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AGENDA

Committee	ECONOMY & CULTURE SCRUTINY COMMITTEE
Date and Time of Meeting	THURSDAY, 3 OCTOBER 2019, 4.30 PM
Venue	COMMITTEE ROOM 4 - COUNTY HALL
Membership	Councillor Howells (Chair) Councillors Henshaw, Gordon, Gavin Hill-John, Parkhill, Robson, Sattar, Stubbs and Simmons

Time approx.

1 Apologies for Absence

To receive apologies for absence.

2 Declarations of Interest

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

3 Minutes (Pages 3 - 6)

To approve as a correct record the minutes of the previous meeting.

4 Culture in Cardiff (Pages 7 - 24)

4.30 pm

Cllr Thomas, Cllr Bradbury, Neil Hanratty, Kathryn Richards, Jon Day, Ruth Cayford – Policy development scrutiny of role of Council and Partners re ensuring a sustainable way forward for Culture in Cardiff

5 Music Strategy - contains Confidential Appendix 5 (Pages 25 - 168)

5.10 pm

Appendix 5 of the Cabinet Report is not for publication as it contains exempt information of the description contained in paragraphs 14 and 21 of Schedule 12A of the Local Government Act 1972. It is viewed that, in all the circumstances of the case, the public interest in maintaining the exemption outweighs the public interest in disclosing the information.

This document is available in Welsh / Mae'r ddogfen hon ar gael yn Gymraeg

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Cllr Thomas, Cllr Bradbury, Neil Hanratty, Kathryn Richards, Jon Day, Ruth Cayford – Pre -decision scrutiny of report to Cabinet re next stages of Music Strategy re Music Board.

- 6 New Theatre - contains Confidential Appendix A and Appendices 1, 2, 3, 4 and 5 (Pages 169 - 206)** 5.40 pm

Appendices A and 1, 2, 3, 4 and 5 of the Cabinet Report are not for publication as they contain exempt information of the description contained in paragraphs 14 and 21 of Schedule 12A of the Local Government Act 1972. It is viewed that, in all the circumstances of the case, the public interest in maintaining the exemption outweighs the public interest in disclosing the information.

Cllr Bradbury, Neil Hanratty, Kathryn Richards – Pre-decision scrutiny of report to Cabinet.

- 7 Cardiff East Industrial Strategy (Pages 207 - 280)** 6.20 pm

Cllr Goodway, Neil Hanratty - Pre-decision scrutiny of report to Cabinet

- 8 ISV - Next Stages - Confidential appendices 4 & 5 - Cabinet report 'to follow' (Pages 281 - 286)** 6.50 pm

Cllr Goodway, Neil Hanratty - Pre-decision scrutiny of report to Cabinet

- 9 Urgent Items (if any)**

- 10 Date of next meeting**

14 November 2019 at 4.30pm in Committee Room 4 County Hall Cardiff.

Davina Fiore

Director Governance & Legal Services

Date: Friday, 27 September 2019

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

ECONOMY & CULTURE SCRUTINY COMMITTEE

19 SEPTEMBER 2019

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

21 : APOLOGIES FOR ABSENCE

Apologies for absence were received from Councillor Simmons.

22 : DECLARATIONS OF INTEREST

None received.

23 : MINUTES

The minutes of the meeting held on 4 July were agreed as a correct record and signed by the Chairperson.

24 : WORK PROGRAMME 2019/20

Members of the Committee were provided with the additional information they requested at their work-programming forum, held on 4 July 2019, to enable them to undertake final prioritisation and rationalisation of potential items and agree an approved Work Programme 2019/2020.

The Principal Scrutiny Officer outlined all of the options available to Members and additional items to be included on the work programme were agreed as follows:

- Allotments
- Playing Pitches Strategy
- Culture
- Parks
- Bus Station
- Cardiff Commitment
- City Hall
- St David's Hall
- Heritage Buildings

Task Groups

- Tourism – Cllrs Howells, Gordon, Henshaw, Robson and Parkhill
- Community Sport – Cllrs Howells, Hill-John and Stubbs

Members also considered it would be useful to try to schedule at least one policy development/ review per committee meeting, so that committee time is used effectively if pre-decision items slip off the agenda. Members requested that officers

be informed that the Committee would wish to know the reasons why items slip, in order to identify any underlying issues that the Council could resolve.

The Chairperson added that he had received a request from the Youth Council for a representative to be invited to sit on this Committee. This happens already on the Children & Young People Scrutiny Committee and has worked well. The Chair clarified that they would not be official members of the committee but are present at the invitation of the Chair and can observe and contribute to the work of the Committee. They would only be present for non-confidential, public items. The Chair explained he was minded to agree to this request as it would be of benefit to this Committee to ensure that things are looked at from a Young Persons' perspective. It would also help the work the Council is doing to embed a child rights approach and develop a child friendly city. Members of the Committee agreed with this and tasked the Principal Scrutiny Officer to make contact with the Youth Council and work with them to support their representative.

25 : FORWARD WORK PLAN

RESOLVED: to agree the updated Committee Forward Work Plan and approve it for publication on the Council's internet.

26 : CARDIFF CAPITAL REGION CITY DEAL JOINT OVERVIEW AND SCRUTINY: UPDATE REPORT

The report provided Members with details of the Cardiff Capital Region City Deal (CCRCD) Joint Overview & Scrutiny Committee (JOSC) meeting held on 24 June 2019.

Members noted that Councillor Patel was the Cardiff Representative and had expressed concerns over the level of scrutiny supported at the meetings, and that it could be more robust.

The Chairperson added that Scrutiny Chairs had expressed similar concerns and were writing to the Chair of the City Deal noting the issues such as lack of witnesses and meetings and also that the committee is under resourced.

The Chairperson considered it might be useful if the committee writes its concerns in a letter to Councillor Patel too; Members of the Committee agreed with this.

RESOLVED: to note the update provided on the Joint Overview and Scrutiny Committee for Cardiff Capital Region City Deal meetings on 24 June 2019 and 23 September 2019.

27 : CORRESPONDENCE

RESOLVED: to note the report.

28 : URGENT ITEMS (IF ANY)

None received.

29 : DATE OF NEXT MEETING

3 October 2019 at 4.30pm.

The meeting terminated at 5.35 pm

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**CYNGOR CAERDYDD
CARDIFF COUNCIL**

ECONOMY & CULTURE SCRUTINY COMMITTEE

3 OCTOBER 2019

CULTURE IN CARDIFF

Purpose of the Report

1. To provide Members with the context for Members' scrutiny of Culture in Cardiff.

Structure of the meeting

2. Members will hear from Councillor Huw Thomas (Leader) and Councillor Peter Bradbury (Cabinet Member – Culture & Leisure). Neil Hanratty (Director of Economic Development), Jon Day (Operational Manager – Tourism) and Ruth Cayford (Culture & Creative Industries Manager) will be in attendance, to give a presentation.
3. At the meeting, Members will be able to discuss with internal witnesses the existing landscape, place-making and economic role of culture and whether there are any lessons from the good practice review that are applicable to Cardiff, focusing on what is needed to ensure a sustainable way forward re the role of Cardiff Council and Culture in Cardiff. External witnesses will be invited to the second stage of the scrutiny on Culture, which will take place later on in the year.

Scope of Culture Scrutiny

4. At their meeting on 19 September 2019, Members agreed they wished to explore the current and future role of Culture in the economy of Cardiff. Members clarified that they wished to understand the role of Cardiff Council and partners in ensuring a sustainable way forward for Culture in Cardiff.
5. Members agreed a scope for this scrutiny, which is attached at **Appendix A**. This sets out that Members wish to:

- a) Review the existing landscape including partnership working, budget and resources.
- b) Explore the place-making and economic roles of Culture in Cardiff, and its impact on the region and nation.
- c) Reference good practice from other core cities in UK and experiences from across Europe, captured via Eurocities Creative Cities work.
- d) Explore what is needed to ensure a sustainable way forward re role of Cardiff Council and Culture in Cardiff and make recommendations accordingly.

6. This report provides an overview of:

- i. Definitions of Culture
- ii. Place-making role of Culture
- iii. Economic role of Culture
- iv. Role as Capital City of Wales
- v. Good practice from other core cities in UK and experiences from across Europe.

7. The presentation will include an overview of the existing landscape:

- vi. Available budget and resources and the work underway with these
- vii. Partnership working and how to build on Cardiff's offer, aligning resource and identifying additional funding schemes.
- viii. On-going work re Cultural Compact to provide structure and governance for partnership work.

Definitions of Culture

8. The term Culture can cover a wide range of activities and areas, as the following definitions illustrate:

Bristol Council:

*'For the purposes of this strategy, we are defining culture in its widest sense, embracing: our lives, identities and communities; heritage; museums, galleries, cinemas, music venues, theatres, libraries, festivals and events; practice; industry; and our shared futures.'*¹

Bradford District:

Culture covers cultural assets, including *'stunning landscapes, heritage buildings, great cultural organisations, entrepreneurs and venues'* as well as *'vibrant and*

¹ 'City of Openness, Imagination and Originators – A Strategy for Bristol Culture (June 2017)

diverse cultures ... reflected in the communities of the District and major events, festivals and venues².

Manchester

*'For the purpose of this strategy, culture means: Art, Music, Literature, Heritage, Dance, Theatre, Craft, Photography, Film, Design, Museums and Combined Arts.'*³

9. The **Cultural Cities Enquiry**⁴ took:

'a deliberately broad outlook that does not seek to define the boundaries of culture. Our remit has encompassed arts institutions, museums, libraries, the historic environment and cultural festivals, popular and grassroots culture. But we have been aware that culture is a social expression that will take many different forms, and is ever evolving. We have been particularly interested in the relationship between culture and the wider creative industries, in the knowledge that distinctions between 'cultural', 'creative' and 'digital' enterprises are fast eroding. Artists are increasingly incorporating digital mediums into their practice, and at the sharp end of the creative industries this is mirrored in widespread fluidity of people, skills and technology, particularly in the fast-growing new field of Createch, based on the interplay of creativity and technology.'

10. The Welsh Government, in their Vision for Culture '*Light Springs Through the Dark*' (December 2016) stated that:

'The Welsh Government is fully committed to culture. By 'culture', or 'diwylliant' in Welsh, we mean the arts, music, literature and heritage or put another way, all of the creative activities that give people purpose, and a sense of belonging and identity.'

11. In response to a request from Cardiff Council for a definition of culture, Nick Capaldi, Chief Executive, Arts Council of Wales, provided the following personal definition:

² Backing Bradford's Bid to be City of Culture 2025 – report to City of Bradford MDC 10 September 2019

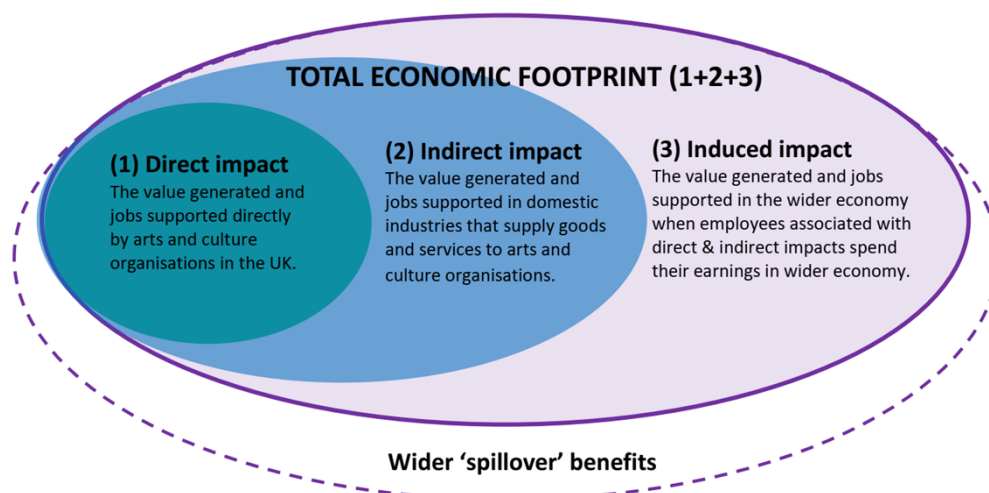
³ 'Grown in Greater Manchester. Known around the World' – Greater Manchester's Strategy for Culture and Creativity 2019

⁴ The Cultural Cities Enquiry was sponsored by Core Cities, Key Cities, Arts Council England, Arts Council of Wales, Creative Scotland and Belfast City Council and reported in February 2019. The report has been sent to all Committee Members and is available at: <https://www.corecities.com/cultural-cities-enquiry>

“Art is the expression and experience of human creative skill and imagination, producing activity that can be enjoyed and appreciated primarily for its beauty or emotional power. Arts Council strategies encourage creative ambition and endeavour in the arts; the need for the arts to connect and engage. It’s also about the skill needed to ensure that the impact of what the arts achieve renews itself and lasts. The Arts illuminate and give life to the wide range of strategies that underpin public life. From arts and health to cultural tourism, public art to town centre re-generation, the arts bring meaning, authenticity and enjoyment to our everyday lives. They create and sustain jobs, enrich education services, bring people together, improve our quality of life. The arts are fundamental to the well-being of the people of Wales.’⁵

Economic role of Culture

12. Arts Council England commissions regular reports on the contribution of the arts and culture industry to the UK economy. These reports include book publishing, sound recording and music publishing, performing arts, support activities to performing arts, artistic creation and the operation of art facilities including concert and theatre halls. The reports do not include the creative industries, museums and libraries, for which a separate report has recently been commissioned. However, they provide the most comprehensive overview available of the economic role of culture.
13. The reports use an input/ output model to calculate economic contribution, as illustrated by the graphic below:



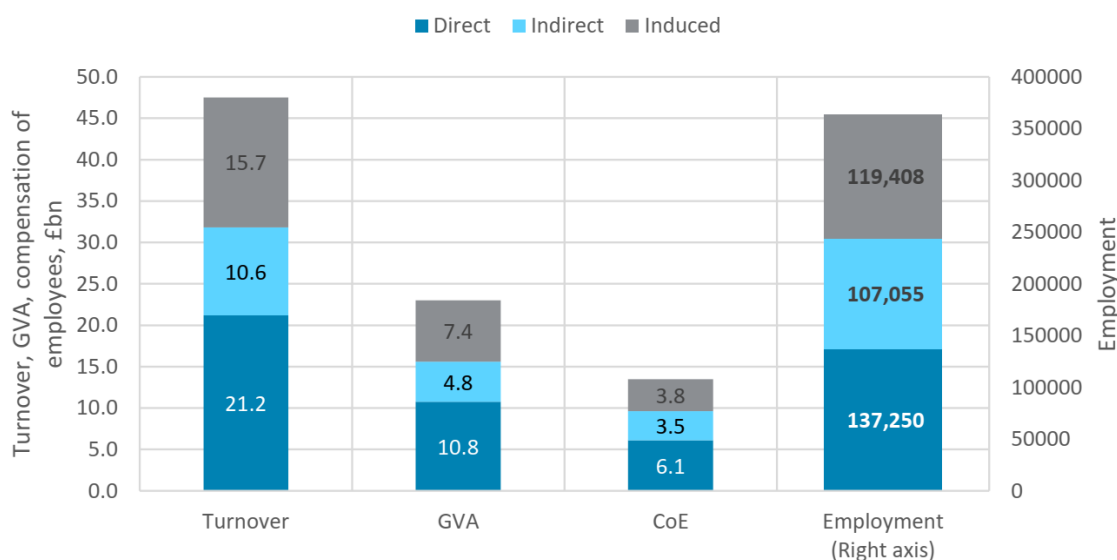
⁵ Email from Mr N Capaldi – sent 26 September 2019

14. The most recent report, published in April 2019⁶, states that the arts and culture directly generated⁷:

- a) £21.2bn in turnover;
- b) £10.8bn Gross Value Added
- c) 137,250 jobs
- d) £6.1bn in CoE -compensation of employees (remuneration).

15. However, to understand the whole economic impact, the report factors in the indirect and induced impacts (as referenced in the graphic at point 18), resulting in the following:

Figure C: The direct, indirect and induced impacts of the arts and culture industry in the UK, 2016.



16. The above figure shows that the arts and culture industry, covered by this report generated in 2016:

- a) £48bn in turnover;
- b) £23bn Gross Value Added
- c) 363,713 jobs
- d) £13,4bn in CoE -compensation of employees (remuneration).

⁶ The contribution of the arts and culture industry to the UK economy – CEBR April 2019, available at: <https://www.artscouncil.org.uk/publication/contribution-arts-and-culture-industry-uk-economy-0>

⁷ Figures cited relate to 2016, which is the last year that official statistics are available for.

17. From a Wales perspective, the creative industries are the fastest growing sector of the economy. The Welsh Government's Cultural Statement⁸ notes the following benefits from the cultural sector:

'The creative industries are a vital engine of our economy. They contribute jobs and wealth and help to put Wales on the map, raising its image world-wide. The latest figures (2014) show that we have over 5,300 creative businesses, which generate over £2.1bn annual turnover, and give employment to over 49,000 people.'

'The cultural sector produces talented individuals with transferable skills that benefit our creative industries. The not-for-profit culture sector can develop digital initiatives from which the commercial creative industries subsequently benefit.'

18. The Welsh Government also highlights that culture in Wales plays a vital role in attracting more people to visit Wales, with cultural tourism growing year on year. £150 million per year is spent on holidays where culture and heritage is the main activity and the numbers visiting Wales for culture and heritage are increasing, generating demand for transport, accommodation, catering and other tourism-related business.⁹

19. In addition, the quality of cultural facilities influences people when they are thinking about where to locate, as they seek a good quality of life for themselves, their families and their employees.

*'People prefer to live and work in areas they find attractive and distinctive. There is great potential for the cultural and creative sectors to support the new city deals and place-based regeneration generally..... There is much we can learn from what has been achieved in other UK cities such as Manchester, Edinburgh, Liverpool and Stoke-on-Trent, and also from cities overseas like Barcelona and Bilbao.'*¹⁰

20. Another economic benefit of culture is that it can lead to individuals learning new skills and boosting their confidence, helping to increase their employability.

⁸ 'Light Springs Through the Dark' – December 2016

⁹ As above

¹⁰ As above

Place-making role of Culture

21. Culture has a role in place-making, not only via regeneration as highlighted above, but in and of itself, by providing a range of opportunities for people to express themselves, participate in creative activities, feel included, both individually and as part of a community, learn and have rewarding experiences.
22. In turn, this brings a range of benefits, including: improved enjoyment and confidence levels; increased physical and mental wellbeing; increased aspirations; a sense of community and cohesion and wellbeing.
23. The Welsh Government is clear that it is for these reasons that they have included 'a vibrant culture' as one of the seven national goals in the Well-being of Future Generations Act 2015, creating 'a society that promotes and protects culture'. Recent figures for Wales, from 2015, suggest that levels of attendance at cultural events and active participation in cultural pursuits are high – 79% of adults attended at least one arts event, whilst 40% participated in artistic activities.¹¹
24. The place-making role of Culture is demonstrated clearly in the UK City of Culture initiative. The bids by various cities to win the title of UK City of Culture, with the consequent additional funding and publicity, focus on the benefits to the place and the people that an increased emphasis on culture will bring e.g. Coventry's winning bid to be UK City of Culture 2021 has the following stated 'step changes' that will result from the year-long programme of activities:
 - a) Culture Driving the Economy –
 - i. 2,116 new jobs
 - ii. Increase in visitor spend
 - iii. 100 new businesses supporting arts and culture
 - iv. Increased GVA from creative industries
 - b) Culture Closing the Gaps in Participation –
 - i. More local people engaging in culture
 - ii. More local people being trained culture reps
 - iii. Programmes to reach in to communities and schools

¹¹ 'Light Springs Through the Dark' – December 2016

- c) Culture Building Bridges –
 - i. More young people not in education, employment or training participating in culture
 - ii. Increase in BAME audiences
 - iii. Increase in BAME, Disabled and Young People on boards of publically funded culture institutions
- d) Culture Underpinning the Health of the City –
 - i. Culture projects re mental health
 - ii. Culture projects re obesity
 - iii. Reduction in levels of depression and anxiety
 - iv. Increase in dance and physical activity
- e) Culture Takes Pride of Place – Recognition and Legacy –
 - i. increase in neighbourhood and city centre satisfaction
 - ii. increase in volunteers and participations
 - iii. increase in graduate retention
 - iv. sustainability fund for building resilience and legacy.

Role as Capital City of Wales

25. In July 2017, the Council's new Administration set out a policy programme entitled 'Capital Ambition'. This clearly stated that '*a successful Wales needs a successful capital city*' and that '*Cardiff plays a vital role in creating jobs and prosperity for the people of the city and the wider city-region.*' The Foreword, by the Leader Councillor Huw Thomas stated:

'This Administration is committed to working closely with the Welsh Government and city-region partners, with local organisations and communities, to help create prosperity and tackle poverty in both the capital city and the Valleys.'

26. The delivery commitments set out in Capital Ambition include:

- a) **Building on our Capital City Status:** We must continue to attract major sporting and cultural events, tourists, investment and students into Wales
- b) **Making the Most out of our Cultural Capital:** Cardiff's distinct 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. We will continue to make the most of these assets, attracting major events to Wales while supporting the best Welsh talent to emerge onto the world stage.’

Good Practice

27. There are two main reports that capture the lessons learnt from other core cities in UK and experiences across Europe:

- a) Cultural Cities Enquiry Report¹²
- b) Eurocities – Future Creative Cities.¹³

28. The **Cultural Cities Enquiry Report ‘*Enriching UK Cities through smart investment in Culture*’ (February 2019)** highlights that smart investment in cultural activities brings enormous benefits to cities and people. The report covers a broad range of cultural activities and identifies four key areas to ignite the power of culture to drive economic growth. These are:

- a) **Cultural City Compact** – bringing people and institutions together e.g. creative people, universities, industries, businesses and Arts Council to establish city-wide plans that focus on bringing in higher levels of investment, making the best use of cultural property assets and attracting diverse talent.
- b) **Focus on new investment proposals** – including imaginative and creative use of financial sector, such as corporate social venture funds, enterprise development partnerships, attaining available tax credits and exploring the possibilities of a tourism tax.
- c) **City Talent Development** – including planning how to attract and retain a diverse range of talented, creative people and business.
- d) **Cultural and Heritage Property Assets** – using these to drive urban regeneration and maximising civic returns from these.

¹² The report has been sent to all Committee Members and is available at:

<https://www.corecities.com/cultural-cities-enquiry>

¹³ The report ‘Future Creative Cities’ - December 2017, has been sent to all Committee Members and is available at: <http://www.eurocities.eu/eurocities/news/Future-creative-cities-Why-culture-is-a-smart-investment-for-cities-WSP0-AWWHJC>

29. The report makes eight recommendations based on the above, as follows:

- i. Cities to establish Cultural City Compacts with financial support from national governments
- ii. Establish and enhance collaborative networks of cultural organisations to share professional expertise and support joint investment in shared infrastructure.
- iii. Cultural organisations and cities should make it easier for people to give more by offering contactless giving, to improve donor experience and increase donations.
- iv. Establish place-based Corporate Social Venture Funds with investment from local business, city institutions and social investors, to provide repayable finance and business support to grow local social enterprises with a cultural or creative focus.
- v. Support small organisations to access existing creative tax reliefs and extend the remit of the scheme to cover literature and popular music.
- vi. Establish a pilot BIDs+ scheme. Establish a UK wide review of the merits of a tourist levy.
- vii. Cultural organisations to set diversity targets for leadership and boards, and publish progress. City Compacts to support city-wide plans for development of creative talent pathways.
- viii. Establish portfolio approaches to cultural property assets, maintaining civic/ community/ cultural sector ownership to recycle returns.

30. For each recommendation, the report sets out practice tools to help with their implementation, as well as providing contextual information to explain the reasoning behind the recommendation.

31. The Eurocities '***Future Creative Cities – Why Culture is a smart investment in Cities***' (December 2017) stems from three years of peer learning across 150 cities and regions in 2015-2017. The report presents examples aimed at tackling key cultural challenges and concludes that the following are needed from city administrations to make investment in culture in cities work:

- a) **Bold Vision for Culture** – where the city administration moves to a partnership mindset, acting as a trusted partner and facilitator to

help develop a vision in cooperation with cultural and creative sector.

- b) **Understand Cultural Resources** – improve city administration working with cultural and creative sector by better cooperation between service areas rather than relying on one service area to be the link
- c) **Value Cultural Workers** – recognise that investing in culture should not come as a systematic trade-off for additional social and economic impacts
- d) **Innovation for Culture** – explore and open up new avenues of funding and encourage experimentation and cross-fertilisation between cultural and creative sectors
- e) **Help Cultural Workers to become organised** – improve their representation at City level fora and facilitate structuring of local networks/ associations, including identifying ‘link pins’ and ‘creative mediators’
- f) **Monitor and Evaluate** – document the impact of Culture

32. Further information on the above is available on pages 22-25 of the report, available at:

<http://www.eurocities.eu/eurocities/news/Future-creative-cities-Why-culture-is-a-smart-investment-for-cities-WSPO-AWWHJC>

Way Forward

33. Members will hear from Councillor Huw Thomas (Leader) and Councillor Peter Bradbury (Cabinet Member – Culture & Leisure). Neil Hanratty (Director of Economic Development), Jon Day (Operational Manager – Tourism) and Ruth Cayford (Culture & Creative Industries Manager) will be in attendance. There will be a presentation that will include an overview of the existing landscape, including:

- a. Available budget and resources and the work underway with these
- b. Partnership working and how to build on Cardiff’s offer, align resource and identify additional funding
- c. On-going work re Cultural Compact to provide structure and governance for partnership work.

34. Members will have the opportunity to discuss with internal witnesses the existing landscape, place making role and economic role of culture and whether there are any lessons from the good practice review that are applicable to Cardiff, focusing on what is needed to ensure a sustainable way forward re the role of Cardiff Council and Culture in Cardiff.

Legal Implications

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

Financial Implications

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

RECOMMENDATION

The Committee is recommended to:

- i) Consider the information in this report, its appendices and the information presented at the meeting; and
- ii) Decide the way forward for any future scrutiny of the issues discussed.

DAVINA FIORE

Director of Governance & Legal Services

27 September 2019

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Economy & Culture Scrutiny Committee:

Short Scrutiny - Culture

Reason for Short Scrutiny

Members wish to explore the current and future role of Culture in the economy of Cardiff. Members wish to understand the role of Cardiff Council and partners in ensuring a sustainable way forward for Culture in Cardiff.

Scope

1. Review existing landscape including partnership working, budget and resources.
2. Explore place- making and economic roles of Culture in Cardiff, and impact on region and nation.
3. Reference good practice from other core cities in UK and experiences from across Europe, captured via Eurocities Creative Cities work.
4. Explore what is needed to ensure a sustainable way forward re role of Cardiff Council and Culture in Cardiff and make recommendations accordingly.

Methodology

1. Review existing landscape with internal and external witnesses–
 - i. Available budget and resources and work underway with these e.g. Music Strategy/ Signature Event/ Music Board/ Castle Quarter- Womanby Street/ Indoor Arena/ Chapter and Creative Industries.
 - ii. Partnership working – how to build on Cardiff’s offer, aligning resource and identifying additional funding schemes.
 - iii. On-going work re Cultural Compact to provide structure and governance for partnership work.
2. Explore place-making and economic role of Culture in Cardiff, and impact on region and nation, with internal and external witnesses –
 - i. Place-making role of Culture
 - Improve Quality of Life
 - Improve Health & Wellbeing of local population
 - Improve opportunities/engagement for local population
 - Contributes to meeting FGWB Act requirements.
 - ii. Economic role of Culture
 - Attract & retain skilled workforce & employers/ investors/ start-ups
 - Support the Creative Industries – the fastest growing area of the economy
 - Economic and social benefits for whole population – not elitist
 - Attract more visitors/ staying visitors – helps promote Cardiff
 - iii. Role as Capital City of Wales
 - role to play that helps region and nation

Culture – Approved Scope – approved by committee 19-09-19

3. Reference good practice from other core cities in UK and experiences from across Europe, captured via Eurocities Creative Cities work.
 - i. Core Cities UK – Cultural Cities Enquiry Report – Enriching UK cities through smart investment in Culture – February 2019
 - ii. Eurocities – Future Creative Cities Report – Why culture is a smart investment for cities – December 2017
 - iii. Desk based research of other relevant websites.
4. Explore, with internal and external witnesses, what is needed to ensure a sustainable way forward re role of Cardiff Council and Culture in Cardiff and make recommendations accordingly.

Witnesses

- Internal Witnesses - Cllr Thomas and Cllr Bradbury, Neil Hanratty/ Ken Poole, Jon Day and Ruth Cayford
- External witnesses - written and verbal contributions to be invited from:
 - o Cardiff based Culture organisations e.g. Chapter, Ffotogallery, Not Fit State Circus etc.
 - o National Culture organisations e.g. Arts Council of Wales, Wales Arts International, Museum of Wales, National Dance Company of Wales, BBC National Orchestra of Wales, Youth Arts Wales, Cardiff Singer of the World and Welsh National Opera etc.
 - o Academic & Professional Experts including Cultural Cities contributor

Potential Structure for Scrutiny

- Paving report to September Committee as part of Work Programming report
- 1st meeting – hear from internal witnesses
- 2nd meeting – hear from external witnesses and then internal witnesses given chance to respond.

Timescales

To fit with other scheduled work of committee. To ensure external witnesses given sufficient notice to provide evidence in writing/ attend committee.

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CYNGOR CAERDYDD
CARDIFF COUNCIL

ECONOMY & CULTURE SCRUTINY COMMITTEE

3 OCTOBER 2019

MUSIC STRATEGY UPDATE: Pre-Decision Scrutiny

Appendix 5 of the Cabinet Report, at Appendix A, 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. It is viewed that, in all the circumstances of the case, the public interest in maintaining the exemption outweighs the public interest in disclosing the information.

Purpose of the Report

1. To provide Members with background information to aid the scrutiny of the draft report to Cabinet titled '*Music Strategy Update*', which is due to be considered by Cabinet at their meeting on 10 October 2019.
2. Members should note that **Appendix 5** of the Cabinet report, attached at **Appendix A**, is exempt from publication. Members are requested to keep this information confidential, in line with their responsibilities as set out in the Members Code of Conduct and the Cardiff Undertaking for Councillors.

Structure of the meeting

3. The Chair will move that this item be considered in two parts: an open session, where Members will be able to ask questions on the issues and papers that are in the public domain; and a closed session, where members of the public will be excluded, where Members can ask questions that pertain to **Appendix 5**.
4. Members will hear from Councillor Huw Thomas (Leader) and Councillor Peter Bradbury (Cabinet Member – Culture & Leisure). Neil Hanratty (Director of Economic Development), Jon Day (Operational Manager – Tourism) and Ruth Cayford (Culture & Creative Industries Manager) will be in attendance, to give a presentation.

5. At the meeting, Members will be able to discuss the report to Cabinet and the proposed recommendations and will then be able to decide what comments, observations or recommendations they wish to pass on to the Cabinet for their consideration prior to making their decisions.

Scope of Pre-Decision Scrutiny

6. At their meeting on 10 October 2019, the Cabinet will consider a report that sets out the proposed response to the recommendations of the Sound Diplomacy report and seeks cabinet approval for the establishment of a Music Board, in particular approval for the terms of reference and proposed appointments to the Board.
7. During this scrutiny, Members have the opportunity to explore:
 - i. The proposed response to the Sound Diplomacy recommendations;
 - ii. The proposals for establishing a Music Board;
 - iii. Whether there are any risks to the Council;
 - iv. The timeline and next steps for delivering re a Music Strategy for Cardiff; and
 - v. The recommendations to Cabinet.

Background

8. In 2017, a campaign to save Womanby Street as a live music venue, led to the Leader, Councillor Thomas, giving a commitment to work with partners across Cardiff to develop a Music Strategy. The Council employed Sound Diplomacy to undertake initial work on this, resulting in a report to the Cabinet meeting of 18 April 2019 titled '*The Cardiff Music Ecosystem Study*'. The Sound Diplomacy report also contained strategic recommendations.
9. One of the strategic recommendations was to establish a Music Board to act '*as a platform that enables better communication between a city's governing body and its music ecosystem.*' Sound Diplomacy recommended a board of 15-18

members, with a 50/50 gender split, 15% BAME representation and Welsh language speakers.

10. At the Cabinet meeting on 18 April 2019, Cabinet noted the report and resolved to receive a further report setting out a detailed response to the report and its strategic recommendations. It further resolved to receive a report to establish a Music Board.

Issues identified in the Cabinet Report

11. The draft report to Cabinet has **five** appendices:

- **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*
- **Confidential Appendix 5** - *Proposed Music Board Member Appointments.*

12. The proposal to establish a Music Board is set out at **Points 8 – 18** of the report to Cabinet and includes Terms of Reference – at **Appendix 3** – and membership – contained in **Confidential Appendix 5**.

13. The proposed response to Sound Diplomacy's strategic recommendations is contained in **Appendix 2** and referenced at **points 19-20** of the report to Cabinet. This notes that the response is initial, as '*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.*'

14. **Points 21 – 23** outline work to date to develop a Signature Event that '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 report to Cabinet states that there will be a report presented to

Cabinet later in 2019 outlining the detail of the proposed event and associated budgetary implications.

15. The financial implications section, at **Point 25, Appendix A**, highlights:

‘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.’

16. The legal implications, at **Point 26, Appendix A**, states that Legal Services are instructed that the client service area has given careful consideration to the legal framework and policies and that the proposed actions can be achieved within legal constraints. In addition, the legal implications section highlights that the Music Board’s Terms of Reference do not include decision making, as this is not a function of the Board.

Proposed Recommendations to Cabinet

17. The report to Cabinet contains the following recommendations:

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

Previous Scrutiny

18. This Committee undertook policy development scrutiny of work to develop a Music Strategy by receiving a presentation briefing on the Sound Diplomacy report, at their meeting on 9 April 2019.

19. In the Chair's letter,¹ Members highlighted:

- a. *'Members share the view that a Music Strategy for Cardiff will lead to a number of creative and economic benefits for residents, visitors, businesses and those working in Cardiff, as well as across the region.'*
- b. *Members welcome Sound Diplomacy's work and were pleased to hear the range of engagement with stakeholders and that this has helped to surface issues that need addressing to enable Cardiff to achieve the aims of being 'a global leader in the Music Cities movement' and to embrace 'Music Urbanism as a tool for regeneration, investment and development'.*
- c. *Given the level of engagement with stakeholders and the need to maintain this engagement and momentum to enable Cardiff to move forward as a Music City, Members **recommend** that all stakeholders who contributed via Sound Diplomacy engagement events be given the opportunity to comment on the strategic recommendations.*
- d. *Members are pleased that the proposed scope of strategy is broad, not limited to live music or a particular genre but encompassing all genres and the music ecosystem across the city. A particular concern of committee members is to ensure that music is accessible and inclusive for all young people, not only in terms of being musicians but also in terms of developing pupils' awareness and skills sets so they can benefit from the range of skilled roles that exist across the music economy.*
- e. *The membership of the partnership Music Board will be critical to the success of work in this area and Members were pleased to hear that you intend membership to be broad and inclusive, with a number of sub-groups to provide focus on particular aspects. At the meeting, we asked about the resources available to support the Music Board and*

¹ Letter from Councillor Howells, Chair of ECSC, to Councillor Bradbury, Cabinet Member Culture & Leisure, dated 11 April 2019

note the response that existing resources will be sufficient to provide secretariat support.'

Way Forward

20. Members will hear from Councillor Huw Thomas (Leader) and Councillor Peter Bradbury (Cabinet Member – Culture & Leisure). Neil Hanratty (Director of Economic Development), Jon Day (Operational Manager – Tourism) and Ruth Cayford (Culture & Creative Industries Manager) will be in attendance.
21. Members will also be able to discuss the report to Cabinet and the proposed recommendations and will then be able to decide what comments, observations or recommendations they wish to pass on to the Cabinet for their consideration prior to making their decisions.
22. All Members are reminded of the need to maintain confidentiality with regard to the information provided in **Appendix 5**. Members will be invited to agree the meeting go into closed session to enable discussion of this information.

Legal Implications

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

Financial Implications

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

RECOMMENDATION

The Committee is recommended to:

- i) Consider the information in this report, its appendices and the information presented at the meeting;
- ii) Determine whether they would like to make any comments, observations or recommendations to the Cabinet on this matter in time for its meeting on 10 October 2019; and
- iii) Decide the way forward for any future scrutiny of the issues discussed.

DAVINA FIORE

Director of Governance & Legal Services

27 September 2019

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**CABINET MEETING:
2019**

October

MUSIC STRATEGY UPDATE

CULTURE & LEISURE (CLLR PETER BRADBURY)

PORTFOLIO: CULTURE & LEISURE

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.

PORTFOLIO:

Reason for this Report

1. In the Cabinet Meeting of 18 April 2019 it was resolved that a further report would be brought back to Cabinet to establish of a Music Board for the city and to respond to the recommendations outlined in the Sound Diplomacy report. 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.

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 use 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 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.

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

6. 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.
7. 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

8. 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.”

9. The report suggested that governance to address these issues is established that:
 - Creates a leading representative body formed by a wide range of people with proven leadership ability and influence within the music ecosystem;
 - Provides an advisory board to help establish, promote and maintain the city as a music friendly city;
 - Connects with other cities to share best practice, and for information and talent exchange;
 - Advocates for the sustainability of the music sector in the city, including the affordability of living and working spaces;
 - Supports the development of music activity in the city;
 - Collaborates with South Wales Police and the Public Service Board to maintain a safe music ecosystem;
 - Lobbies the Welsh Government to increase support for the music sector.
10. Subsequently the Sound Diplomacy report recommended the establishment of Music Board to act “as a platform that enables better communication between a city’s governing body and its music ecosystem”.
11. Working with Sound Diplomacy a draft terms of reference for the board has been established that is attached as Appendix 3.
12. 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”.
13. 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.
14. 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, networking and providing introductions, representing the board or 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.

15. 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.
16. 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.
17. To establish the Board an open invitation for Board Members was issued in August seeking applications. The advertisement and the criteria for appointing board members is attached as Appendix 4.
18. 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

19. 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.
20. 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

21. 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.”

22. It has for some time been considered that establishing a regular major 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 project culture in Wales on the world stage.

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

Reason for Recommendations

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

Financial Implications

25. 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 (including Equality Impact Assessment where appropriate)

26. 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.
27. 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.
28. 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.
29. 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.
30. 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.

31. 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>
32. 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
33. 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>
34. 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.

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.

SENIOR RESPONSIBLE OFFICER	Neil Hanratty Director of Economic Development
	Date

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

Confidential Appendix 5: Proposed Music Board Member Appointments

DRAFT



SOUND
DIPLOMACY

SOUND DIPLOMACY MUSIC CITY REPORT INFORMING A MUSIC STRATEGY FOR CARDIFF

Music Ecosystem Study and Strategic Recommendations

Presented by Sound Diplomacy
to Cardiff Council

March 2019

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Cover Image courtesy Tafwyl Festival

1. INTRODUCTION

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

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

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

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

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

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

1.1 About the project

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

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

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

1.2 Methodology

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

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

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

1.3 About the authors

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

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

2. CONTEXT

2.1 Global context

The UK has long been one of the largest music markets in the world, behind only the US, Japan and Germany in 2017.¹ 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.

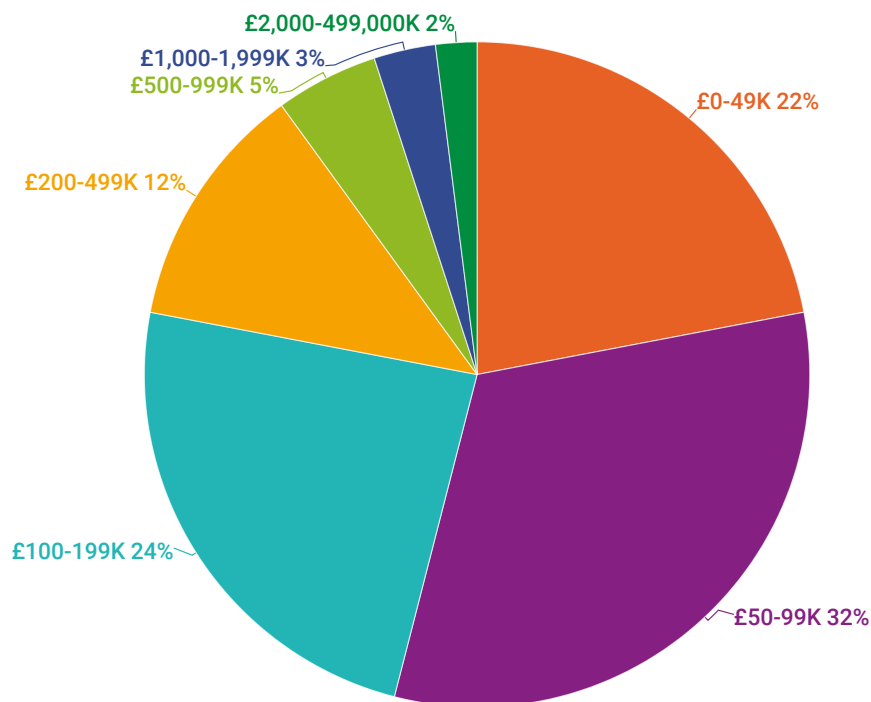
DIRECT IMPACT

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).



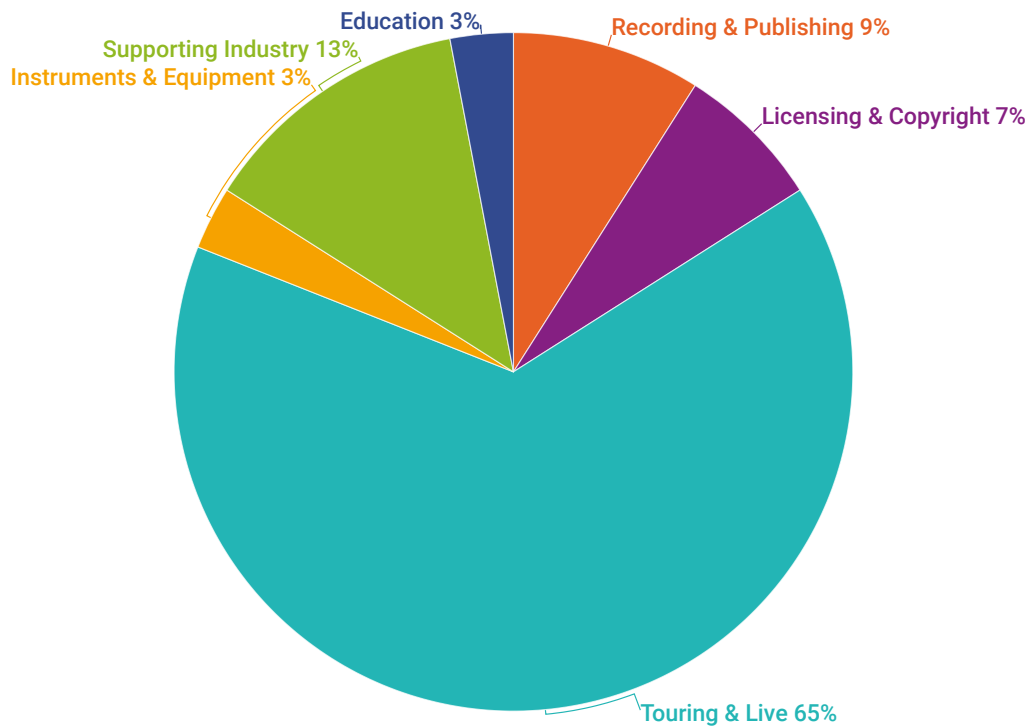
GRAPHIC 1: CARDIFF – MUSIC ENTERPRISES TURNOVER, 2016



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.

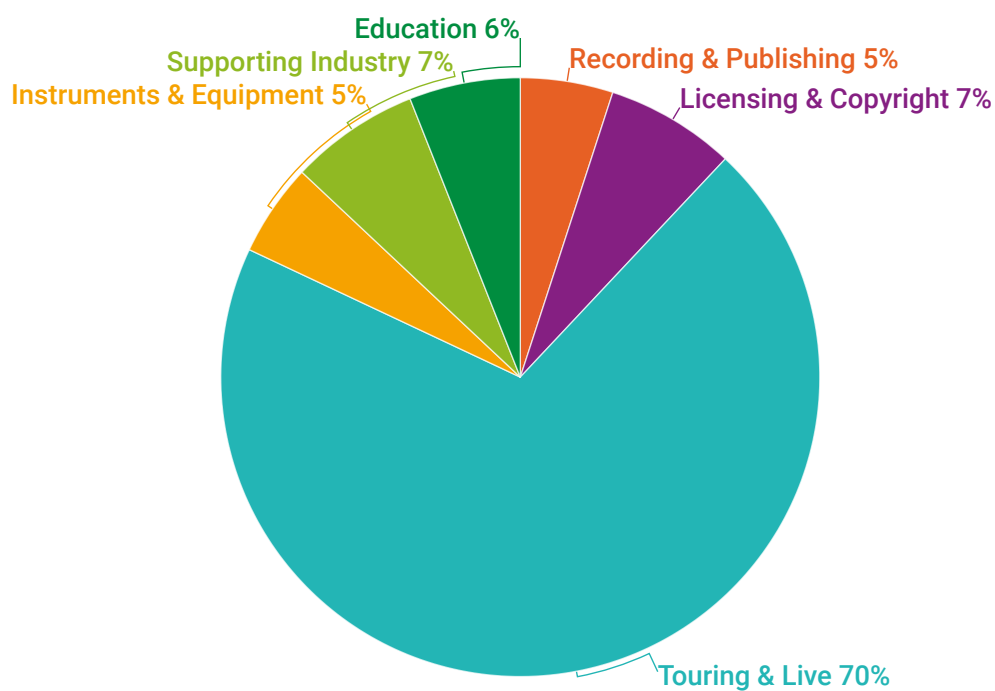
⁷ Artistic and creative activities are those that are involved in the processes of creation and production within the music ecosystem, whether for live music or recorded music, for example musicians, authors, photographers, designers, among others.

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.

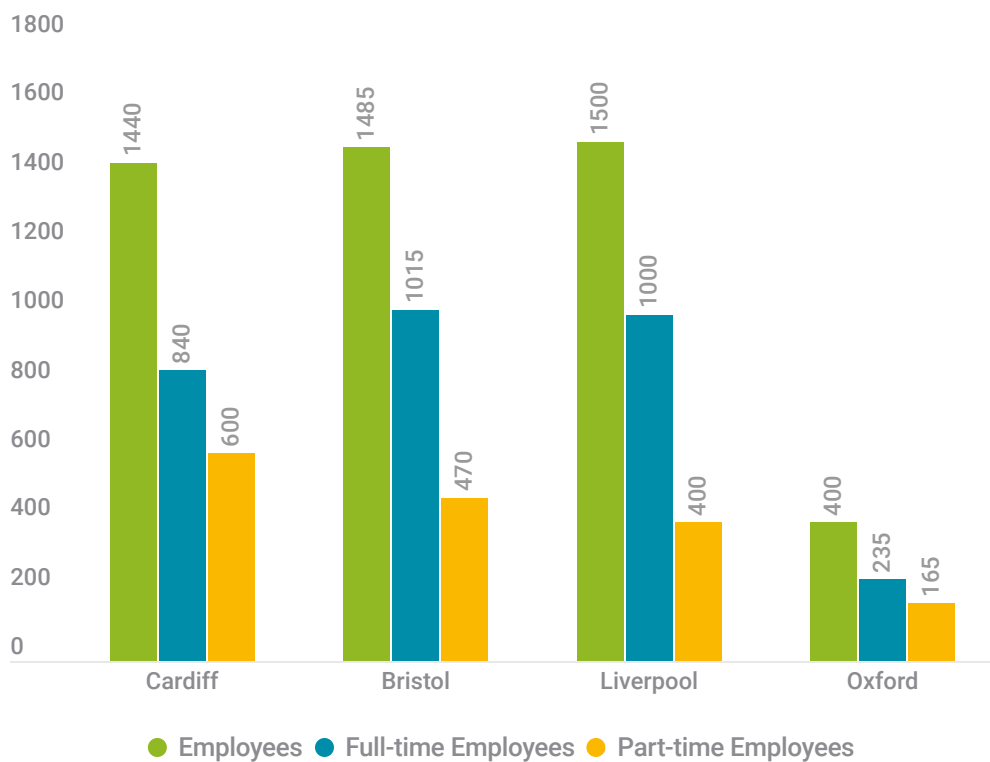
GRAPHIC 3: CARDIFF – MUSIC ECOSYSTEM EMPLOYMENT, 2016



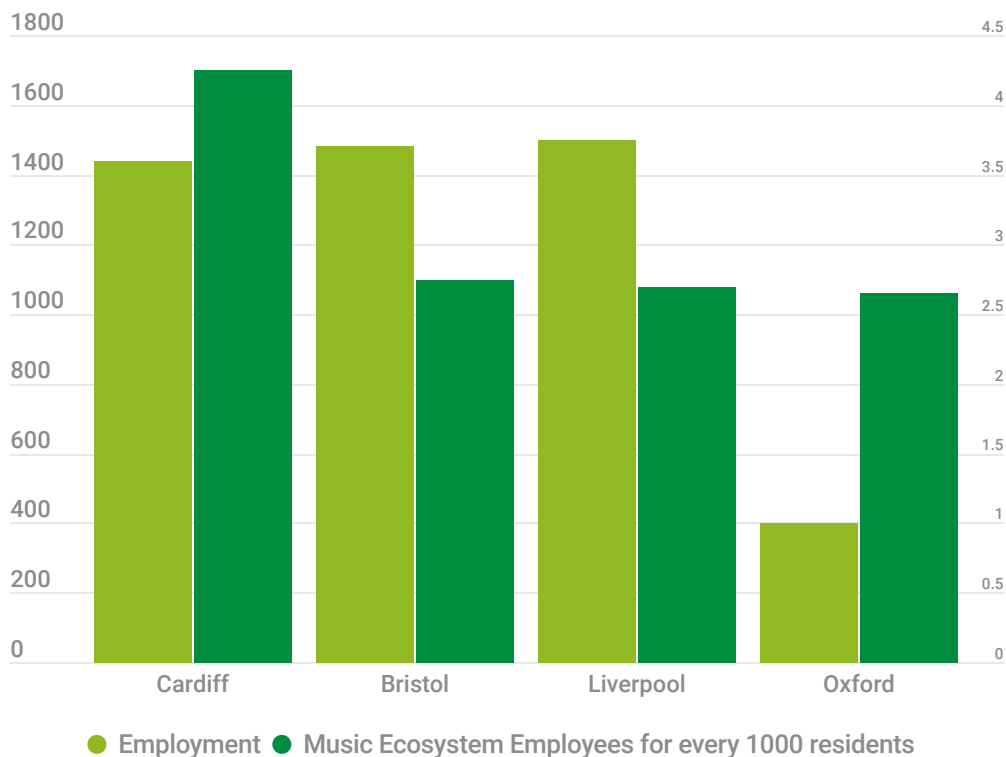
The number of employees working in the music sector in Cardiff is similar to those of Bristol (1,485) and Liverpool (1,500), and much greater than Oxford (400). However, we found that Cardiff generates 4.3 jobs in the music sector for every 1,000 residents, while Bristol, Liverpool, and Oxford only generate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

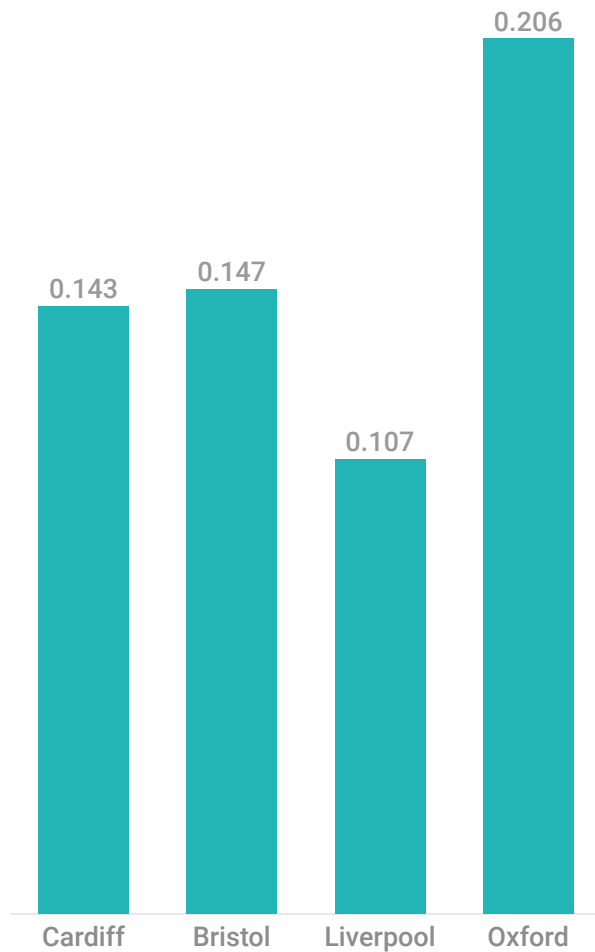


GRAPHIC 5: COMPARATOR CITIES – EMPLOYMENT, 2016



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

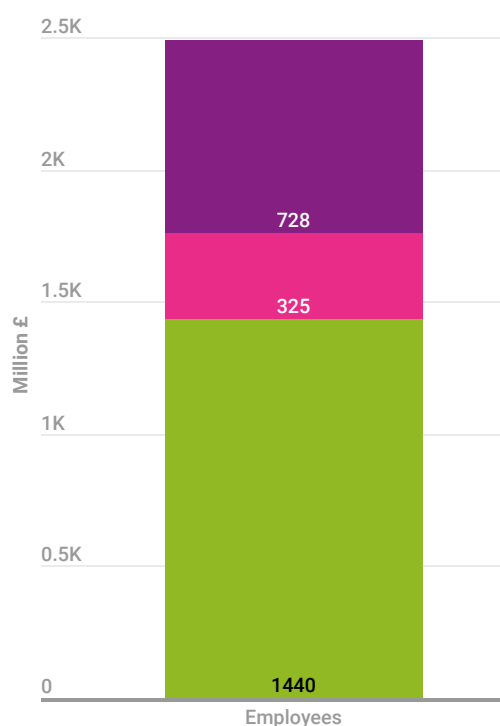
Output: £49.95 million
GVA: £43.32 million
Wages: £33.58 million
Employees: 729

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.

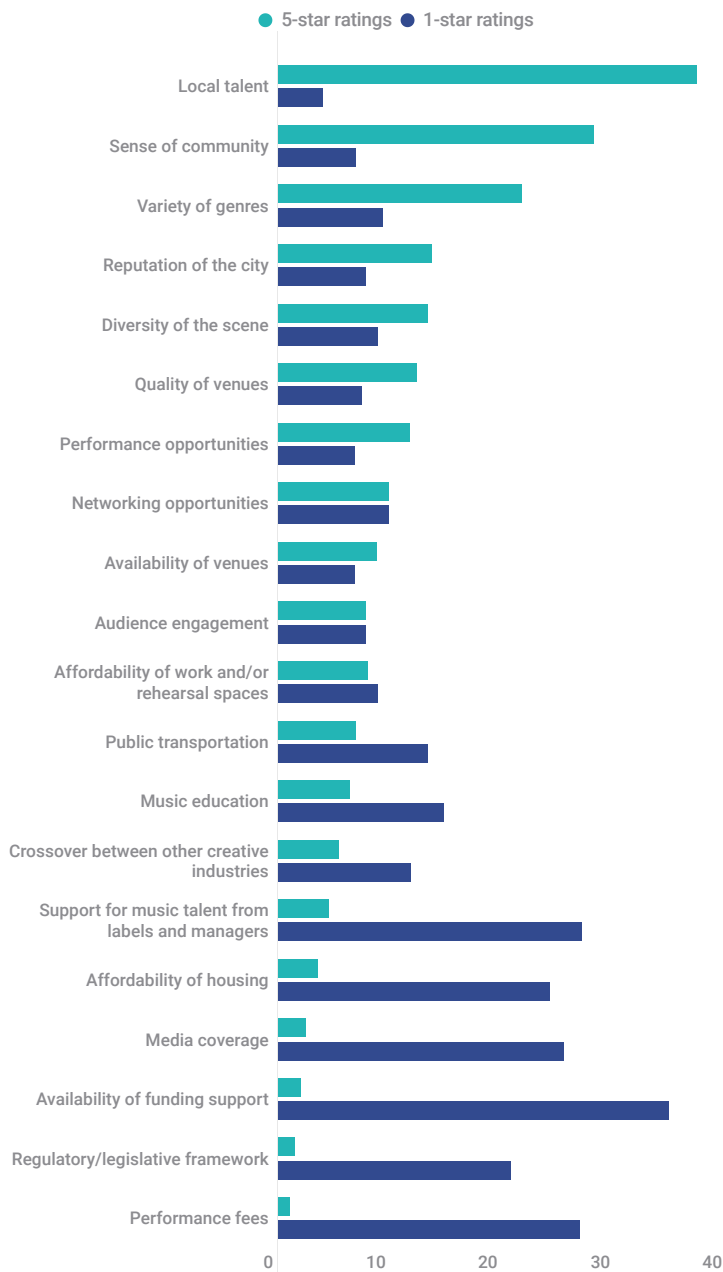
EMPLOYMENT & SKILLS

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)

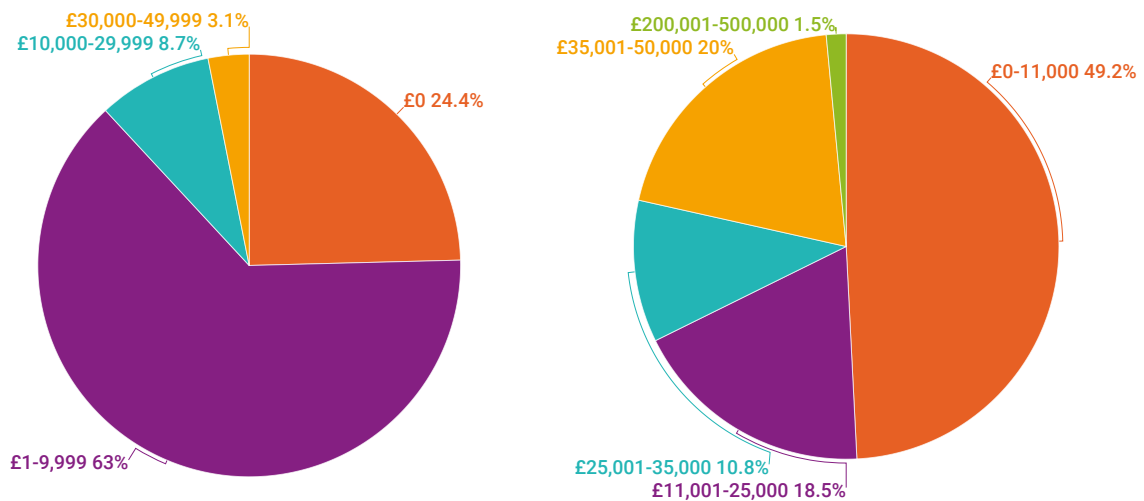
²⁵ <http://www.arts.wales/139279>

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)

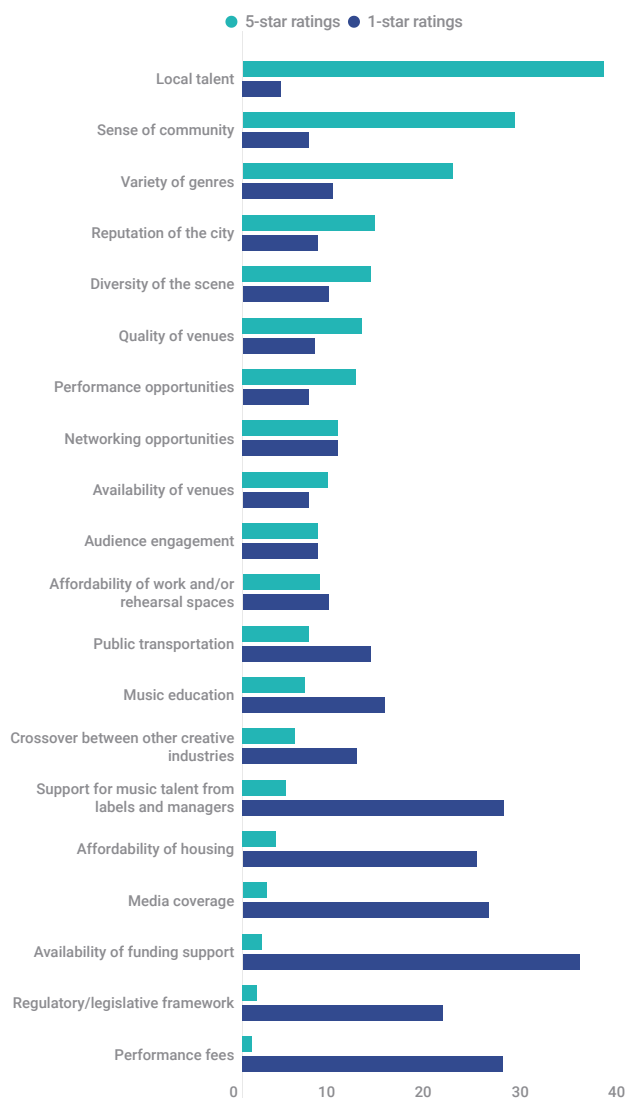
²⁷ Ibid.

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.

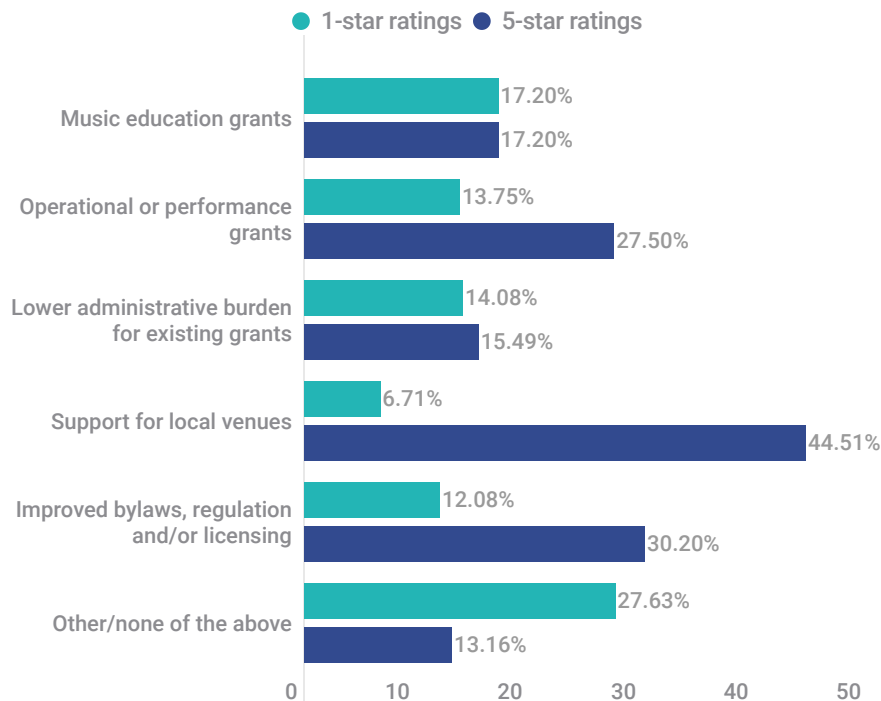
FIGURE 3. OVERVIEW OF 5-STAR AND 1-STAR RATED ASSETS IN CARDIFF’S MUSIC ECOSYSTEM



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.

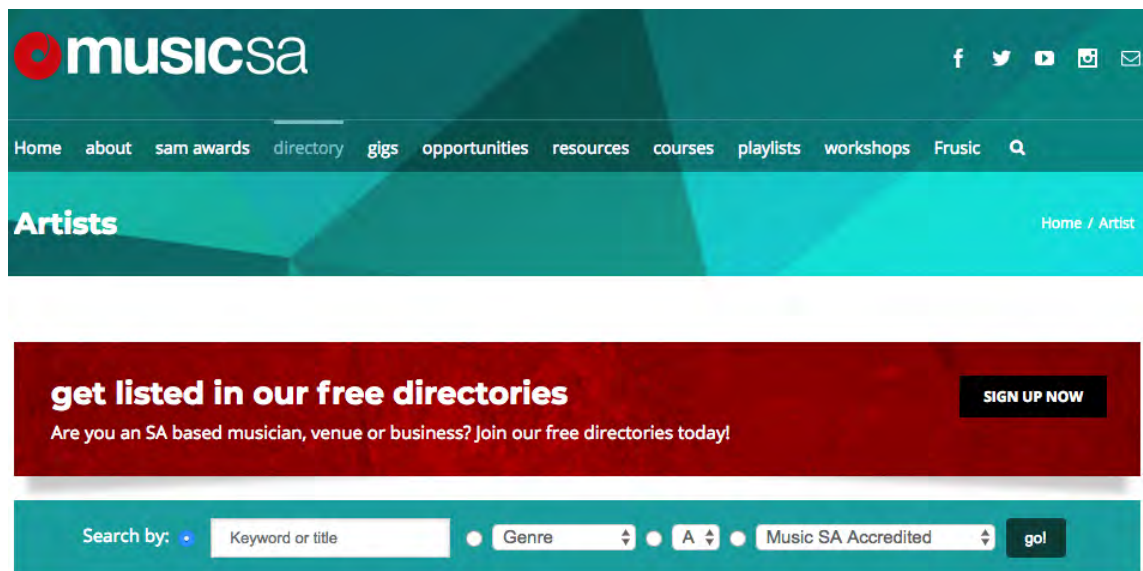
A structured approach and a unified digital database should be the starting point. This will allow transparent communication, keep different stakeholders up to date with anything related to the Music Office, policy updates, new funding opportunities, networking events, workshops, etc. This database will 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 defendable. It will also be helpful to identify some early 'easy wins' that will provide momentum and excitement about the board's possibilities. The London Music Board has been successful thanks to early investment by the council, and a clear set of objectives that were published online.

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

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

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

LONDON MUSIC BOARD

The London Music 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. It's 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.

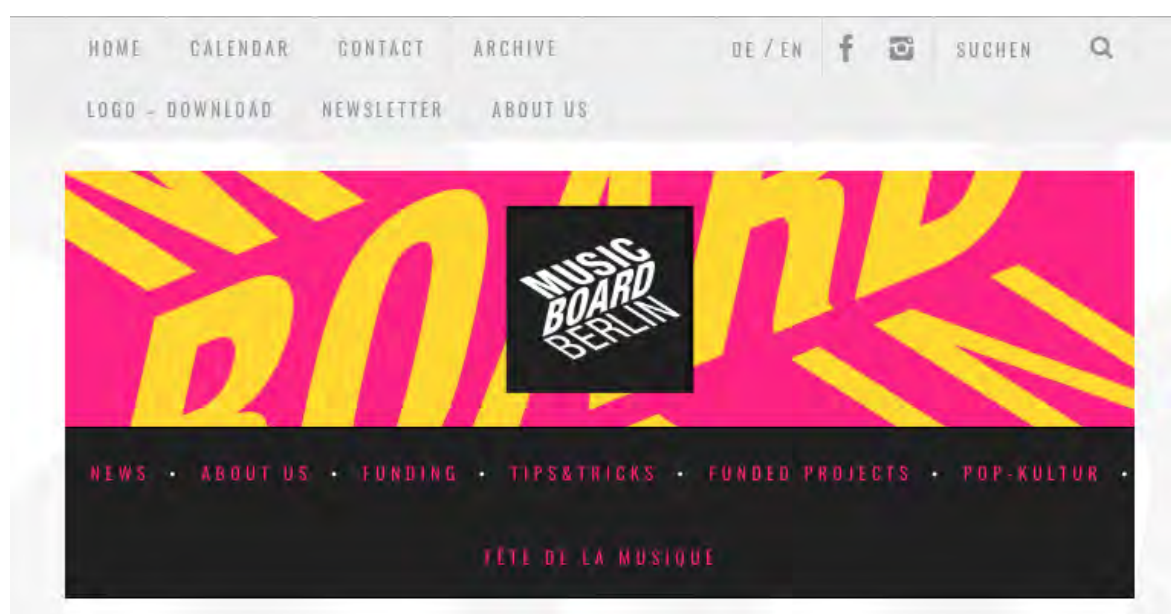


Figure 5. Screen Shot of Musicboard Berlin's Website Header as of 27-8-2018

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.



Principality Stadium. Photo: VisitCardiff

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 Ecca 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)



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.

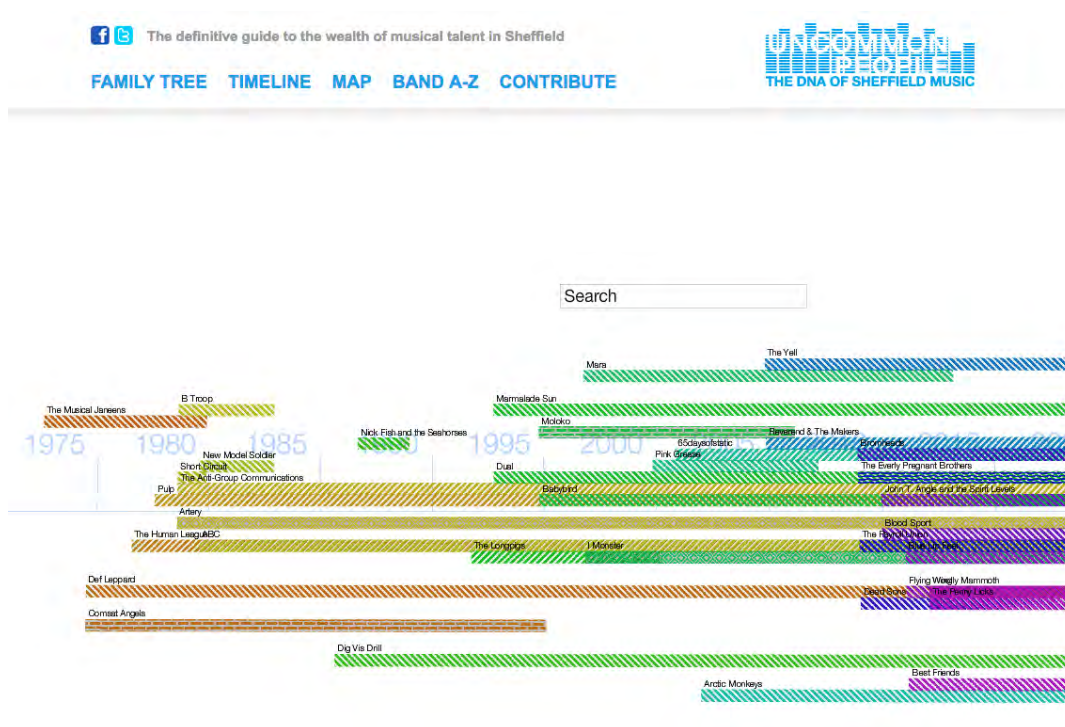


Figure 6. Screen shot of Uncommon People’s interactive ‘Timeline’ site as of 27-8-2018

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.



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

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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

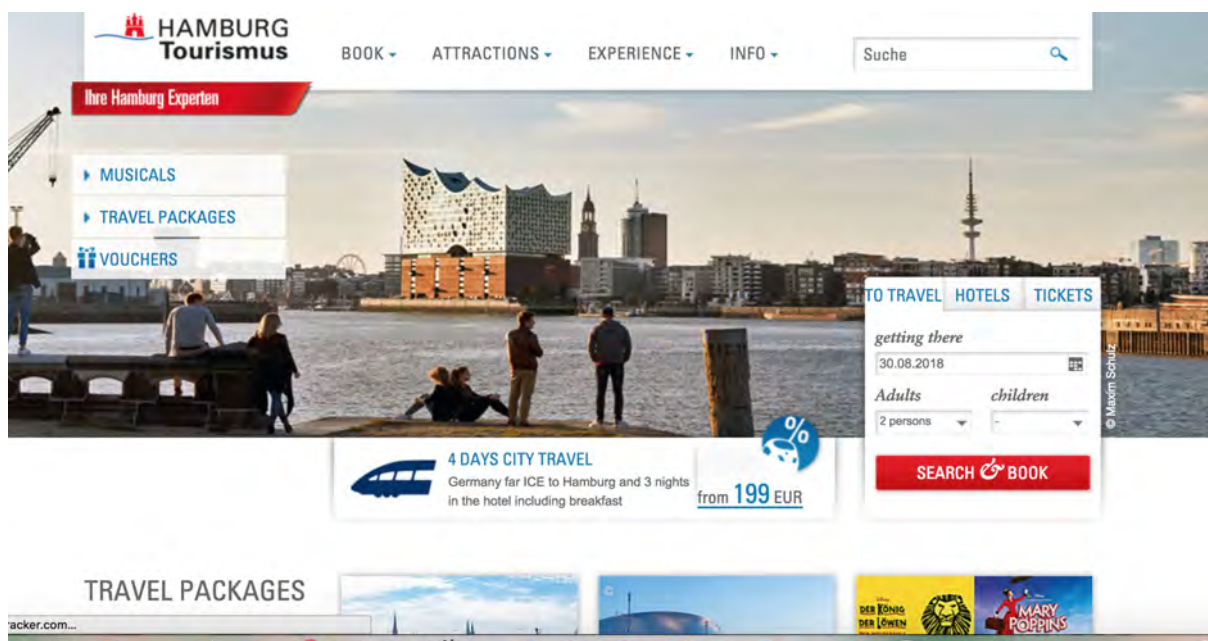


Figure 7. Screen shot of Tourism Hamburg's website as of 23-8-2018 (1)

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.

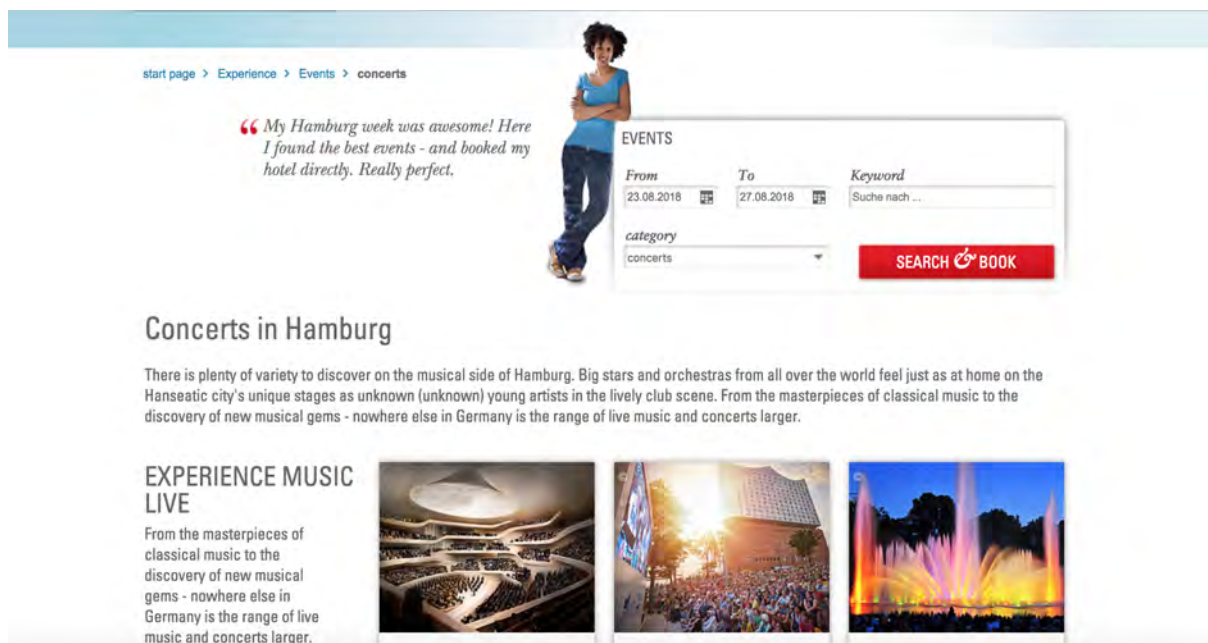


Figure 8. Screen shot of Tourism Hamburg’s website as of 23-8-2018 (2)

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.

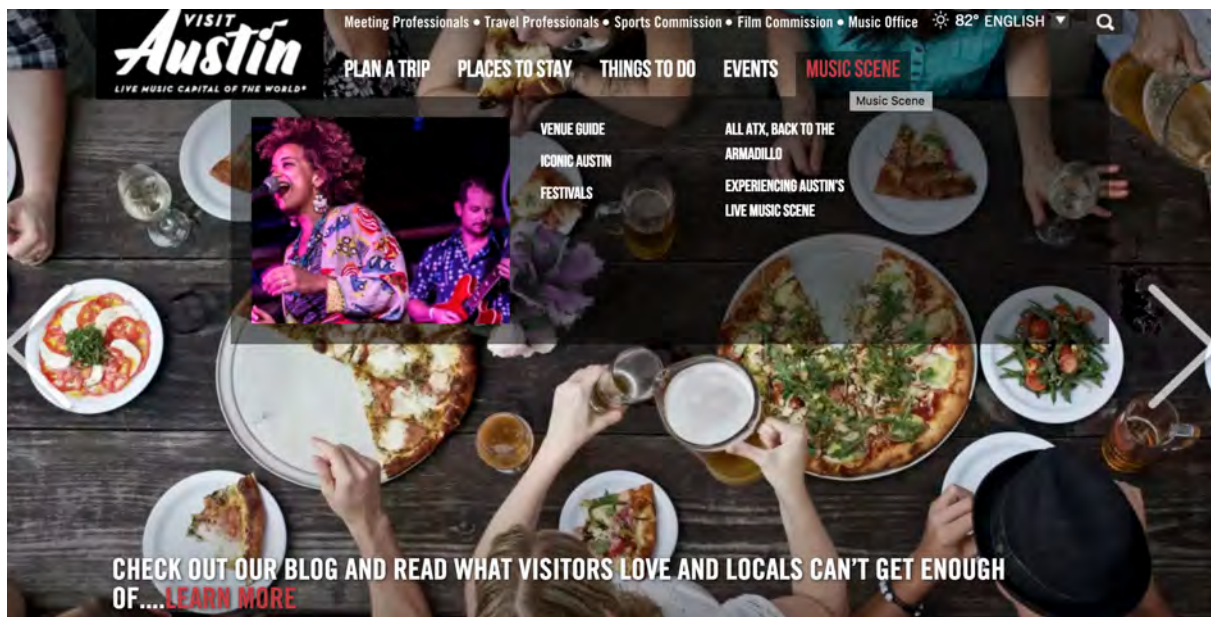


Figure 9. Screen shot of Visit Austin's website as of 23-8-2018 (1)

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

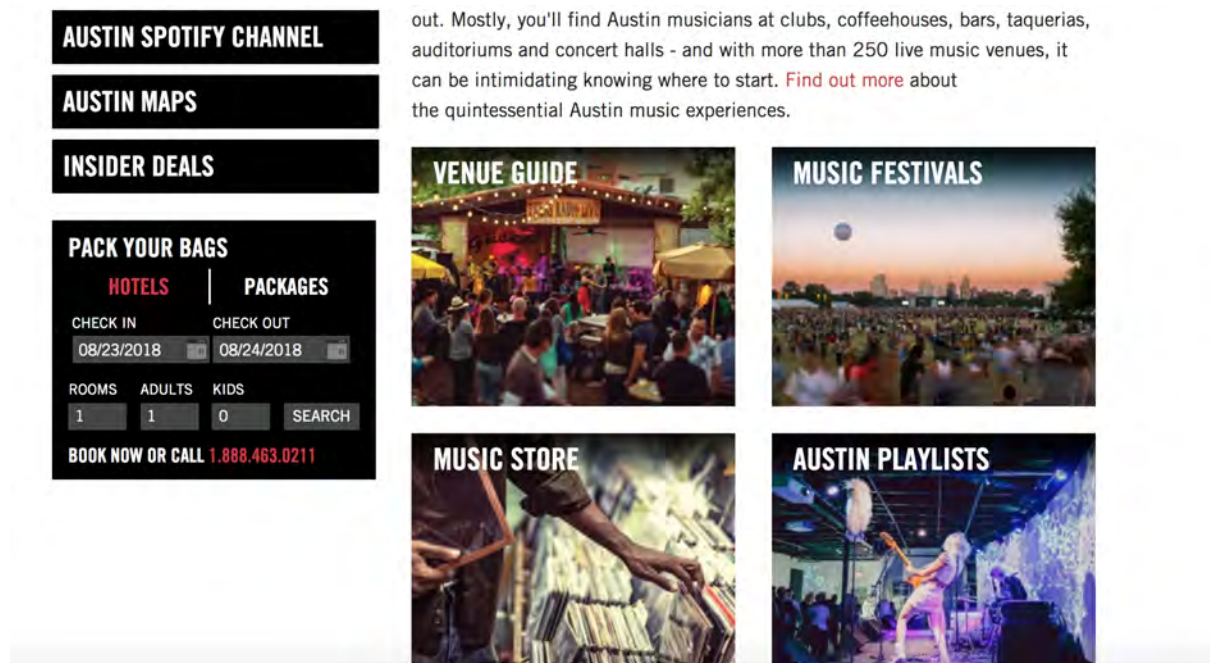


Figure 10. Screen shot of Visit Austin’s website as of 23-8-2018 (2)

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

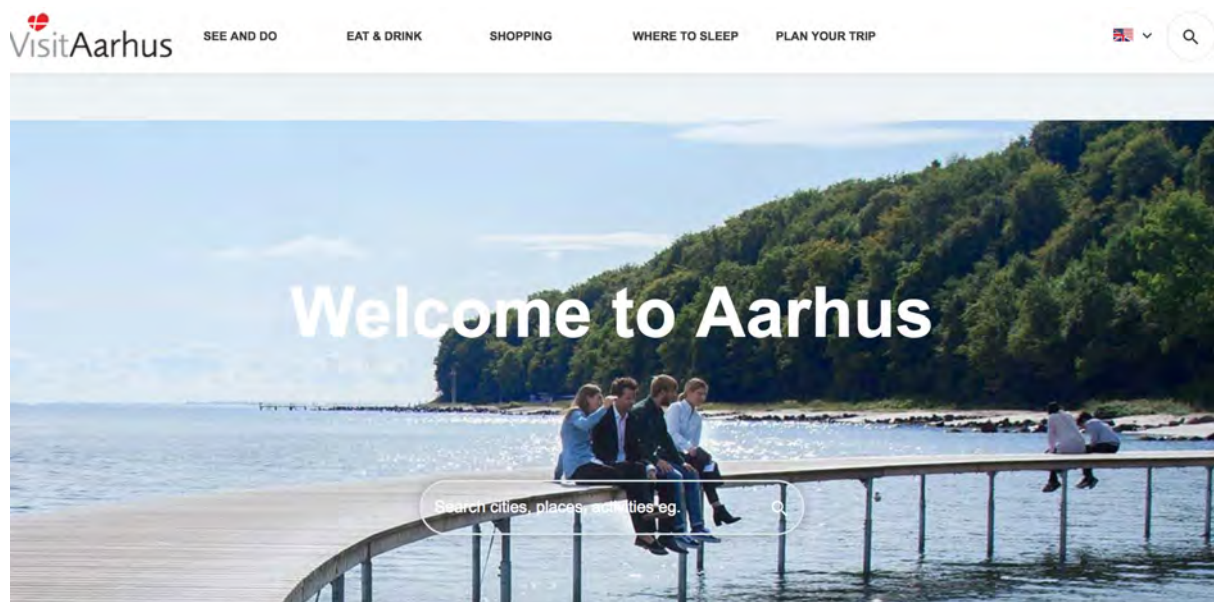


Figure 11. Screen shot of Visit Aarhus' website as of 23-8-2018 (1)

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.

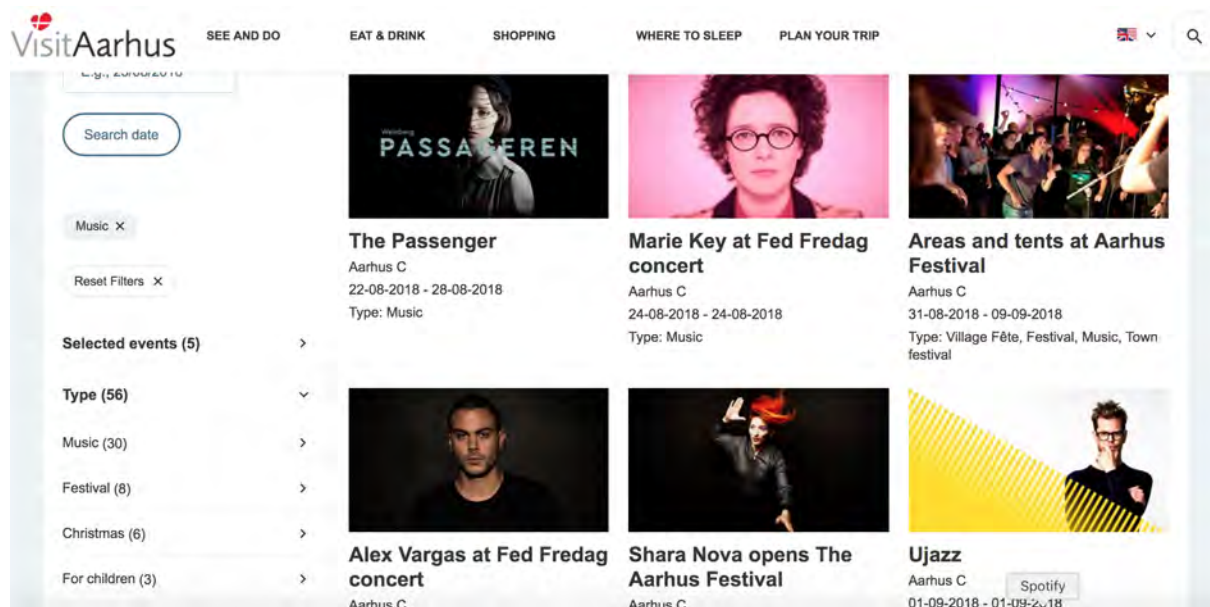


Figure 12. Screen shot of Visit Aarhus' website as of 23-8-2018 (2)

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 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.

RESPONSE:

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.

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.

RESPONSE:

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.

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.

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.

RESPONSE:

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.

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 re-establish St David's Hall as a world class concert hall and a national cultural asset, scoping options for investment to revitalise the National Concert Hall of Wales.

RESPONSE:

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.

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.

RESPONSE:

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.

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.

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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 that 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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CYNGOR CAERDYDD
CARDIFF COUNCIL

ECONOMY & CULTURE SCRUTINY COMMITTEE

3 OCTOBER 2019

SECURING THE FUTURE OF THE NEW THEATRE: PRE-DECISION SCRUTINY

Appendix A and Appendices 1, 2, 3, 4 and 5 of the Cabinet Report at Appendix B 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. It is viewed that, in all the circumstances of the case, the public interest in maintaining the exemption outweighs the public interest in disclosing the information.

Purpose of the Report

1. To give Members background information to aid the scrutiny of the draft report to Cabinet regarding the New Theatre, which is due to be considered by Cabinet at their meeting on 10 October 2019.
2. Members should note that **Appendix A and Appendices 1, 2, 3, 4 and 5** of the Cabinet report at **Appendix B** are exempt from publication. Members are requested to keep this information confidential, in line with their responsibilities as set out in the Members Code of Conduct and the Cardiff Undertaking for Councillors.

Scope of Scrutiny

3. At their meeting on 10 October 2019, the Cabinet will consider a report that presents the outcome of the market process to secure a theatre operator to rent, operate and maintain the New Theatre. The report seeks Cabinet approval for the recommended tenant.
4. During this scrutiny, Members have the opportunity to explore:
 - i) Undertake pre-decision scrutiny of the report to Cabinet on New Theatre - *attached as Appendix B*
 - ii) Explore with witnesses key factors shaping future plans and any

risks to the Council

- iii) Gain an understanding of the next steps and timelines involved, and
- iv) Test the recommendations to Cabinet.

Structure of the meeting

- 5. The Chair will move that this item be considered in two parts: an open session, where Members will be able to ask questions on the issues and papers that are in the public domain; and a closed session, where members of the public will be excluded, where Members can ask questions that pertain to **Appendix A and Appendices 1, 2, 3, 4 and 5 of Appendix B.**
- 6. Members will hear from Councillor Peter Bradbury (Cabinet Member – Culture & Leisure), Neil Hanratty (Director of Economic Development) and Kathryn Richards (Head of Culture, Venues, Tourism & Events). There will be a presentation taking Members through the proposals and recommendations to Cabinet, followed by Members questions.
- 7. Members will then be able to decide what comments, observations or recommendations they wish to pass on to the Cabinet for their consideration prior to making their decisions.

Background

- 8. At over 110 years old, the New Theatre is the oldest traditional theatre in Cardiff, with a growing maintenance backlog, including high priority works estimated at circa £350,000. The operation of the New Theatre requires an annual Council subsidy as well as facilities management costs, including cleaning, utility costs and NNDR. However, it is estimated that in 2018/19, the New Theatre delivered £21m back to the local economy¹.
- 9. In 2015/16, the Council undertook a public procurement exercise covering the New Theatre and St David's Hall. This found that the benefit of externalisation

¹ Cited in report to Cabinet

through that process was marginal and the Council decided not to proceed. In November 2018, Cabinet considered a report on the future of Cardiff's heritage buildings and 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.

10. 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.'

Issues identified in report to Cabinet

11. The draft report to Cabinet entitled '*Securing the Future of the New Theatre*' is attached at **Appendix B** and has **five** appendices:

- **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

12. The report states that the Council has advertised in the Arts Professional publication, seeking 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.

13. The expressions of interest were evaluated against an agreed set of criteria, detailed in the report to Cabinet, by a multi-disciplinary team of property, legal and cultural venue officers, and interested parties were invited to interviews. A shortlist of four final respondents were invited to submit full and final bids, details are in Confidential Appendix 1 and 2.

14. Of the four final parties, two were discounted, as they provided no guarantees regarding removal of the current operating subsidy. The remaining two offers were of similar monetary value, committed to operating the theatre without subsidy, and are from reputable theatre companies, committed to retaining and developing all existing staff through the TUPE process with pensions protected.
15. The key difference in the two offers is the strength of covenant under-pinning the lease agreement with the preferred offer being able to provide a significant parental company guarantee.
16. The report to Cabinet states that the '*details of the financial and cultural standing and performance of the company making the preferred offer is provided in Confidential Appendix 3.*' The highlights from this are summarised at **Point 22** of **Appendix B**.
17. The **risks** to the Council are summarised at **Point 23** of **Appendix B** with Confidential Appendix 4 setting 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.
18. The **Financial implications** are set out at **Points 27-30** of **Appendix B**, with **Legal** implications at **Points 31- 36** and **HR implications** at **Point 37**. Members are advised to ensure they have read these.

Proposed Recommendations to Cabinet

19. The report to Cabinet contains the following recommendations:

(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.

Appendix A

20. At the last Committee meeting, 19 September 2019, during discussions about the work programme and this item coming for pre-decision scrutiny, Members

requested information on the income received from the pantomimes at the New Theatre, for the last five years. This has been provided, at **Appendix A**.

Previous Scrutiny

21. At Committee in January 2019, Members received a copy of the Council's *Changes for Cardiff* budget consultation survey that highlighted a consultation budgetary proposal for the New Theatre and sought residents' views on this.

22. The consultation survey contained the following:

New Theatre Cardiff has a vibrant and varied theatre scene, attracting a wide range of performances and audiences. Venues including the Millennium Centre, St David's Hall, the Sherman Theatre and Chapter Arts provide an array of entertainment choices. Cardiff Council wants to ensure that, as the capital city of Wales, we are able to ensure the continuation of high quality theatre productions in the city. An opportunity exists for the Council to secure a new private theatre tenant for the New Theatre building to develop the current theatre offer in the city. This proposal could secure savings of £404k to the Council. (CONSULT 7)

- *Have you visited the New Theatre in the last 12 months?*
- *Have you visited a theatre elsewhere in Cardiff in the last 12 months?*
- *Do you support the proposal to secure a private tenant to develop and sustain the current theatre offer in the city?*

23. The consultation survey responses showed the following:

- 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.
- Almost two-thirds of respondents (64.7%) supported the principle of reducing the subsidy of entertainment and art events.

24. At Committee in February 2019, Members undertook pre-decision scrutiny of the Budgetary Proposals for 2019/20, which included a savings proposal, at Line 7, for £404,000 from the New Theatre.
25. As part of the papers for the meeting in February 2019, Members received a hyperlink to the Equality Impact Assessment undertaken for this savings proposal; this stated that *'any positive/negative impact will be considered and evaluated as part of the lease negotiations.'*
26. Following budget scrutiny, the Chair, Councillor Howells, wrote to Councillor Weaver (Cabinet Member – Finance) stating:
- 'Members note the double-pronged approach being taken to the New Theatre, Line 7, seeking expressions of interest from private companies at the same time as tightly managing operations to control spend. Members are clear that they wish to scrutinise any new proposed operating model for the New Theatre and ask that officers liaise with scrutiny services to ensure that this happens at the appropriate time.'*²
27. Councillor Weaver's response letter, dated 22 February 2019, included the following:
- 'The request to scrutinise any new lease arrangements in respect of the New Theatre is noted and officers will liaise with scrutiny services to ensure this is programmed accordingly.'*

Way Forward

28. Councillor Peter Bradbury (Cabinet Member – Culture & Leisure) will be invited to make a statement. Neil Hanratty (Director of Economic Development) and Kathryn Richards (Head of Culture, Venues, Tourism and Events) will attend to give a presentation and answer Members' questions on the proposals.
29. All Members are reminded of the need to maintain confidentiality with regard to the information provided in **Appendix A and Appendices 1, 2, 3, 4 and 5 of**

² Letter from Cllr Howells, Chair to Cllr Weaver, Cabinet Member, dated 20 February 2019

Appendix B. Members will be invited to agree the meeting go into closed session to enable discussion of this information.

Legal Implications

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

Financial Implications

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

RECOMMENDATION

The Committee is recommended to:

- i) Consider the information in this report, its appendices and the information presented at the meeting;
- ii) Determine whether they would like to make any comments, observations or recommendations to the Cabinet on this matter in time for its meeting on 10 October 2019; and
- iii) Decide the way forward for any future scrutiny of the issues discussed.

DAVINA FIORE

Director of Governance & Legal Services

27 September 2019

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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CABINET MEETING:

October 2019

SECURING THE FUTURE OF THE NEW THEATRE

CULTURE & LEISURE (CLLR PETER BRADBURY)

AGENDA ITEM:

Appendices 1 – 5 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.

PORTFOLIO: CULTURE & LEISURE

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.

Reason for Recommendations

26. 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

27. 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.
28. 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.
29. 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.
30. 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

31. 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
32. 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.
33. 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.
34. 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

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 Guidance (Wales) Act 2015 and how this strategy may improve the social, economic, environmental and cultural well-being of Wales.

HR Implications

37. 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
	Date

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

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

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**CYNGOR CAERDYDD
CARDIFF COUNCIL**

ECONOMY & CULTURE SCRUTINY COMMITTEE

3 OCTOBER 2019

CARDIFF EAST INDUSTRIAL STRATEGY: PRE-DECISION SCRUTINY

Purpose of the Report

1. To give Members an overview of the draft report to Cabinet titled Cardiff East Industrial Strategy, which is due to be considered by Cabinet at their meeting on 10 October 2019.

Scope of Scrutiny

2. At their meeting on 10 October 2019, the Cabinet will consider a report that updates the Cabinet on work undertaken to develop a Cardiff East Industrial Strategy and seeks cabinet approval for the proposed Strategy and the next steps in implementing this. The report also requests Cabinet to consider the potential support for the Cardiff Parkway development.
3. During this scrutiny, Members have the opportunity to explore:
 - The proposed Cardiff East Industrial Strategy;
 - Whether there are any risks to the Council;
 - The next steps for delivering Cardiff East Industrial Strategy; and
 - The recommendations to Cabinet.

Background

4. East Cardiff has significantly high levels of deprivation, with almost 44% of the area falling within the 10% most deprived areas in Wales. This is illustrated by the following:
 - unemployment rates 1/3 higher than the rest of Cardiff
 - 33% over 16yr olds have no educational qualifications.¹

¹ Compared to 21% average across Cardiff.

5. The Administration's policy programme, the Corporate Plan and the Economic Strategy all include a commitment to develop a new Industrial Strategy for East Cardiff. Consequently, the Council commissioned consultants to undertake an initial consultation and research exercise to review the economic potential of the East Cardiff area. Following their report, the Council commissioned further work to explore how the findings of the initial report could be realised.
6. The Council's Corporate Plan links the delivery of an Industrial Strategy for Cardiff East to the progression of the Cardiff Parkway development, stating that the Industrial Strategy will support it. The Economic Strategy also states "*Working with partners to deliver a new Cardiff Parkway Station at St Mellons.*"

Issues identified in the Cabinet Report

7. The draft report to Cabinet entitled '*Cardiff East Industrial Strategy*' is attached at **Appendix A** and has one appendix - **Appendix 1** – '*Cardiff East Industrial Strategy Phase 1: Scoping, Visioning and Spatial Planning Summary Report*'.
8. The report to Cabinet summarises the key findings from the consultants' reports, highlighting the need for a coordinated approach to development and for significant multi-modal improvements to address poor public transport connectivity and rail freight terminal connectivity.
9. The report to Cabinet at **Points 18 – 20**, outlines three phases for developing East Cardiff. The phases are high level and the report to Cabinet states, at **point 16**, that '*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.*'
10. The consultants work has identified various strengths and opportunities in East Cardiff, including:
 - Potential investments, including the Cardiff Parkway development and expanded Eastern Bay Link Road

- Opportunity to work in partnership to attract UK Government funding and private sector investment
- Opportunity to expand visitor economy in Harbourside area
- Potential for energy, creative and digital, distribution and advanced manufacturing.
- Land available in Harbourside area,
- Potential for renewable energy generation and to build a district heating network
- Potential to enhance green infrastructure – **points 24-25**.

11. The consultants work has also identified various challenges that need addressing in East Cardiff, including:

- Historic under-investment, resulting in poor public transport connectivity
- Environmental enhancements
- Flood Protection
- Remediation works
- Increasing capacity of existing utilities networks.

12. At **points 31-36**, the report to Cabinet focuses on Cardiff Parkway, highlighting the need for *'adequate investment in public infrastructure to provide access by road and active travel measures to both the rail station and the business park'* and that *'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.'*

13. **Points 38-41** set out the proposed Next Steps, which include:

- Establishing a cross-disciplinary Cardiff Council Officer Working Group to develop a master planning framework, delivery strategy and programme, and business case for public sector investment
- Using Scenario 1 as the basis of the Council's initial consideration of East Cardiff.

14. Scenario 1 focuses on expanding Lamby Way to the east, focusing on infill between existing employment land and remediation of landfill sites. It would require enhancing the existing highway network.

15. Financial and legal implications are set out at **Points 44-56** of the report to Cabinet and Members are advised to read these.

Proposed Recommendations to Cabinet

16. The report to Cabinet contains the following recommendations:

- 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.*

Way Forward

17. Councillor Russell Goodway (Cabinet Member – Investment and Development) will be invited to make a statement. Neil Hanratty (Director of Economic Development) will attend to give a presentation taking Members through the proposals and recommendations to Cabinet, followed by Members questions.

18. Members will then be able to decide what comments, observations or recommendations they wish to pass on to the Cabinet for their consideration prior to making their decisions.

Legal Implications

19. The Scrutiny Committee is empowered to enquire, consider, review and recommend but not to make policy decisions. As the recommendations in this report are to consider and review matters, there are no direct legal implications. However, legal implications may arise if and when the matters under review are implemented with or without any modifications. Any report with recommendations for decision that goes to Cabinet/Council will set out any legal implications arising from those recommendations. All decisions taken by or on behalf of the Council must (a) be within the legal powers of the Council; (b) comply with any procedural

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

Financial Implications

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

RECOMMENDATION

The Committee is recommended to:

- i) Consider the information in this report, its appendices and the information presented at the meeting;
- ii) Determine whether they would like to make any comments, observations or recommendations to the Cabinet on this matter in time for its meeting on 10 October 2019; and
- iii) Decide the way forward for any future scrutiny of the issues discussed.

DAVINA FIORE

Director of Governance & Legal Services

27 September 2019

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CABINET MEETING:

October 2019

CARDIFF EAST INDUSTRIAL STRATEGY

INVESTMENT & DEVELOPMENT (CLLR RUSSELL GOODWAY)

AGENDA ITEM:

PORTFOLIO: INVESTMENT & DEVELOPMENT

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 states *"Working 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.

Issues

- 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.
- 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

- 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

- 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.
- 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.

11. 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.
12. 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. The partnership could be exemplars that could attract UK Government funding and private sector investment.

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.

13. 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.
14. 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.
15. 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.

16. 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.
17. Each phase is outlined in detail in the report. However in summary they include:
18. 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 scenario represents the immediate response in delivering the strategy and would not require significant work to progress. Fundamentally the majority of this scenario 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 scenario however may require an element of land assembly.
19. 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 scenario 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.
20. 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.
21. 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
22. 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.

23. 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 relief lines that were previously used to service the Steel Works in East Cardiff. This opportunity has been recognised by Welsh Government and Transport for Wales, and has recently resulted in the announcement that a new station will be provided at Rover Way as part of the later phases of the current South Wales Metro programme.
24. 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.
25. 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.
26. 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.
27. 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.

28. 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.
29. 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

30. 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

31. 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.
32. 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.

33. 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.
34. 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.
35. 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.
36. 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

37. 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

38. 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.
39. 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.

40. As an immediate response, it is proposed that Scenario 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.
41. Any further consideration of Scenarios 2 and 3 set out above would require significant further work as well as co-ordination with partners to provide a detailed and deliverable plan for the area. Both scenarios however should be noted for the potential they offer to develop the area.

Reason for Recommendations

42. 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.
43. To endorse the exploration of Tax Increment Finance, in conjunction with the Cardiff Capital Region, to support the necessary infrastructure investment.

Financial Implications

44. The Cardiff 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 Scenario 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 (including Equality Impact Assessment where appropriate)

45. As and when individual proposals within the Strategy are developed legal advice should be obtained.
46. As set out in the body of the report the Strategy has no status as a Council Planning Policy document.
47. 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).
48. 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.

49. 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.
50. 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.
51. 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.
52. 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
53. 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>
54. 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.

- 55. 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.
- 56. The Council must also have regard to its duties under The Active Travel (Wales) Act 2013.

RECOMMENDATIONS

Cabinet are recommended to:

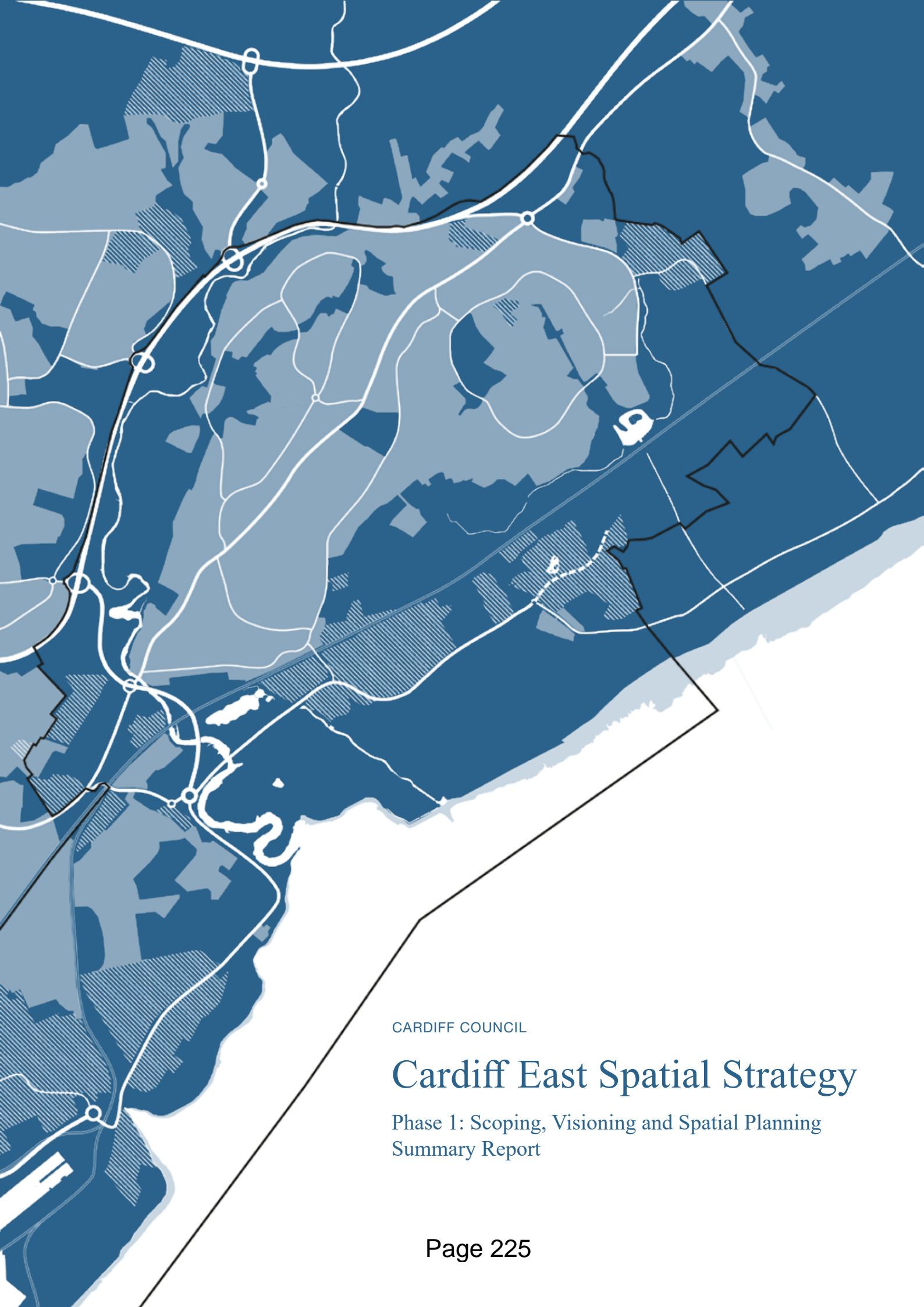
- I. Approve the East Cardiff Industrial Strategy.
- II. Delegate authority to the Director of Economic Development, in consultation with the Cabinet Member for Investment and Development, the Monitoring Officer and the Section 151 officer to develop opportunities on Council owned land, including marketing 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
	Date

The following appendices are attached:

Appendix 1: Cardiff East Spatial Strategy

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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%

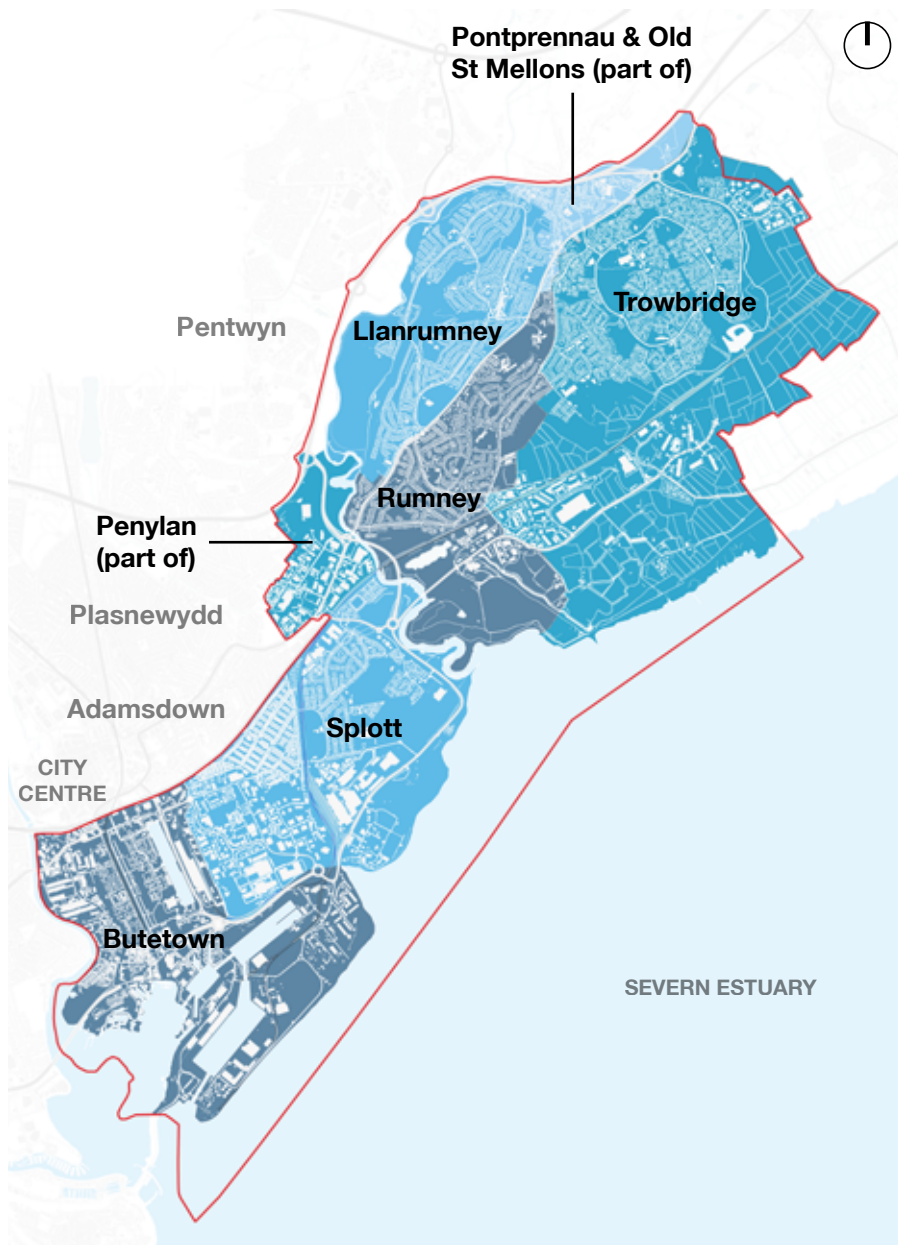
Population aged over 16 with no qualifications.
Cardiff average: 21%

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

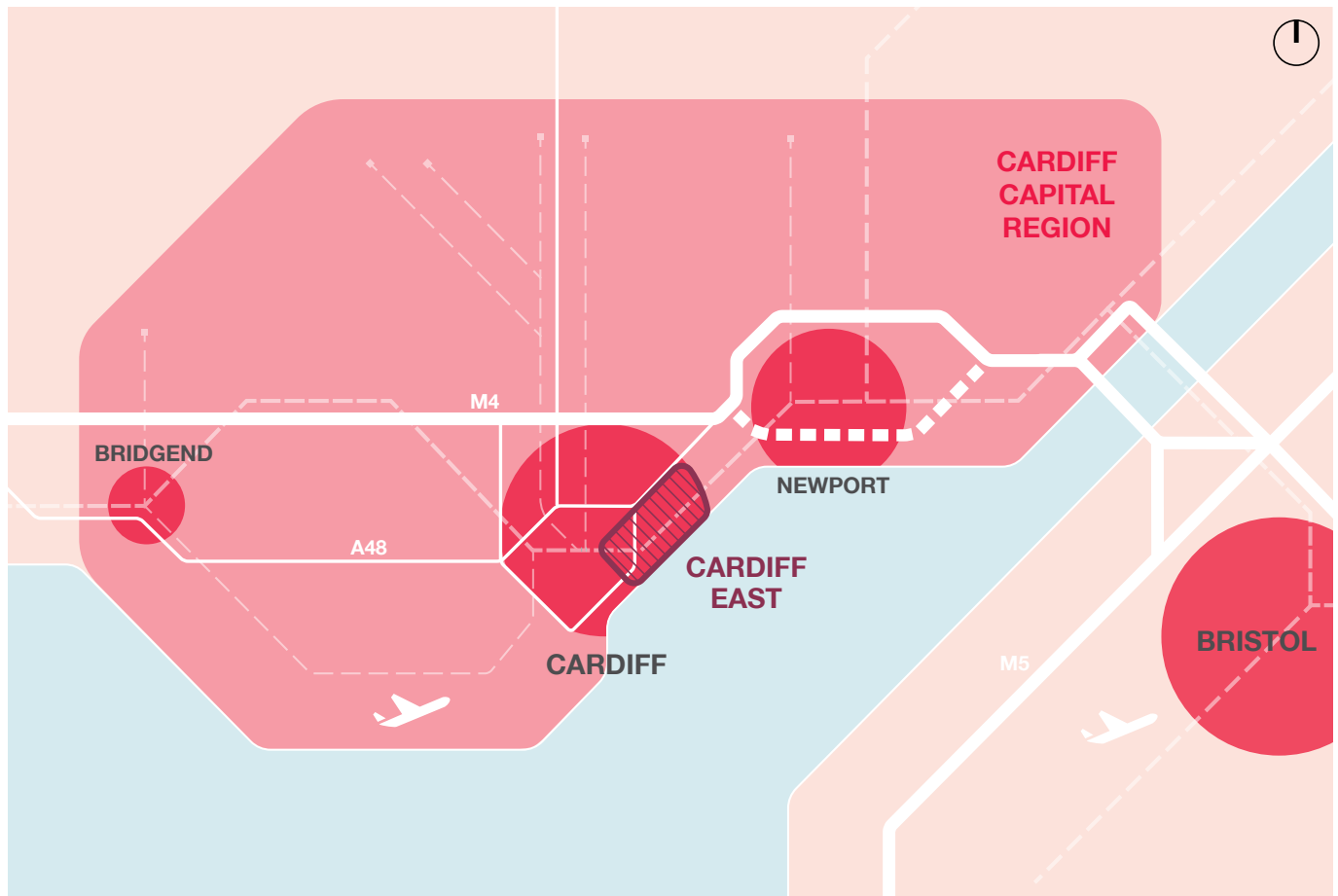
The Cardiff Capital Region (CCR) City Deal is a programme agreed in 2016 between the UK Government, the Welsh Government and the ten local authorities in South East Wales to bring about significant economic growth in the region through investment, upskilling, and improved physical and digital connectivity.

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.

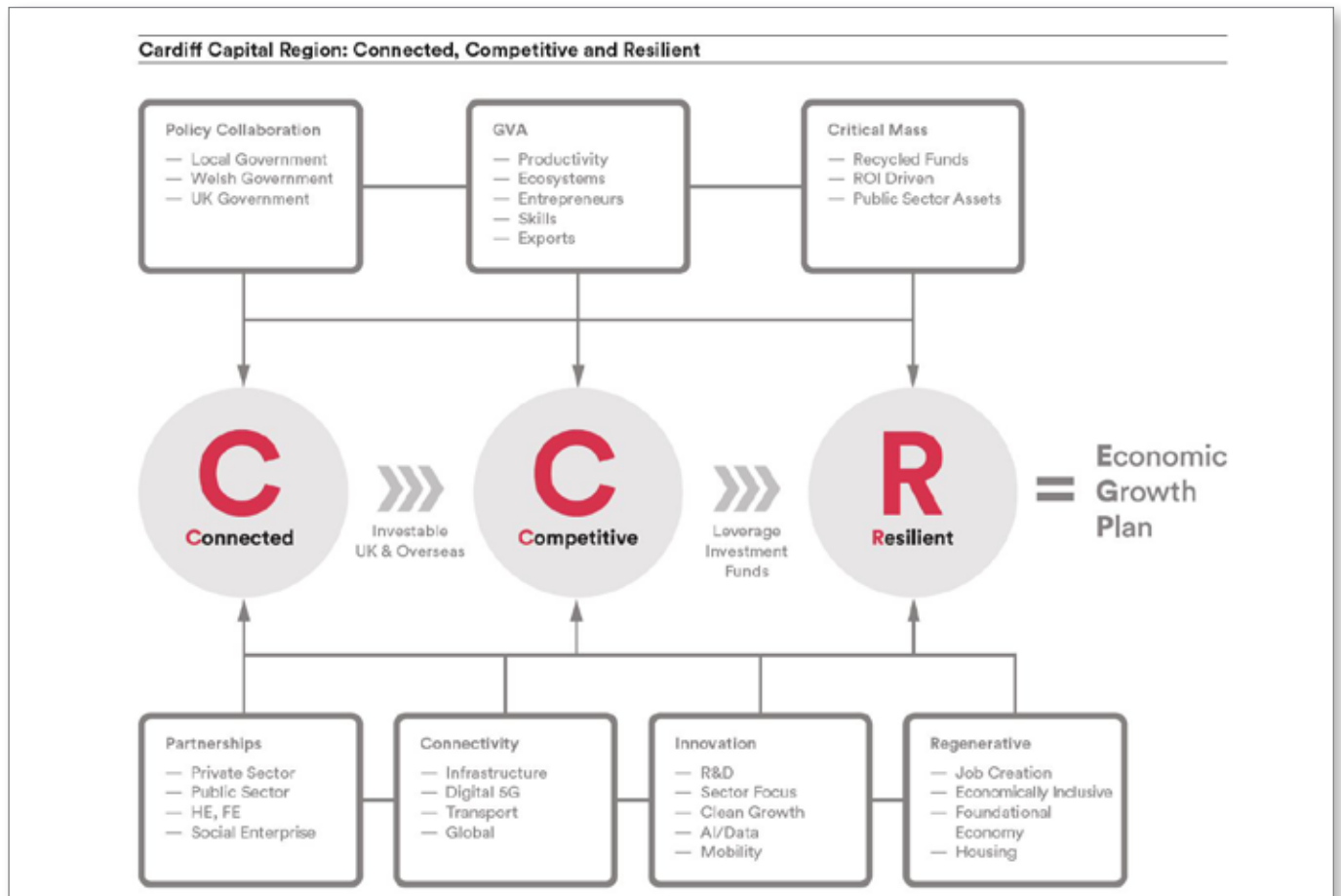
In April 2019, Cabinet resolved to approve the Draft Economic Strategy “Building More and Better Jobs”, which “sets out the Council’s vision for the city’s economy and establishes how the key development priorities will be delivered.” The Strategies and proposed projects are identified overleaf.

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.

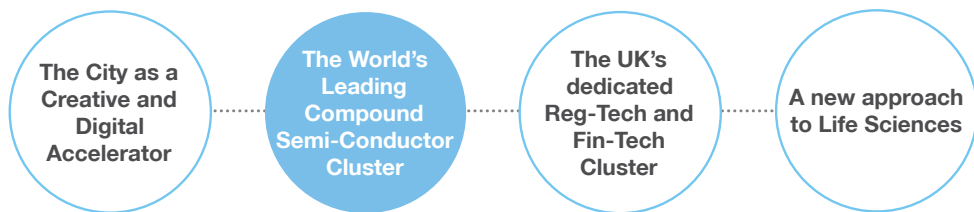
SPATIAL STRATEGY: KEY PRIORITIES



PROPOSED PROJECTS



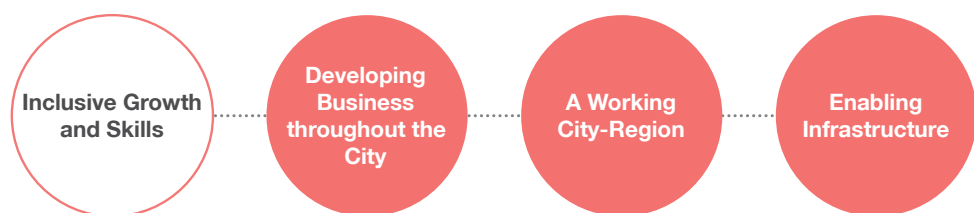
INDUSTRIAL STRATEGY: KEY PRIORITIES



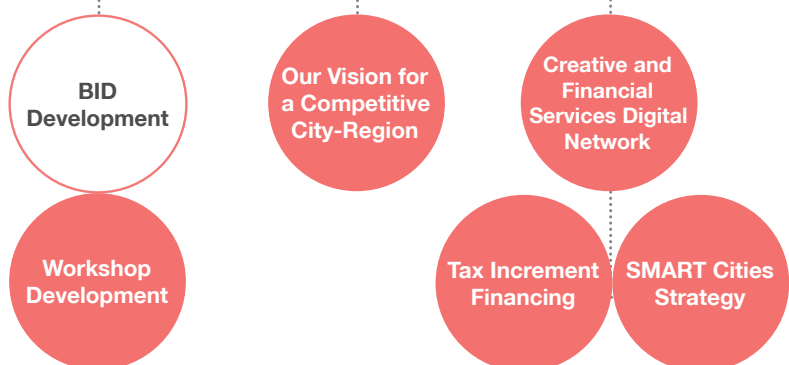
KEY PROJECTS



UNDERPINNING THEMES: KEY PRIORITIES



KEY PROJECTS



CARDIFF INDUSTRIAL STRATEGY

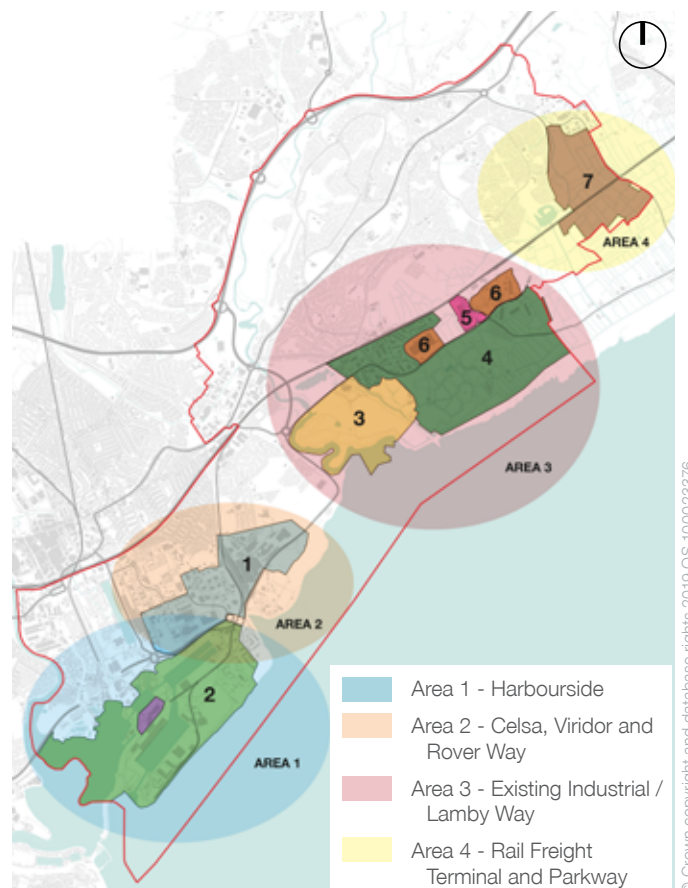
The 2018 Cardiff Industrial Strategy by BD Consulting identifies a corridor of interest in eastern Cardiff, within which are emerging themes: employment, land supply, transportation, technology, sustainable energy and industrial strategy. Cardiff East has a diversity of employment, including manufacturing, 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.

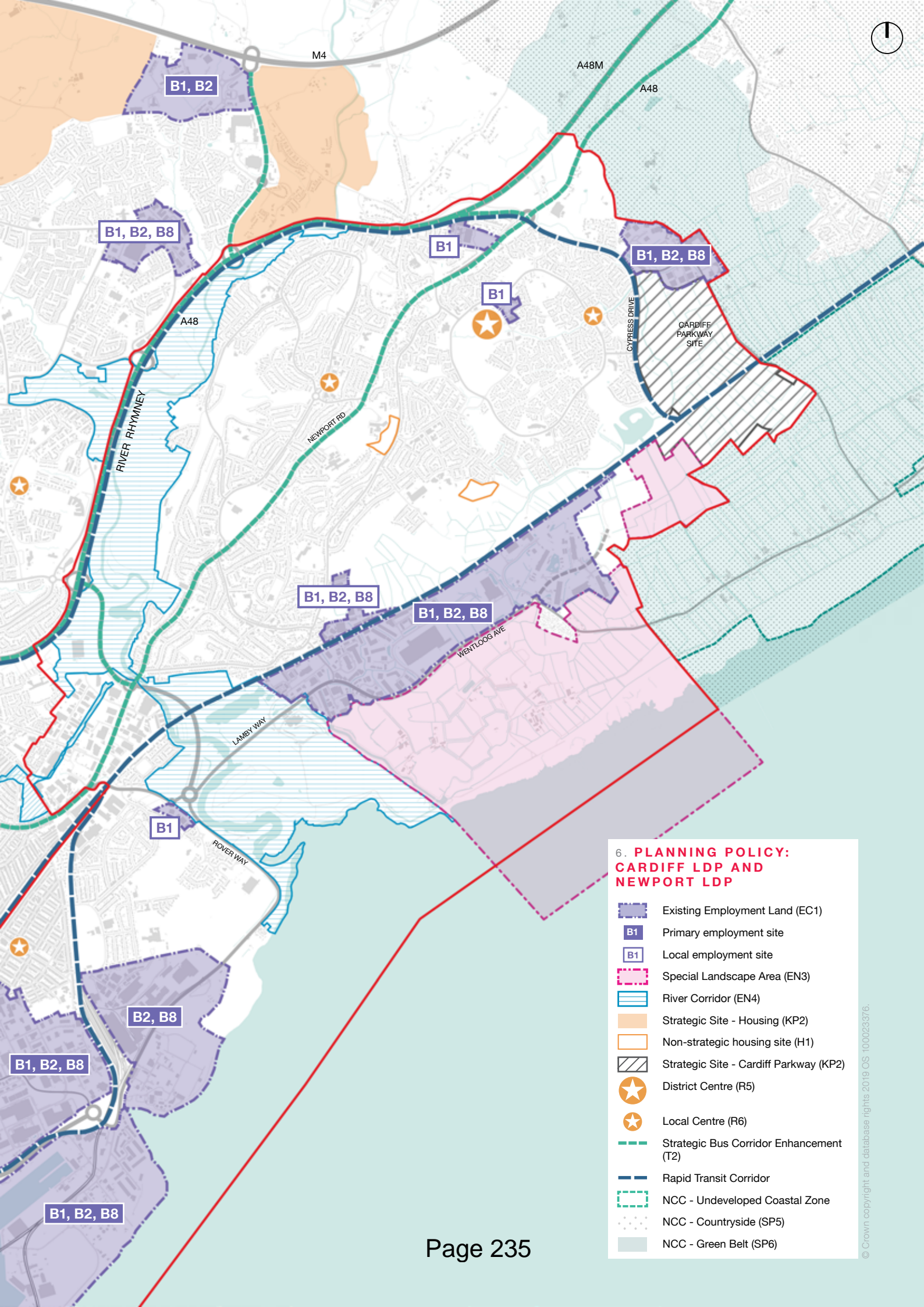
STRATEGIC RAPID TRANSIT AND BUS CORRIDORS (T2)

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.

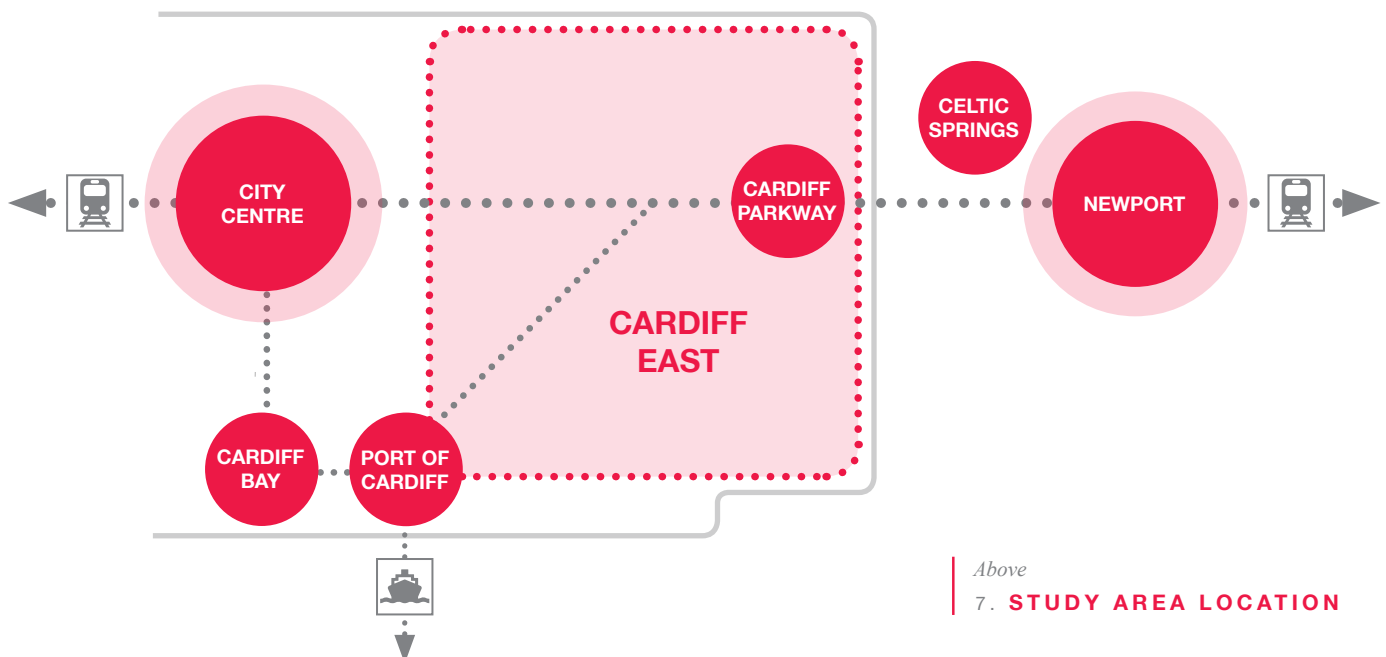
INDUSTRIAL CONTEXT

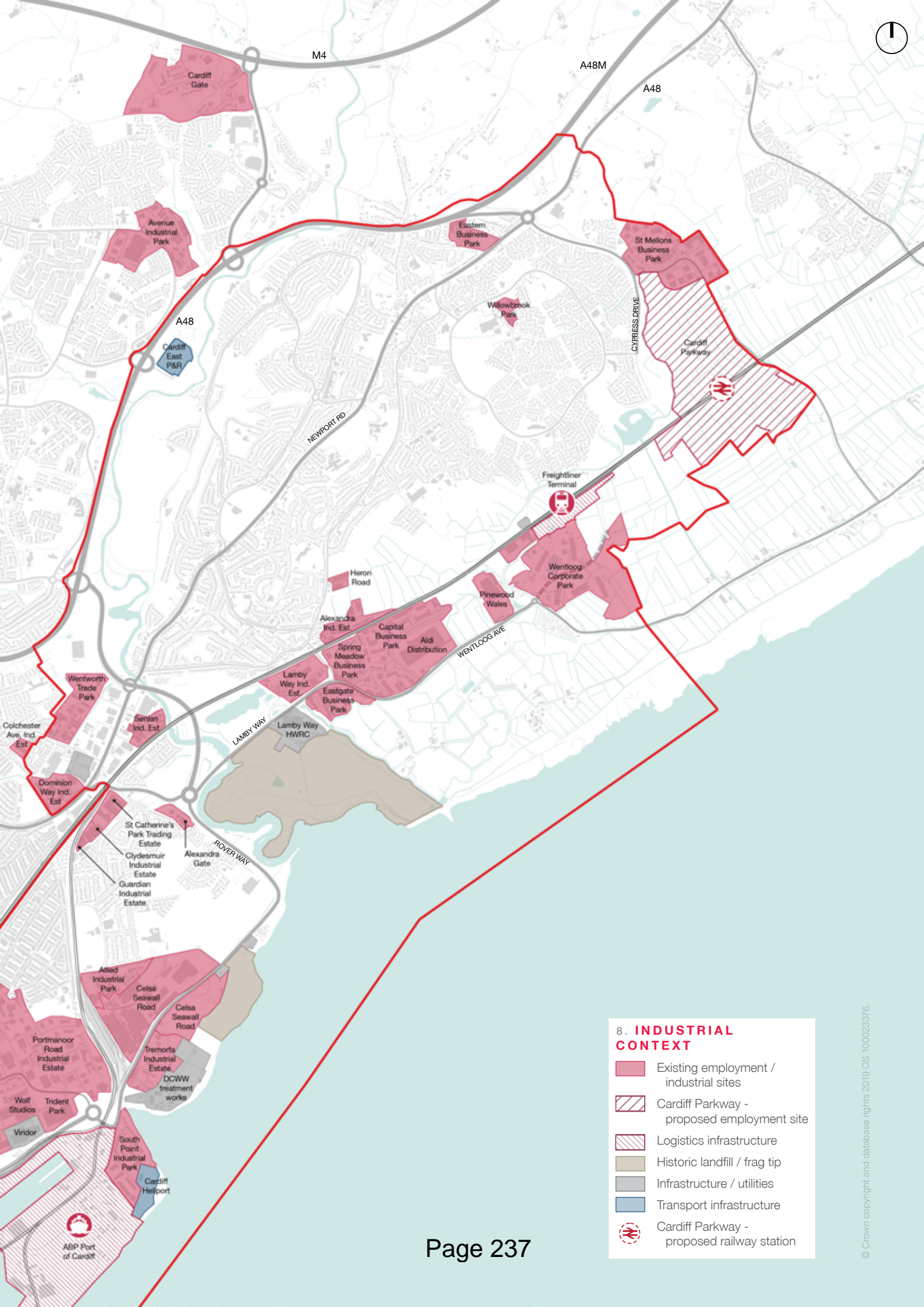
Cardiff has a low supply of available employment sites, which is further threatened by plans to redevelop and regenerate existing industrial and mixed-use areas including Dumballs Road and incremental losses at Newport Road. There will be increasing pressure on eastern Cardiff to offset these losses 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

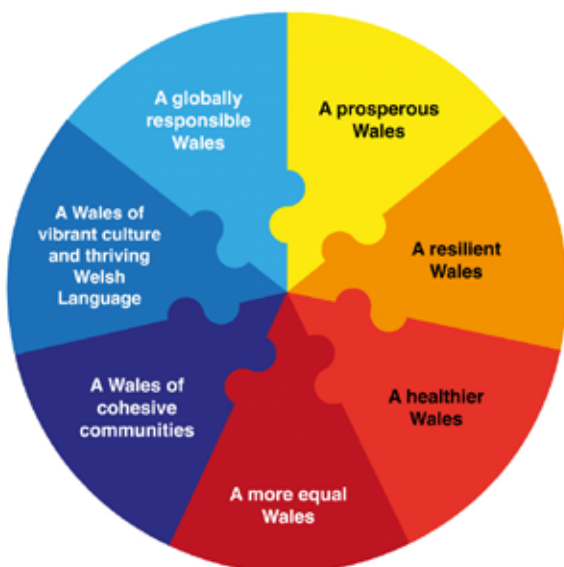
The Cardiff East area is diverse in land use and built environment, with a wide range of land uses sitting alongside and within the extensive residential communities.

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.

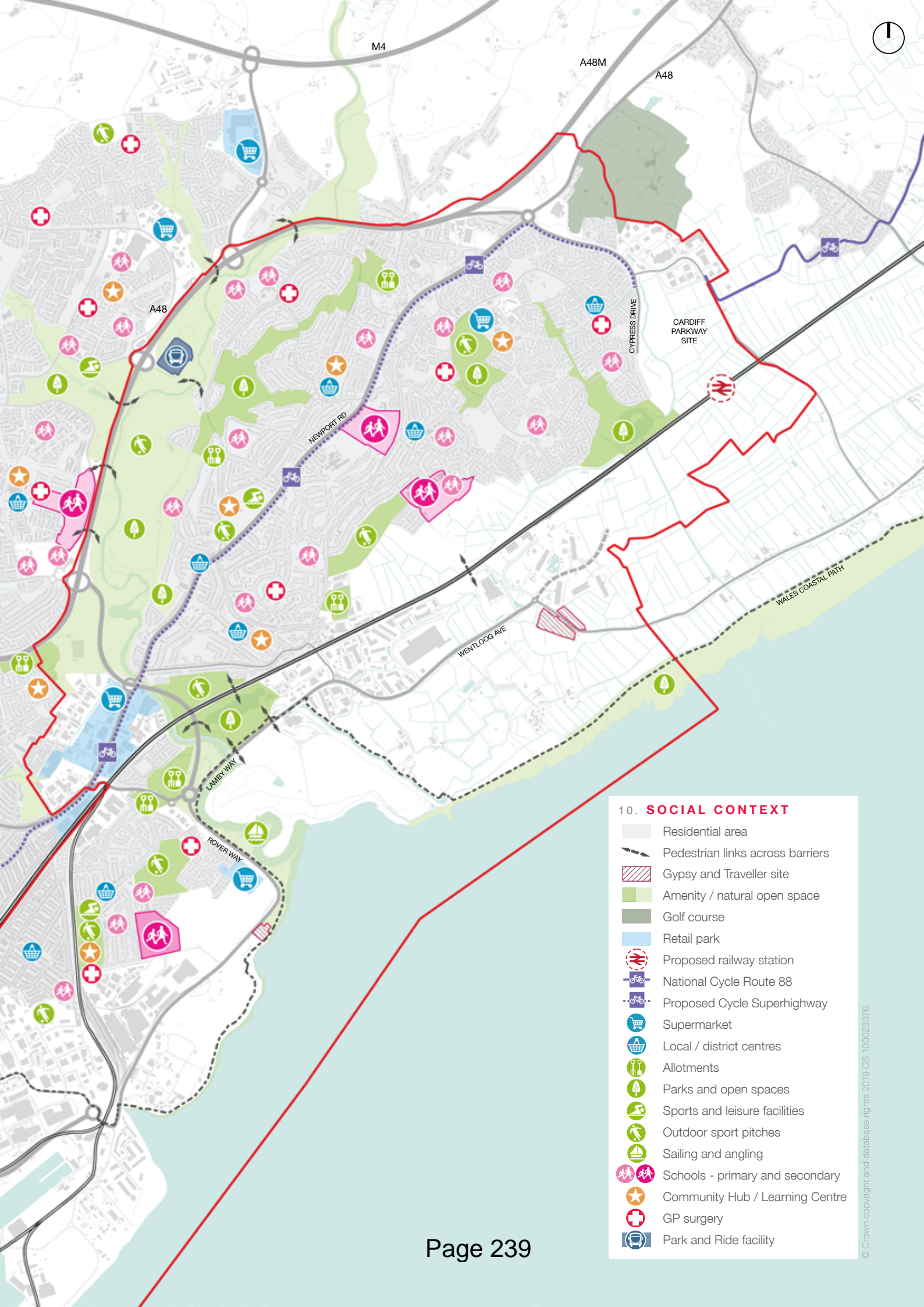
The area currently has a relatively good range of services within and close to residential areas but poor intra-area connectivity (whether by vehicle, active travel or public transport) may limit people’s access and range of choice.

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



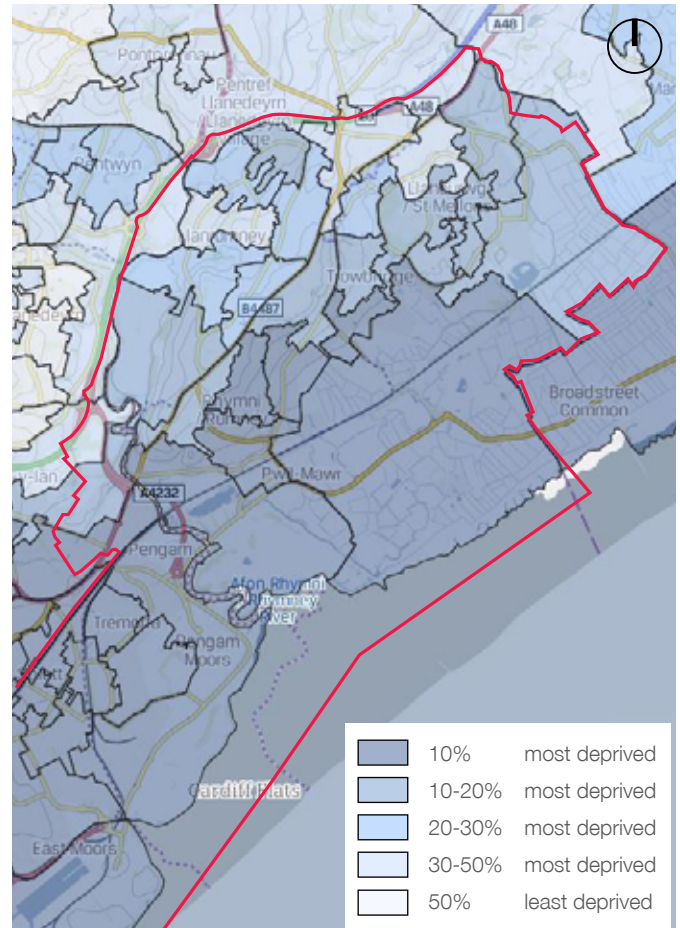
10. **SOCIAL CONTEXT**

-  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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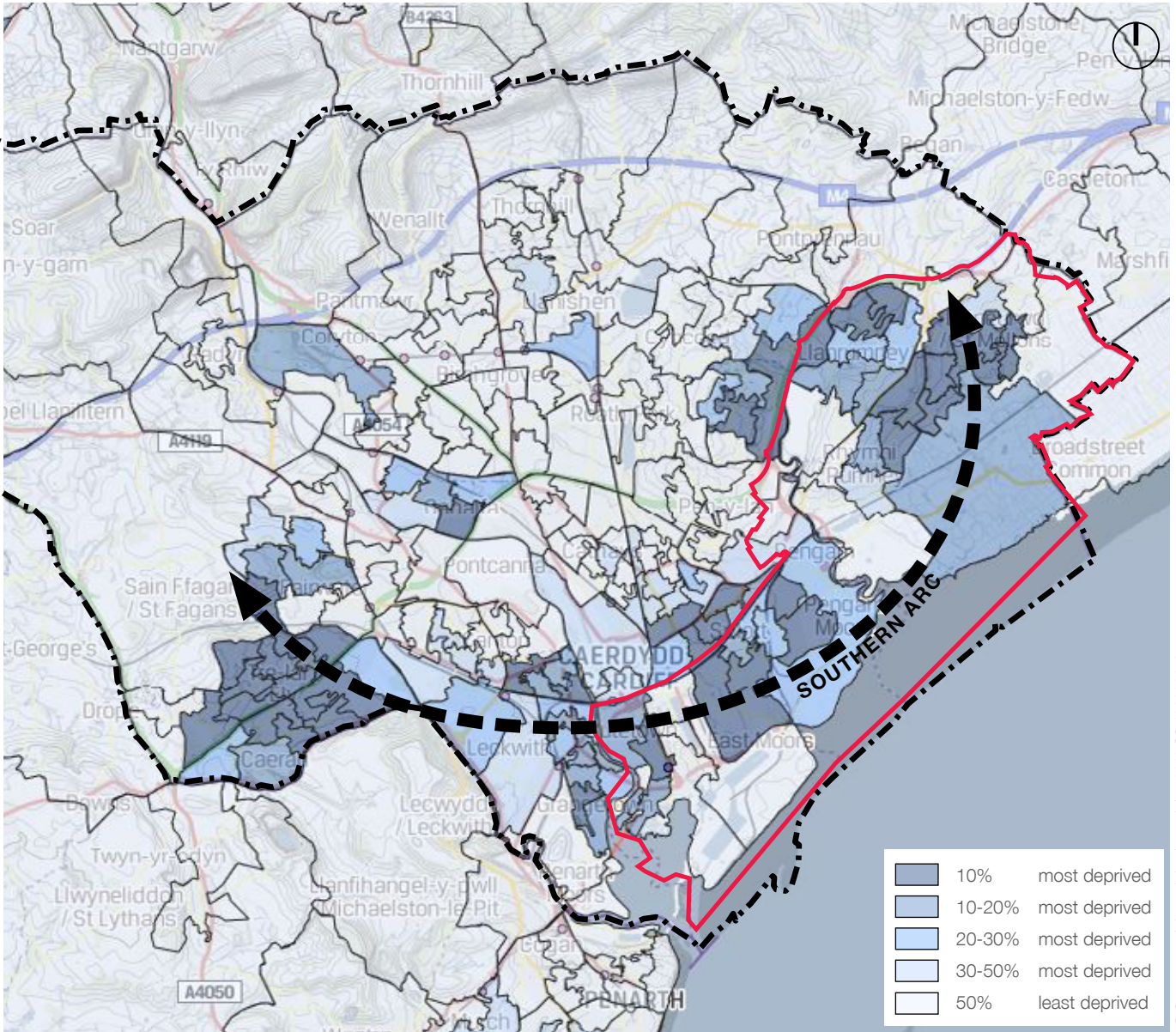
11. PHYSICAL ENVIRONMENT WIMD 2014 SCORE

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12. CARDIFF COUNCIL OVERALL WIMD 2014 SCORE

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3.3 Landscape context

LANDSCAPE CONTEXT

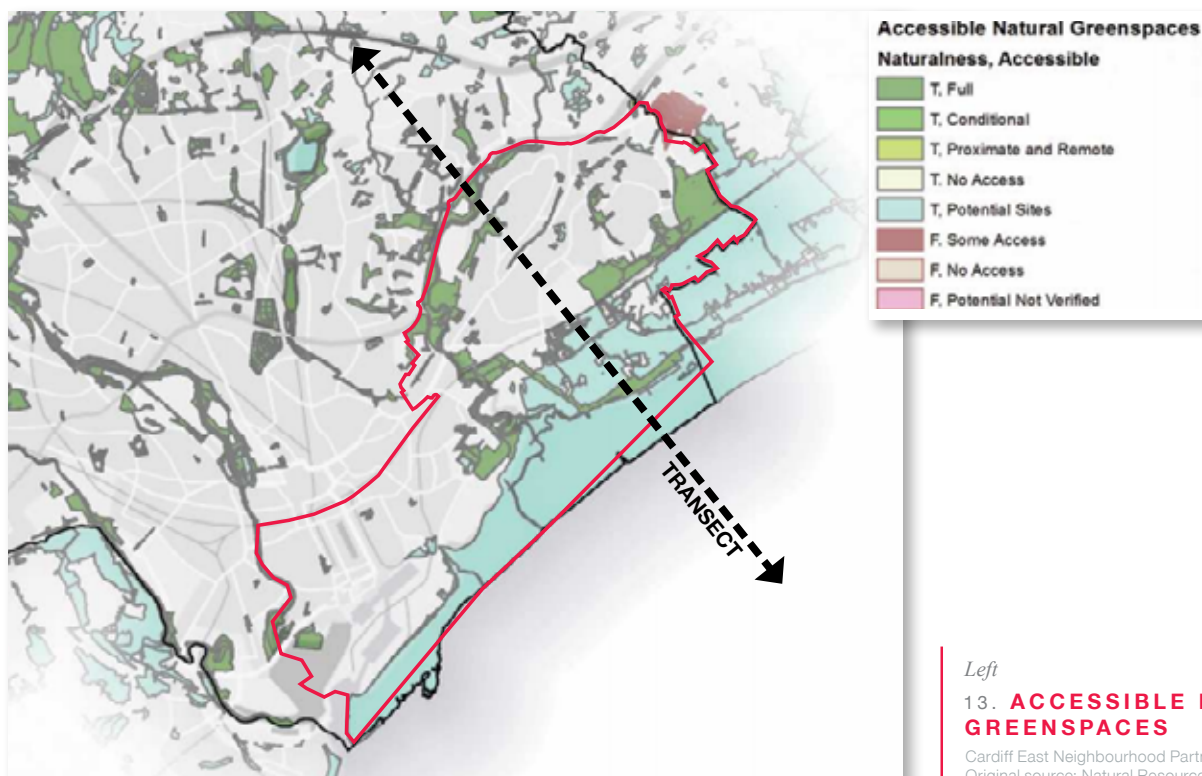
Eastern Cardiff sits within a transition between the hills to the north, at Cefn Mably and Ruperra, through to the Rhymney River Valley, to the Wentloog Levels and Severn Estuary to the south. Areas of residential and employment development interspersed by linear bands of natural landscape and major 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.

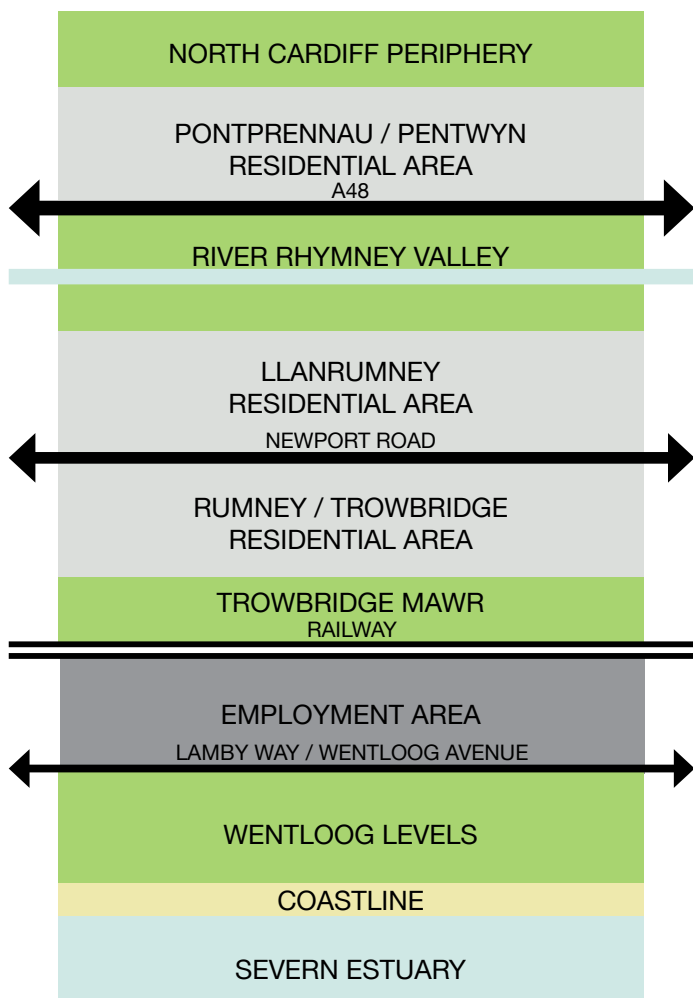


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13. ACCESSIBLE NATURAL GREENSPACES

Cardiff East Neighbourhood Partnership Area report.
Original source: Natural Resources Wales.

14. **LANDSCAPE TRANSECT**



15. **CURRENT LANDSCAPE CONTEXT**



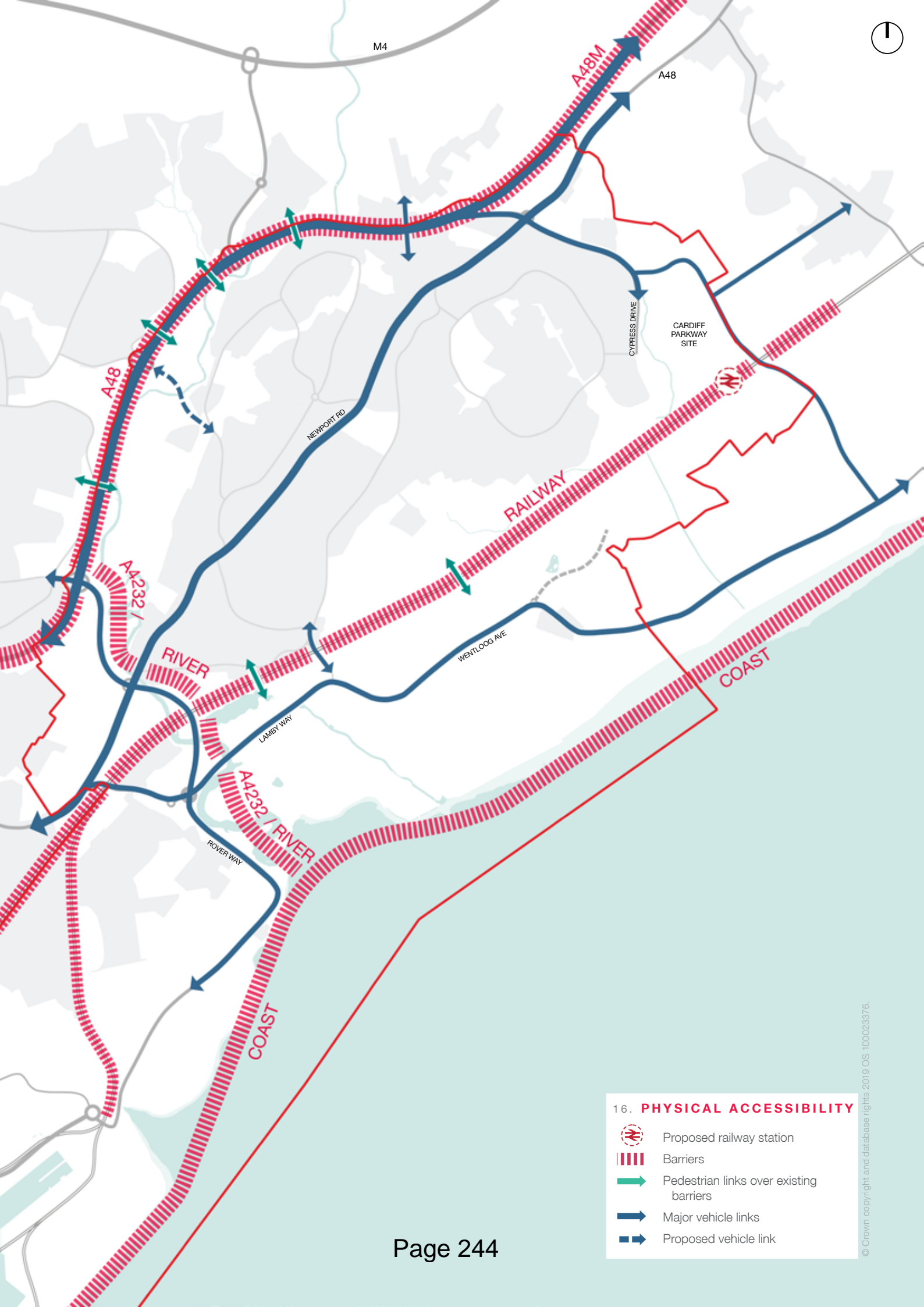
River Rhymney estuary at Rover Way








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.

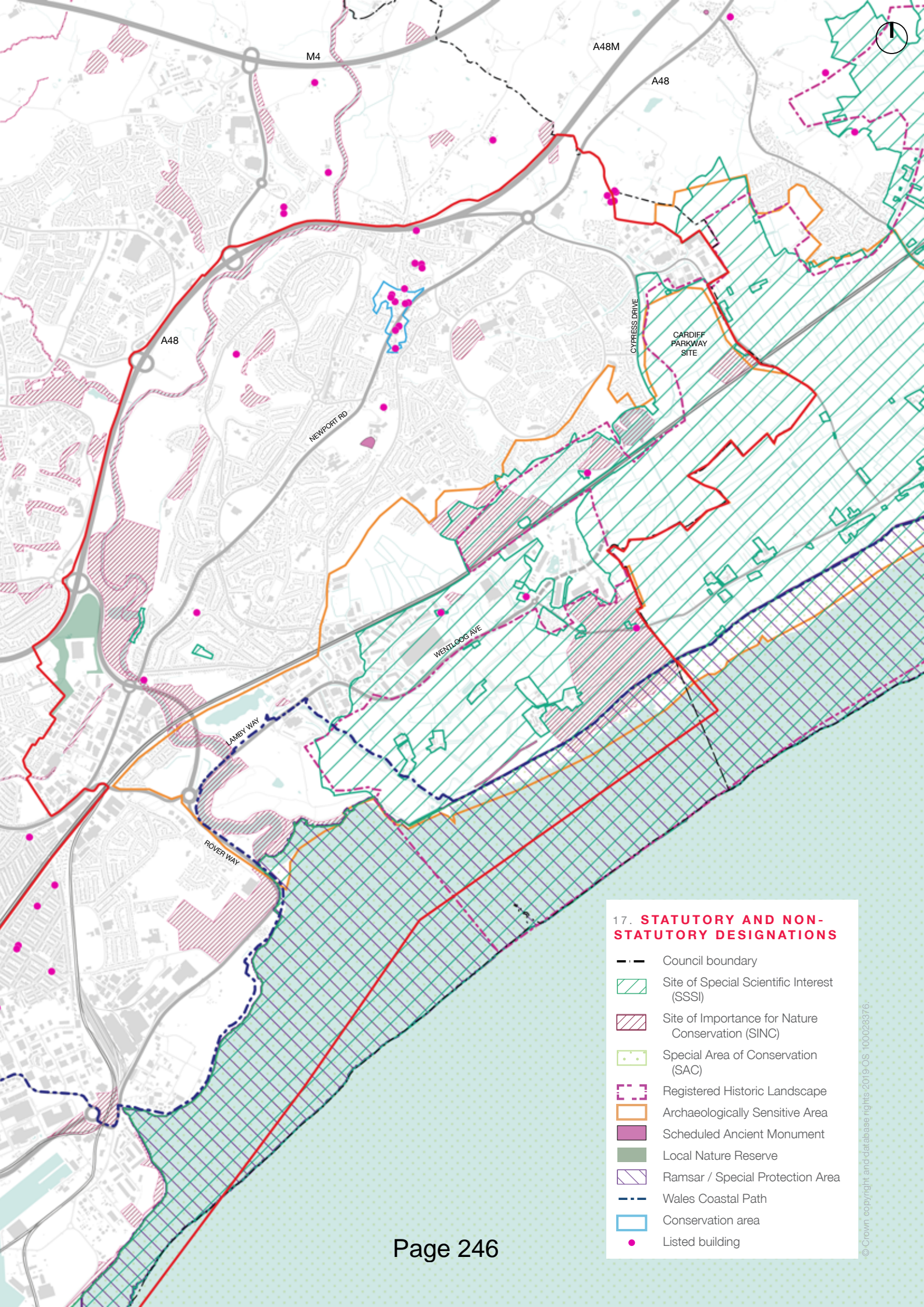
A new railway station is proposed at Cardiff Parkway, giving the area a mainline rail service. The Transport White Paper identifies the opportunity for a light rail service running along the relief lines, linking the City Centre and Cardiff Bay, through Splott/Tremorfa and on to the proposed Cardiff 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.

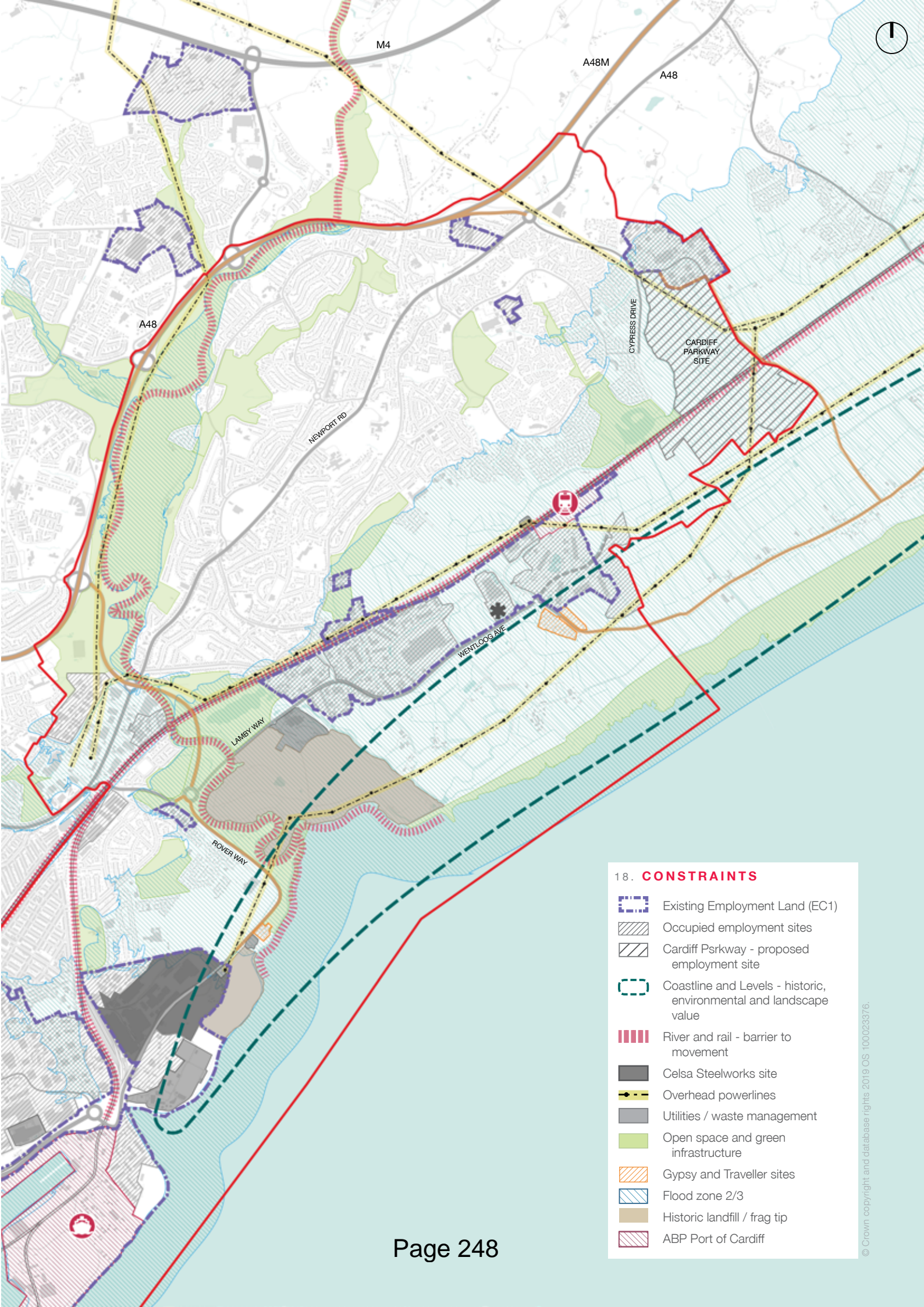
Development within the Wentloog Levels should have regard to the joint report by Cardiff Council, Countryside Council for Wales and Welsh Development Agency, "Landscape Study of Cardiff - Volume 2: Design Guidelines for the Wentloog Levels (1999).

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

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

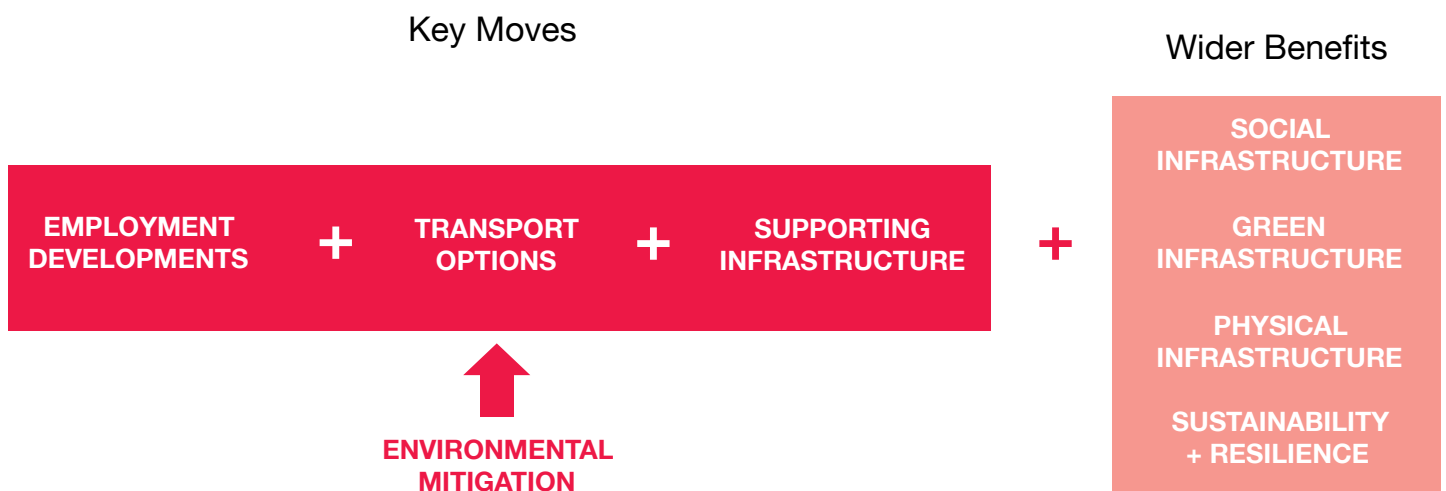
4. TOWARDS A VISION

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.

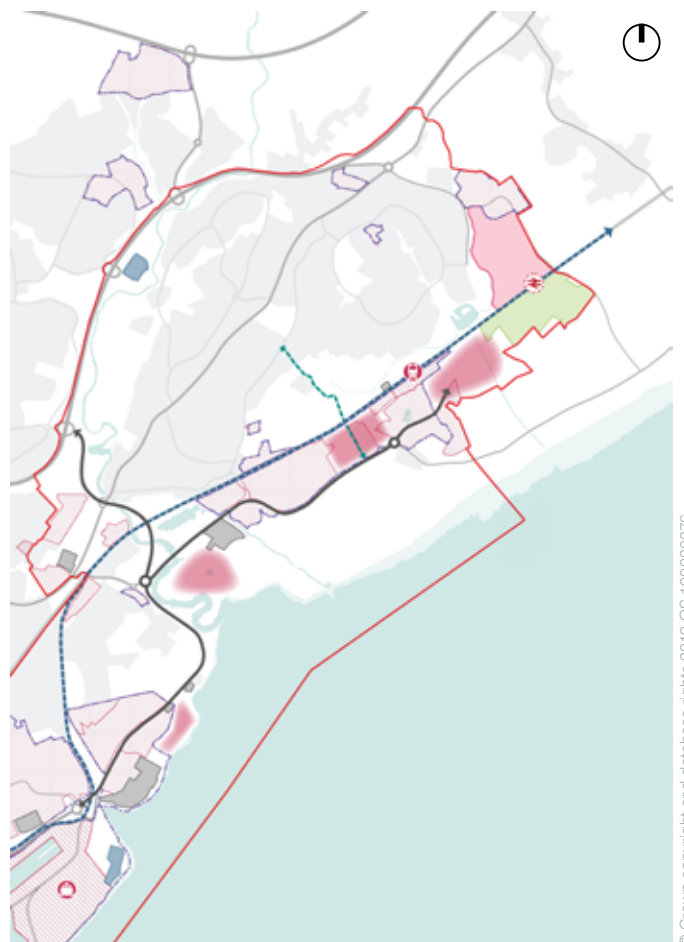
The Phases are presented as high-level concepts and may represent end positions or growth over time. These Phases are subject to feasibility. The Phases are based on the assumption of growth facilitating greater opportunity.

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.

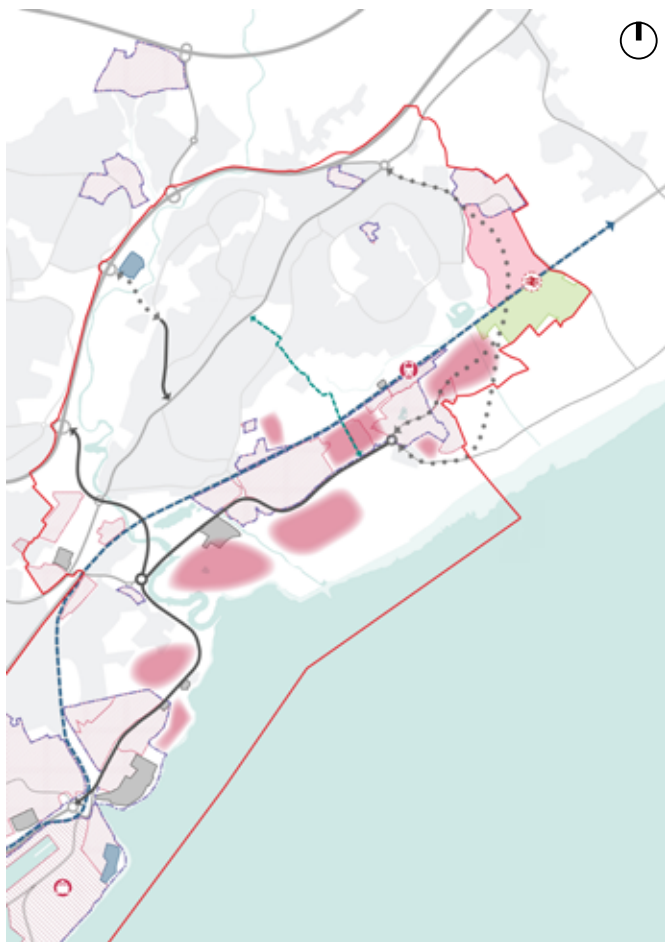
21. PHASE 1 - FILLING IN THE GAPS



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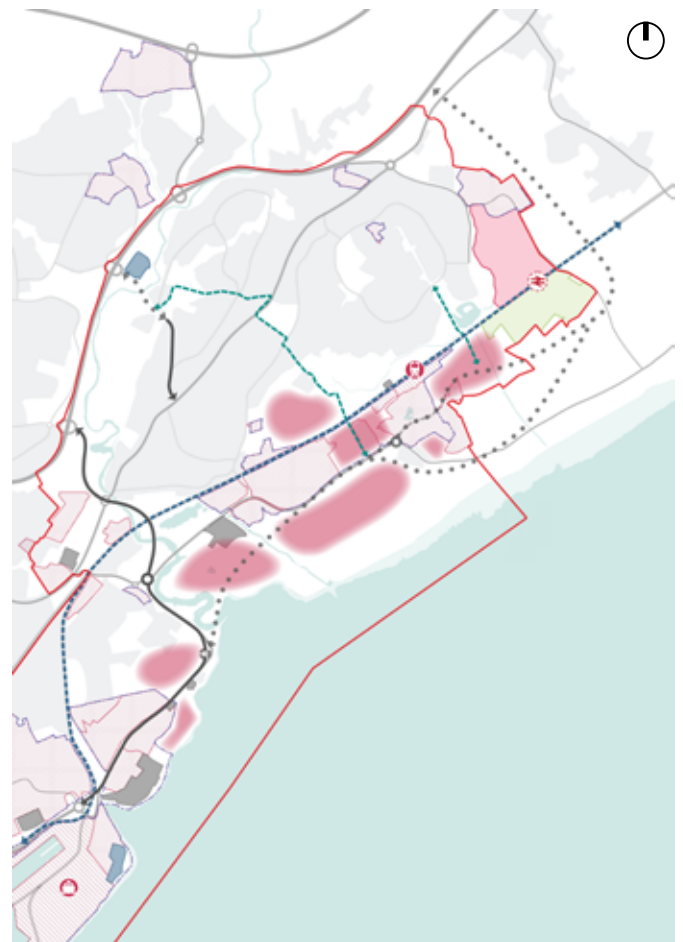
- Low scale of development: infill between existing employment land and remediation of landfill sites.
- Enhancement of existing highway network.

22. PHASE 2 - EXPANDING TO THE SOUTH



- 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.

23. PHASE 3 - OPTIMISING THE OPPORTUNITY



- 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.

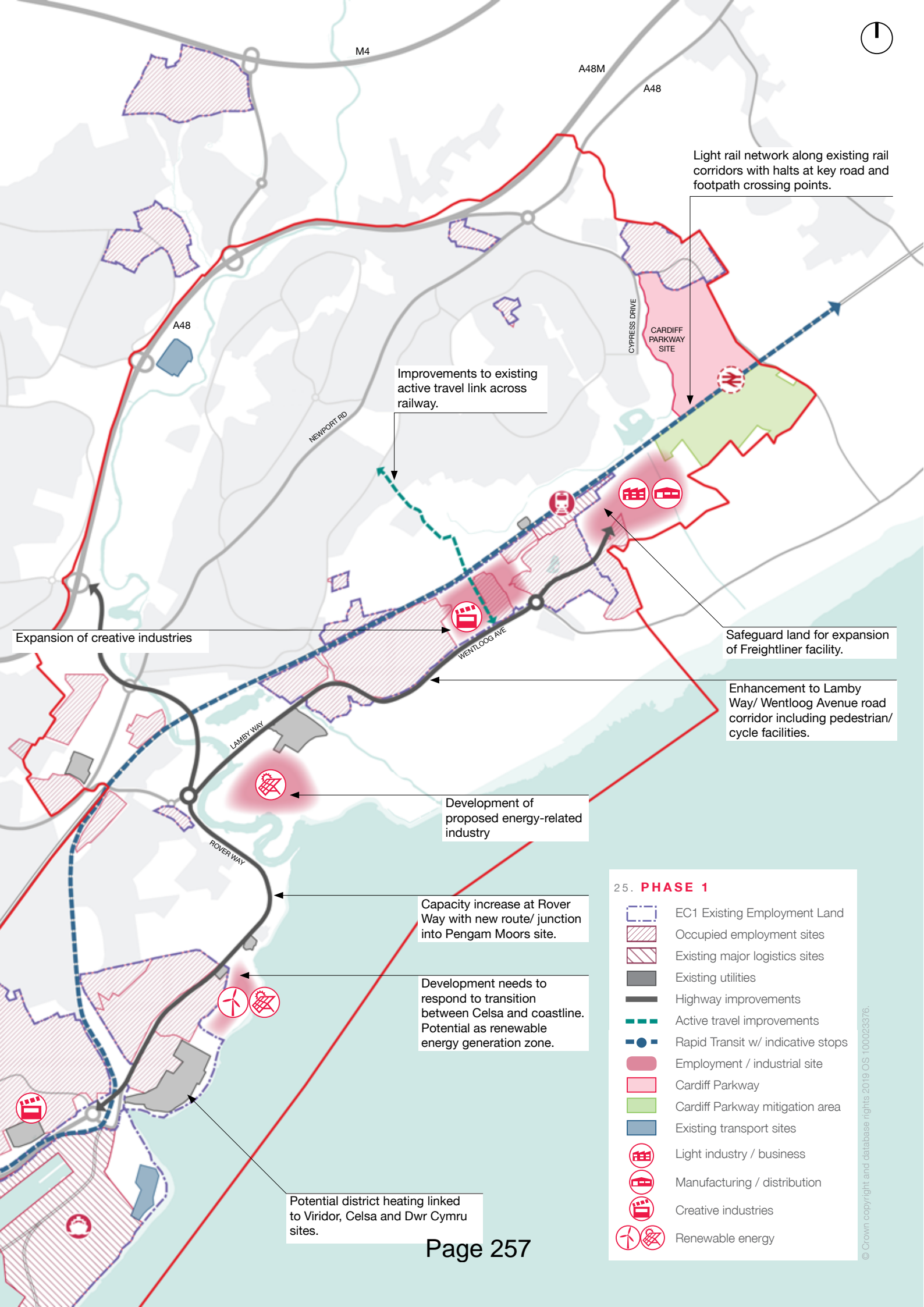
KEY MOVES

- 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

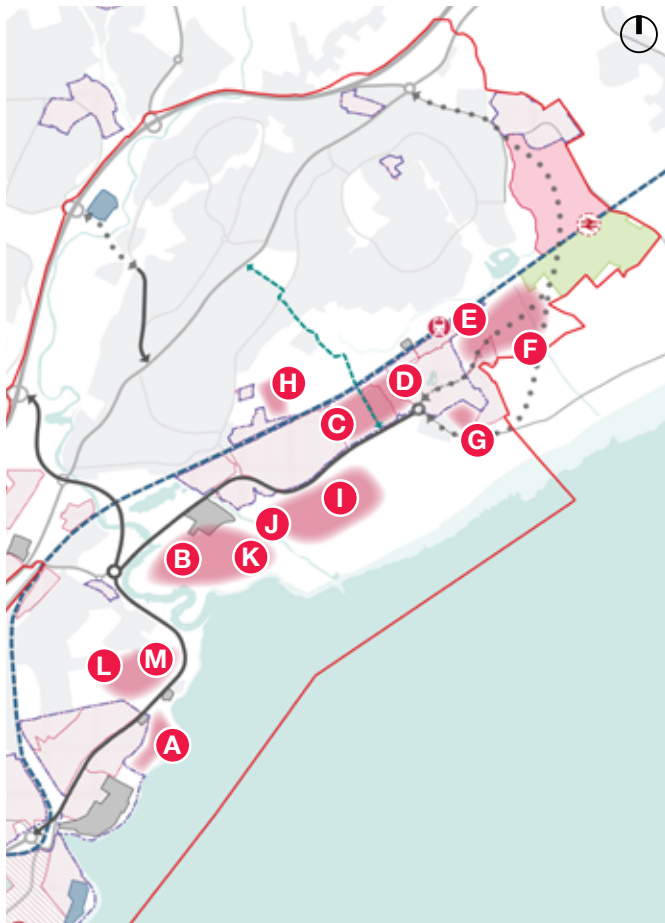
OVERVIEW

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

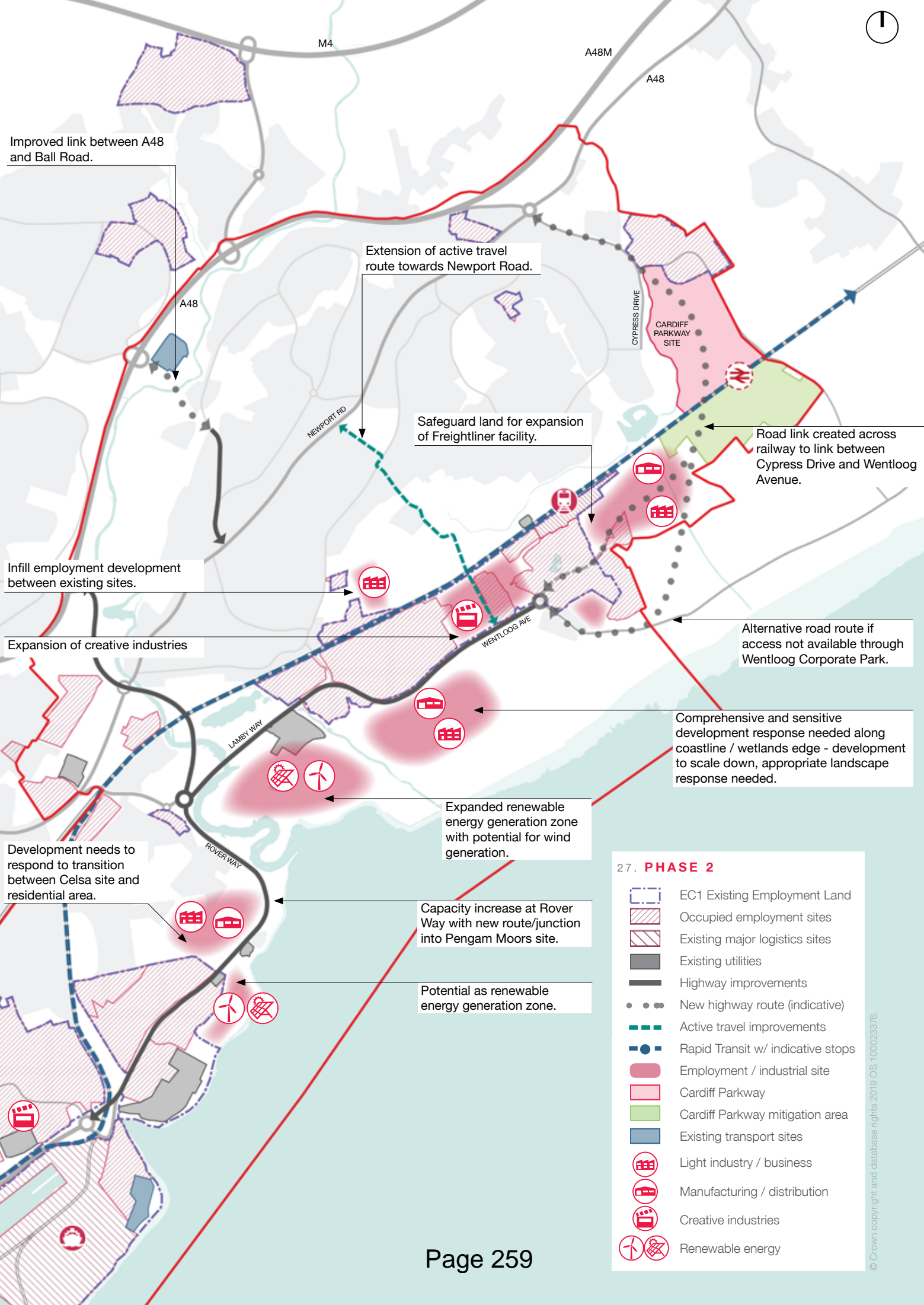
As Phase 1, plus:

- 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.

Alternative road route if access not available through Wentloog Corporate Park.

Expansion of creative industries

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

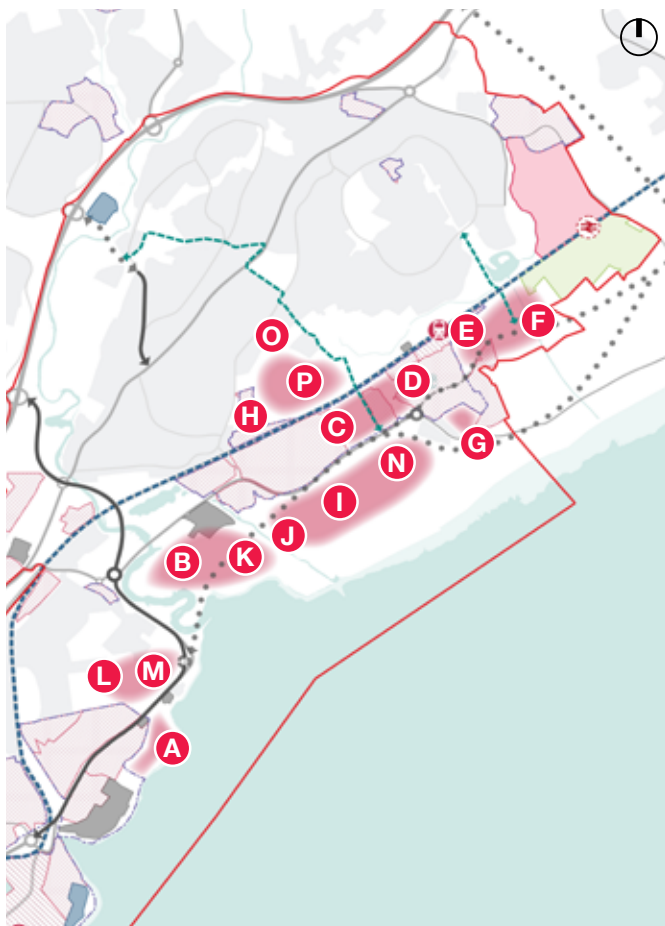
OVERVIEW

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

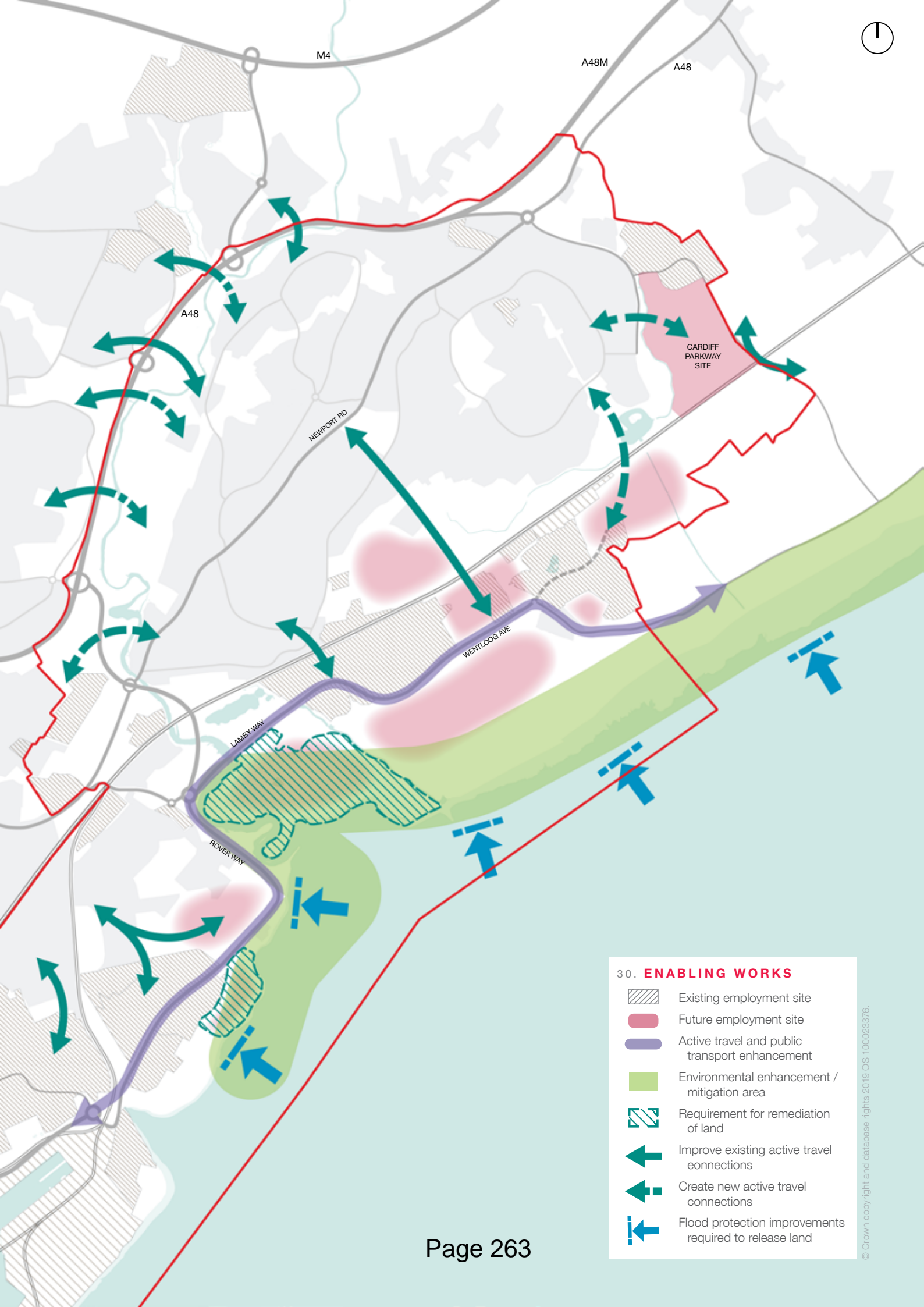
-  EC1 Existing Employment Land
-  Occupied employment sites
-  Existing major logistics sites
-  Existing utilities
-  Highway improvements
-  New highway route (indicative)
-  Active travel improvements
-  Rapid Transit w/ indicative stops
-  Employment / industrial site
-  Cardiff Parkway
-  Cardiff 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)

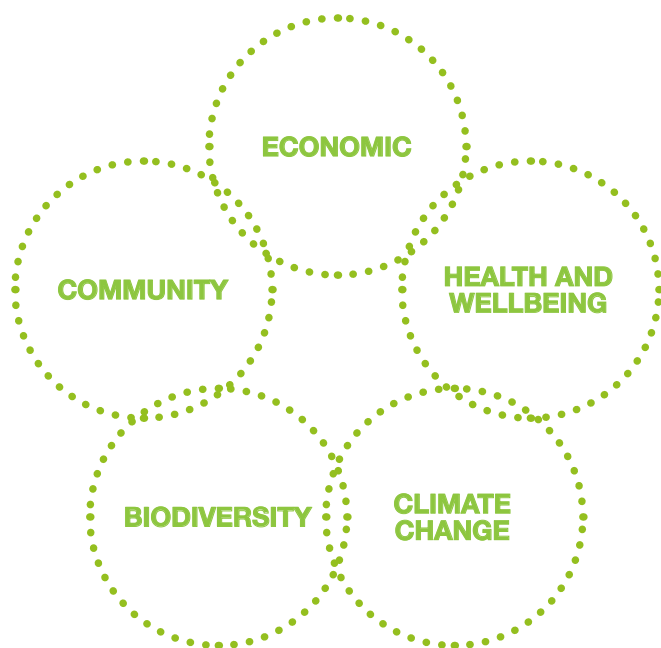
5.1 Green infrastructure

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.

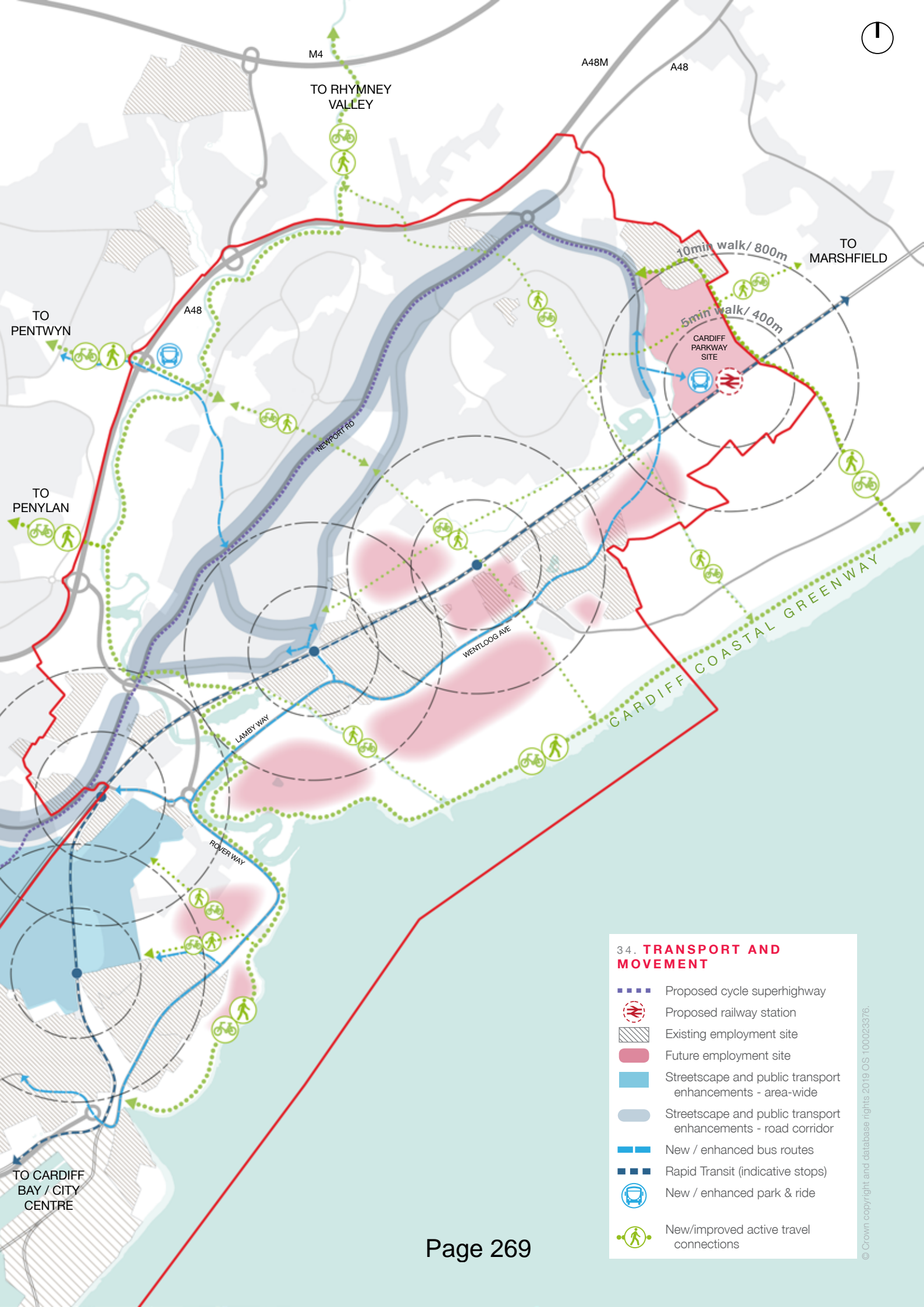
Parking standards should be reviewed to ensure sufficient but sustainable levels are provided. Charging infrastructure for electric vehicles may also be included within new and refurbished sites, facilitating use of electric private vehicles, fleets and logistics.

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.



3.4. 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

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.

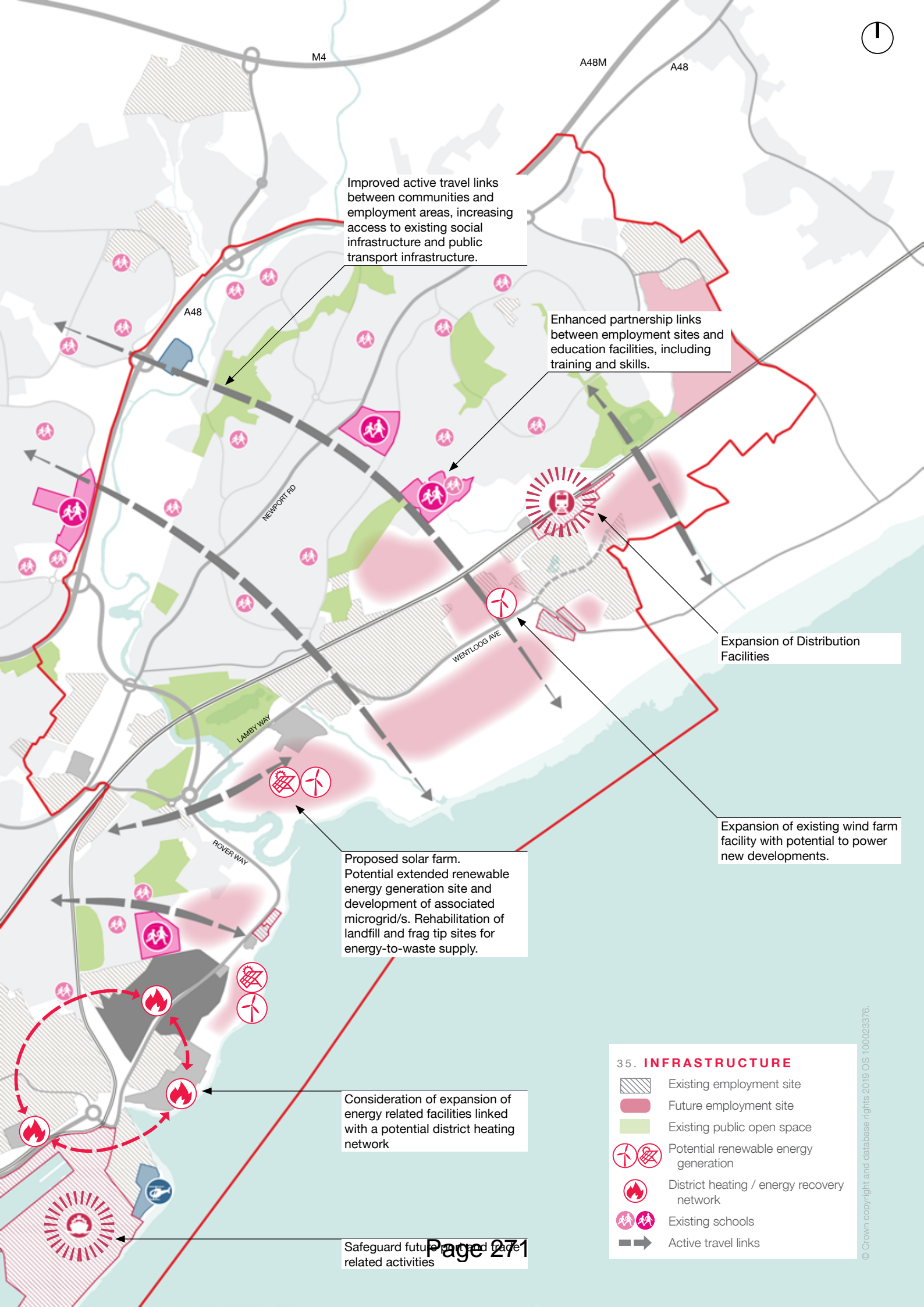
5.4 Physical infrastructure

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 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

© Satyajith J via Flickr



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.

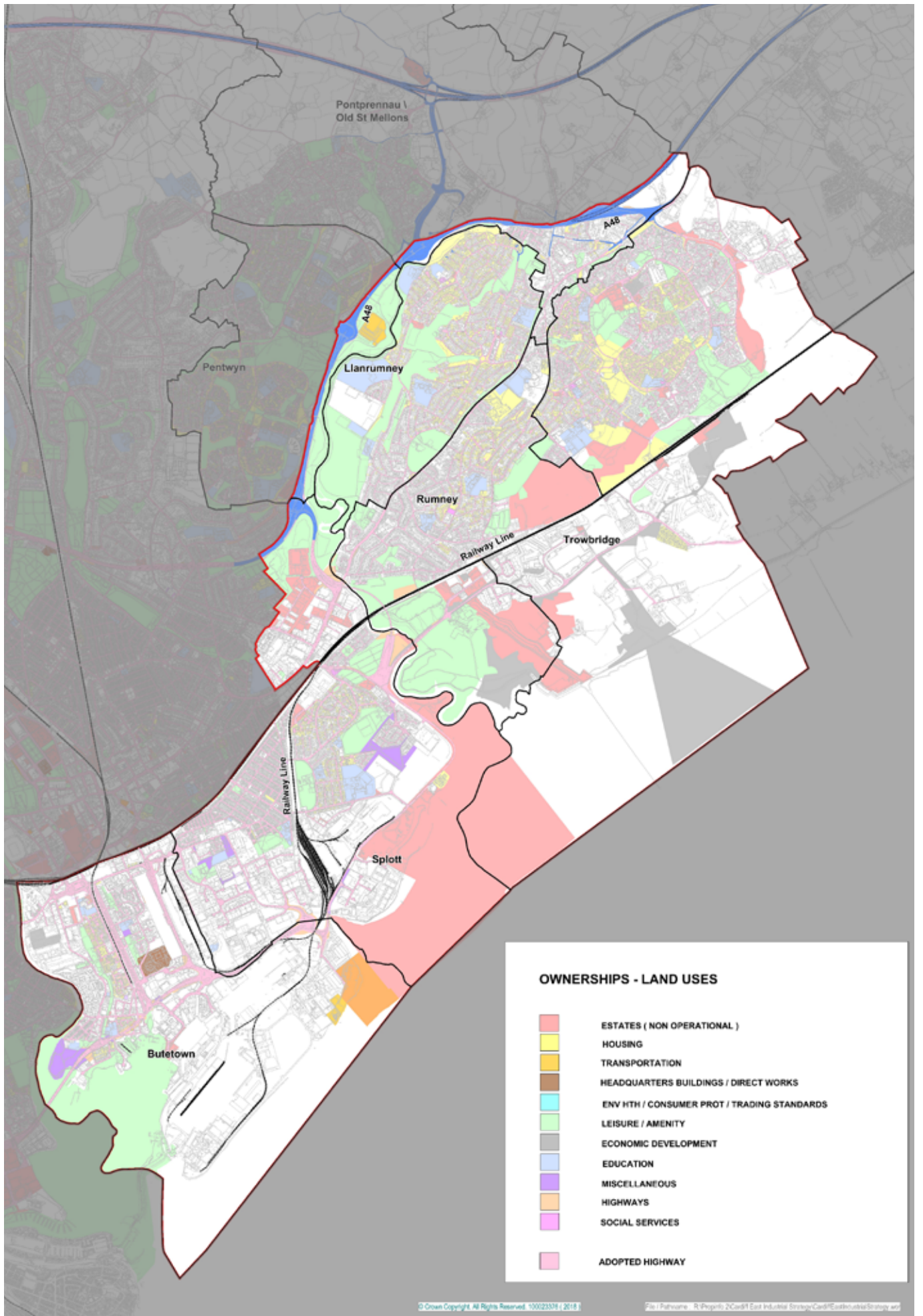
- **Green and blue infrastructure strategy:** Development required to address the special landscape and ecological context of the Wentloog Levels and look for opportunities to enhance ecological and recreational amenity. A combined approach is required taking into account ecology and biodiversity, surface 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.



CYNGOR CAERDYDD
CARDIFF COUNCIL

ECONOMY & CULTURE SCRUTINY COMMITTEE

3 OCTOBER 2019

**INTERNATIONAL SPORTS VILLAGE (ISV) DEVELOPMENT STRATEGY: PRE-
DECISION SCRUTINY**

Appendices 4 and 5 of the Cabinet Report 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. It is viewed that, in all the circumstances of the case, the public interest in maintaining the exemption outweighs the public interest in disclosing the information.

Purpose of the Report

1. To give Members background information to aid the scrutiny of the draft report to Cabinet regarding the International Sports Village (ISV) Development Strategy, which is due to be considered by Cabinet at their meeting on 10 October 2019.
2. Members should note that **Appendices 4 and 5** of the Cabinet report are exempt from publication. Members are requested to keep this information confidential, in line with their responsibilities as set out in the Members Code of Conduct and the Cardiff Undertaking for Councillors.

Scope of Scrutiny

3. At their meeting on 10 October 2019, the Cabinet will consider a report that seeks cabinet approval for a revised development strategy for the ISV, including considering land ownership and use as well as future operating models and appropriate procurement processes to identify these.
4. This item will enable Members to:
 - a. Undertake pre-decision scrutiny of the report to Cabinet on the International Sports Village - *to follow as Appendix A*
 - b. Explore with witnesses key factors shaping future plans and any risks to

the Council

- c. Explore with witnesses the fit between these discussions and the wider Cardiff Bay regeneration plans
- d. Gain an understanding of the next steps and timelines involved, and
- e. Test the recommendations to Cabinet.

Structure of the meeting

5. The Chair will move that this item be considered in two parts: an open session, where Members will be able to ask questions on the issues and papers that are in the public domain; and a closed session, where members of the public will be excluded, where Members can ask questions that pertain to **Appendices 4 and 5**.
6. Members will hear from Councillor Russell Goodway (Cabinet Member – Investment and Development) and Neil Hanratty (Director of Economic Development). There will be a presentation taking Members through the proposals and recommendations to Cabinet, followed by Members questions.
7. Members will then be able to decide what comments, observations or recommendations they wish to pass on to the Cabinet for their consideration prior to making their decisions.

Background

8. In 2001, the administration's 'Ambitions for Cardiff' strategy document contained a commitment to "*progress the development of the £240m International Sports Village as the centre piece of Cardiff's plans to become a regional capital of sporting excellence*". The commitment to this project was reiterated in the Ambitions for Cardiff 2002-03 as "*progress the development of the International Sports Village as the centrepiece of Cardiff's plans to become a European Sports/Leisure destination*".

9. As part of the regeneration project, the Council acquired ownership of tranches of land on the ISV site, which remain in Council ownership. Since then, a mixture of public and private sector investment has resulted in the following developments:

- i) Cardiff International Swimming Pool
- ii) Cardiff International White Water Centre
- iii) Ice Arena Wales
- iv) Residential and Retail developments
- v) Pont y Werin Bridge.

10. In 2012, the Council signed a Development Agreement with Greenbank Partnership Ltd (GPL)¹ to construct a new Ice Arena and undertake work to secure a Snow Dome or equivalent alternative leisure facility, with the release of the Council owned Waterfront site for mixed-use development.

11. In July 2017, the Council's new Administration set out a policy programme and associated delivery commitments in the Capital Ambition five-year plan. This contains 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.*'

12. Since then, the Council has had a dialogue with GPL regarding the next stages of ISV development. The global financial 'crash' and consequent impacts on property markets translated into localised delays in the roll-out of the Cardiff Pointe development; the Council responded by providing GPL with an extension to the Development Agreement timeline. GPL have recently informed the Council that they are entering a Joint Venture with a new development partner to complete Cardiff Pointe.

13. In addition, in March 2018 Cabinet provided authority for the Council to acquire 4.32 acres of land on the former Toys R Us retail building including a large service

¹ GPL are the owners and developers of the adjacent Cardiff Pointe site and signed a Development Agreement with Cardiff Council, in 2012, to construct a new Ice Arena and undertake work to secure a Snow Dome or equivalent alternative leisure facility

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.

14. The draft report to Cabinet entitled '*International Sports Village Development Strategy*' is marked '*to follow*' as **Appendix A** and has **five** appendices:

- **Appendix 1** – Phasing plan
- **Appendix 2** – Land ownership plan
- **Appendix 3** – New development strategy
- **Confidential Appendix 4** – Financial Strategy
- **Confidential Appendix 5** – Contractual issues

15. Members are advised to ensure they have read the following:

- i) New development strategy proposals
- ii) Proposed financial strategy
- iii) Financial implications
- iv) Legal implications
- v) Confidential appendices.

Previous Scrutiny

16. In March 2018, this Committee undertook pre-decision scrutiny of a report to Cabinet re International Sports Village, with confidential information in the appendices. Overall, Members were supportive of the recommendations to Cabinet and Cabinet, at their meeting on 15 March 2018, resolved:

'that authority be delegated to the Director of Economic Development in consultation with the Cabinet Member for Investment and Development and statutory officers to acquire the leasehold interests in the Toys 'R' Us site shaded blue on the plan attached at Appendix 1, on the terms set out in Confidential Appendix 3 and subject to a full independent valuations.'

17. In the Chair's letter² Members highlighted:

'Members wish to undertake further scrutiny of the proposals for revitalising the ISV, as these come forward... We look forward to these including details

² Letter from Cllr Howells, Chair Economy & Culture Scrutiny Committee, to Cllr Goodway, Cabinet Member Investment & Development, dated 9 November 2018.

on proposed improvements to pedestrian and cycle routes in the Bay, thus enhancing the visitor and resident experience.'

18. At their Committee meeting on 8 November 2018, Members scrutinised a report to Cabinet regarding land at Harbour Drive. The full report is available at: <https://cardiff.moderngov.co.uk/ieListDocuments.aspx?CId=151&MId=3541&LLL=0>

19. Following their scrutiny, the Chair, Councillor Nigel Howells, wrote to Councillor Russell Goodway, Cabinet Member- Investment & Development, stating³:

'Members are supportive of the proposal to purchase land in order to protect the Bay edge for leisure use and to provide opportunities for appropriate investment to enhance further the amenity of Cardiff Bay. Members are reassured to hear that officers are working on an overall Cardiff Bay masterplan, which will include this site.'

Way Forward

20. Councillor Russell Goodway (Cabinet Member – Investment and Development) will be invited to make a statement. Neil Hanratty (Director of Economic Development) will attend to give a presentation and answer Members' questions on the proposals.

21. All Members are reminded of the need to maintain confidentiality with regard to the information provided in **Appendices 4 and 5**. Members will be invited to agree the meeting go into closed session to enable discussion of this information.

Legal Implications

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

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

Financial Implications

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

RECOMMENDATION

The Committee is recommended to:

- i) Consider the information in this report, its appendices and the information presented at the meeting;
- ii) Determine whether they would like to make any comments, observations or recommendations to the Cabinet on this matter in time for its meeting on 10 October 2019; and
- iii) Decide the way forward for any future scrutiny of the issues discussed.

DAVINA FIORE

Director of Governance & Legal Services

27 September 2019