers could follow suit should their developments fail to attract sufficient numbers of students. Members felt that this presented risks in terms of building standards and receipt of planning obligation monies. The Committee went on to question the level of demand for student accommodation in Cardiff, particularly as the Annual Monitoring Report states *'current evidence shows the further strength of the student accommodation market in Cardiff'*. A Member cited a recent Savills report which provided an opposite view. I would be grateful if you could provide a copy of the evidence used to support the claim that *'current evidence shows the further strength of the student accommodation market in Cardiff'*.

- **Congestion** – The Committee welcome the positive cycling results that are included in the Annual Monitoring Report, however, they are concerned that congestion levels continue to increase across the city (for example, from 27% in 2017 to 28% by 2018). They believe that reducing congestion levels in Cardiff should be one of the fundamental principles of the Local Development Plan, and they will monitor the progress made in this area closely. They hope that the Transport White Paper that is due to be published shortly will shed a light upon what can be done to reduce congestion in Cardiff.

- **Bus Station & Wanugron Road Transport Interchange** – At the meeting I asked for confirmation on:
 - When work would start on the new Bus station;
 - When the new Bus Station would be completed (including full fit out);
 - When work would start on Wanugron Road Transport Interchange;
 - When Wanugron Road Transport Interchange would be completed (including full fit out).

I was referred to the answer provided at the last Full Council meeting for the new Bus Station and given a brief response for the Waungron Road Transport Interchange. It would be appreciated if you could confirm the current position on the new Bus Station and the Waungron Road Transport Interchange when replying to this letter.

- **Bus Rapid Transit Routes** - At the meeting I expressed my concern at the lack of progress around the delivery of the Bus Rapid Transit Routes that have been included in the Local Development Plan. I would be grateful if you could provide the Committee with a detailed update on these proposed schemes, along with an estimate as to when these will be delivered.
- **Modal Split Target** – The Annual Monitoring Report repeatedly makes reference to a 50:50 modal split target that has been set for 2026. This created a little confusion for some Members who thought that the Council was actually looking to achieve a 60:40 modal split by 2026. I would be grateful if you could explain the current modal split target for 2026, and confirm if this has been changed from 60:40 target in recent years.
- **Travellers Site Update** – The Committee asked about the progress that had been made in identifying a new Travellers site in Cardiff. Members were told that discussions were ongoing around the location of a potential new site, and that as the content of the discussions were confidential it would not be possible to disclose any information at a public meeting. Members understand this position and ask that you provide the Committee with:
 - A confidential update on the progress that has been made since the review of the Second Cardiff Local Development Plan Annual Monitoring Report (4th September 2018);
 - Confidential updates on any future progress relevant to the development of a new Traveller site.

I would be grateful if you would consider the above comments and provide a response to the content of this letter.

Regards,

Handwritten signature of Ramesh Patel in black ink.

Councillor Ramesh Patel
Chairperson Environmental Scrutiny Committee

Cc:

- Andrew Gregory - Director of Planning, Transport & Environment
- James Clemence – Head of Planning
- Stuart Williams – Group Leader, Planning Policy
- Davina Fiore - Director of Governance & Legal Services
- Members of Cardiff's Environmental Scrutiny Committee

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CABINET MEETING:10 OCTOBER 2019

NATIONAL DEVELOPMENT FRAMEWORK**STRATEGIC PLANNING & TRANSPORT (COUNCILLOR CARO WILD)****AGENDA ITEM: 11**

Reason for this Report

1. The purpose of this report is to set out a proposed Cabinet response to the Welsh Government's National Development Framework 2020-2040 Consultation Draft.

Background

2. The National Development Framework (NDF) is a new development plan which will set the direction for development in Wales from 2020 to 2040. It is being prepared by the Welsh Government and will represent the highest tier of statutory development plans in Wales.
3. It will provide a framework which will be built upon by Strategic Development Plans (SDPs) at a regional level and Local Development Plans (LDPs) at a local authority level. SDPs and LDPs will be required to be in conformity with the NDF.
4. The NDF is a spatial plan which means that it sets a direction for the future provision of infrastructure and development. It does not allocate exact locations for development but, in the case of SDPs, sets out the policies and key issues the WG requires the regions to take forward.
5. The Well-being of Future Generations (Wales) Act 2015 influences the content of the Plan which seeks to maximise contributions to the well-being goals and well-being objectives. The NDF also gives a spatial expression to Welsh Government policies of national importance and is intended to be read alongside 'Planning Policy Wales' (PPW), which provides planning policy on an all-Wales basis.

Issues

6. A copy of the Consultation Draft NDF is included in Appendix1 of this report. The front portion of the document outlines the scope of the NDF

and sets out 11 overarching ambitions based on national planning principles and sustainable placemaking outcomes as outlined in PPW.

7. This is followed by the NDF Spatial Strategy which sets out a guiding framework for where large scale change and nationally important developments will be focused over the next 20 years. It contains a Spatial Strategy Key Diagram along with 15 policies based on 3 components:
 - Where in Wales growth should be focused
 - How growth should be planned and managed
 - How we should power and heat places using renewable energy
8. Particular attention is drawn to the final section of the document which sets out policies for the three regions in Wales including 6 policies relating to South East Wales. Relevant extracts from policies and their supporting justification set out below:

Policy 27 – Cardiff

Cardiff will retain and extend its role as the primary national centre for culture, sport, leisure, media, the night time economy and finance. The Welsh Government supports regional development which addresses the opportunities and challenges arising from Cardiff's geographic location and its functions as a Capital City. The Welsh Government supports Cardiff's status as an internationally competitive city and a core city on the UK stage.

Policy 28 – Newport

The Welsh Government supports Newport as the focus for regional growth and investment and wants to see the City play an increased strategic role in the region. The strategic emphasis should be focussed on achieving growth in the city. Strategic and Local Development Plans across the region should recognise Newport as a focus for strategic housing and economic growth; essential services and facilities; transport and digital infrastructure; and consider how they can support and benefit from Newport's increased strategic regional role. Development in the wider region should be carefully managed to support Newport's growth and to provide a focus for regional planning. The Welsh Government will work with authorities within the region and in England to promote Newport's strategic role and ensure key investment decisions in Wales and England support Newport and the wider region.

Policy 28 supporting text:

- *Cardiff is currently experiencing a period of growth in population and employment, but the city cannot continue to expand indefinitely without major consequences for the environment. It is a compact city nearing its physical limits, which include Caerphilly and Garth mountains to the north and the Bristol Channel to the south. Cardiff must generate and support regional growth throughout the south east while enhancing its status as a vibrant capital city of Wales.*

- *The Strategic Development Plan will need to consider the interdependence between Cardiff and the wider region. Regional transport infrastructure reflects the significance of Cardiff and has consolidated its role as the main focal point of the region. The potential to reach central Cardiff quickly and conveniently using the Metro generates opportunities for development in settlements outside the city. The cultural and economic strength of Cardiff must generate region-wide prosperity and well-being.*
- *The Welsh Government is determined to see development and growth in Newport, allowing the city to fulfil its potential as a second focal point for the region. It has significant brownfield development opportunities to provide new housing and employment areas. There are emerging highly skilled employment opportunities in the transport and digital communications sectors which should be catalysts for further economic investments. The Metro will improve the city's public transport system, especially within the city and to surrounding towns. It benefits from established road and rail links with Cardiff, Bristol and London.*
- *Growth at Newport will help manage the development pressures in Cardiff and provide a strategic focus for the eastern part of the region. Strategic growth should be focussed in and immediately adjoining Newport itself, to support brownfield regeneration.*

Policy 30 – Green Belts in South East Wales

The Welsh Government requires the identification of green belts through a Strategic Development Plan to manage urban form and growth in South East Wales, particularly around Newport and the eastern part of the region.

Regional plans should consider the relationship of any new green belts with the green belt around Bristol.

Policy 30 supporting text:

- *Strategic decisions on the location of development, key services and infrastructure should support the region's cities and Valleys communities and be taken on a regional basis, ensuring they are located in the most accessible and sustainable locations within the context of the whole region. The Welsh Government supports the use of green belts in the South East region in managing and planning urban growth. Planning Policy Wales sets out the policy context for them. The Strategic Development Plan must identify a green belt that includes the area to the north of the M4 from the Severn Crossings to North Cardiff*

Cabinet response

9. The Cabinet welcomes a strategic approach to development in Wales and recognises the opportunities for using the planning system to address national and regional priorities. Clearly, a strategic approach can play an important role in informing the infrastructure investment and developments needed to deliver in areas relating to economic growth, decarbonisation, resilient ecosystems, health and community well-being. As a major urban area, Cardiff particularly welcomes Policy 1, which explicitly supports sustainable urban growth given it is uniquely positioned to deliver on this.
10. Of particular relevance to Cardiff are statements which recognise and support the key role played by cities and large towns by:
 - Encouraging sustainable and efficient patterns of development
 - Co-locating homes with jobs and vital services and the efficient use of resources
 - Focussing on cities and large towns as the main development areas
 - Creating concentrations of jobs, services and amenities
 - Creating a critical mass to support and sustain good public transport services and encourage active travel
11. For this approach to function effectively however, the National Development Framework must be informed by, and respond to, the major demographic, economic, housing and transport trends across Wales. This is particularly relevant for Cardiff, given that its size and scale is of regional and national significance.
12. For example, Cardiff is projected to be the fastest growing UK Core City and over the next 20 years is projected to grow by more than every other Welsh Local Authority combined. Cardiff is also the economic powerhouse of Wales with 82% of net new jobs created in Wales over the last 5 years created in the capital city. The regional significance of the capital city is further underlined by the fact that over 100,000 commuters travel into Cardiff from outside the local authority boundary every day. Cardiff's population and economic growth therefore represents a major opportunity for Wales which the National Development Framework, as currently drafted, significantly underplays, placing a disproportionate emphasis on the challenges associated with growth.
13. For example, Policy 28 recognises the capital city's growth but states that *"the city cannot continue to expand indefinitely without major consequences for the environment."* The Council's LDP which is underpinned by a robust detailed evidence base demonstrates clearly that significant capacity exists for Cardiff to grow sustainably and in accordance with place-making principles for the duration of the plan period. Furthermore, significant brownfield contributions over recent decades have played a key role in delivering sustainable growth in Cardiff and there is no new evidence within the NDF to suggest that further contributions may not be achieved beyond the current plan period. Policy 28 therefore fails to recognise the sustainable city paradigm where critical

mass and agglomeration effects can have major advantages for both the economy and the environment.

14. The National Development Framework identifies “*Newport as the focus for regional growth and investment.*” Cardiff Council fully supports the growth of Newport- as well as any other major conurbation area within the region in line with the principles expressed in Policy 1 of the Framework. However, the Council is very concerned that rather than promoting and supporting economic and population growth in Cardiff *and* Newport the Framework is instead proposing a dispersal of growth from Cardiff to Newport.
15. Cardiff Council would argue that such a policy of dispersal could undermine Cardiff’s role as the economic driver of the Welsh economy, and run counter to delivering sustainable long-term economic growth in Wales. A policy of dispersal runs the real risk that the jobs and investment currently attracted into Wales by the capital city will not be deflected to Newport but instead would be directed to Bristol and other core cities, and thus not come to Wales at all. The Council would instead argue that the Framework should respond to the national trends outlines in paragraph 12 through seeking to support the Cardiff’s population and economic growth, and the unique role the city economy plays in the national economy, whilst ensure that the benefits of this growth are felt across the wider Capital Region.
16. In supporting the proposal that ‘*the cultural and economic strength of Cardiff must generate region-wide prosperity and well-being,*’ the Council would also urge the Welsh Government to ensure that national policy recognises the significant inequalities that exist within Cardiff. For example, if the ‘Southern Arc’ of Cardiff, Ely in the West to Trowbridge in the East, and area with a greater population than Newport, was a single local authority it would be by far the most deprived in Wales. The economic growth in the city centre must lead to improved outcomes for deprived and disconnected communities within the city *and* the wider city-region.
17. The Council is very concerned that the statements above (para 8) appear in the Framework devoid of reference to any evidence base. It is in the Council’s view considered inappropriate for the National Development Framework to include unqualified statements, for example relating to Cardiff’s growth potential, in the absence of robust evidence in the form of urban capacity studies and other relevant data that would be expected in the development of LDPs and in any future SDP. Given the role that the National Framework will play in informing both the Strategic Development Plan and Local Development Plans it is imperative that it is underpinned by the same rigorous and detailed evidence base expected at local and regional levels. The Council is concerned that this is not currently the case.
18. This report in the main limits our comments to those parts of the NDF dealing directly with Cardiff. Nevertheless, we have significant concerns about other aspects as well. These derive broadly from the incompatibility

ofhaving an evidence-weak NDF which would in turn form the basis of SDPs an LDPs which must be evidence-led. We reserve the right to make further comments as appropriate on aspects beyond Cardiff.

19. The Council would also argue strongly that the proposals such as those in Policy 28 do not belong in a National Development Framework, but is instead a decision for Strategic and Local Development Plans.
20. In summary, while Cardiff Council welcomes a great deal in the National Development Framework for the reasons outlined above the **Council cannot support the NDF as currently drafted.**
21. Cardiff Council would therefore welcome further dialogue with Welsh Government to more fully demonstrate how the city is uniquely positioned to deliver on the 11 outcomes of the National Development Framework, and how this role can be more clearly expressed in the final version of the document. This dialogue could also explore how robust local evidence can help inform the development of the National Framework to ensure that any national plan benefits from the same rigorous assessment as local plans.

Reason for the Recommendation

22. To set out a proposed Cabinet response to the Welsh Government National Development Framework Consultation Draft 2020-2040.

Legal Implications

23. The report refers to a proposed response to the Welsh Government's NDF Consultation Draft. The decision about these recommendations has to be made in the context of the Council's 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.
24. 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.
25. 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 <http://cmsprd.cardiff.gov.uk/ENG/Your-Council/Strategies-plans-and-policies/Corporate-Plan/Documents/Corporate%20Plan%202018-21.pdf> 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.

26. 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.
- 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: <http://gov.wales/topics/people-and-communities/people/future-generations-act/statutory-guidance/?lang=en>

27. 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, the report and Equality Impact Assessment deals with all these obligations. The Council has to consider the Well Being of Future Generations (Wales) Act 2015 and how this strategy may improve the social, economic, environmental and cultural well-being of Wales.

Financial Implications

28. There are no direct financial implications arising from this report with the response and further dialogue in connection with the Welsh Government National Development Framework consultation being completed using existing resources.

Human Resources Implications

29. There are no HR implications for this report.

RECOMMENDATION

Cabinet is recommended to approve the proposed response to the NDF Consultation Draft as set out in paragraphs 9-20 of this report and seek further dialogue with WG to address the issues raised.

SENIOR RESPONSIBLE OFFICER	ANDREW GREGORY Director of Planning, Transport & Environment
	4 October 2019

The following Appendix is attached:

Appendix 1 – Consultation Draft National Development Framework 2020-2040

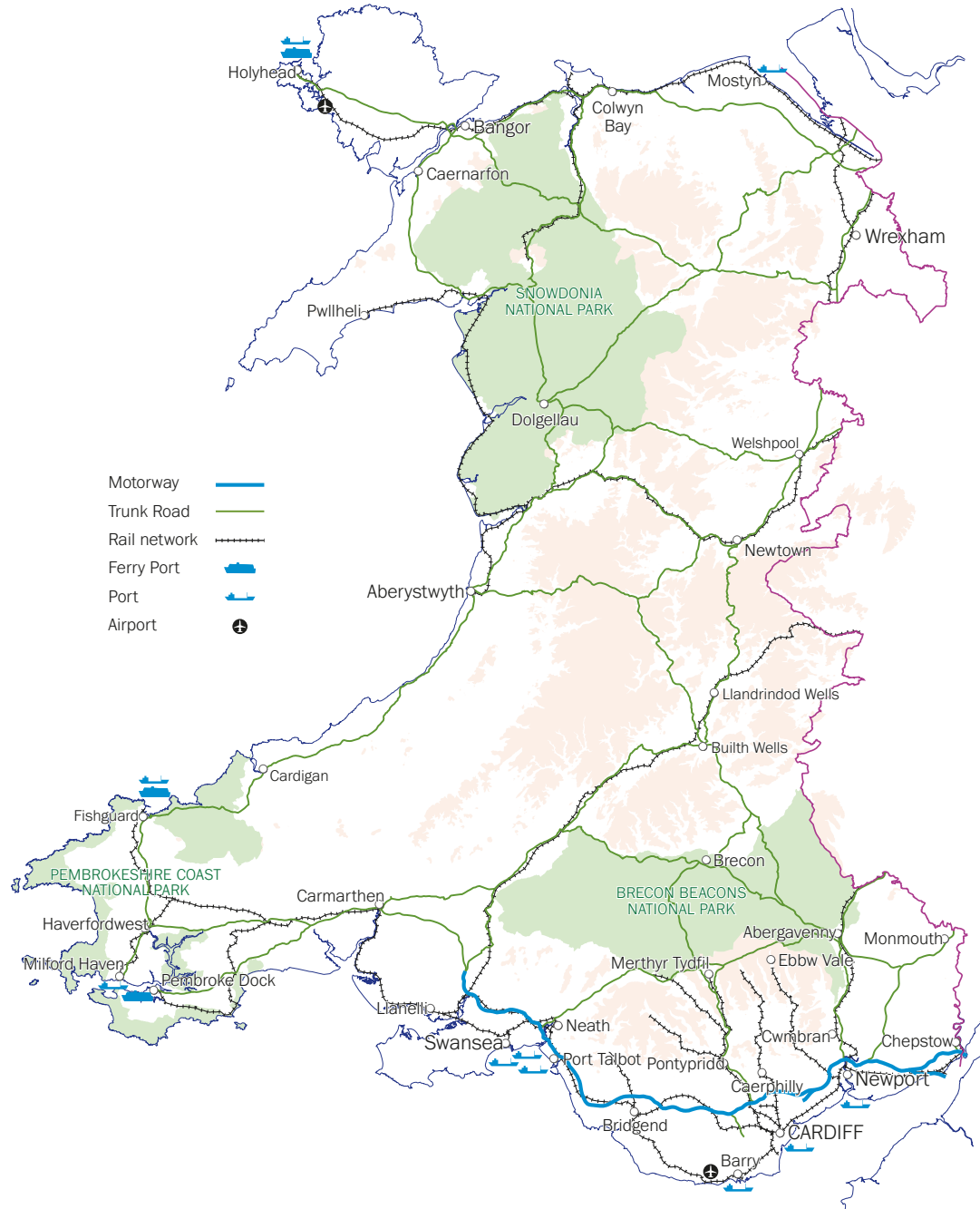
National Development Framework 2020-2040

Consultation Draft: 7 August – 1 November 2019



Llywodraeth Cymru
Welsh Government





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Foreword by Mark Drakeford

This National Development Framework sets out where we think we should try to grow and the types of development we need over the next twenty years to help us be a sustainable and prosperous society.

The Well-being of Future Generations Act means the Welsh Government and other public bodies must think about the long-term impacts of the decisions we make today, and this ethos is clear throughout the National Development Framework.

It is difficult to imagine how the world might look in 2040. We know there are significant challenges to meet, not least in tackling climate change. It is the globally defining challenge of our time and it is why we have declared a climate emergency. Tackling the causes and mitigating the effects of climate change is a key consideration in our plans and hopes for Wales.

The National Development Framework is another building block in making Wales a fair, green and prosperous place. It complements and builds on our national strategy, Prosperity for All, our Economic Action Plan and our plan for a Low Carbon Wales. The Well-being of Future Generations Act also commits us to the creation of a more equal Wales. We know from the UK2070 Commission that there are deep-rooted inequalities across the UK. The Commission concluded that in the UK “we are not taking full advantage of the economic potential that all parts of the UK have to offer”. The National Development Framework has combatting inequality at its core.

It covers a range of issues and challenges, including energy supply, transport, the natural environment, housing and industrial development. We can't pretend that a long-term plan will eliminate all the tensions which are an inevitable part of policy making, but it will give us a basis for our decisions and help explain how decisions are reached. The National Development Framework is clear about what kind of place we want Wales to be by 2040 and that clear vision will be priceless as we take big decisions that affect the future of our country.

A great deal of collaboration from stakeholders and communities across Wales has gone into the preparation of this document and I am grateful for your continued support. The consultation on this draft National Development Framework is open until 1st November and I encourage you to get involved.

Mark Drakeford AM
First Minister of Wales

Foreword by Julie James

I am delighted to launch this consultation on the National Development Framework. It's an exciting responsibility to be putting forward the Welsh Government's twenty year spatial vision for development and I am confident it can support our ambition to make Wales a healthier, fairer and more prosperous place.

We know the next twenty years will see huge changes to the way we currently live our lives. We can expect the way we travel to be revolutionised with the growth of electric vehicles and the potential emergence of automated vehicles. The internet is already making us more flexible in where we can do our work and it is likely that the role and function of town centres has changed forever. We also know that climate change demands different attitudes about energy and a long-term mind-set in all our planning.

The challenge for a plan like the NDF is not necessarily to predict how Wales might change over the next twenty years, but to make sure we can build a society and an economy that is flexible and resilient, to enable all of us to benefit from the changes in a sustainable way. It means the NDF has a strong focus on sustainable travel, with policies on Metro systems and charging infrastructure for low emission vehicles. It sets a clear vision for more renewable energy, coupled with a commitment for more and better green infrastructure.

One of my personal priorities as a Minister is to ensure everyone has access to a good home. As a country we have not provided the homes that meet all our needs. Market led housing provision has failed to meet the needs of far too many people. I look forward to future housing development that includes far more houses to rent from local authorities and other registered social landlords. I want a planning system that consistently delivers the homes that meet all our needs and a system that makes it easier to live active and healthy lives.

I hope the policies in the NDF, complemented by the strong leadership set out in the new Planning Policy Wales, will help make this a reality.

A really important feature of this document is the regional policies. Across the Government we are committed to enabling bespoke approaches that suit the different parts of Wales to be developed. We are proposing the same regional footprint as the Economic Action Plan, so that local planning authorities and their stakeholders have a consistent basis for regional working and are encouraged to move ahead with developing Strategic Development Plans.

I firmly believe our plan-led system will work most efficiently and deliver the best results when we have a complete coverage of plans across three tiers – national, regional and local. We are close to a full suite of Local Development Plans in local authority and National Park areas, and we can look forward to having the National Development Framework in place next year.

This is the first version of the NDF. It has benefitted hugely from the involvement and contribution of stakeholders throughout its preparation. The Welsh Government will review and update the NDF every 5 years, but I am very keen that we use this first opportunity to set an ambitious path towards making sustainable places that work for everyone in our society.

I look forward to hearing what you think of it.

Julie James AM

Minister for Housing and Local Government

1 Introduction

Managing change and planning development that will last for generations is one of the most important responsibilities of government. This document is the Welsh Government's twenty year plan for shaping the future growth and development of our country.

What is the National Development Framework?

The National Development Framework (NDF) is a new development plan which will set the direction for development in Wales from 2020 to 2040. It sets a strategy for addressing key national priorities through the planning system, including sustaining and developing a vibrant economy, decarbonisation, developing resilient ecosystems and improving the health and well-being of our communities.

The NDF is a *spatial* plan, which means it sets a direction for where we should be investing in infrastructure and development for the greater good of Wales and its people. The NDF sets the challenge of delivering these improvements to public, private and third sectors. It makes clear the importance of *planning* new infrastructure and development in such a way they are complementary rather than competing priorities, ensuring opportunities are maximised and multiple benefits are achieved.

The Well-being of Future Generations (Wales) Act 2015 influences the way we plan for new development; it demands that development and use of land contribute to improving the economic, social, environmental and cultural well-being of Wales. Under the commitment to delivering sustainable development we will maximise our contribution to each of

the well-being goals. Choosing where to invest or considering whether a development is suitable in a certain place are difficult decisions where a balance often has to be found between competing priorities. We must strive to find solutions which maximise our contribution to the goals and well-being objectives. The NDF provides leadership and strategic direction for taking these decisions.

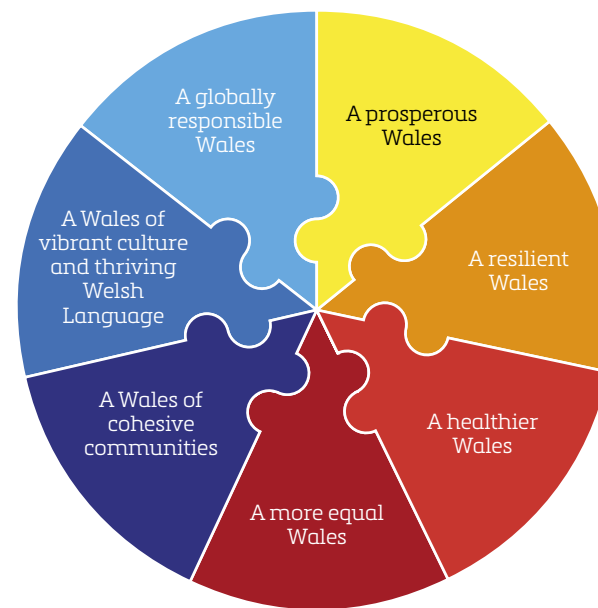
The NDF is the highest tier of **development plan** and is focused on issues and challenges at a national scale. Its strategic nature means it does not allocate development to all parts of Wales, nor does it include policies on all land uses. It is a framework which will be built on by Strategic Development Plans (SDPs) at a regional level and Local Development Plans (LDPs) at local authority level. These plans will identify the location of new infrastructure and development. SDPs and LDPs are required to be in conformity with the NDF and must be kept up to date to ensure they and the NDF work together effectively. Planning decisions at every level of the planning system in Wales must be taken in accordance with the development plan as a whole.



Well-being of Future Generations Act 2015 and the National Development Framework

The Act gives a legally-binding common purpose – the seven well-being goals – for national government, local government, local health boards and other specified public bodies. It details the ways in which these bodies must work, and work together, to improve the well-being of Wales. It is through the Act that Wales will make its contribution to the achievement of the 17 United Nations Sustainable Development Goals.

In developing the NDF, we have recognised our obligations under the Act. Embedding the principles of the Act, including the 5 ways of working (long-term thinking, prevention, collaboration, integration and involvement), within our strategic thinking and policy development has informed, influenced and shaped the NDF. We have carefully considered how the NDF reflects, aligns with and maximises its contribution to the well-being goals, objectives and ways of working.



Document Structure

The document follows a sequential structure, with each section building on the previous one.



The first chapter explains how the NDF fits within wider Welsh Government policy objectives and the purpose of the NDF. Key challenges and opportunities facing Wales over the next 20 years are highlighted in Chapter 2. It also introduces the three regions of Wales and provides a background to the economic, environmental, cultural and social conditions in each region:

North Wales | Mid and South West Wales | South East Wales

The challenges and opportunities inform the **NDF outcomes**, which taken together are a vision for change over the next 20 years. These outcomes, set out in Chapter 3, form the basis and the context for the remaining chapters.

A spatial strategy is presented in Chapter 4. The strategy focuses on the major patterns of development and areas of change on which the planning system at a national scale will focus to achieve the NDF outcomes. The spatial strategy is the overarching framework for deciding where to locate nationally significant developments, in order to maximise their contribution to the well-being goals. A strategic diagram shows the main components of the spatial strategy.

Chapter 4 also provides a policy framework for all-Wales issues of national importance, including renewable energy, affordable housing, mobile communications, ecological networks and charging infrastructure for electric vehicles.

Chapter 5 sets the Welsh Government's ambitions and policies for nationally important growth and development in the three **regions**. It highlights the key locations for development, identifies opportunities for developing infrastructure and sets a framework for regional and local planning.

How does the NDF fit with wider Welsh Government policy?

The NDF gives a spatial expression to Welsh Government policies of national importance. Policies and strategies on wide-ranging matters such as housing, transport, energy, natural resources and health have implications for all parts of Wales and can be supported if the planning system is aligned to deliver their aims. The NDF ensures the aims of the planning system across Wales are consistent with, and support the delivery of, Welsh Government policies.

The role and purpose of the NDF is defined by legislation and by the Programme for Government. The NDF is highlighted in *Prosperity for All: the national strategy* as holding an important role in driving sustainable growth and combating climate change by guiding strategic development over the next 20 years.

The NDF should be read alongside *Planning Policy Wales* (PPW) which provides planning policy on an all-Wales basis. The NDF complements PPW, with a shared commitment to placemaking and by setting out the spatial priorities for planning and development where national-level consideration is required. In combination, and supplemented by

Technical Advice Notes and procedural guidance, the NDF and PPW ensure the planning system across Wales is fully aligned in working towards national ambitions and well-being goals. The NDF does not repeat PPW nor cover all of the same policy areas. Together they set out how the planning system responds to and addresses national challenges and opportunities.

The NDF will be used to guide both public and private investment. Our aim is to ensure investments and developments – whether large or small in scale – contribute to the broader ambitions of the Welsh Government and to the well-being of communities. A broad range of Government strategies and policies have helped shape the NDF, including the Welsh National Marine Plan, the Transport Strategy and the Low Carbon Wales plan. The relationship is two-way with the NDF taking strategic direction and providing a means of delivery and a framework for maximising the potential outcomes.

We will lead the way with our own investments. The NDF will complement the Wales Infrastructure Investment Plan and Regional Economic Development Plans by enabling development that maximises the impacts of our investment. The scale of ambition for change outlined in the NDF reflects the ability of the public sector to deliver new development. The NDF spatial strategy will inform the Wales Infrastructure Investment Plan in determining our capital investment priorities, aligning the planned programme of infrastructure investments in Wales with the NDF's spatial approach.

The Welsh National Marine Plan is the first marine plan for Wales and represents the start of a process of shaping our seas to support economic, social, cultural and environmental objectives. Marine planning will guide the sustainable development of our marine area by setting out how proposals will be considered by decision-makers. The NDF and Marine Plan work together to provide a framework for the management of change around our coast. Co-ordination between marine and terrestrial planning is important to sustain and facilitate the development of port, harbour and marina businesses and associated enterprises; coastal communities; tourism opportunities; energy

generation; and seascapes. The emerging Welsh National Marine Plan has informed the preparation of the NDF and, where relevant, should inform Strategic and Local Development Plans and decisions made through the development management process.

The NDF replaces the Wales Spatial Plan.

The NDF and Habitats Regulation Assessment

Under Article 6 of the Habitats Directive (and Regulation 102 of the Habitats Regulations), an assessment is required where a plan or project is likely to have a significant effect upon a Natura 2000 (European designated) site. Specific mitigation measures have been recommended in the Habitats Regulations Assessment of the NDF to provide a strong guide to lower-tier plans and projects. It concludes that, on the assumption that these mitigation measures are adopted at the lower-tier planning or project scales, significant effects would be avoided. The Welsh Government therefore expects the findings of the Habitats Regulations Assessment of the NDF to be taken into consideration during their preparation and implementation of all development plans, including Strategic and Local Development Plans.

How does the NDF fit with Strategic and Local Development Plans?

There are three different tiers to the development plan in Wales – the NDF, Strategic Development Plans and Local Development Plans. The NDF is all Wales; Strategic Development Plans are prepared at a regional level covering more than one local planning authority area; Local Development Plans are prepared by each individual local planning authority.

Strategic and Local Development Plans must support the implementation of the NDF, and the strategic decisions they take must conform with the direction provided by the NDF.

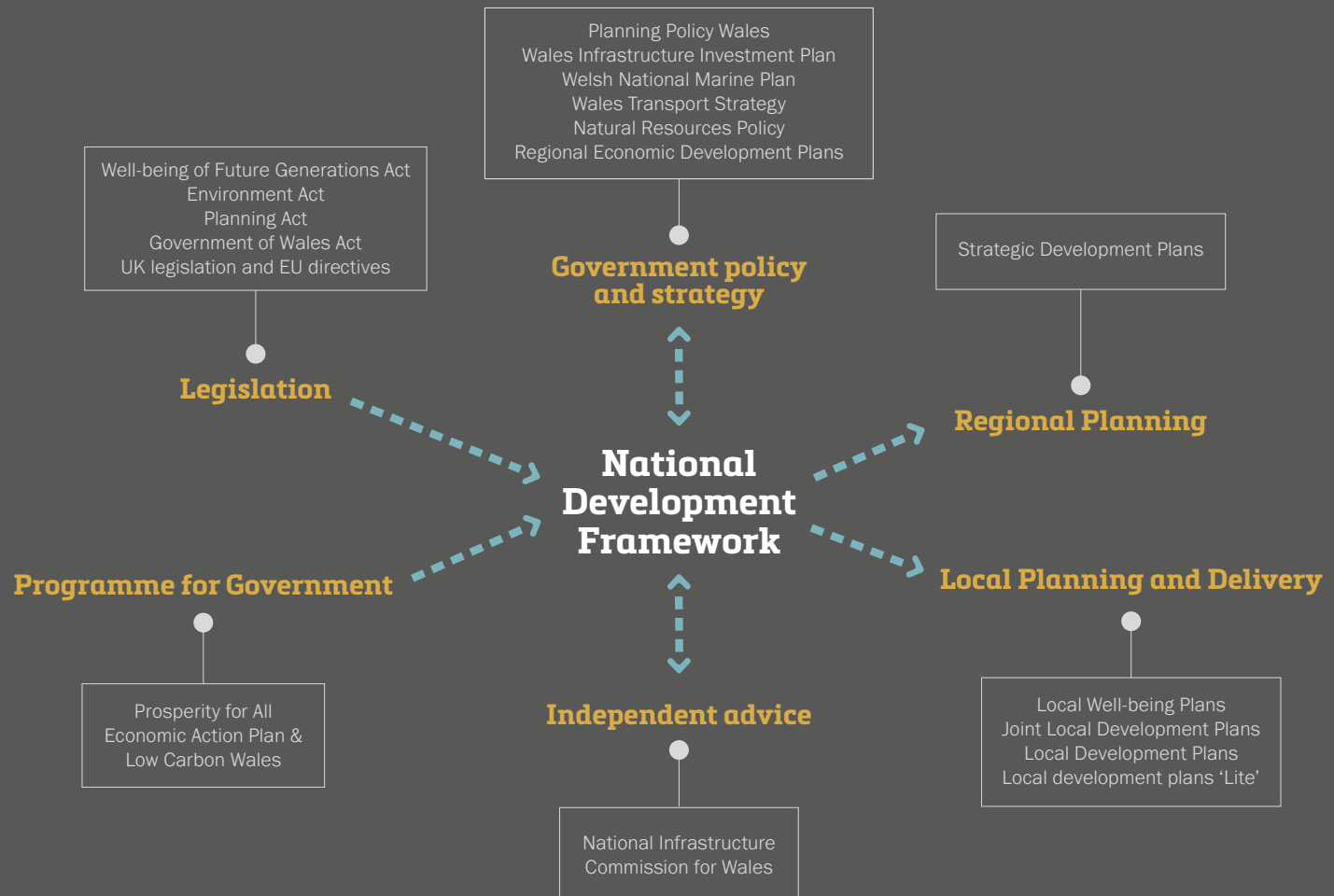
The role of each development plan is to plan and manage land use at its spatial scale. The NDF therefore considers issues at the national scale, Strategic Development Plans cover regional or sub-regional scales and

Local Development Plans consider issues at the local scale. All three tiers are important and it is the collective effect of all tiers working together that is the strength of the planning system in Wales.

The NDF and its spatial strategy has been prepared in the context of the three tiered development planning system. The NDF does not seek to take decisions that are most appropriately taken at the regional or local level. It provides direction and in the case of Strategic

Development Plans, sets out the policies and key issues the Welsh Government requires the regions to take forward. It does not seek to identify the exact location for new development, the scale of growth in individual settlements or prescribe precise boundaries of areas where development should not take place. The regional and local tiers are the most appropriate level at which to take these decisions, involving communities as they do so.

Model of NDF Influence



2 Wales: An Overview – Challenges and Opportunities

Wales is a nation with a long and proud history and a rich social and cultural heritage. We face challenges and opportunities and are committed to protecting the well-being of our future generations.

Changing population

We are a nation of over 3 million people, whose population has grown by 8% between 1997 and 2007 and are projected to rise by a further 4% between 2018 and 2038. We are an ageing nation, reflecting wider UK and European trends, and will have a third more people aged 65 and over by 2038. We are living longer but life expectancy is below the UK as a whole. Communities are spread across Wales from the populated northern and southern areas to sparsely populated mid Wales.

A living, thriving Welsh language

Welsh is a living language, with over 562,000 speakers across all parts of the nation. Our ambition for the Welsh language is to reach a million Welsh speakers, as well as increase the percentage of people who speak Welsh daily by 10% by 2050. Communities in the Welsh speaking heartlands in the north-west and west of Wales continue to live everyday life through a language spoken in our nation for 1,500 years.

Natural resources

Natural resources and resilient biodiversity and ecosystems support our well-being and prosperity; they have shaped our past and will shape

our future. Welsh coal, steel and iron drove the industrial revolution, and our wind, solar and tidal resources point forward to a clean, sustainable future. We depend on high quality natural resources to fuel our industries, provide our food, clean air and water and create jobs and wealth. We are committed to living within our means, using only our share of the planet's resources and using them efficiently.

A living landscape

Our landscapes are amongst the best in the world and tell the story of our nation from volcanoes, glaciers, mountains and river valleys to castles, farms, industrial heritage and ports. A quarter of our country is covered by our three national parks and five areas of outstanding natural beauty. We have a number of World Heritage Sites and nature conservation areas, and our coast on three sides connects communities and people to the sea.

Industrial legacy

Our economy changed profoundly in the late 20th Century and will change again through the 21st. Wales' main population centres in south and north Wales were strongly tied to the traditional heavy industries they grew up around, and as these industries declined, so too did the local economies and the communities that relied upon



them. On average, economic activity, wages and productivity in Wales are lower than the UK average. Gross Value Added (GVA) per head in Wales in 2017 was £19,900 compared to the UK average of £27,300.

A changing economy

Our economy now is more service-based and there is an increasing focus on technology and the digital sector. Over the last 10 years the fastest growing parts of our economy in terms of employment have been in the information and communication sectors. Small and medium sized enterprises are an important part of our economy and grew more in Wales in 2018 than within the UK as a whole. Research and innovation are recognised as twin drivers for competitive economic advantage and driving productivity. The importance of developing an innovative and knowledge based society, built upon research and innovation, is an integral factor for driving our global competitiveness and supports our sustainable economic and social improvement ambitions.

Our visitors

We attract visitors from all over the world, with 10% of our overnight visitors coming from outside the UK. There were 96 million tourist day visits in 2018, 10 million overnight stays and around £6.3 billion generated from tourism for the Welsh economy.

A connected nation

We are an increasingly connected nation. 93% of homes and businesses have access to a superfast fixed broadband speed, though only 38% of homes in Wales use the service. The next stage is to develop access to ultrafast fixed broadband speeds. In 2018, ultrafast coverage rose by almost 20 percentage points, to cover 29% of Welsh homes and businesses. This figure remains behind the UK average, which is a consequence of our dispersed settlements and distinctive topography, and increasing coverage is a key goal.

Our place in the world

We live alongside our neighbours, with close ties across the border in north, mid and south Wales. There are almost 8 million people living within 50 miles of the Wales-England border. More than a fifth of our population was born in England. People travel daily in both directions to work, to shop, to socialise and access services and institutions. We visit and trade with Ireland, Europe and beyond and our ports, roads and rail lines are key connections into wider European networks. We are well connected to Europe but peripheral in a wider geographic context and will strive to maintain and enhance these connections.

Diverse regions

The **North Wales** region comprises Conwy, Denbighshire, Flintshire, Gwynedd, the Isle of Anglesey and Wrexham and is home to almost 700,000 people, of whom over 200,000 speak Welsh. Its dramatic landscape includes low lying coastal plains, mountain ranges and industrialised former coal fields. The population is concentrated in an arc along the coast from the Menai Straits to the border with England. The main concentration of population is in the east around Wrexham-Deeside.

The **Mid and South West Wales** region comprises Carmarthenshire, Ceredigion, Neath Port Talbot, Pembrokeshire, Powys and Swansea and has a population of over 900,000 people, of whom over 200,000 speak Welsh. This large and diverse region includes some of the most rural and sparsely populated parts of the UK, and the urban, industrialised areas around Wales' second city, Swansea. The region has a renowned coastal environment and it includes two of Wales, three national parks.

The **South East Wales** region is geographically the smallest. It comprises Blaenau Gwent, Bridgend, Caerphilly, Cardiff, Merthyr Tydfil, Monmouthshire, Newport, Rhondda Cynon Taf, Torfaen and the Vale of Glamorgan and is the most populous region of Wales, with over 1.5 million residents, of whom over 150,000 speak Welsh. The region includes the coastal cities of Cardiff and Newport and the former industrial heartlands of the South Wales Valleys.

Challenges & Opportunities

We face a number of challenges and opportunities and these have shaped our first NDF.

Climate change and the decline in biodiversity are global challenges and the biggest issues faced by our nation. Addressing these is our greatest responsibility when considering the legacy we will leave for future generations and as a consequence we have declared a Climate Emergency. In response to the challenge, we are committed to decarbonising Wales and to delivering healthy, resilient ecosystems. The NDF, together with Planning Policy Wales, will ensure the planning system nationally, regionally and locally focusses on delivering a decarbonised and resilient Wales through the places we create, the energy we generate and use, a circular economy, the houses we live in and the way we travel.

Wales can become a world leader in renewable energy technologies. Our wind and tidal resources, our potential for solar generation, our support for both large and community scaled projects and our commitment to ensuring the planning system provides a strong lead for renewable energy development mean we are well placed to support the renewable sector, attract new investment and reduce carbon emissions.

Wales has a rich variety of nature conservation sites, protecting a diverse range of important and unique habitats and protected species. **Ecosystems** underpin our well-being, health, economy, culture and identity. We depend on them to provide us with food, raw materials and clean water, and to regulate our climate and air quality. Many of our key industries such as agriculture, forestry, fisheries, energy, water and tourism rely on healthy, functioning ecosystems to prosper and to support communities across Wales. Ensuring the resilience of our ecosystems provides an opportunity to promote green growth and innovation to create sustainable jobs, sustain a more resource efficient economy and maintain healthy, active, sustainable and connected communities.

As our climate changes, pressure on **water resources** is predicted to increase. The supply and management of water will be of increasing importance. Currently, Wales can meet its water needs and we are able to transport water from source to areas of demand. The location of future growth provides an opportunity to consider where we will need water and how we safeguard our resources in the future. Focussing development in existing built-up areas reduces the likelihood of a need for significant new sources of water, but we must recognise the potential impact of climate change on the supply and availability of water.

The management of our **coasts** is important for all regions in Wales. The built-up coastal areas are where the majority of people live. In coastal areas Shoreline Management Plans identify opportunities to build ecosystems resilience and inform spatial choices in relation to development, taking into account erosion and current and future flood risks.

Travel across Wales is shaped by our topography and the distance between the main built-up areas in the north and south. Connections between North Wales and South Wales are fragmented and it is not possible to travel by train without leaving the country. East-West connections are better, but the road and rail networks can be congested. Significant investment in public transport, including Metro schemes and active travel infrastructure, including the walking and cycling routes being developed as a result of the Active Travel Act, provide an opportunity to re-think how our places work. Growth should be shaped around sustainable forms of transport and deliver places that make us and the environment healthier. The National Cycle Network is an important part of our national infrastructure and its planned improvements are supported.

Aggregates underpin economic growth, providing construction related products essential for the delivery of placemaking, housing and infrastructure. When construction leads to a spike in demand, caused for instance by major infrastructure projects, pressures are placed on



the minerals industry to provide the necessary materials. Effective planning ensures a good stock of permitted reserves is available to supplement existing productive capacity at any given time. A reliable supply of minerals, capable of meeting demand in all regions of Wales simultaneously, is vitally important.

The pace of change in **technology** is a challenge and opportunity for all nations. The jobs that future generations will do may not have been invented yet. Automation and Artificial Intelligence technologies will impact on all occupations. Advancements in technologies like electric vehicles, coupled with mobile applications which provide bespoke transport services, have the potential to re-shape the way we travel, the vehicles we own, public transport and the places we will live in. Work patterns have the potential for change too, becoming more flexible in terms of location and hours. The NDF and Planning Policy Wales support the provision of the infrastructure required to support new technologies and to ensure the places we create in the future can support our changing society.

The NDF has been prepared at a time when the UK is changing its relationship with Europe. Since 2016 **Brexit** has been central to public debate and has given rise to profound uncertainty on our future relationship with Europe and a wide-range of well established policy frameworks, which impact all aspects of our lives. As a nation, we are especially vulnerable to the impacts of Brexit. Both agricultural funding and regeneration programmes are areas of major public policy which have been shaped by wider European policies and funding. In response the NDF seeks to provide a positive, proactive framework to give certainty and direction on where Wales will grow and where we will invest. It also provides a framework responsive to changing circumstances to ensure that we are able to take decisions on future policy issues that are still to be defined.

Prosperity and reducing inequality remain the priorities Welsh Government policies. Prosperity is not equal across all parts of Wales, and West Wales and the Valleys continues to be recognised within Europe as one of the less developed regions. Health varies across Wales, with our poorest communities experiencing pronounced differences in health outcomes. The NDF provides a framework for regional planning to tackle regional inequalities and ensure that the most prosperous parts of Wales play a role in supporting their wider regions. It will ensure we take action to meet the needs of those struggling to access housing and that the places we create make us happier and healthier.

Good quality **affordable homes** are the bedrock of communities and form the basis for individuals and families to flourish in all aspects of their lives. The NDF provides evidence of the need for housing across Wales at both a national and regional level. In particular, this evidence demonstrates the need for a focus on increasing the delivery of affordable homes. The Welsh Government is targeting its housing and planning interventions towards achieving this aim within the broader context of increasing supply and responding to different needs.

Our society is **ageing** and we need to think about the type of houses in which we will live in the future; where they are; the social and healthcare services that will support us; and the type of places that we as an ageing population would like to live in. It is also a reminder that we need to retain and attract young people and promote active lifestyles. The NDF, together with Planning Policy Wales, places a strong focus on the places we create through our planning system. Building new houses or infrastructure is not an end itself; we are determined to create places that support our well-being across the whole of our lives.

The NDF will help us prepare for the future. The NDF Outcomes set out the Wales we wish to pass on to future generations.

3 NDF Outcomes

Identifying what we want to achieve is an important step in preparing a strategy for a development plan. The NDF Outcomes are overarching ambitions based on the national planning principles and national sustainable placemaking outcomes set out in Planning Policy Wales. The 11 outcomes are collectively a statement of where we want to be in 20 years time. Every part of the NDF, from the spatial strategy to regional policies, is concerned with achieving the NDF Outcomes. Most policy areas will contribute to multiple outcomes.

Through the NDF, we will develop:

A Wales where people live....

1. and work in connected, inclusive and healthy places
2. in vibrant rural places with access to homes, jobs and services
3. in distinctive regions that tackle health and socio-economic inequality through sustainable growth
4. in places with a thriving Welsh Language
5. and work in towns and cities which are a focus and springboard for sustainable growth
6. in places where prosperity, innovation and culture are promoted
7. in places where travel is sustainable
8. in places with world-class digital infrastructure
9. in places that sustainably manage their natural resources and reduce pollution
10. in places with biodiverse, resilient and connected ecosystems
11. in places which are decarbonised.

The 11 Outcomes can be achieved over the next 20 years if the planning system – through the NDF and other development plans – is focussed on the long-term and provides quality development in the right places for the right reasons. These Outcomes are inter-related and inter-dependent, and will improve places and well-being across Wales.



Outcome

1

Our cities, towns and villages will be physically and digitally well connected, offering good quality of life to their residents. High-quality homes meeting the needs of society will be well-located in relation to jobs, services and accessible green and open spaces. Places will meet and suit the needs of a diverse population, with accessible community facilities and services.

2

In rural areas, job opportunities and community services will be supported to help attract and retain people. A balance will be found between development and preserving the character of rural Wales, ensuring our small towns and villages have bright futures as attractive places to live and work. There will be support for the agricultural sector and its supply chains to boost resilience through diversification.

3

The regional approach will recognise that different parts of Wales work differently to each other, with distinct underlying characteristics and challenges. The three regions will address inequalities by building stronger links between public services, communities and business. Each region will be encouraged to build on their existing strengths and pursue opportunities to achieve greater prosperity and well-being.

4

We aim to have a million Welsh speakers in Wales by 2050 – an increase of almost 80% on current levels. Where Welsh is the everyday language of the community, development will be managed to ensure there are jobs and homes to enable the language to remain central to those communities' identities. Elsewhere education authorities will lead in developing infrastructure to enable the language to develop as a natural, thriving part of communities.

5

Cities and large towns are magnets for jobs and investment, while people are drawn to live and work there for the economic and social opportunities they provide. Development plans will enable and support aspirations for large towns and cities to grow, founded on sustainability and urban design principles, active travel and investment in key built and green infrastructure to enable population and economic growth whilst reducing pollution. Areas outside the urban centres will benefit directly from the strength of our large towns and cities, through improved connectivity and additional investment in new homes, jobs and services.

6

Development Plans will have a forward thinking, positive attitude towards enabling economic development, investment and innovation. Increased prosperity and productivity will be pursued across all parts of Wales, building on current activity and promoting a culture of innovation, social partnership, entrepreneurialism and skills-development in sustainable industries and sectors. The culture, heritage and environment of Wales will play a positive, modern role in the economy by attracting the interest and expenditure of tourists, and providing a distinctive and trusted brand for Welsh businesses.

7

All methods of travel will need to have low environmental impact and low emissions, with ultra low emission vehicles and public transport replacing today's petrol and diesel vehicles. Active travel and public transport will be a significant part of the transport mix, allied with a reduced reliance on private vehicle use, with sustainable transport infrastructure embedded within new developments to enable easy and convenient access from one place to another for commuting, business, tourism and leisure purposes.

8

Broadband provision will develop and evolve, beginning with comprehensive coverage of superfast and progressing to ultra-fast fibre, which will help businesses to be more productive, resilient and innovative. Better digital communication will enable changes to the economy and way of life, and ensure Wales can lead and keep pace with the latest global technological advancements.

9

Wales' natural resources, including its minerals, coast, water, forests and landscape, support a range of activities and sectors and are assets of great value in their own right. The environmental, social and cultural value of our resources will be managed, maintained and enhanced, while economic benefits will be utilised sustainably and appropriately by promoting nature-based solutions and a circular economy. Across Wales better resource choices will be reflected in more sustainable places, which benefit from reductions in levels of pollution, and be healthier and more liveable.

10

The variety of flora and fauna found across Wales make Wales a special place. Biodiversity underpins the functioning of healthy resilient ecosystems and the multiple benefits they provide. While biodiversity has declined in recent decades, we will reverse these losses and enhance the resilience of ecosystems. The planning system will ensure wildlife is able to thrive in healthy, diverse habitats, both in urban and rural areas, recognising and valuing the multiple benefits to people and nature.

11

The challenges of climate change demand urgent action on carbon emissions and the planning system must help Wales lead the way in promoting and delivering a competitive, sustainable decarbonised society. Decarbonisation and renewable energy commitments and targets will be treated as opportunities to build a more resilient and equitable low-carbon economy, develop clean and efficient transport infrastructure, improve public health and generate skilled jobs in new sectors.

4 Strategic and Spatial Choices: the NDF Spatial Strategy

A spatial strategy sets a structure for the type and location of development across the plan area. It highlights the key settlements in which development will be focussed and the infrastructure, transport, actions and resources required to support the strategy.

The NDF spatial strategy is a guiding framework for where large scale change and nationally important developments will be focused over the next 20 years. The strategy blends the existing settlement patterns and the distribution of jobs and homes with a vision of managing change and future trends for the benefit of everyone in Wales.

The spatial strategy supports the NDF Outcomes. Decisions taken at a national level, including Welsh Government investment choices, will reflect the principles of the strategy and make positive contributions towards the national placemaking objectives.

Our strategy is to build on existing strengths and to consolidate advantages. It encourages sustainable and efficient patterns of development, based on co-locating homes with jobs and vital services and the efficient use of resources. It contributes to achieving decarbonisation and biodiversity objectives and supports national ambitions for improving health. It enables the creation of thriving, sustainable communities and is aligned with the Welsh Government's broader goal of encouraging a million people to speak the Welsh language by 2050.

Co-locating homes, jobs and services means focusing on cities and large towns as the main development areas. Developing our urban areas to enhance their performance will be challenging,

but we firmly believe it is the right ambition for Wales and supports the Welsh Government's commitment to social justice. Choosing to develop new towns and enabling sprawling greenfield development would be to ignore the untapped potential of places which already have town centres, universities and colleges, public transport infrastructure and a good range of public services. It would also squander key assets in the form of productive countryside and natural resources.

The focus on growing urban areas will create concentrations of jobs, services and amenities and a critical mass of people to sustain good public transport services and a range of economic activities. An urban growth focus enables more people to walk and cycle for everyday journeys and, with good urban design, can create positive impacts on public health, air quality and well-being.

Sustainable growth will involve setting an ambitious strategy for achieving biodiversity and green infrastructure enhancement in our urban areas. Effective and innovative nature-based solutions to the challenges of urban form, design and density will be required in order to reap the well-being rewards of living and working in exemplar, future-resilient settlements.

In all parts of Wales, the strategy supports sustainable growth. Any place without jobs, homes, community spaces and wildlife has no prospect of having a thriving and cohesive community, Welsh language or economy. There is such a thing as too much development or the wrong type of development, whereas sustainable development should foster a stable or growing population to ensure a healthy natural environment and economic and social stability.



Growth and new development must be in the right place, undertaken in the right way and make efficient use of our resources to achieve the NDF Outcomes. The spatial strategy has three components and sets out:

- where in Wales growth should be focused;
- how growth should be planned and managed
- how we should power and heat places using renewable energy and district heat networks.

Spatial Strategy: Where Wales will grow

Population trends in Wales have historically reflected economic fortunes, with people drawn to the areas where jobs were available. Over two centuries this has resulted in the development of three main urban clusters of cities and towns:

- Cardiff, Newport and the Valleys;
- Swansea Bay and Llanelli; and
- Wrexham and Deeside.

Each of these urban areas is economically distinctive, supporting a range of businesses, enterprises and universities, and offering culturally rich lifestyles to residents and visitors. They are nationally significant places and this strategy promotes their continued growth and regeneration. As a result, new large-scale employment opportunities and housing growth will occur predominantly, though not exclusively, in these urban areas.

Outside of these areas are a mix of smaller towns and villages and large areas of countryside. Many towns are traditionally market towns and have retained the function of being gathering places for people living and working in rural places. Along the coast our maritime and resort towns remain popular places in which to live and visit, though there is a need for regeneration in some places. Development in towns and villages in rural areas will support local aspirations and need, complementing rather than competing with efforts to grow our cities and towns.

The NDF identifies a range of important regional centres which, through specific policies in Strategic and Local Development Plans, should retain and enhance the commercial and public service base that make them focal points in their areas. This will apply in places like Carmarthen, the Pembrokeshire Haven towns, Aberystwyth, Llandrindod Wells, Newtown, Caernarfon, Bangor and the coastal towns from Llandudno to Prestatyn.

By focussing large scale growth on the urban areas, development pressures can be channelled away from the countryside and productive agricultural land can be protected. Rural areas have an important function as providers of food, energy and mineral resources. Communities in rural areas are strongly supported; the aim is to secure sustainable economic and housing growth which is focussed on retaining and attracting working age population and maintaining and improving access to services. In areas designated for their landscape or ecological importance, protection against inappropriate development remains in place.

The spatial strategy empowers local policy and decision-makers to develop the national priorities through Strategic and Local Development Plans and identify areas and issues of significance to their particular areas.

Spatial Strategy

National Growth Areas



Regional Growth Areas



Regional Connectivity



Intra-urban Connectivity



International Connections



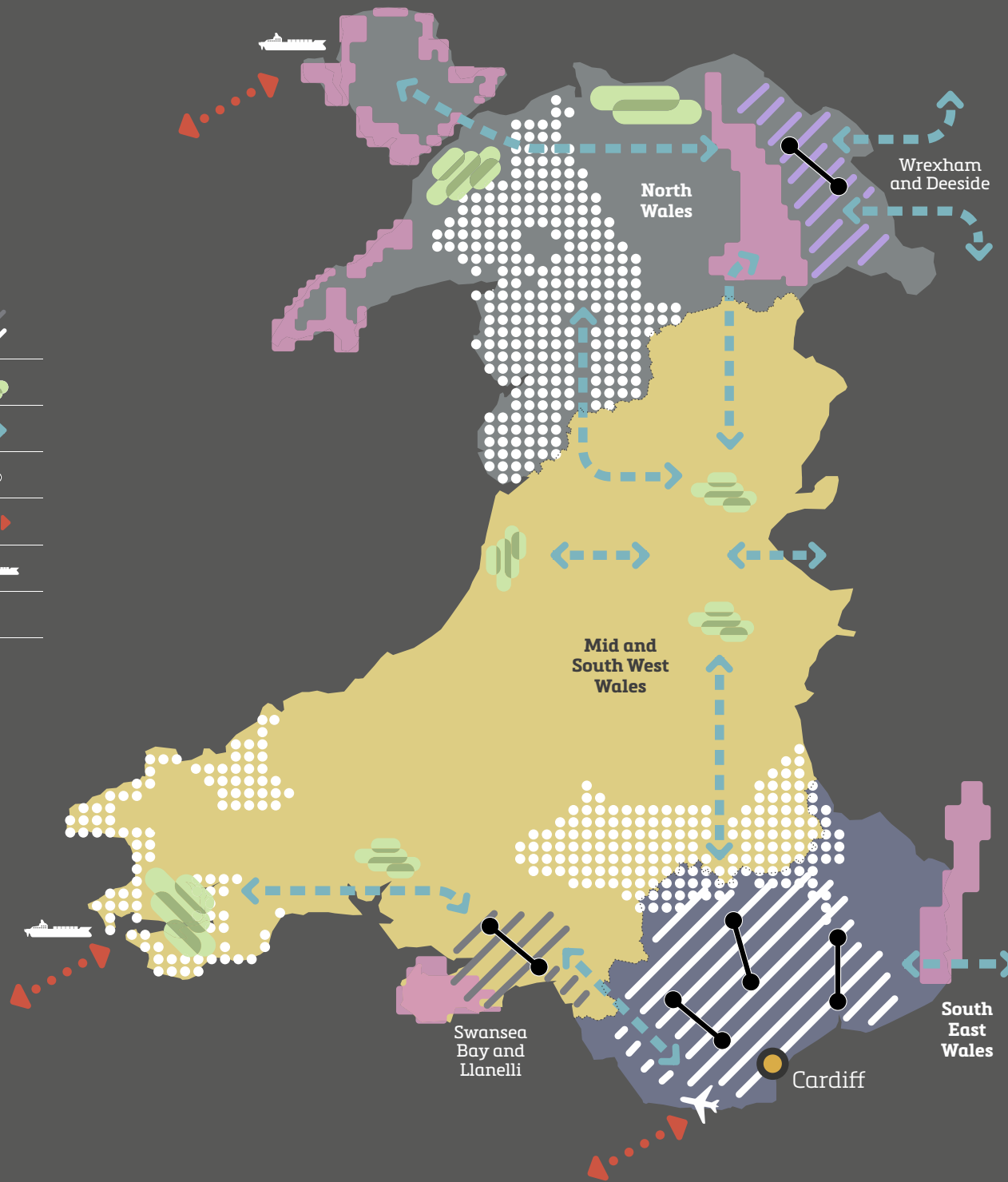
Strategic Port / Airport



National Parks



Areas of Outstanding Natural Beauty (AONBs)



Policy 1 – Sustainable Urban Growth ^{P1}

Urban growth should support towns and cities that are compact and orientated around urban centres and integrated public transport and active travel networks. Higher density and mixed use development on sites with good access to urban centres and public transport hubs, including new and improved Metro stations, will be promoted and supported.

Spatial Strategy: Planning and managing growth

We want places to be healthy, prosperous, vibrant and cohesive, and to support well-being. How we shape places will determine how we respond to climate challenges and make use of our resources. It is important that places are well planned and have strategies for ensuring our needs and demands are met and managed in a sustainable way. Sustainably planned places reduce the need to travel by car; encourage walking, cycling and public transport; embed green infrastructure; and take action to ensure air is clean. They ensure homes and businesses are connected to essential services such as energy, water and broadband and provide different spaces for all our daily activities.

Planning is fundamental to achieving liveable, successful places. We set out in the preceding section those parts of Wales which will accommodate strategic growth. This section, which applies to all parts of Wales, sets out how this growth should be planned and managed to create sustainable places.

Supporting our urban areas

- ^{P1} The growth aspirations of the NDF are an opportunity to shape and grow, renew and regenerate our cities and towns and create sustainable, healthy places which embed green infrastructure. The Welsh Government wants towns and cities that are compact and organised around urban centres and public transport hubs.

Density is a key factor in shaping how places grow and function. Higher density development makes efficient use of land, requires less land to be developed and protects rural areas from loss of countryside. Higher densities provide the necessary intensity of people and activity to animate streets and public spaces, support high streets and sustain good public transport services.

Successful, healthy towns and cities have a rich mix of residential, commercial and community uses within close proximity to each other. This creates activity throughout the day and enables people to walk and cycle to school, work or the shops, rather than being reliant on travelling by car.

The density and mix of uses of development should reflect the site and area's wider context, particularly the proximity to an urban centre and the public transport accessibility. This variety will result in different areas having different characteristics, including some lively and busy areas and some quieter and more secluded areas, which will result in places that cater for varied lifestyles. However, low density and mono-functional development in areas with the potential for greater densities and a mix of uses, misses the opportunity to allow more people to live closer to transport hubs, jobs, services and cultural destinations and fails to create more sustainable places.

The Welsh Government promotes Transit Orientated Development, which involves the above mentioned principles of compact, higher density, mixed use development around transport corridors and stations. The Metro projects, which

Policy 2 – Supporting Urban Centres ^{P2}

Proposals for new public service facilities of a significant scale should be located in town and city centres. A sequential approach must be used to assess development plan allocations and to determine planning applications for developments. Only in exceptional circumstances should public service facilities of a significant scale be approved outside of town and city centres.

are at different stages of progress, all offer significant and timely opportunities to identify locations for Transit Orientated Developments around new and existing stations. Land in close proximity and with good access to Metro stations is an important and finite resource and will play a key role in delivering sustainable urban places.

Good planning and a commitment to excellence in urban design are required to successfully accommodate higher density developments. High density does not necessarily mean high rise and it should not be achieved by squeezing standard design houses closer together or by reducing internal living space. Urban solutions to the layout and design of development, including compact forms of development, are capable of integrating higher densities in a way that creates vibrant places, with a high quality public realm and a good quality of life. Incorporating green infrastructure, in particular, will require innovative design solutions to deliver wider well-being benefits.

These principles are applicable to towns and cities with good public transport links throughout Wales. They are scalable, with the definition of higher density and mixed use development varying in different places. Further guidance will be produced to support the implementation of the policy in different parts of Wales.

^{P2} The principle of ‘town centres first’ is well established in planning policy in relation to retail developments. However, good planning can help us re-think the future of town and city centres, which are moving away from their traditional retail roles. They remain

important focal points of communities and are increasingly becoming places to live and work, centres of community and cultural activity, and the focus for public services such as health and education.

Public service facilities include hospitals, primary healthcare facilities, libraries, universities and colleges and any public sector organisation building which attracts significant numbers of workers and visitors. Local planning authorities, both urban and rural, should be confident in defining what constitutes development of ‘a significant scale’ for their area. Appropriate definitions can be produced through an understanding of the type and scale of development an area can expect, the quality of the public transport services they will rely upon and with local consultation.

Public investment and land

Investment by the public sector and the decisions it takes regarding its land can make a major contribution to shaping places. The Welsh Government and the wider public sector must lead the way in shaping sustainable places. Public services and facilities are central to our lives and support society best when they are accessible to all.

Major public buildings and facilities serve large populations, often well beyond the boundaries of the settlement. These include general hospitals, large government buildings, council offices, transport hubs, colleges and universities. Smaller developments which serve part of a city or town, including

Policy 3 – Public Investment, Public Buildings and Publicly Owned Land ^{P3}

Welsh Government investments and land holdings will support the delivery of sustainable places. We will work with all public land owners and investors to ensure that new development of a significant scale is located in town and city centres which are accessible by walking, cycling and public transport.

Strategic and Local Development Plans should review publicly owned land, both redundant and in current use, to identify potential sites for development and re-development, including for mixed use and affordable housing developments that will support the creation of sustainable places.

schools and GP surgeries, may be more appropriate in accessible locations within neighbourhoods, particularly in or adjacent to local centres, where they can better meet the needs of communities.

^{P3} Policy P3 applies to major trip-generating developments, such as public service facilities, sport stadia, cultural venues and exhibition spaces which have the potential to drive regeneration and often rely on public funding.

The Well-being of Future Generations Act means all public sector bodies in Wales have a duty to deliver the well-being goals. This will require consideration of the wider implications of decisions in relation to the sale, re-use and development of publicly owned land.

In assessing the cost or value of the potential development of publicly owned land, either by the public sector or following a sale to a private or third sector interest, all potential costs should be considered. These include costs to the environment, climate change targets and wider society. A development in an unsustainable location that results in increased car trips, that is poorly served by public transport, that is inaccessible to the least mobile or poorest members of society, that fails to make a contribution to supporting vibrant town and city centres will have negative impacts on both current and future generations. A short term capital receipt or a cheaper development cost is unlikely to offset these longer term costs.

The Welsh Government, UK Government departments, local authorities and other public landowners should undertake strategic reviews of their land holdings in Wales and consider the NDF Outcomes and spatial strategy. Where publicly owned land could support sustainable places, positive consideration should be given to the future use of this land and whether it could, for example, support new mixed use development, including affordable housing and new commercial activities, or transport infrastructure.

Supporting our rural areas

Large parts of Wales are rural in character. Rural areas are sparsely populated, with 40% of the population living in settlements of less than 10,000 people in Wales, and they are integral to the health and livelihood of our nation. Like our urban centres, rural areas are diverse, with both prosperous and deprived communities, innovative businesses, essential resources and distinctive histories and cultures. They draw visitors to Wales from around the world and they play a major role in meeting our water, food and energy needs. They also include places where Welsh is the main language of the community.

It is important the challenges faced by the rural economy, in particular the agricultural sector, are at the fore when considering the future of rural areas and that the planning system responds to these challenges, facilitating appropriate new development and diversification.

Policy 4 – Supporting Rural Communities P4

The Welsh Government supports sustainable rural communities and appropriate proportionate growth in rural towns and villages.

The future for rural areas are best planned at the regional and local level. Strategic and Local Development Plans should plan positively to meet the needs of rural communities with regard to housing, transport, businesses, services and diversification in the agricultural sector.

Strategic and Local Development Plans should ensure people living in rural areas have access to jobs, services and social infrastructure of appropriate scale. They should support strong and resilient rural areas, with a positive framework for economic development, diversification and meeting local housing needs. Strategic spatial decisions must ensure the needs of the dispersed rural population are met.

P4 Rural towns are integral to their surrounding areas and should be supported. It is important that rural communities have appropriate access to wider job and economic markets, and decisions on regional economic development and transport infrastructure and services should consider the needs of all parts of Wales. It is also important that rural communities are able to develop stronger economies and support enterprise. Strong rural economies support strong and resilient communities, can reduce the need to travel, and reduce the reliance on a small number of larger economic centres. Priority should be given to economic activities with strong links to rural areas, including food and drink processing, energy generation, tourism and leisure, the environmental economy and businesses ancillary to farming, forestry and other rural economic activities. The improved provision of broadband in rural Wales supports an increasingly diverse business base.

The Welsh Government wants rural areas to sustain themselves and meet the needs of those living there and it also wants the Strategic and Local Development Plans prepared in rural areas to develop strong, ambitious policies that support rural areas. Where these plans identify growth in rural settlements, this will be supported where it is appropriate, proportionate to the needs of the settlement and the wider rural area they serve and where it has been planned through the evidence based, consultative development plan process.

In the preparation of development plans and in determining proposals through the Development Management process, decision makers should be confident in identifying which areas constitute ‘rural’ in the context of this policy. A rural location within proximity of the major urban areas experiences a different set of issues in terms of access to housing, employment, essential health, education and transport services than a rural location in central mid Wales and it may not be appropriate for rural focussed policy to be applied to both types of location equally. Through an understanding of the issues and geography of an area and through the preparation of development plans, appropriate definitions can be prepared.

The policies in this section on supporting urban centres, delivering affordable homes, supporting communities through the use of publicly owned land, mobile action zones and the provision of electric vehicle charging infrastructure all apply to Wales’ rural areas. They should be considered as priority issues for the preparation of Strategic and Local Development Plans across the whole of Wales.

Delivering Affordable Homes

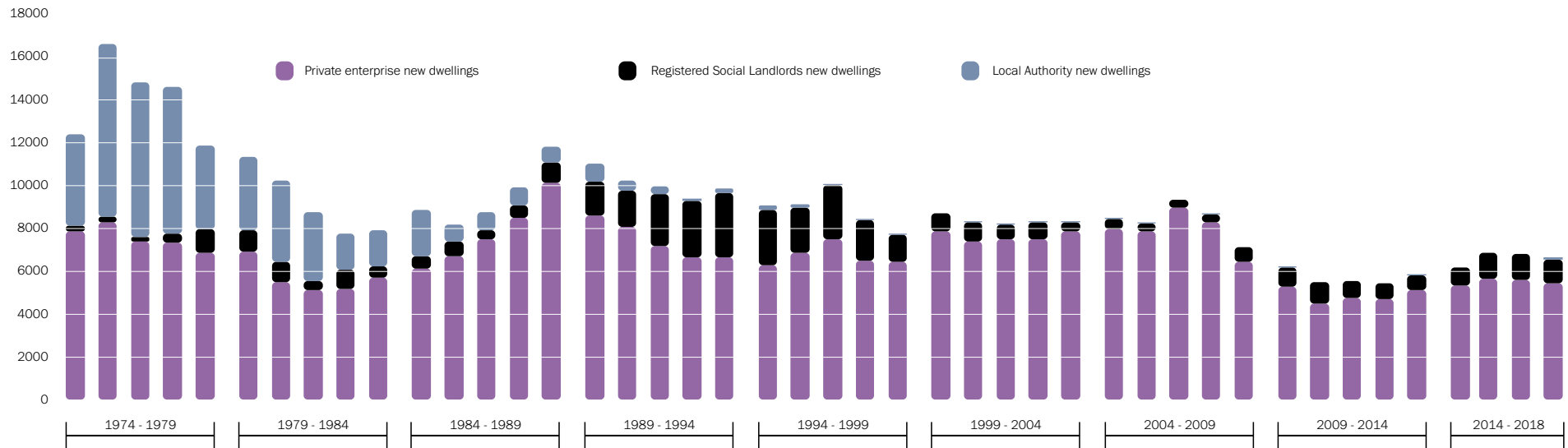
Providing housing in Wales at levels which meet our needs is a priority. There is a complex picture of provision and the opportunities people have vary significantly depending on income and where they live in Wales.

The Welsh Government has published a range of ‘Estimates of housing need in Wales’ based on different demographic scenarios. The central estimate suggests a need for an additional 114,000 homes across Wales up to 2038. During the initial five years (2018/19 to 2022/23) it is estimated that on average 8,300 additional homes will be required annually, with more than half (57%) of these homes needed in South East Wales, almost a quarter (24%) in Mid and South West Wales and 19% in North Wales.

These estimates also indicate that the provision of affordable homes should become a key focus for housing delivery. It is estimated under the central estimate that on average 47% of additional homes should be affordable housing (social housing or intermediate rent) throughout 2018/19 to 2022/23, with the remaining 53% being market housing. This represents an average of approximately 3,900 affordable homes and 4,400 market homes per year over the five year period.

The scale of the housing challenge is illustrated in the Chart below, which demonstrates that delivery of new homes over the last ten years has not reached the level of additional homes that it is now estimated are required over the next five years.

Housing completions 1974-2018: Wales



Source: Information on new dwelling completions by financial year by tenure in Wales are based on the reports of local authority building inspectors and the National House Building Council (NHBC). It is sometimes difficult for building control officers who record the data to identify the intended final tenure of the property (the basis for the tenure information). This may lead to an under-count of social sector new house building and an over-count for the private sector. Therefore the tenure breakdown should be treated with caution.

Policy 5 – Delivering Affordable Homes P5

The Welsh Government will increase delivery of affordable homes by ensuring that funding for affordable homes is effectively allocated and utilised.

Strategic and Local Development Plans should develop strong evidence based policy frameworks to deliver affordable housing, including setting development plan targets based on regional estimates of housing need and local assessments. In response to local and regional needs, they should identify sites for affordable housing led developments and explore all opportunities to increase the supply of affordable housing.

To address both the ‘delivery gap’ and housing need in Wales, a shift in the delivery model is required by building affordable homes at scale and pace. The gap has widened since greater reliance has been placed on the private sector to meet this basic human need. To address this we will support a more balanced approach with local authorities, registered social landlords and Small and Medium sized construction and building enterprises encouraged to build more homes. The reuse of publicly owned land will be important to the delivery of these homes.

P5 The planning system has a long established role in the delivery of affordable housing. We are committed to ensuring that new housing meets the needs of all members of society especially

those unable to afford to buy on the open market. Sustainable places are inclusive and welcoming to all; they do not exclude sections of the community or create ghettos of the affluent and the poor. The Welsh Government is committed to increasing the delivery of affordable housing in the areas where it is needed and will use its funding, land, planning and housing policies to drive delivery. We recognise that the affordability of housing is not uniform across Wales and different responses will be needed in different parts of Wales to meet the needs of local communities.

The Welsh Government will work with everyone involved in the planning and delivery of affordable housing, including those in the public, private and third sectors to achieve these aims.

Policy 6 – Planning in Mobile Action Zones ^{P6}

In Mobile Action Zones, local planning authorities and telecommunications operators will work together to increase mobile coverage collaboratively by identifying suitable sites and buildings for new equipment and infrastructure.

Considerable weight will be given to the need to increase mobile phone coverage, along with its associated economic benefits. Accordingly, there is a presumption in favour for new mobile telecommunications infrastructure, provided that there are no significant adverse landscape impacts.

Policy 7 – Ultra Low Emission Vehicles ^{P7}

The Welsh Government supports the increasing use of ultra low emission vehicles. We will work with the UK Government, local authorities, the energy sector and businesses to plan for and implement the roll out of electric vehicle charging infrastructure, including the creation of a network of rapid charging points to enable longer distance travel by electric vehicles throughout Wales.

Changing Technology: Mobile Communications

Mobile phones are an essential tool in our everyday lives. In addition to making calls, for many of us they are how we access media, e-mails, entertainment, services and information.

They are becoming means of payment, tools to make transport arrangements, order our food and shopping and keep in touch with schools, public services and employers. Good mobile communications coverage is important to economic and social wellbeing.

- ^{P6} We are committed to ensuring all parts of Wales are supported by the telecoms infrastructure they need. We will identify Mobile Action Zones, focusing on areas of little or no coverage and where there is demand for new infrastructure, to provide a focus for our actions. We will work with mobile network operators, infrastructure providers and local authorities to increase digital connectivity in the Mobile Action Zones we identify.

Changing Technology: Ultra Low Emission Vehicles

Sustainable places will support a reduction in the need to travel, particularly by private vehicles, and a modal shift to walking, cycling and public transport. A transition away from petrol and diesel vehicles to ultra low emission (including electric) vehicles is also crucial to the achievement of the Welsh Government's carbon reduction targets.

- ^{P7} It is important that we plan and deliver the infrastructure, and in particular the charging infrastructure, that electric vehicles will rely on. We expect business and industry to drive much of the roll out of charging infrastructure. There is also an important role for the public sector and the Welsh Government will set out a strategy for electric charging infrastructure. We will keep under review the pace and geography of the delivery of charging infrastructure, particularly in rural areas, to ensure that no parts of Wales are left behind in this transition.

Changes in transport technology also offer the opportunity to change the way in which we travel. The advent of driverless cars will inevitably present new challenges and opportunities and could, in the future, completely transform the current concepts of private car ownership, especially within and close to our major urban areas.

Policy 8 – Strategic framework for biodiversity enhancement and ecosystem resilience ^{P8}

To ensure the enhancement of biodiversity and the resilience of ecosystems, the Welsh Government and its key partners will identify:

- areas which could be safeguarded as ecological networks for their potential importance for adaptation to climate change or other pressures, for habitat restoration or creation, or which provide key ecosystems services, to ensure they are not unduly compromised by future development; and
- opportunities where strategic green infrastructure could be maximised as part of development proposals, requiring the use of nature based solutions as a key mechanism for securing sustainable growth, ecological connectivity, social equality and public well-being.

Planning authorities should include these sites in their development plan strategies and policies in order to promote and safeguard the functions and opportunities they provide.

In all cases, cumulative action towards securing the enhancement of biodiversity and the resilience of ecosystems should be demonstrated as part of development proposals through innovative, nature-based approaches to site planning and the design of the built environment.

Supporting Strategic Green Infrastructure

The Welsh Government is committed to reversing the decline in biodiversity and increasing the resilience of our ecosystems. In collaboration with our partners, including Natural Resources Wales and local authorities, we will take strategic action to secure biodiversity enhancements, to safeguard ecological networks, and to maximise the use of green infrastructure and nature based solutions. Effective action is generally best undertaken at a regional or local level reflecting individual opportunities.

Planning Policy Wales sets out a range of policies to maintain and enhance biodiversity and promote the resilience of ecosystems, including the stepwise approach. The NDF's strategic focus on urban growth requires an increased emphasis on biodiversity enhancement in order to ensure that the approach is sustainable.

- ^{P8} We need to expand and make connections between our designated sites to increase the ability of species and ecosystems to adapt to the pressures of climate change and pollution. Strategic and Local Development Plans should consider how designated sites fit within the wider network of habitats, and assess what action needs to be taken to safeguard land which may be needed to connect or enlarge those sites in order

to contribute to their long-term resilience, to contribute to the wider resilience of ecological networks, or to protect and enhance ecological services.

Safeguarding is intended to ensure that areas of land that are potentially important for expanding or connecting ecological networks, adapting to climate change or other pressures, or which provide key ecological services, are not unduly compromised by development. Safeguarding does not necessarily prohibit development, but sets out a requirement to consider both the long-term future land needs of the habitats and species it is intended to protect and improve, and the present and predicted future needs for particular ecosystem services and functions. Areas may be safeguarded for a wide variety of reasons, including the need to increase the resilience or connectivity of certain habitat types, such as species rich meadows.

Local authorities and Natural Resources Wales should work together to ensure that appropriate action is taken to safeguard sites both within and beyond their administrative boundaries. Safeguarded areas should be identified through the Green Infrastructure Assessment, and set out in the development plan.

Strategic green infrastructure in and around urban areas

Urban ecosystems play a vital role in supporting physical and mental well-being. There are significant positive links between mental well-being and access to green space in urban areas, and we receive benefits not only by being more active, but also just through **being in and near** green spaces. Even limited open green space in dense urban areas can provide benefits to large numbers of people, provided that it is high quality and accessible.

As the population of Wales becomes increasingly urban, the opportunity to optimise well-being benefits from ecosystems will be greatest in these areas. Through the innovative use of nature-based solutions, and by increasing well-integrated green infrastructure in and around urban areas, development can restore natural features and processes into cities and landscapes, maintain and enhance the strategic functioning of our natural resources and ecological networks, and provide locally accessible, high quality green spaces and corridors.

Strategic Green Infrastructure mapping

Natural Resources Wales have produced indicative maps to illustrate national biodiversity themes. They provide the starting point for considering enhancement as part of green infrastructure assessments and a means of ensuring that cumulative action is taken to secure enhancement through development proposals.

Area Statements will develop this approach by identifying key challenges and opportunities to strengthen ecological networks and ecosystem services. They will provide a local scale evidence base and mapping of key environmental themes, and will identify areas where taking action at the right scale can maximise benefits. Any priority areas for action identified in Area Statements are a material planning consideration, and development plans should set out appropriate policies to safeguard and connect these areas, and to protect and enhance their identified key ecological functions and features.

Regional and local interventions can collectively contribute towards increasing the resilience of our national ecological networks. The Welsh Government expects Strategic and Local Development Plans to set out strategies that contribute to these aims through their Green Infrastructure Assessments, and form an appropriate policy response.

Woodlands provide a wide range of benefits for society, from abating carbon emissions and reducing flood risk in sensitive locations, to being increasingly important as community resources, and providing places for active recreation, education and lifelong learning. Our woods and forests underpin many economic activities and sectors and have a key role to play in replacing fossil fuels, storing carbon and helping us to cope with the effects of a changing climate. The 'right tree in the right place' plays a key role in realising these benefits.

Policy 9 – National forest P9

The Welsh Government is committed to developing a national forest, and will identify appropriate delivery sites and mechanisms to achieve this aim. Action to safeguard proposed locations for the national forest will be supported.

- P9 An increase in woodland cover is needed to help build the resilience of our ecosystems, to secure the delivery of our climate change and decarbonisation aspirations, and to ensure that the productive potential of Welsh woodlands is maintained.

The Welsh Government has therefore set a target to increase woodland cover in Wales by at least 2,000 hectares per annum from 2020. A national forest will help achieve this target and improve well-being for people and communities.

The forest will be a national asset which could provide jobs in timber, leisure, tourism and other sectors. It is likely to be dispersed across a number of locations, and could act as a catalyst for improving land in need of regeneration. Any sites or development proposals, which require planning permission and forming part of this project, should be supported where appropriate. There is an opportunity for the national forest to be linked by green infrastructure incorporating active travel facilities and to become an important asset for local people and tourists.

Spatial strategy: Powering and heating places with renewable energy and District Heat Networks

The spatial strategy provides a long term context and framework for infrastructure investment and the protection of the environment and places a strong emphasis on the requirement to make the best use of our resources.

Growing our towns and cities will require clean energy and an efficient means of providing heat and power to homes and workplaces. This section sets out the spatial implications of our energy and heat needs.

Renewable Energy

Wales is abundant in opportunities to generate renewable energy and the Welsh Government is committed to maximising this potential. Generating renewable energy is a key part of our commitment to decarbonisation and tackling the causes of climate change.

We have set the following ambitious targets for the generation of renewable energy:

- For 70 per cent of electricity consumption to be generated from renewable energy by 2030.
- For one gigawatt of renewable energy capacity to be locally owned by 2030.
- For new renewable energy projects to have at least an element of local ownership by 2020.

Proposals for large scale energy development are classed as Developments of National Significance and are determined by Welsh Ministers. Proposals below the threshold for Developments of National Significance are determined by local planning authorities. Large scale energy developments include:

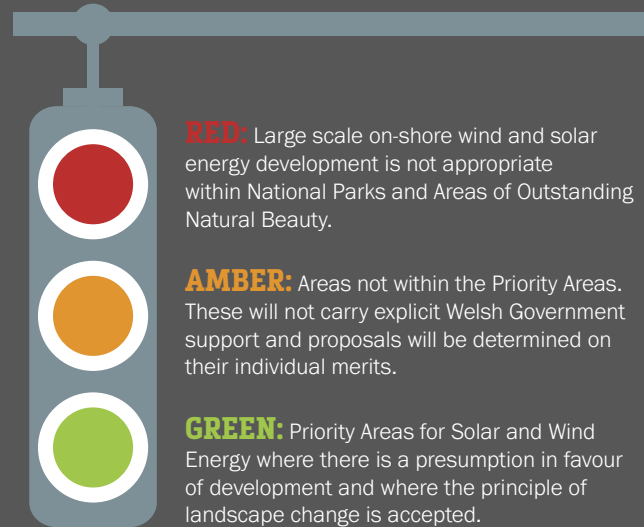
- All on-shore wind generation over 10 mega watts.
- Other renewable energy generation sites with generating power between 10 mega watts and 350 mega watts.

Our spatial priority is for large scale wind and solar development to be directed towards Priority Areas for Wind and Solar Energy shown on page 42. There is a presumption in favour of large scale on-shore wind and solar energy development in these areas, an acceptance of landscape change and a focus on maximising benefits and minimising impacts. Communities will be protected from significant cumulative impacts to avoid unacceptable situations whereby, for example, smaller settlements could be potentially surrounded by large wind schemes.

The Welsh Government will use its policy levers to assist in the delivery of renewable energy projects in these areas. The development of Priority Areas will assist in co-ordinating strategic action, bringing a critical mass of new renewables developments together to build the case for new or reinforced grid infrastructure. We will work with relevant stakeholders to help unlock the renewable energy potential of these areas and the economic, social and environmental benefits they can bring to communities.

The Welsh Government adopts a clear traffic light based approach to its policy on large scale wind and solar renewable energy projects.

These technologies are viable and deliverable, and have the greatest ability to make positive contributions to our renewable energy targets in the short-to-medium term:



Large scale wind and solar renewable energy development can be visually prominent. A strategic review of landscape and visual impact identified the Priority Areas for Solar and Wind Energy as the most appropriate locations to accommodate landscape change. There is, therefore, an acceptance of landscape change in these areas. However, the design and micro siting of proposals must minimise the landscape and visual impact, particularly those in close proximity to built-up areas.

Policy 10 – Wind and Solar Energy in Priority Areas ^{P10}

The Welsh Government supports large scale on-shore wind and solar energy development in the identified Priority Areas for Solar and Wind Energy. There is a presumption in favour of development for these schemes and an associated acceptance of landscape change.

When determining planning applications for large scale on-shore wind and solar energy development in Priority Areas, significant weight will be given to the proposal's contribution to reducing Wales' greenhouse gas emissions and meeting our decarbonisation and renewable energy targets.

Planning applications must demonstrate how local social, economic and environmental benefits have been *maximised* and the following adverse impacts have been *minimised*:

- landscape and visual impacts;
- cumulative impacts;
- the setting of National Parks and Areas of Outstanding Natural Beauty;
- visual dominance, shadow flicker, reflected light or noise impacts;
- electromagnetic disturbance to existing communications systems; and
- the following identified protected assets:
 - archaeological, architectural or historic assets;
 - nature conservation sites and species;
 - natural resources or reserves.

Suitable access to the site for construction and maintenance purposes must be provided. Plans must also be in place for the end of the development's lifetime, including the removal of all infrastructure as soon as their use ceases and the appropriate after-use of the site.

^{P10} Not all of the area within the Priority Areas for Solar and Wind Energy is suitable for the generation of renewable energy. Natura 2000 sites within the Priority Areas are excluded. Careful consideration will be given to the siting of schemes, particularly the cumulative impacts. Further guidance on the development of on-shore wind and solar energy schemes in Priority Areas will be produced to assist in the development process. The implementation of developments within the Priority Areas will be monitored against the Welsh Government's renewable energy targets.



Policy 11 – Wind and Solar Energy Outside of Priority Areas ^{P11}

Outside of the Priority Areas for Solar and Wind, planning applications for large scale wind and solar development must demonstrate the proposal is acceptable, in accordance with the criteria below.

Planning applications must demonstrate how local social, economic and environmental benefits have been maximised and that there are *no unacceptable adverse effects* on, or due to, the following:

- landscape and visual impacts;
- cumulative impacts;
- the setting of National Parks and Areas of Outstanding Natural Beauty;
- visual dominance, shadow flicker, reflected light or noise impacts;
- electromagnetic disturbance to existing communications systems; and
- the following identified protected assets:
 - archaeological, architectural or historic assets;
 - nature conservation sites and species;
 - natural resources or reserves.

Suitable access to the site for construction and maintenance purposes must be provided. Plans must also be in place for the end of the development's lifetime, including the removal of all infrastructure as soon as their use ceases and the appropriate after-use of the site.

Policy 12 – Wind and Solar Energy in National Parks and Areas of Outstanding Natural Beauty ^{P12}

Large scale on-shore wind and solar energy development is not acceptable within National Parks and Areas of Outstanding Natural Beauty.

^{P11} Outside the Priority Areas, large scale on-shore wind and solar energy developments may be appropriate. Applications will be determined based on the merits of the individual proposal and the onus is on the applicant to demonstrate that a proposal will not have an unacceptable impact on its surroundings.

^{P12} Large scale on-shore wind and solar energy development is not appropriate within National Parks and Areas of Outstanding Natural Beauty. Proposals close to the boundaries of these designated areas must demonstrate that the development will not undermine the objectives that underpin the purposes of the designation.

Policy 13 – Other Renewable Energy Developments ^{P13}

Proposals for other large scale renewable energy generation will be determined in accordance with the criteria of policy P11.




^{P13} Renewable energy technologies other than wind and solar are supported in principle. The Welsh Government is preparing an Energy Atlas to identify opportunities for all types of renewable projects. Proposals should ensure there is no significant unacceptable detrimental impact on the surrounding natural environment and local communities and that the development brings with it positive social, environmental and economic benefits.

Large scale renewable energy schemes can generate direct social and economic benefit to local communities across the country. Local ownership of projects in whole or part can ensure these benefits are accrued over the long-term, generating funds to develop community facilities and help address fuel poverty.

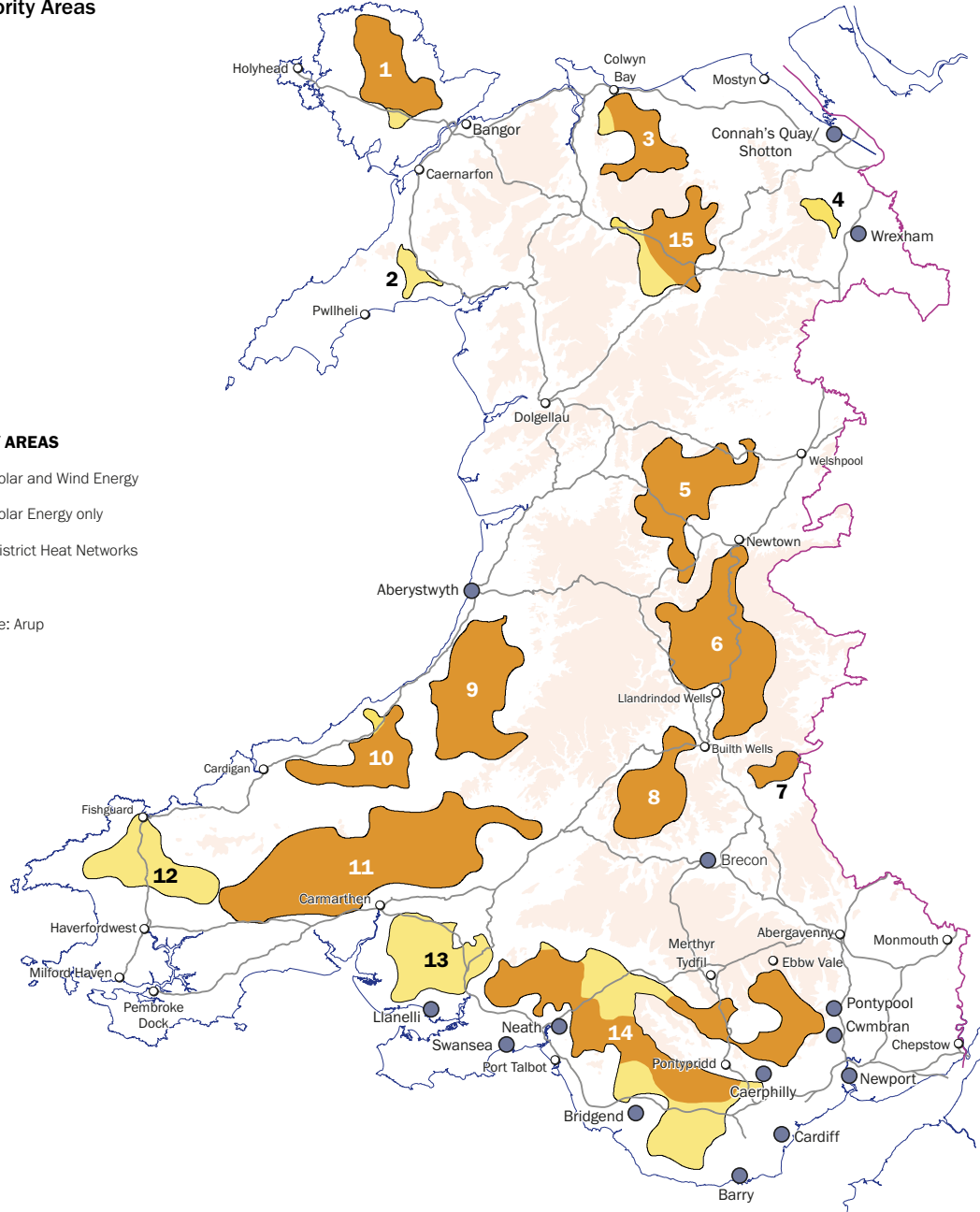
Renewable energy projects can also provide environmental benefits, such as contributing to resilient ecological networks, restoring degraded peatlands and restoring semi-natural grasslands on post-agricultural land. The Welsh Government encourages active consideration of how these benefits can be realised in all renewable energy developments. With all projects, provisions for access to the site for construction and maintenance of the scheme should recognise and respond to the environment in which they are located. The careful removal of infrastructure as soon as their use ceases and the appropriate after-use of the site will also ensure environmental benefits are realised.

Wales Energy Priority Areas

PRIORITY AREAS

-  Solar and Wind Energy
-  Solar Energy only
-  District Heat Networks

data source: Arup



Policy 14 – Priority Areas for District Heat Networks ^{P14}

Within Priority Areas for District Heat Networks, planning authorities should identify opportunities for District Heat Networks and ensure they are integrated within new and existing development.

Policy 15 – Masterplanning for District Heat Networks ^{P15}

Large scale mixed used development should, where feasible, have a District Heat Network. Planning applications for such development should prepare an Energy Masterplan to establish whether a District Heat Network is the most effective energy supply option and, for feasible projects, a plan for its implementation.

District Heat Networks

District Heat Networks are a method of delivering heating and hot water to multiple buildings from a central heat source and, particularly in urban areas, can be the most effective way to provide low carbon heat. The Welsh Government supports the establishment of District Heat Networks, as part of delivering the urban growth focus of the Spatial Strategy.

^{P14} Our spatial priority is for the suitability and viability of District Heat Networks to be investigated in the towns and cities identified as Priority Areas for District Heat Networks shown on page 42. These are the areas in Wales considered to have the greatest potential for District Heat Networks. They have been identified on the basis of having a sufficiently high heat density to make them viable. They take into account settlement size, mix of uses, development potential and any existing work being undertaken to develop District Heat Networks. In principle, they are supported wherever they are viable.

^{P15} Planning authorities should explore and identify opportunities for District Heat Networks, particularly in the Priority Areas, and, where possible, seek to develop city or town-wide District Heat Networks in as many locations as possible.

As a minimum, proposals for large scale, mixed use developments of 100 dwellings or more should consider the potential for a District Heat Network. There is also potential for them below this threshold.

The design of new development should maximise the opportunities to accommodate a District Heat Network. Particular consideration should be given to the form, density, mix of uses and phasing of development.

5 The Regions

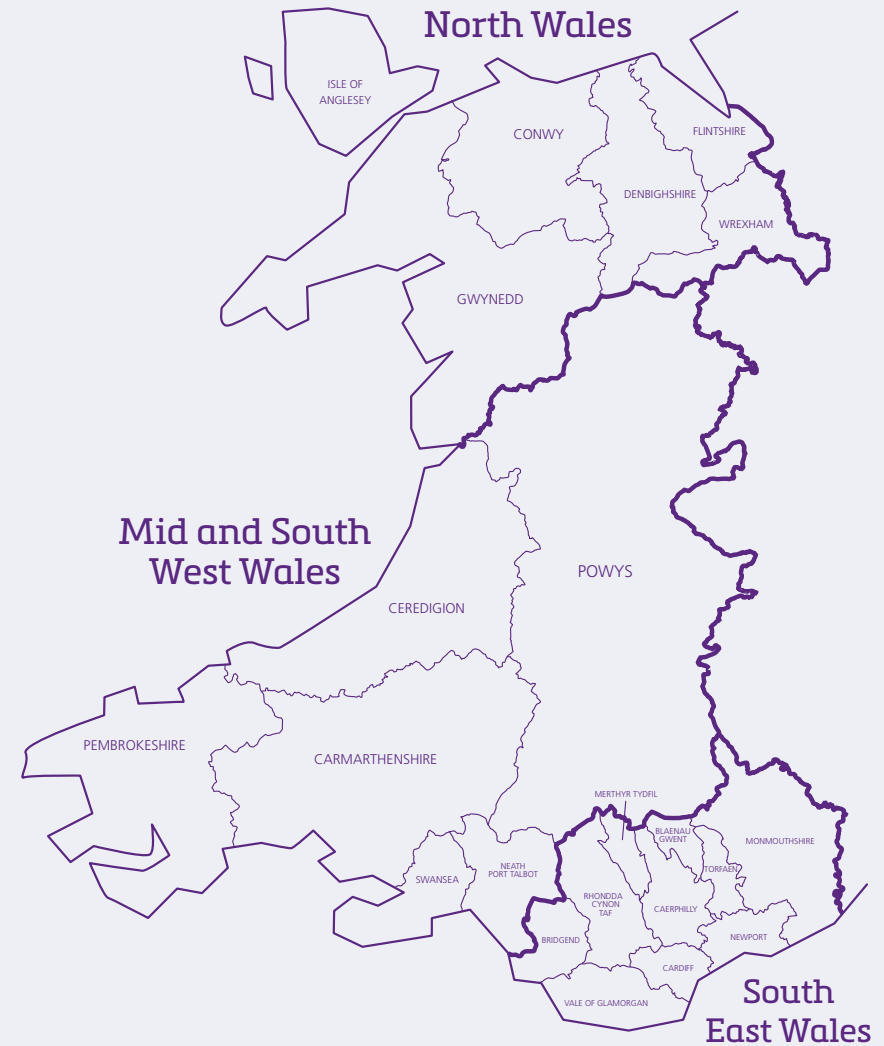
Wales' three regions provide a focus for Welsh Government policy and future investment. Each region has its own distinctive opportunities and challenges. Embracing these through more effective regional collaboration will lead to better outcomes for all parts of Wales and create a fairer distribution of wealth and opportunity.

The planning system has an important role to play in shaping regional development by co-ordinating and managing development across each region and by ensuring that wider than local issues are tackled collaboratively and strategically.

Strategic Development Plans are prepared at a regional scale. They consider strategic regional issues in relation to future growth areas, housing demand, economic development, transport and green infrastructure which cut across local planning authorities and require a regional, integrated planning response.

Informal regional arrangements including commitments to work together through traditional Local Development Plans or approaches to regional planning that do not result in the preparation of a Strategic Development Plan, do not constitute the form of regional planning required by the NDF.

The Development Plans Manual provides guidance on the preparation and revision of Strategic Development Plans and Local Development Plans.





Policy 16 – Strategic Policies for Regional Planning ^{P16}

Strategic Development Plans should embed placemaking as an overarching principle and should establish for the region (and where required constituent LDPs):

- a spatial strategy;
- a settlement hierarchy;
- the housing provision and requirement;
- the gypsy and traveller need;
- the employment provision;
- the spatial areas for strategic housing and employment growth, renewable energy and the identification of green belts, green corridors and nationally important landscapes;
- the location of key services, transport and connectivity infrastructure;
- a framework for the sustainable management of natural resources and cultural assets;
- ecological networks and opportunities for protecting or enhancing the connectivity of these networks; and
- a co-ordinated framework for minerals extraction and the circular economy, including waste treatment and disposal.

The Welsh Government requires Strategic Development Plans to come forward in each of the three regions to deliver the requirements of this policy.

^{P16} Strategic Policies for Regional Planning

Many policy areas are best considered at the regional scale and the role of a regional plan is to develop a clear policy framework that identifies these issues; develops a strategic policy response; and provides direction for decision makers in accordance with the plan-led system.

Local authorities and national, regional and local partners in the public, private and third sectors all have a contribution to make to the development of Strategic Development Plans and these plans can include other policy issues that are important at the regional scale. The preparation of Local Well-being Plans, Area Statements (Natural Resources Wales); regional transport models and plans (Transport for Wales); and the Welsh Government's Housing Need Assessment are examples of work that can directly support the preparation of Strategic Development Plans.

To deliver direction for their region, it is important that Strategic Development Plans are prepared. Local planning authorities should determine their geographical footprints. The Welsh Government will work with local planning authorities to support the establishment of Strategic Development Plans.

Alignment of Regional Development Plans and Strategies

It is important that Strategic Development Plans both shape and are shaped by other regional strategies, including the Welsh Government's Regional Economic Development Plans and City and Growth Deals. If key outcomes are not aligned or do not support one another, the region's ability to deliver will be undermined. Although different regional strategies will operate to different timeframes and may be revised at different times, regional plan makers should explore with regional partners how evidence and consultation activities can be joined.

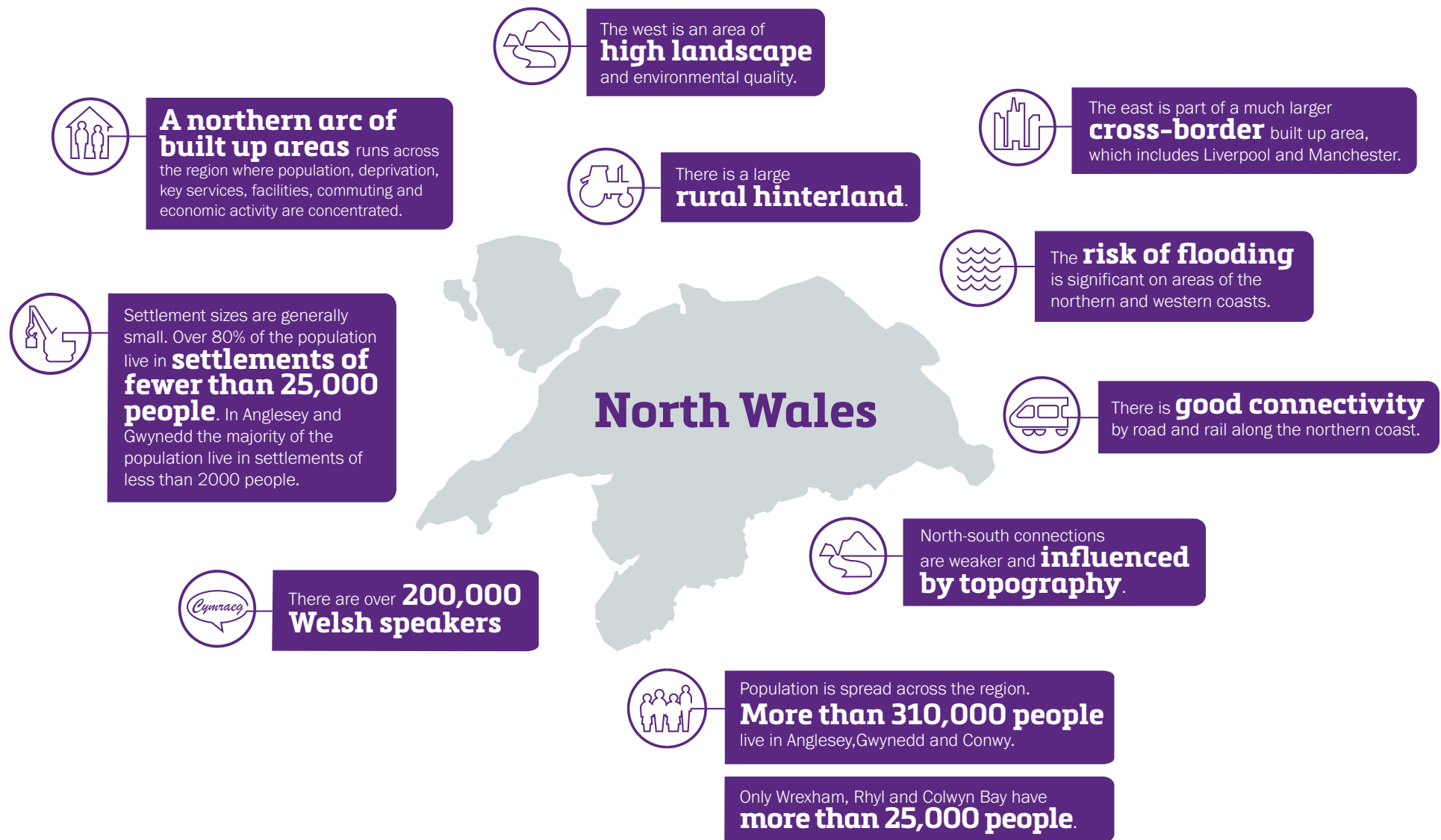
NDF Review & Regional Planning

The Welsh Government requires progress on regional planning across Wales and as part of the monitoring of the NDF, will monitor formal progress on the preparation of Strategic Development Plans.

The Three Regions

The following sections set out the NDF policies for each region and provide direction for the preparation of Strategic and Local Development Plans and decisions to be taken on planning proposals.





Policy 17 – Wrexham and Deeside ^{P17}

The Welsh Government supports Wrexham and Deeside as the primary focus for regional growth and investment. Wrexham and Deeside’s role within the North region and the wider cross-border areas of Cheshire West and Chester and Liverpool City Region should be maintained and enhanced.

Strategic and Local Development Plans across the region should recognise Wrexham and Deeside as the focus for strategic housing and economic growth; essential services and facilities; advanced manufacturing; transport and digital infrastructure; and consider how they can support and benefit from Wrexham and Deeside’s regional role.

The Welsh Government will work with cross border authorities to promote Wrexham and Deeside’s strategic role and ensure key investment decisions support Wrexham and Deeside and the wider region.

Overview

The North Wales region comprises Conwy, Denbighshire, Flintshire, Gwynedd, the Isle of Anglesey, Snowdonia National Park and Wrexham and is home to almost 700,000 people. Its dramatic landscape includes low lying coastal plains, mountain ranges and industrialised coal fields. The population is concentrated in an arc along the coast from the Menai Straits to the border with England and the main concentration of population is in the east around Wrexham-Deeside.

The regional issues that local planning authorities should work together to plan for, are set out below alongside the spatial policy areas that the Welsh Government will focus on from a national perspective to support the North region.

A collaborative, holistic approach

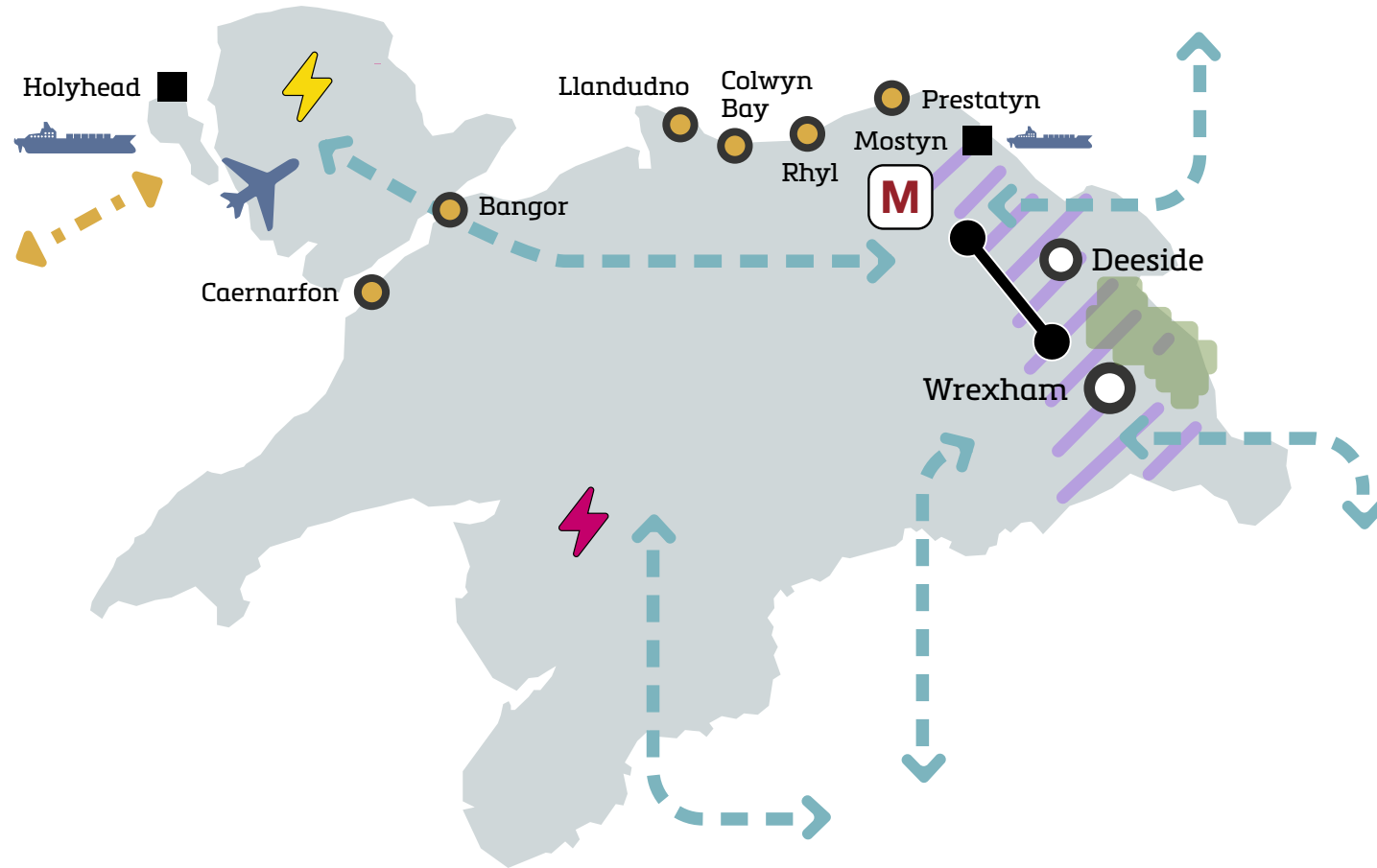
Across North Wales, there are a range of strategic issues that need to be considered. Many of these issues have national, regional and local dimensions and will be delivered through co-ordinated action at all levels.

Housing, economic growth and connectivity infrastructure should be co-ordinated and planned on the basis of the whole region. The management of natural resources and flooding and the protection and enhancement of areas of environmental and landscape importance should inform strategic decisions on locations for growth and new infrastructure. Decarbonising society and responding to the threats of climate change should be central to all regional planning.

The region should work together to consider the connections with Mid & South West Wales, Cheshire West and Chester and North West England. Promoting accessibility and inter-linkages between these areas, based on an understanding of their roles and functions, will ensure these areas operate as a cohesive whole, and do not compete against each other or take strategic decisions in isolation.

Focus for growth

^{P17} In accordance with the NDF Spatial Strategy, growth in the North region should be focussed on the main existing built-up areas of Wrexham-Deeside. The Wrexham and Deeside area includes Wrexham (and Wrexham Industrial Estate), Broughton, Buckley, Deeside (and Deeside Industrial Park).



National Growth Area	
Regional Connectivity	
Intra-urban Connectivity	
International Connections	
Ports	
Green Belt	
Anglesey Airport	
Centres of National Growth	
Centres of Regional Growth	
Anglesey Energy Island	
Trawsfynydd	
North Wales Metro	



Policy 18 – North Wales Coastal Settlements ^{P18}

The Welsh Government supports the built up coastal arc from Caernarfon to Deeside as the focus for managed growth, reflecting this area’s important sub-regional role supporting the primary growth area of Wrexham and Deeside.

Strategic and Local Development Plans across the region should recognise the role of this corridor as a focus for housing, employment and key services.

Policy 19 – Green Belts in North Wales ^{P19}

The Welsh Government supports the role of Strategic Development Plans identifying and establishing green belts to manage urban form and growth in North Wales, particularly around Wrexham and Deeside.

The Strategic Development Plan should consider the relationship of any new green belts with the green belt in Cheshire West and Chester.

^{P18} The built-up corridor along the North Wales coast from Caernarfon to Deeside includes Bangor, Llandudno, Colwyn Bay, Rhyl and Prestatyn. The Welsh Government expects the built up areas in this arc to continue to play an important role within the region, providing jobs; leisure and retail; cultural opportunities; education, health and services. It is important this corridor maintains its regional role and supports a managed growth approach that allows these roles to be enhanced. Regeneration opportunities in this corridor are strongly supported. Strategic and Local Development Plans across the region should recognise the role of this corridor as a focus for housing, employment and key services.

Flooding from rivers and sea is a major issue across the region. The potential for flooding around Wrexham and Deeside and along the North Wales coast will have implications for the delivery of growth in this area. Strategic decisions on flood management and related investment must be co-ordinated with decisions to direct development to growth areas.

Planning and co-ordinating the delivery of new housing to meet identified needs will be an important task for the regional planning process. Under the Welsh Government central estimates 19,400 additional homes are needed in the region until 2038 and over the initial five years (2018/19 to 2022/23) 51% of the additional homes needed should be affordable homes. These estimates provide part of the evidence and context on which Housing Requirements for Strategic Development Plans can be based.

^{P19} Strategic decisions on the location of key services and infrastructure should support existing built-up areas and be taken on a regional basis, ensuring they are located in the most accessible and sustainable locations and support actions to address inequality and deprivation and improve links to neighbouring areas of England. The Welsh Government supports the use of green belts in the North region in managing and planning urban growth. Planning Policy Wales sets out the policy context for them. Strategic development plans must identify a green belt that includes the area to the north east of Wrexham.

Welsh language

With over 200,000 Welsh speakers across the region and with concentrations of settlements where Welsh is the first language for many people, it is important that development plans consider the relationship between strategic housing, transport and economic growth and the Welsh language.

A strong economy

The Regional Economic Development Plan prepared by the Welsh Government in partnership with local authorities, communities, business and key stakeholders, will set out the priorities for future regional economic development. The planning system, through its Strategic and Local Development Plans and the decisions it takes, will have a major role to play in shaping the places that support and strengthen the regional economy.

The Strategic Development Plan should be informed by and seek to facilitate the delivery of the North Wales Growth Deal and ensure support for a smart, resilient and connected North Wales. It will provide a framework to take the strategic locational decisions that will support the long term ambitions of the Growth Deal in relation to housing, economic growth, key services and essential infrastructure. They should also consider the importance of key economic sectors across the region.

Tourism is an important sector to the economy across North Wales. Strategic and Local Development Plans should consider the main tourism areas, the type of visitors they attract and the infrastructure required to support existing areas and future growth.

Universities have an important presence in the region, providing further education, undertaking research and supporting innovation, providing employment, attracting students to Bangor and Wrexham and supporting the local businesses and communities around them.

The Strategic Development Plan should seek to maximise opportunities arising from investment in high value manufacturing sectors. Supported by the Welsh Government, the Advanced Manufacturing Research Institute at Broughton, when built in 2020, will be a collaboration between the University of Sheffield’s Advanced Manufacturing Research Centre, Deeside Enterprise Zone Advisory Board, Swansea University and Coleg Cambria. It will support Airbus and other key high value manufacturing companies and will focus on R&D in advanced manufacturing techniques and skills development, for high value manufacturing aerospace, automotive, nuclear and food sectors.

The Welsh Government strongly supports resilient and prosperous rural communities, as set out by policy P4, and expects to see development plans across the region responding positively to the aims of this policy.

Policy 20 – Port of Holyhead ^{P20}

The Welsh Government will work with port operators, local authorities and investors to support the development of the port and facilitate new investment in order to ensure that its strategic gateway role is maintained and enhanced. Investment to improve the port’s capacity to accommodate cruise ships is supported. New development around the port should be carefully managed to ensure that future expansion and change at the port is not constrained or compromised.

Policy 21 – Transport Links to North West England ^{P21}

The Welsh Government will work with local and regional authorities in North Wales and North West England to ensure transport investments, including in the North Wales Metro, strengthen cross-border transport links.

Strategic and Local Development Plans should support improved transport links between North Wales, Chester, Liverpool and Manchester and plan growth to maximise the potential opportunities arising from better regional connectivity.

A connected, accessible region

^{P20} The region is served by ports at Holyhead and Mostyn. The Welsh Government recognises the importance of the port at Holyhead to Anglesey, North Wales, Wales, the wider UK and Ireland. Holyhead is a major regional asset and an important gateway to Wales and can be the first experience people have of visiting Wales. It is important they have a positive experience. Strategic and Local Development Plans should consider and plan for its future development needs and maximise the opportunities it provides to support growth across the region. A new cruise terminal can provide enhanced facilities for ships and passengers and be a gateway for visitors to the north of Wales. Mostyn plays an important role in supporting the off-shore renewable energy sector.

^{P21} Proposals for a North Wales Metro provide an opportunity to improve accessibility across the region and are supported by the Welsh Government. In accordance with P16, Strategic Development Plans must ensure that long term strategic decisions maximise the opportunities in areas that will benefit

from improved accessibility and investment in public transport services. There are strong functional relationships between settlements and regions in North Wales and North West England, with people travelling daily in both directions to access jobs, services and facilities in neighbouring regions.

Strategic and Local Development Plans should be confident in seeking to align areas of need with areas of opportunity, including where areas of opportunity are across the border and resulting investment and action is focussed on improving the links between Welsh communities and economic opportunities in England.

The Welsh Government will maintain its commitment to tackling congestion on the A55 including through its Pinch Point Programme of small scale interventions aimed at addressing congestion pinch points on the main road network. Where connectivity corridors between North Wales and England are identified, the potential for these corridors to become green infrastructure will be explored.

Policy 22 – North West Wales and Energy P22

The Welsh Government supports North West Wales as a location for new energy development and investment.

New energy-related development should support local and regional communities; provide jobs and investment in training and skills; and work with universities and businesses across the region and North West England to co-ordinate and maximise new investment to support the wider region.

In determining any applications for nuclear energy generating stations in this region, consideration should be given to the need for further non-renewable energy generation, their contribution towards Wales’ energy mix, their impacts on the natural and historic environment and the economic benefits they would bring to the region.

A unique region

Managing the North’s outstanding natural resources, which include the coast, two world heritage sites, a national park, Areas of Outstanding Natural Beauty and minerals is a priority for the region and it should be ensured they can be enjoyed by future generations and help provide economic benefits for the region’s communities. The region’s distinctive heritage should be preserved and enhanced by high quality development.

P22 The planning system has a key role in supporting renewable energy and ensuring the North plays its part in decarbonising society. The region has strong potential for generating wind, solar and tidal energy.

The Welsh Government supports the North West Nuclear Arc initiative which is a shared vision (with the UK Government, universities and the National Nuclear Laboratory) of realising the potential positive impacts the nuclear sector can bring to an area in terms of investment, skills and training. The Anglesey ‘Energy Island’ Programme also seeks to co-ordinate action around new energy developments to maximise the benefits for the area.

The potential Wylfa Newydd nuclear power station development could provide significant employment, training and other associated economic benefits across the whole region if a decision is made to proceed with the scheme. Small Modular (nuclear) Reactors could also potentially provide low carbon energy generation in the region. Trawsfynydd is currently being promoted by the Snowdonia Enterprise Zone Advisory Board as a

potential site for a Small Modular Reactor, building on the existing sector-specific technical capacity and expertise available locally.

The potential economic benefits of new nuclear developments, particularly in terms of their high-value job creation may provide a catalyst for regional development. However, these considerations will need to be balanced against the long-term impact these large-scale developments can have on sensitive areas and the surrounding environment.

The region’s concentration of population, its historic and future growth and proximity to markets in North West England mean it is a high consumer of materials and natural resources. It is vital the region makes the best use of material resources, promotes resource efficiency and is ambitious in supporting innovative ways of promoting a circular economy.

Within the region sand and gravel extracted primarily from Wrexham and Flintshire and crushed rock aggregates from Flintshire, serve both local markets and those in North West England. Whilst similar deposits exist in North West Wales, particularly in Gwynedd, these are less well-placed to serve the main markets and production is therefore more limited. Conwy and Denbighshire play an important role providing limestone for development and infrastructure projects along the North Wales coast. The quarrying of slate aggregate is largely constrained by National Park and Area of Outstanding Natural Beauty designations and, where extracted, it is generally used locally or for high value developments further afield.



The region contains **two national parks and an Area of Outstanding Natural Beauty.**



There are **universities** at Lampeter, Carmarthen, Swansea and Aberystwyth.



330,000 live in Powys, Ceredigion & Pembrokeshire.



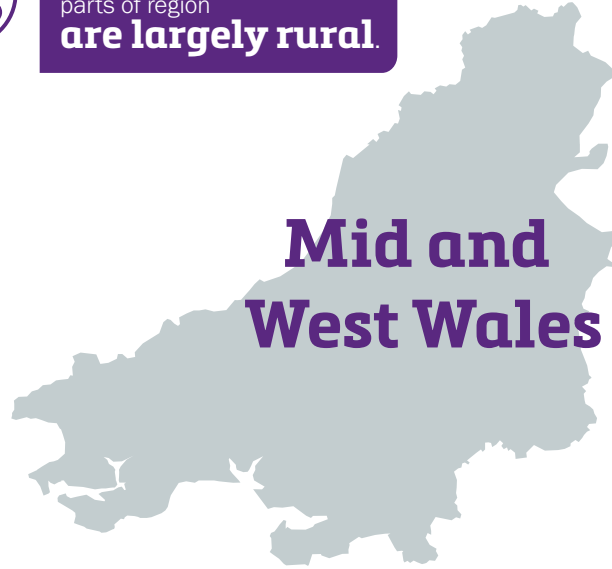
Northern and western parts of region **are largely rural.**



The region has significant **renewable energy potential.**

There are no settlements in Powys, Ceredigion or Pembrokeshire of more than **25,000 people.**

67% of people in Ceredigion and 60% in Powys live in settlements of **fewer than 2000 people.**



Undulating topography across mid Wales limits ease of movement and digital connectivity.



Swansea-Neath Port Talbot – Llanelli is part of the **larger South Wales coastal-valleys built-up area** running east.

574,000 live in Swansea, Neath Port Talbot & Carmarthenshire.



There is **relatively good connectivity** along the southern coast by road and rail.

Outside of the southern coastal area, **travel by train is limited.**

Overview

The **Mid and South West Wales** region comprises Carmarthenshire, Ceredigion, Neath Port Talbot, Pembrokeshire, Powys, Swansea and the Brecon Beacons and Pembrokeshire Coast National Parks and has a population of over 900,000 people. This large and diverse region includes some of the most rural and sparsely populated parts of the UK and the urbanised, industrialised built up areas around Wales' second city, Swansea. The population is concentrated in the south around Swansea Bay and Llanelli, with a secondary cluster of towns around the Milford Haven waterway and across the region's larger towns which include Aberystwyth, Carmarthen, Llandrindod Wells and Newtown.

The regional issues that local planning authorities should work together to plan for are set out below, alongside the spatial policy areas the Welsh Government will focus on from a national perspective to support the Mid and South West region.

A collaborative, holistic approach

Across Mid and South West Wales, a range of strategic issues need to be considered. Many of these issues have national, regional and local dimensions and will be delivered through co-ordinated action at all levels.

Housing, economic growth and connectivity infrastructure should be co-ordinated and planned across the whole region. The management of natural resources and flooding and the protection and enhancement of areas of environmental and landscape importance should inform strategic decisions on

locations for growth and new infrastructure. Decarbonising society and responding to the threats of climate change should be central to all regional planning.









The size and diversity of this region, which includes Wales' second city, two national parks and some of the most rural areas of the UK, means that the region does not have the degree of interconnectedness of other regions. From a high level national perspective, there are two broad spatial sub-regions – the built up areas around Swansea, Neath Port Talbot, southern Carmarthenshire and the Haven towns, and the dispersed settlements in a wider rural hinterland across north Pembrokeshire, Ceredigion, Powys and northern Carmarthenshire.

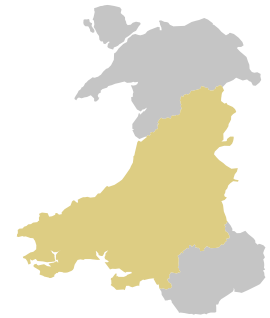
There will be common strategic issues for the region and issues which are specific to sub-regions. It will be for local planning authorities to determine how regional planning should be undertaken across the region. It may be that a combination of a Strategic Development Plan and one or more Joint Local Development Plans are required. The Welsh Government will support approaches that define and focus on sub-regions, rather than a single full region, where it is demonstrated this is appropriate.

Focus for growth

In accordance with the NDF Spatial Strategy, growth in the Mid and South West Region should primarily be focussed in the Swansea Bay and Llanelli area and in a secondary role, the Haven Towns, Carmarthen, Llandrindod Wells, Newtown and Aberystwyth.



- National Growth Area 
- Regional Connectivity 
- Intra-urban Connectivity 
- International Connections 
- Ports 
- Swansea Bay Metro 
- Centres of National Growth 
- Centres of Regional Growth 



Policy 23 – Swansea Bay and Llanelli ^{P23}

Swansea Bay and Llanelli will be the main focus for regional scale growth and investment.

Regional and local development plans should recognise Swansea Bay and Llanelli as the focus for strategic growth; essential services and facilities; transport and digital infrastructure; and consider how they can support and benefit from their strategic regional role.

The Welsh Government will promote Swansea Bay and Llanelli’s strategic role and ensure key investment decisions support it and the wider region.

Policy 24 – Regional Centres ^{P24}

The towns of Carmarthen, Llandrindod Wells, Newtown, Aberystwyth and the four Haven Towns will be the focus for managed growth, reflecting their important sub-regional functions.

Regional and local development plans should recognise the roles of these settlements as being a focus for housing, employment and key services within their wider areas and consider how they continue as a focal point for sub-regional growth.

^{P23} The Welsh Government supports the Swansea Bay and Llanelli area (comprising Neath, Port Talbot, the City of Swansea and Llanelli) as the primary growth area for the region. This area is the main existing centre of population, employment and services and is served by the main connectivity infrastructure. The area can accommodate new growth in a planned and co-ordinated way, to support the needs of the wider surrounding region.

^{P24} The Welsh Government supports the role of the regional centres of Carmarthen, Llandrindod Wells, Newtown, Aberystwyth and the four Haven Towns (Milford Haven, Haverfordwest, Pembroke and Pembroke Dock). These places play important sub-regional roles, providing jobs; leisure and retail; education and health services; and connectivity infrastructure that is used and relied on by both their own populations and communities around them. It is important that these settlements maintain their regional role and support a managed growth approach that allows their roles to be enhanced.

Planning and co-ordinating the delivery of new housing to meet identified needs will be an important task for the regional planning process. Under the Welsh Government central estimates

23,400 additional homes are needed in the region until 2038 and over the initial five years (2018/19 to 2022/23) 44% of the additional homes needed should be affordable homes. These estimates provide part of the evidence and context on which Housing Requirements for Strategic Development Plans can be based and should be considered at the regional scale.

Strategic decisions on the location of key services and infrastructure should support existing communities and be taken on a regional basis, ensuring they are located in the most accessible and sustainable locations and support actions to address inequality and deprivation. In the east of the region, links to the English Midlands provide an opportunity to build upon existing functional relationships, particularly in relation to housing, employment markets and public services. Joint planning and infrastructure delivery is supported where it contributes to the well-being of the region’s communities. Strategic and Local Development Plans should be confident in seeking to align areas of need with areas of opportunity, including where areas of opportunity are across the border and resulting investment and action is focussed on improving the links between Welsh communities and economic opportunities in England.

Policy 25 – Haven Waterway ^{P25}

The Welsh Government supports continued operations and future development at Haven Waterway.

Strategic and Local Development Plans should support its growth and seek to maximise the benefits it provides to the region and Wales. The Welsh Government will work with operators, local authorities and investors to support and facilitate appropriate new development.

Welsh language

With strong Welsh speaking heartlands in the region, it is important that Strategic and Local Development Plans consider the relationship between strategic housing, transport and economic growth and the Welsh language.

A strong rural Wales

The Welsh Government strongly supports resilient and prosperous rural communities, as set out in policy P4, and expects to see development plans across the region responding positively to the aims of this policy.

Regional plans should provide a strong and positive framework to support rural communities across the Mid and South West region. They should consider how jobs, services and homes can be provided within rural communities, so that rural settlements are able to sustain themselves and grow. Regional plans should also consider how people will access the jobs and services they rely on outside their community. Accessibility and inter-linkages between settlements, based on an understanding of their roles and functions, is an important component of strategic planning and key locational decisions should be fully informed by the needs of rural communities and how they will access jobs and services.

The Growing Mid Wales Partnership have set out an important framework for action to grow productivity, innovation and jobs across Mid Wales and are making the case for a regional growth deal. Regional plans will have a key role to play in facilitating the infrastructure that will support economic growth and co-ordinating it with the delivery of new homes and services.

A strong city region

The Regional Economic Development Plan prepared by the Welsh Government in partnership with local authorities, communities, business and key stakeholders, will set out the priorities for future regional economic development. The planning system, through Strategic and Local Development Plans and the decisions it takes, will have a major role to play in shaping the places that support and strengthen the regional economy.

The Strategic Development Plan should be informed by the Swansea Bay City Region City Deal and Economic Regeneration Strategy. They should ensure that key locational decisions on housing and employment sites, key services and essential infrastructure are planned to support and benefit from the investment and projects across the region; and consider the role of the universities in supporting growth and innovation.

The region is served by ports at Milford Haven, Port Talbot, Swansea and Fishguard and plays an important role supporting the maritime sector and the national economy. They are important national infrastructure and supporting their future role locally, regionally and nationally is a key consideration.

^{P25} The Haven Waterway has a unique combination of a natural harbour, long established industries and the potential for new strategic development. Development plans should recognise this and provide a framework for managing future growth.

Policy 26 – Swansea Bay Metro ^{P26}

The Welsh Government supports the development of the Swansea Bay Metro and will work with agencies to enable its delivery.

Strategic and Local Development Plans should support the scheme and plan growth to maximise the potential opportunities arising from better regional connectivity.

^{P26} The Strategic Development Plan should seek to improve connectivity across the region and should consider long term proposals such as the Swansea Metro scheme, which can provide a basis for better integrating land-use and transport planning. The Metro provides an opportunity to improve accessibility across the region and is supported by the Welsh Government. In accordance with P16, development plans must ensure that long term strategic decisions maximise the opportunities in areas that will benefit from improved accessibility and investment in public transport services. Where new transport corridors are created by the Metro scheme, the potential for these corridors to incorporate green infrastructure must be explored. The Welsh Government will maintain its commitment to tackling congestion on the M4 and trunk road network including through its Pinch Point Programme of small scale interventions aimed at addressing congestion pinch points on the main road network.

A resource rich region

Mid and South West Wales has outstanding natural resources, which include the coast, two national parks, an Area of Outstanding Natural Beauty, minerals, agricultural land, water and a high quality landscape. Development plans should provide a framework for their management and enhancement, enabling them to be enjoyed by future generations and to provide economic benefits for the region's communities.

It is vital the region plays its role in decarbonising society and supports the realisation of renewable energy. There is strong potential for wind, tidal and solar energy generation and development plans should provide a framework for generation and associated infrastructure.

The region's minerals and aggregates play an important role in supporting development across Wales and England. There are active quarries in the region, primarily within Pembrokeshire Coast National Park and Ceredigion, supplying sand and gravel mainly for local markets. Powys is an important focus for sandstone and igneous rock extraction and fulfils demand both in and outside of Wales.

A diverse region

The Mid and South West region supports a large and diverse tourism industry. Development plans and decisions on planning applications should provide a positive framework to support growth and ensure that communities across all parts of the region are able to benefit from their landscapes, natural and historic environment, heritage assets and visitor attractions to support and grow their economies. It is important the region's distinctive heritage is preserved and enhanced by high quality development.



Almost half the population of Wales live in the region and there are over 150,000 Welsh speakers.

The region's population grew **by over 9% between 1997-2017**.

Population growth between 1997-2017 has been uneven, with the **largest growth in Cardiff**.

There are significant populations in built up areas **across the whole region**.



The valley topography in the north of the region has defined settlement and movement patterns.



Rural areas in the east and south of the regions are **well connected to main urban centres**.



The region is served by **Cardiff Airport and major ports** at Cardiff, Newport and Barry.



Connectivity is good east-west by road and rail in the southern part of the region.



Road connectivity is good east-west along the heads of the valleys.

Connectivity from the valleys to the coast is along the linear valley floors.



Major population centres are in the **Valleys and two cities**.

The majority of people live in settlements of at least **25,000 people**.

There are over **640,000 people** in Rhondda Cynon Taf, Caerphilly, Torfaen, Blaenau Gwent, and Merthyr Tydfil.

Continuous built up areas are a distinctive feature of the valleys.

Policy 27 – Cardiff ^{P27}

Cardiff will retain and extend its role as the primary national centre for culture, sport, leisure, media, the night time economy and finance.

The Welsh Government supports regional development which addresses the opportunities and challenges arising from Cardiff’s geographic location and its functions as a Capital City.

The Welsh Government supports Cardiff’s status as an internationally competitive city and a core city on the UK stage.

Overview

The **South East Wales** region comprises Blaenau Gwent, Bridgend, Caerphilly, Cardiff, Merthyr Tydfil, Monmouthshire, Newport, Rhondda Cynon Taf, Torfaen and the Vale of Glamorgan and is the most populous region of Wales, with over 1.5 million residents. It is a major city region on a UK scale. The region is the smallest geographically of the three regions and includes the coastal cities of Cardiff and Newport and the former industrial heartlands of the South Wales Valleys.

The regional issues that local planning authorities should work together to plan for are set out below alongside the spatial policy areas that the Welsh Government will focus on from a national perspective to support the South East region.

A collaborative, holistic approach

Across South East Wales, there are a range of strategic issues that need to be considered. Many of these issues have national, regional and local dimensions and will be delivered through co-ordinated action at all levels.

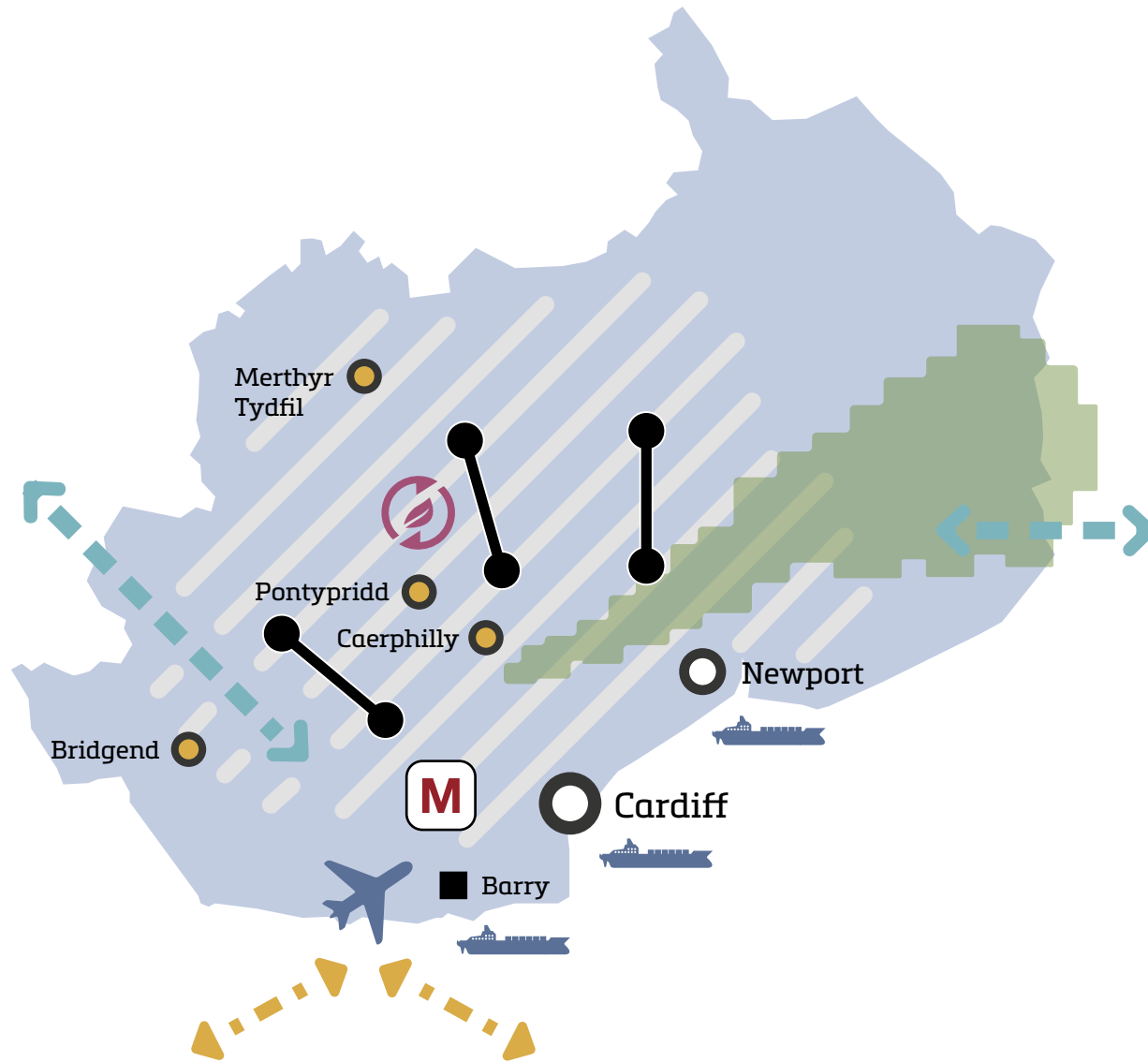
Housing, economic growth and connectivity infrastructure should be co-ordinated and planned on the basis of the whole region. The management of natural resources, flooding and the protection and enhancement of areas of environmental and landscape importance should inform strategic decisions on locations for growth and new infrastructure. Decarbonising society and responding to the threats of climate change should be central to all regional planning.

Clear decisions should be made on the scale and location of growth through the preparation of a Strategic Development Plan to ensure that all parts of the region are working together to achieve the region’s goals. A Strategic Development Plan should focus on the movement of people across the region and support an integrated approach to strategic land-use and transport planning. Key locational decisions including for employment centres, strategic housing growth and services should focus on the most sustainable and accessible locations and seek to address congestion, reduce car based commuting and improve air quality.

Focus for growth

In accordance with the NDF Spatial Strategy, growth in the South East Region should primarily be focussed in Cardiff, Newport and the Valleys.

- ^{P27} Cardiff will remain the primary settlement in the region, its future strategic growth shaped by its strong housing and employment markets and it will retain its capital city role, accommodating higher level functions and attractions. Strategic and Local Development Plans will need to consider the interdependence of Cardiff and the wider region. Cardiff relies on people from across the full region and ensuring communities around the Capital are vibrant, prosperous and connected helps to support Cardiff.



National Growth Area	
Regional Connectivity	
Intra-urban Connectivity	
International Connections	
Ports	
Green Belt	
Valleys Regional Park	
South Wales Metro	
Cardiff Airport	
Centres of National Growth	
Centres of Regional Growth	



Policy 28 – Newport P28

The Welsh Government supports Newport as the focus for regional growth and investment and wants to see the City play an increased strategic role in the region. The strategic emphasis should be focussed on achieving growth in the city.

Strategic and Local Development Plans across the region should recognise Newport as a focus for strategic housing and economic growth; essential services and facilities; transport and digital infrastructure; and consider how they can support and benefit from Newport’s increased strategic regional role. Development in the wider region should be carefully managed to support Newport’s growth and to provide a focus for regional planning.

The Welsh Government will work with authorities within the region and in England to promote Newport’s strategic role and ensure key investment decisions in Wales and England support Newport and the wider region.

Cardiff is currently experiencing a period of growth in population and employment, but the city cannot continue to expand indefinitely without major consequences for the environment. It is a compact city nearing its physical limits, which include Caerphilly and Garth mountains to the north and the Bristol Channel to the south. Cardiff must generate and support regional growth throughout the south east while enhancing its status as a vibrant capital city of Wales.

The Strategic Development Plan will need to consider the interdependence between Cardiff and the wider region. Regional transport infrastructure reflects the significance of Cardiff and has consolidated its role as the main focal point of the region. The potential to reach central Cardiff quickly and conveniently using the Metro generates opportunities for development in settlements outside the city. The cultural and economic strength of Cardiff must generate region-wide prosperity and well-being.

P28 The Welsh Government is determined to see development and growth in Newport, allowing the city to fulfil its potential as a second focal point for the region. It has significant brownfield development opportunities to provide new housing and employment areas. There are emerging highly skilled employment opportunities in the transport and digital communications sectors which should be catalysts for further economic investments. The Metro will improve the city’s public transport system, especially within the city and to surrounding towns. It benefits from established road and rail links with Cardiff, Bristol and London.

Growth at Newport will help manage the development pressures in Cardiff and provide a strategic focus for the eastern part of the region. Strategic growth should be focussed in and immediately adjoining Newport itself, to support brownfield regeneration.

The South East region includes some of the most distinctive landscapes in the country. Few areas in the UK have been as shaped by their natural resources as the South Wales Valleys, which in turn drove the growth of the coastal communities. The legacy of 20th Century industrial decline remains a major issue. The commitment to addressing these challenges has been strong and the work of local authorities, the third sector and businesses has delivered investment and supported large-scale regeneration initiatives. Strategic and Local Development Plans should focus on how further regeneration can be achieved; how sustainably located brownfield sites can be brought back into use; and how communities can access the homes, jobs and services they need. It is important to preserve and enhance the region's cultural heritage with high quality development.



Policy 29 – The Heads of the Valleys ^{P29}

The Welsh Government supports co-ordinated regeneration and investment in the Heads of the Valleys area to increase prosperity and address social inequalities. The Welsh Government will work with local authorities, businesses, the third sector, agencies and stakeholders to support investment, including in the manufacturing sector, and to ensure a regional approach is taken to addressing issues in the Heads of the Valleys area.

Strategic and Local Development Plans across the full region must identify how they can support, both directly and through a joined-up regional approach, the Heads of the Valleys area to deliver greater prosperity, support regeneration and improve well-being.

Policy 30 – Green Belts in South East Wales ^{P30}

The Welsh Government requires the identification of green belts through a Strategic Development Plan to manage urban form and growth in South East Wales, particularly around Newport and the eastern part of the region.

Regional plans should consider the relationship of any new green belts with the green belt around Bristol.

^{P29} The Heads of the Valleys area, covering the northern parts of Rhondda Cynon Taf, Merthyr Tydfil, Caerphilly, Blaenau Gwent and Torfaen, is a priority area for the Welsh Government and should be a priority for the Strategic Development Plan. The area, like the Valleys more generally, has one of the most distinctive urban settlement patterns in the UK; has seen significant investment in the A465, from EU funding programmes and in the future through the South Wales Metro. It has the potential to build on its tourism offer and proximity to the Brecon Beacons National Park. National, regional and local strategies, plans and investment must be co-ordinated and focus on those interventions that can address the structural economic and social issues that impact upon communities' prosperity and well-being.

Planning and co-ordinating the delivery of new housing to meet identified needs will be an important task for the regional planning process. Under the Welsh Government central estimates 71,200 additional homes are needed in the region until 2038 and over the initial five years (2018/19 to 2022/23) 48% of the additional homes needed should be affordable homes.

These estimates provide part of the evidence and context on which Housing Requirements for Strategic Development Plans can be based and should be considered at the regional scale. It is vital that housing is considered at the regional level and not on the basis of the aspirations of individual local planning authorities. Understanding and managing different development pressures across the region will be a key issue and Strategic Development Plans will need to consider housing need across the full region.

^{P30} Strategic decisions on the location of development, key services and infrastructure should support the region's cities and Valleys communities and be taken on a regional basis, ensuring they are located in the most accessible and sustainable locations within the context of the whole region. The Welsh Government supports the use of green belts in the South East region in managing and planning urban growth. Planning Policy Wales sets out the policy context for them. The Strategic Development Plan must identify a green belt that includes the area to the north of the M4 from the Severn Crossings to North Cardiff.

A growing, equitable region

The South East region accounts for 51% of the total economic output of the Welsh economy and accounts for over 55% of additional housing need in Wales during the next few years, with estimates suggesting this proportion will increase in the future. The Regional Economic Development Plan prepared by the Welsh Government in partnership with local authorities, communities, business and key stakeholders will set out the priorities for future regional economic development. The planning system, through Strategic and Local Development Plans and the decisions it takes, will have a major role to play in shaping the places that support and strengthen the regional economy.

The Strategic Development Plan should seek to maximise opportunities arising from investment in the compound semiconductor sector. Compound semiconductor technology lies at the heart of the next industrial revolution and is a technology growing rapidly in Wales. The technology underpins a range of products including smartphones, Wi-Fi, satellite communication systems, robotics and efficient LEDs. In Wales, industry, academia and Governments are working to develop a world class compound semiconductor cluster. By developing these capabilities in the region, Wales has established the core elements for a compound semiconductor ecosystem that will help bridge early stage research, applied industrial research and innovation through to high volume manufacturing and its supporting supply chain.

Prosperity is not uniform across the region. The Cardiff Capital Region City Deal has made progress in developing and strengthening a regional approach. Strategic and Local Development Plans should consider how prosperity can be spread across the region, how local economies can be

strengthened and how growth in the strongest economic areas can benefit the whole region. They should consider social, health and environmental inequalities and ensure that strategic land-use choices contribute to tackling these issues. Improving accessibility and the movement of people and goods is a key strategic priority and can support actions to address economic, social, cultural and environmental inequality.

Welsh language

There are more than 150,000 Welsh speakers across the region and the number is growing. It is important that development plans consider the relationship between strategic housing, transport and economic growth and the Welsh language.

An integrated, connected region

The South East region has traditionally had a high degree of integration, with the relationship between the cities, the Valleys and adjoining rural areas shaping the roles and functions of settlements in the region. The opportunity to build on these relationships and re-establish them where they have weakened, will allow issues that are difficult to address at the local level, to be considered collectively at the regional level.

A Strategic Development Plan will need to consider where people live, work, shop and spend their leisure time now and in the future and the location of the key health, education and social infrastructure they rely on. It should consider how the energy the region requires will be generated and transported; how waste will be managed; and the digital infrastructure required to support the region's communities. By focussing on improving accessibility and identifying the most sustainable locations, a strategic development plan should make clear choices on strategic locations and plan for the region as a cohesive whole.

Policy 31 – Growth in sustainable transit orientated settlements ^{P31}

Development and growth in the region should be focussed in places with good active travel and public transport connectivity. Land in close proximity to existing and committed new mainline railway and Metro stations should be the focus for development.

Strategic and Local Development Plans should plan growth to maximise the potential opportunities arising from better regional connectivity.

The Welsh Government supports the development of the South Wales Metro and will work with agencies to enable its delivery.

Policy 32 – Cardiff Airport ^{P32}

The Welsh Government supports the growth and development of Cardiff Airport.

Proposals to expand the capacity of the airport; to provide new and improved airport facilities and passenger services; and to improve transport links to the airport are supported. Improvements to accessibility are supported and should prioritise a modal shift from the private car to sustainable transport modes including public transport.

Development of land adjacent to Cardiff Airport which is part of the Enterprise Zone is supported where it supports the functions of the airport.

New development around the airport should be carefully managed to ensure future expansion and change at the airport is not constrained.

^{P31} The relatively high population density in South East Wales means the region is well-suited to Transit Orientated Development, as set out in P1. The quality, variety and frequency of transport services will vary across the region and should be taken into account by local planning authorities in the preparation of the regional settlement strategy, in accordance with P16.

The South Wales Metro scheme provides a major strategic opportunity to improve rail, bus, cycling and walking infrastructure across the region and provide a focus for investment, regeneration and associated development. Development plans must ensure that long term strategic decisions maximise opportunities in areas that will benefit from improved accessibility and investment in public transport, including from the Metro.

The Metro reflects the importance of Cardiff to the region but also provides potential and opportunity for other parts of the region to function as key centres. Merthyr Tydfil, Pontypridd, Caerphilly and Bridgend will be strategically important locations on the South

Wales Metro system. Regeneration and sustainable, inclusive economic growth in these towns will help deliver the ambitions of the Our Valleys, Our Future project. Where new transport corridors are created by the Metro scheme, the potential for these corridors to incorporate green infrastructure must be explored.

^{P32} Cardiff Airport is an essential part of Wales' strategic transport infrastructure. It is an international gateway, connecting Wales to the world, and is a key driver within the Welsh economy. Proposals to expand airport operations and improve connectivity and accessibility are essential to the airport's future success and its ability to compete with other UK regional airports. There are ambitious plans to grow Cardiff Airport's passenger numbers from 1.6 million passengers per annum to three million and beyond by 2040. Proposed growth in the airport's capacity will require new and improved airport facilities and passenger services.

Policy 33 – Valleys Regional Park ^{P33}

The Welsh Government supports the establishment of the Valleys Regional Park.

Strategic and Local Development Plans should embed its principles into their planning frameworks. The Welsh Government will work with local authorities, the third sector and key partners to support the Valleys Regional Park and maximise opportunities for new development.

The region is served by ports at Newport, Cardiff and Barry. Each plays an important economic role and collectively they are key infrastructure within the region. Development plans should consider the role of the ports locally, regionally and nationally and establish frameworks to support their operation and potential expansion. The Welsh Government will maintain its commitment to tackling congestion on the M4 and trunk road network including through its Pinch Point Programme of small scale interventions aimed at addressing congestion pinch points on the main road network.

Rivers and valleys

^{P33} The Welsh Government, communities and partners have developed a positive framework through ‘Our Valleys, Our Future’ to drive change and regeneration. The Valleys Regional Park seeks to maximise the social, economic and environmental potential of the Valleys’ natural and cultural heritage assets and it is important that the planning system supports its delivery.

The region’s concentration of population and its historic and future growth mean that it is a high consumer of materials and natural resources. It is vital the region makes the best use of material resources, promotes resource efficiency and is ambitious in supporting innovative ways of promoting a circular economy. The region is heavily dependent upon marine aggregates from the Bristol Channel and the Severn Estuary and minerals from this area serves both Welsh and English markets.

The relationship between the NDF’s policies and the ‘Outcomes’ it sets out to achieve.

OUTCOMES	P1	P2	P3	P4	P5	P6	P7	P8	P9	P10	P11	P12	P13	P14	P15	P16	P17	P18	P19
A Wales where people live ...																			
and work in connected, inclusive and healthy places	●	●	●	●	●	●	●	●	●	●	●	●	●			●	●	●	●
in vibrant rural places with access to homes, jobs and services	●	●	●	●	●	●	●	●	●	●	●	●	●			●	●	●	●
in distinctive regions that tackle health and socio-economic inequality through sustainable growth	●	●	●	●	●	●		●		●	●	●	●			●	●	●	●
in places with a thriving Welsh Language			●	●	●	●	●									●	●	●	
and work in towns and cities which are a focus and springboard for sustainable growth	●	●	●	●	●	●	●	●					●	●	●	●	●	●	●
in places where prosperity, innovation and culture are promoted	●	●	●	●						●	●	●	●	●	●	●	●	●	
in places where travel is sustainable	●	●	●	●	●		●									●	●	●	
in places with world-class digital infrastructure				●		●										●	●	●	
in places that sustainably manage their natural resources and reduce pollution	●	●		●			●	●	●	●	●	●	●			●	●	●	
in places with biodiverse, resilient and connected ecosystems	●			●				●	●	●	●	●				●	●	●	
in places which are decarbonised	●	●		●			●		●	●	●	●	●	●	●	●	●	●	●

OUTCOMES	P20	P21	P22	P23	P24	P25	P26	P27	P28	P29	P30	P31	P32	P33
A Wales where people live ...														
and work in connected, inclusive and healthy places		●		●	●		●	●	●	●	●	●		●
in vibrant rural places with access to homes, jobs and services	●	●	●	●	●	●					●			
in distinctive regions that tackle health and socio-economic inequality through sustainable growth	●	●	●	●	●	●	●	●	●	●	●	●	●	●
in places with a thriving Welsh Language	●		●	●	●			●						
and work in towns and cities which are a focus and springboard for sustainable growth		●	●	●		●	●	●	●	●	●	●	●	●
in places where prosperity, innovation and culture are promoted	●	●	●	●	●	●		●	●				●	●
in places where travel is sustainable		●		●	●		●	●	●	●	●			
in places with world-class digital infrastructure				●	●				●					
in places that sustainably manage their natural resources and reduce pollution			●					●	●	●				
in places with biodiverse, resilient and connected ecosystems							●							●
in places which are decarbonised		●	●	●	●		●	●	●		●	●		

