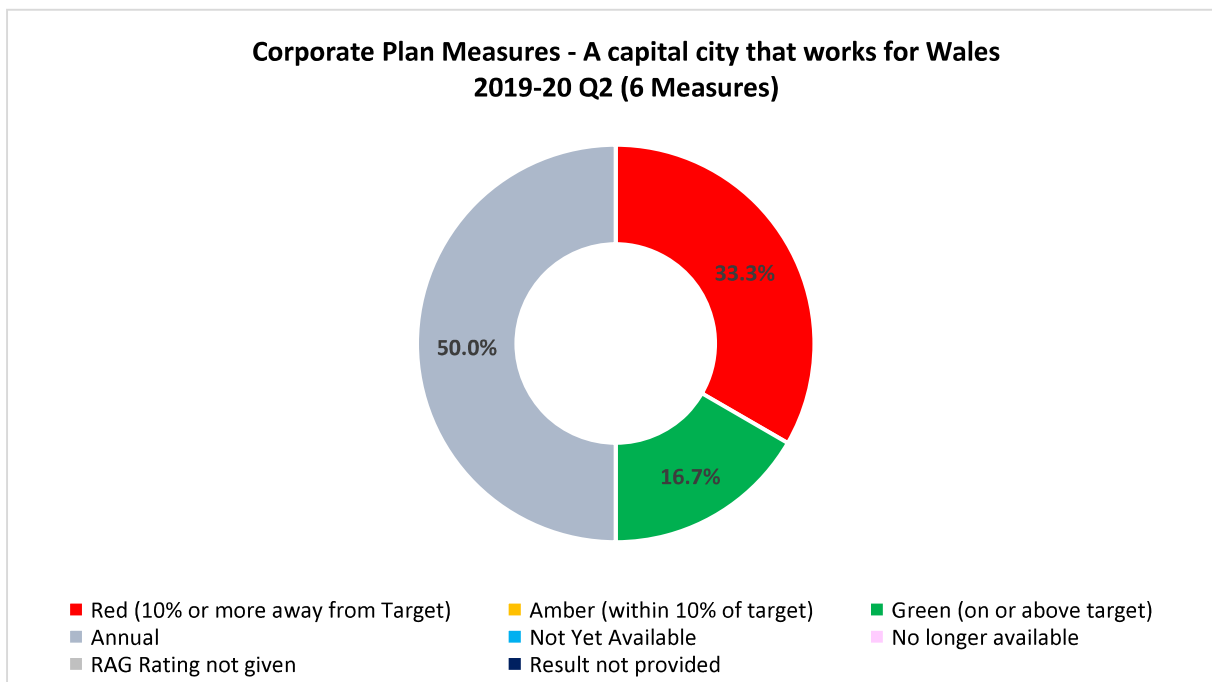
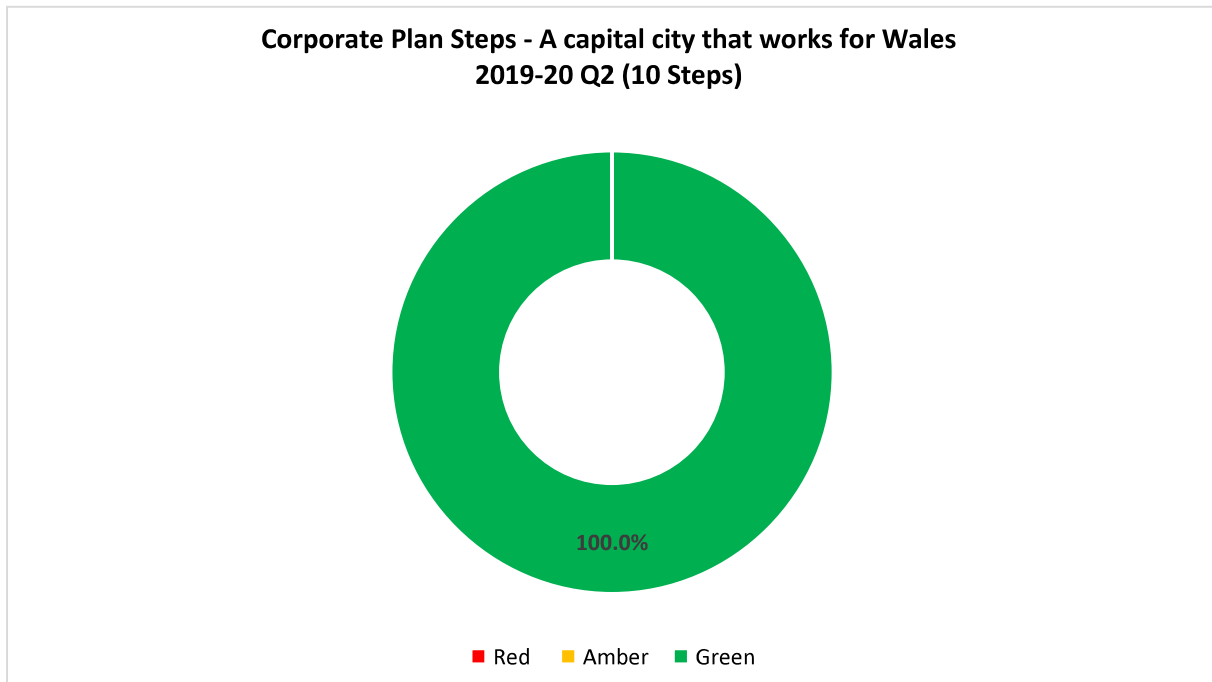


## Well-being Objective 2.1: A capital city that works for Wales – Summary

- Connected Capital
- Business Capital
- Inclusive Capital
- Smarter Capital
- Sporting and Cultural Capital City



## Business Capital

Cardiff has maintained its role as the economic powerhouse of Wales, creating 20,000 net new jobs over the last year. This serves to underscore the importance of the capital, which has created five out of every six net new job in Wales over the past five years.

Key anchor projects are progressing well, with every Corporate Plan Step on course for delivery by the end of the year. In terms of Key Performance Measures, 642 new jobs have been created, meaning that the position at the end of Quarter 2 has already exceeded the end of year target by over 28%. The overall combined target for jobs created and safeguarded is also above the target level for Quarter 2, and whilst the jobs safeguarded figure is below target, current projects in development are expected to see this target exceed by the end of the year.

Cardiff continues to attract new businesses and serve as a centre for inward investment, and a number of new 'challenger' banks that are expected to drive the future development of the FinTech sector have recently invested in the city. The development of high-quality office accommodation also continues apace, albeit there remains only a limited supply available.

Central Square marks the city's first business district in the heart of the city centre built around the needs of the city's key sectors, whilst the development of Metro Central has seen recent funding approvals from both Welsh and UK Government. In particular the UK Government has announced funding support of £58.3m towards the upgrade of Central Station, completing the required funding package. Work to develop a masterplan vision has now commenced.

To support Cardiff businesses' preparation for Brexit, the Council has continued to work with Business Wales and the UK Government to signpost appropriate advice and support. Two well-attended Brexit events have taken place in the city, focused on the implications of a 'No-Deal' departure, however concerns remain about the lack of clarity on the potential impact of a 'No-Deal' Brexit.

## Sporting and Cultural Capital City

Creative Cardiff have announced the first series of **investment in innovation support for a range of production companies in Cardiff** with new incubation / accelerator space being made available by the University of South Wales in their Atrium Building in the heart of Cardiff.

The Cardiff Food and Drink Festival took place in early July, supporting over 120 small businesses and attracting in excess of 75,000 visitors to Cardiff Bay over the weekend.

## Key Challenges

**Brexit:** A Welsh Government Report – "A Brighter Future for Wales" – estimates the long-term impact on Wales of a 'No-Deal' Brexit to be broadly similar to the UK as a whole; a

negative impact on GVA of 8.1% by 2033. In the short-term, a 'No-Deal' Brexit could result in a recession, rises in inflation (such as an increase in food or fuel prices) and unemployment, placing pressure on real incomes and real consumer spending. Many Cardiff-based firms are also reliant on access to EU markets, with 46% of Cardiff's exports going to the EU. In response to the risk of national economic downturn, the Economic Development Team have identified a package of interventions required to support the local economy, but this would require the support of national government to put into place.

**The Future of Structural Funds:** The future of structural funds – a major source of economic investment for South East Wales – remains an ongoing cause of uncertainty. Given the nature and scale of the disadvantage in parts of Cardiff, Cardiff will make representations to ensure future funding arrangements reflect more accurately inequality across the region and the levels of deprivation within the city.

**Attendance at Council Venues:** Attendance at Council venues remains well below target with a total of 388,258 visits as at Quarter 2, against an annual target of 903,000. Forced closures for 18 days at the Museum of Cardiff as a result of flood damage and changes to the Pierhead building's exhibition programme have been identified as contributing factors.

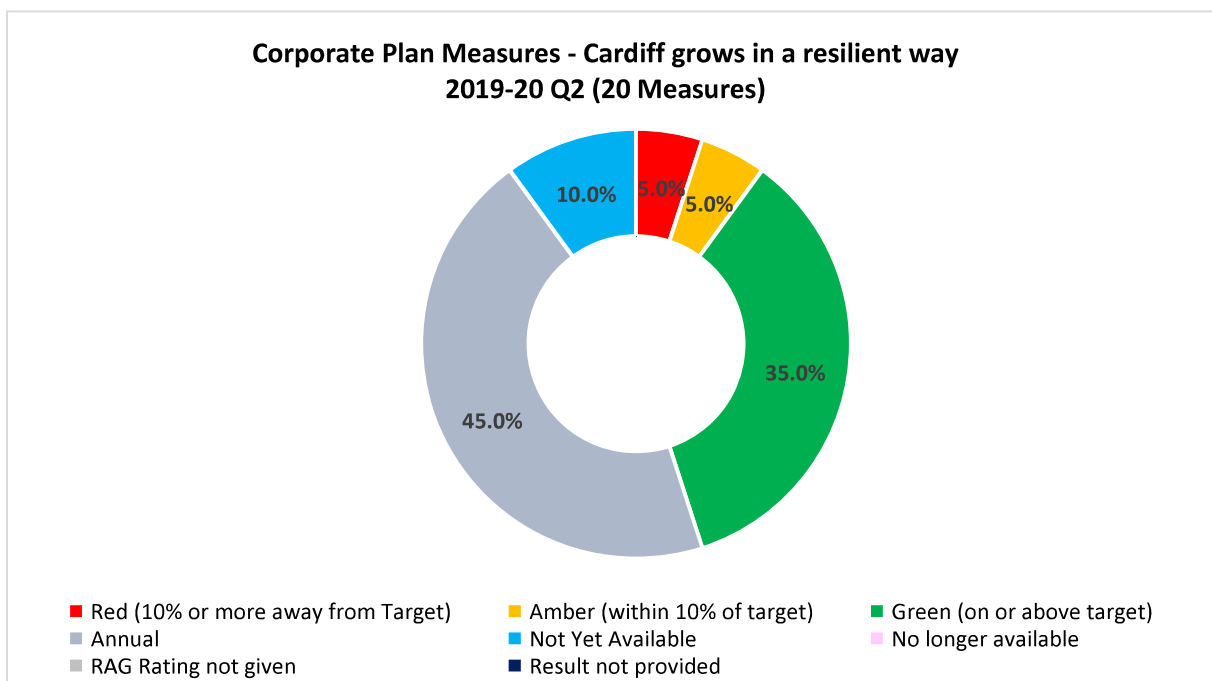
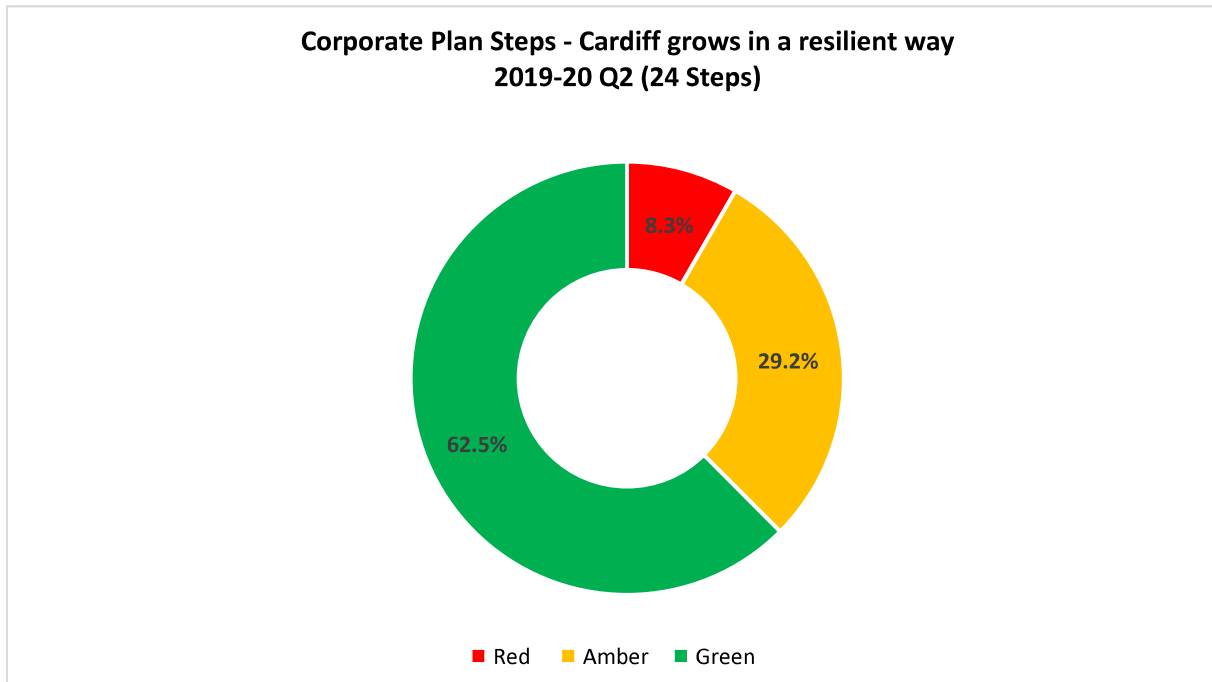
### **Forward Planning**

- Cabinet will consider an **Industrial Strategy to the East of the City** in Quarter 3.
- Following Sound Diplomacy's Music Ecosystem Study report presented to Cabinet in April 2019, Cabinet will consider **the Terms of Reference for establishing a Music Board** in Quarter 3. This will also include **options for a signature music event**.
- Cabinet will consider options for **New Theatre** in Quarter 3.
- Cabinet approval for the next phase of the development for the International Sports Village means that progress will now need to be made towards securing a developer.
- **Cabinet will consider options for a new mixed-use development at Dumballs Road**, through the delivery of 2,000 homes by 2022 in Quarter 3.

## Well-being Objective 3.1:

### Cardiff grows in a resilient way – Summary

- Housing
- Transport and Clear Air
- Waste, Recycling and Clean Streets



## Housing

The **Council continues to make progress in increasing the number of affordable homes in the city.** A further 118 affordable homes were granted planning permission on a number of Cardiff Living sites across Cardiff during Quarter 2. Furthermore, planning applications for several strategic housing sites are due to be considered over the next 12 months.

The Council has no concerns in relation to meeting the overall target of 1,000 homes by 2021 even though the Quarter 2 performance was below the target. Both the St Mellons scheme and the Maelfa Independent Living Scheme are at the pre-application consultation stage of planning and are expected to be considered at planning committee before the end of the year. The purchase of the lowerth Jones site in Llanishen has been completed and architects have been appointed to develop options for this site.

## Transport and Clear Air

Flagship transport projects which form a major part of Cardiff's forthcoming Transport White Paper, including Cardiff Cross-Rail and Cardiff Circle-Line, were launched at an All-Wales Active Travel event in July. The Transport White Paper will be launched in Quarter 3.

**The Clean Air Plan submitted to the Welsh Government** by the Council in Quarter 1 has been accepted, subject to points of further clarification. This has meant that an additional Legal Direction has been issued to the Council with a response deadline set of no later than 31<sup>st</sup> October 2019. The Council is working to provide the Welsh Government the additional information requested and a revised Plan will be issued to the Welsh Government for assessment by 31<sup>st</sup> October, prior to approval and confirmation of any funding in Quarter 3.

**Progress has been made with regional and national partners towards the development of a transport delivery programme in line with the Cardiff Region Metro.** Working groups with Transport for Wales (TfW) and TfW Rail have been established to progress the preparation of business cases for improvements to stations, new stations and line extensions in Cardiff, however progress regarding station improvements has been slow due to delays in the Core Valley Lines being transferred to the Welsh Government.

**To make all our local communities safer, greener and more attractive to play, walk and cycle in, the roll-out of 20mph zones across the city continues to be progressed.** Schemes for Penylan, Canton, Butetown and Splott are at various stages of development and a draft study brief to progress implementation across the rest of the Cardiff has been shared with Welsh Government.

**Investment into transforming the city's cycling and walking infrastructure is continuing.** Construction of the Senghenydd Road Cycleway is progressing well, Lloyd George Avenue Cycleway is at design stage and Concept Design, Modelling Work or Design is now ongoing for all planned Cycleways, with some aspects already at public consultation or invitation to tender stage.

**The first ten electric vehicle charge points in Cardiff in residential areas with no access to off-street parking have been installed** and became operational in September 2019. Work has commenced to identify additional on-street electric vehicle charge points in the city.

### Waste, Recycling and Clean Streets

Whilst Cardiff's recycling performance is a success story over recent years, emerging as a foremost recycling city in a UK global context, achieving Welsh Government's bold recycling figures over the coming years represents a significant challenge.

A number of initiatives have been funded and deployed across the city to improve recycling performance, which include education and awareness raising, improved options and facilities for recycling as well as a fundamental consideration of the approach to collection of residual waste, recyclables and food waste. Close monitoring of Key Performance Measures has alerted the Council to the risk of falling short of the statutory recycling targets, despite good progress made against a range of identified measures in this area. Recycling performance at Household Recycling Centres, for example, has improved.

Early engagement work is now being undertaken with Welsh Government and other stakeholders to consider an approach to recycling that reflects the challenges presented within a major urban area. A project team will be established and service options will be modelled to inform a long-term change programme.

The introduction of afternoon cleansing teams and targeted work through the "Love Where you Live" campaign and enforcement officers has been designed to improve waste presentation in areas of concern. The roll-out of trial cleansing rounds has now been put in place with a review underway and all rounds targeted to be in place by December 31<sup>st</sup>.

### Energy

The contract for delivering a 10MW+ Solar Farm at Lamby Way has now been signed following a complex and protracted negotiation which resulted in delivery timelines being delayed and caused some slippage for the projected income generation targets.

### Key Challenges

The monitoring and review of performance data reveals challenges with achieving the statutory 64% recycling target, with current projections showing performance of 59%.

The fundamental review of recycling and associated costs to deliver recycling outcomes is ongoing to support informed decision making on recycling operations. Following the review, the service will develop a robust model for recycling in Cardiff, including in-year monitoring. Reviews are also underway of 'post-sort' operations and of the city-wide rollout of bottles and jars to ascertain the outcomes of the investment in these operations.

The percentage of recycling and waste collections reported as missed by the customer was 0.11% in Quarter 2, compared with 0.12% in Quarter 1 and against a target of less than

0.01%. Missed collections continue to be analysed to identify causal factors and any trends so that options for corrective action can be considered. Improvements to in-cab technology are also in place to support crews with the location of assisted collections.

Whilst the city's overall cleanliness score is above the corporate target of 90%, an analysis of the data reveals a small number of wards with low cleanliness scores which are below the city-wide target. This coheres with poor public perception of cleanliness in parts of the city. A locality-based approach is being developed and core data is being reviewed to determine the most appropriate points of influence.

### Forward Planning

- Cabinet will consider the Transport White Paper in Quarter 3.
- A revised plan for Clean Air will be submitted by the set deadline of 31<sup>st</sup> October with a decision on approval and funding expected in early November 2019.
- Cabinet will consider the Food Strategy in Quarter 3.