



Greener, Fairer, Stronger

City Recovery and Renewal Strategy

November 2021



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Introduction

The COVID-19 pandemic has had an extraordinary impact on Cardiff, changing the way we live our lives and the way we do business in ways few of us could have imagined.

As the city emerges from the pandemic it is essential that we consider the steps we need to take to accelerate recovery, whilst at the same time recognising that we need to use the crisis as a catalyst to building back stronger, greener and fairer.

This report provides the Council's priorities for renewal. It outlines briefly how the pandemic has affected the city economy and the national and international trends that have been accelerated during the crisis. In addition, to inform this work, Dr Tim Williams, a leading authority on city development, was commissioned to provide a global perspective. Our response is set out as a series of key missions to develop the city of the future, and the initial steps we consider appropriate to achieve these missions.

There will undoubtedly be a long-term impact of the pandemic, but we have also seen an acceleration of trends that were emerging before COVID-19. Similarly, we have seen changes in the way we work and live that we may want to 'lock-in' to the future city. This report considers all of these issues and how, from a city development perspective, we should adopt a partnership approach to addressing a crisis that in many ways is comparable to that which affected the city as it grappled with deindustrialisation in the late 1970s and 1980s.

The city is entering a new and different environment, with new challenges and opportunities. This document proposes some of the initiatives and projects that the Council will take forward and provides the start of a conversation with citizens and city stakeholders on how we, together, can lead recovery and renewal in the capital city of Wales.



The Impact of COVID-19 on Cardiff

The COVID-19 pandemic has had a major impact on every aspect of city life. First and foremost, it's a public health crisis. Stay at home and stay local restrictions have also meant many months apart for families and friends.

Businesses have shut for extended periods and retail and hospitality have seen their doors closed, with, at its peak in the summer of 2020, 50,000 workers in the city furloughed, 9,000 have been reliant on the Self Employment Income Support Scheme and unemployment has roughly doubling over the course of the last year.

Jobs and businesses where there is direct person to person contact, including retail, hospitality and close contact services have been particularly affected. These sectors tend to employ more young people, women and people from an ethnic minority background and are typically, though not exclusively, concentrated within the city centre.

City centre businesses during this time were therefore particularly affected. Most businesses in the city centre ceased operating during the initial lockdown, whilst two-fifths were concerned about a cessation of trading. This is in an area with almost 70,000 jobs, Wales' largest cluster of employment, representing around a third of the city's workforce and responsible for attracting the majority of the city's 21 million annual visitors.

Across the UK businesses have also been making permanent job losses. In some cases this has been as a result of the direct economic impact of the pandemic, whilst other businesses (notably some large high street retail chains) have seen an acceleration of trends such as the movement towards online shopping. As a result it is clear that despite the support in place we do not expect a full and immediate recovery of the labour market once all restrictions are lifted.

City centres have also seen the impact of restrictions on events and the prevalence of work from home for office workers.

Evidence from last summer where gradual easing of restrictions allowed the reopening of hospitality with social distancing measures in place showed that footfall returned to levels just below that of the previous year, especially in the areas of the city where the Council introduced specific interventions to aid social distancing.

The pandemic had also seen the city's cultural venues and museums close their doors, with an impact on city life, wellbeing and jobs in the arts and creative sectors.

The pandemic has also changed the way we use our city. We have seen radical shifts in in how we move around, with increases in cycling allied to big falls in public transport usage. Congestion reduced, air quality improved, and city-region commuting fell to a fraction of pre-pandemic levels.

The increase in home working, with an estimated 46% of us working remotely in Cardiff at one point, has led to many discovering the neighbourhoods on their doorstep for the first time, and a greater demand for services and amenities closer to home. The city's public spaces and parks have become ever more important, for accessing green spaces and nature during lockdown and, when restrictions have allowed, to meet with friends and family.

Different communities and groups of people will however have had very different experiences. The health impact of the pandemic has not been felt evenly, with higher levels of infection in the city's more deprived communities and with those from a minority ethnic background.

And whilst children and young people are generally less clinically vulnerable to COVID-19 than the adult population, the wider effects of the pandemic have disproportionately affected the younger generation. Since March 2020, children and young people have experienced several extended periods of school closures and seen the routines of their daily lives upturned.

Cardiff Impact Summary

- The city economy was hit hard by the pandemic, with a doubling of unemployment only mitigated by high levels of public support.
- Young people were particularly hit, especially those working in events, hospitality and retail.
- There was a rapid and significant shift to home working, with 46% of the workforce working from home at the peak of the pandemic.
- The city centre in particular felt the impact due to the restrictions imposed, and the prevalence of working from home.
- The cultural, arts and heritage sector was hit hard, and Cardiff's major events programme suspended.
- Transport flows across and into the city reduced, with a shift to cycling and walking
- Economic inequalities that existed before the pandemic: between young and old; rich and poor; and between ethnic minority groups; will have widened.
- Evidence from Summer 2020 has shown that once restrictions ease there is latent demand in our economy.

The Initial Response – 2020

Supporting businesses and workers

In June 2020, Cabinet agreed to establish an Economic Recovery Task Force, with a focus on:

- Providing support for businesses and workers;
- Creating opportunities for young people;
- Creating partnerships to promote the uptake of options.

The Council's Into Work team successfully secured over £1million in funding to increase capacity to respond. This has enabled a scaling up of activity, leading to circa 400 individuals being supported into employment. In addition, the team supported well over 200 employers through their Employer Liaison Team, provided advice on accessing employment, training or benefits to 40,000 individuals, directly supported over 1,000 individuals with Universal Credit claims; delivered over 300 training courses and provided Adult Learning training for over 1,200 people. The Into Work team has also developed industry-specific redundancy support for employers impacted by the current economic climate, such as Debenhams and Arcadia.

The Council have also worked closely with officials in Welsh Government to review demand for business support and, in particular, those who fell between the gaps of UK Government support. Subsequently we have delivered circa 20,000 grants for small businesses, around 800 freelancer grants for the creative sector, and 200 grants for new starters. In total, the Council's Business Rates and Economic Development teams have supported over 20,000 businesses and paid out over £120 million in financial support over the course of the pandemic.

Supporting young people

The Economic Recovery Task Force has also worked to create additional opportunities for young people. This has included co-coordinating and promoting the Kickstart Scheme, which provides funding to create new job placements for 16 to 24 years olds on Universal Credit who are at risk of long-term unemployment. The Council also applied directly to the UK Government's Kickstart Scheme grant funding, to help create Kickstart Corporate Trainee opportunities for those aged 16-24, claiming Universal Benefit and at risk of long-term unemployment.

The Council's Youth Service has expanded its number of mentors, enabling one-to-one support to be provided to 300 more clients a week. 22 Care Workers have been supported into work through mentoring projects and pre-employment training. Additionally, the Council has also commissioned One Million Mentors to expand its mentoring programme for young people in Cardiff, providing one to one mentoring for all those taking part.

City Centre Recovery

Over the course of the summer of 2020 a series of interventions were put in place to support businesses and make the city centre a safer and more attractive place for residents and visitors.

The Castle was made free to enter for visitors, creating a new green public square within the city centre.

In August 2020, the Council, in partnership with FOR Cardiff, established the Castle Street Café to provide additional space for city centre food vendors in light of restrictions imposed.

The Council also developed the '#samediff' campaign to promote footfall in the city centre in a safe way. The campaign was delivered primarily through digital assets, targeting specific audiences to reflect changes in restrictions brought into place.

As a result of the interventions that the Council put in place, the increase in visitor numbers in the city centre outperformed the average for regional cities average significantly, with the recovery most pronounced in and around Castle Street, notably High Street.

Investing in active travel

To support the shift to safe and active travel, the delivery of the cycle networks was accelerated, with new pop-up cycle lanes put in place across the city.

District centres

To support local centre recovery improvements were made to provide additional space for eating and drinking, safe public spaces and increased local walking and cycling infrastructure, including initiatives Wellfield Road, Whitchurch, Llandaff and Pontcanna.

Cardiff Response Summary

- A rapid upscaling of its Into Work services support helped people back into work or training
- Over £120m in direct support to business has been administered by the Council.
- A range of additional support has also been put in place for young people, including a Kickstart Corporate Trainee scheme.
- The Council delivered a range of city centre interventions that outlined the city's resilience and the ability for footfall to recover.
- Investments have been made across the city in pop-up and permanent cycle-lanes
- District centre schemes helped support recovery for shops and restaurants in local communities.

UK Context

Across the UK, the pandemic has hit cities hardest. They have also seen the greatest change in the way people work, visit, and play in their local areas.

An overnight shift to home working

At its peak, around half of the UK's workforce was operating from home in some form or other.

Prior to the pandemic an online meeting was a novelty for many, today it is the norm. It is clear that much of this behaviour will be locked in, and that we will see a permanent shift in the office environment in the post pandemic world. This won't see the end of the office however, and in many cases this is seen as an opportunity for cities to re-orientate themselves towards more productive, collaborative activities.

Despite the pandemic there has been relatively low impact on office vacancy rates so far, though the full impact will take some time to understand. Nonetheless, work undertaken by Arup suggests there will be a 20% forecasted reduction in demand for future office space.

Evidence from UK analysis also shows that whilst homeworking is something that suits some – it is not something everyone wants to adopt looking for. In particular surveys have outlined that those in managerial occupations are almost twice as likely to want to have some form of flexible working than those in manual labour occupations.

An acceleration of the shift to online retail

Analysis by city experts Metrodynamics suggests what many believe to be an inevitability – that online retail is set to be a more permanent feature of the post-pandemic economy. This is, however, simply the acceleration of a pre-pandemic trend. Metrodynamics further outline that whilst the “shift presents opportunities to redesign urban centres to suit new purposes, in the near term there are significant challenges to face.” Estimates by KPMG suggests between 20% – 40% of retail offering could be lost to online retail.

But the city centre as ‘experience’ for shopping, eating and drinking appears resilient.

Conversely across the UK we have seen footfall in city centres recover relatively quickly. The demand for people to return to these spaces as places to meet, where shopping or work is just one reason to visit, does not appear to be particularly vulnerable. To that end, the challenge for cities is to make sure they remain active, animated and attractive. Cities are generally responding by making more of the local character that creates a city experience more unique to each city.

Forced to close for much of the year, the hospitality sector has taken a huge hit from the pandemic. Many in the sector have closed, some have changed their business model, whilst others have simply struggled through. The pandemic has also seen a lot of innovation within the sector however, from pubs and restaurants embracing new ways of working.

Post pandemic, commentators are outlining the expectation that there will be money to spend, with lockdown easing a rush of people to get out is expected.

Furthermore, a survey undertaken by Demos found that it was very clear that most people thought their local facilities, including retail, transport services and parks and open spaces, had become more important to them. The survey suggested that even things that were restricted during the pandemic, like access to transport and local jobs, had also increased in importance.

The rediscovery of the local

The consensus is that the pandemic has led to a greater connection between people and their area across the UK, whether it is for groceries, a coffee, or simply exploring what is on their doorstep. For many commentators a lot of this activity will remain locked-in, with a desire of better, cleaner, greener, safer and more sustainable neighbourhoods. Surveys also suggest that people intend to spend more time in the local area, even after the pandemic subsides.

The pandemic has widened existing inequalities

The health impact of the pandemic has not been felt evenly, with older people and those from deprived communities and from a minority ethnic background experiencing worse health outcomes. Across the UK, those working in front line jobs – often ‘key workers’ – have seen greater levels of infection and greater mortality than those able to work from home. Overall, economic and health inequalities that existed before the pandemic have widened.

UK Context Summary

- Most of the UK's workforce adopted some form of homeworking, and some of this is expected to stick.
- There will be some reduction in demand for office space.
- Online retail is set to become a more permanent feature, yet there is expected to be a renaissance of local centres and demand for authenticity.
- Footfall is expected to return to city centres – but it may be looking for a broader range of experiences.
- The local environment has become more important for everyone across the UK.
- The economic effects of the virus has disproportionately hit the young and deprived communities.

International Picture

Dr Tim Williams

The COVID-19 pandemic has had a big impact on cities and it will undoubtedly leave a lasting legacy. However, it is clear that in its wake it will not lead to the death of cities, rather cities like Cardiff will be at the forefront of our economic recovery. The pandemic has seen an acceleration of economic trends, whether it is agile working or the onward march of technology.

Whilst the world's megacities may struggle as people and businesses seek out more comfortable places to live and work, the benefits of agglomeration, of sharing ideas and of collaboration is likely to become more important than ever.

Quality of life will become increasingly important to people living in cities, and this brings a real opportunity to smaller cities that are big enough to benefit from agglomeration, but small enough to provide a quality of life without the negative consequences of pollution, congestion, and a high cost of living.

Within Wales, Cardiff is best placed to respond. Cardiff's weakness is also its opportunity. The city is, by international standards, small. Its size means it is not delivering the agglomeration benefits for the nation that it could, and whilst its renaissance in recent decades has seen the city perform well, it is still some way from delivering for the nation in the way that it could.

It is essential that Cardiff is empowered to respond. All evidence on city performance shows that its governments' flourish and deliver most for their region when they are empowered and work in partnership with other tiers of government. It is critical, therefore, that the city is given the responsibility, powers and capacity to determine and manage its economic agenda – but in doing so it must be hand in hand with its city-region and national government partners.

Cities on the eve of COVID-19

History does suggest we will as a society get on top of this threat however pessimistic the mood has been. The Spanish Flu of 1918/19, was, it must not be forgotten, followed by the Roaring 20s, when growth returned to cities and conspicuous consumption in them exploded. As urbanist Ed Glaeser points out, cities and pandemics have a long history: cities and towns have always had to 'strike a balancing act between providing the densities that support the collaboration, knowledge and innovation needed to accelerate economic growth, whilst also addressing the public health risks that density creates'.

Whatever happens from this point there must be no question that Cardiff can, with its public, private and third sectors aligned, 'manage it', and do so with imagination and verve. In so doing Cardiff can not only carry on its journey as Wales's Core City but also attract new investment and talent along the way.

On the eve of COVID-19, the 'Mega' cities, were beginning to experience pressures from growth. Their very productivity and thus attraction in the international market, was making them victims of their own success threatening their near-monopoly as attractors of talent, ideas and wealth. In particular, high-asset price inflation was inducing some families with children to move to areas offering more affordable housing and equivalent or enhanced liveability. Essentially the global cities and those on the cusp of that category were becoming what

some have termed 'luxury cities': increasingly gentrified and unequal. This was prompting increased interest in the attractions of competitive 'secondary' cities, with signs of a potential shift in the geography of talent attraction and investment which smaller but still competitive cities with the right assets, liveable environments and strategies were primed to exploit.

News of the death of cities has been greatly exaggerated...

Rushing to the defence of cities, urbanist Richard Florida says that 'news of the city's death has been greatly exaggerated'. Conceding that 'some aspects of our cities and metropolitan areas will be reshaped, depending on how long the current pandemic lasts' and that 'fear of density, and of subways and trains in particular, plus a desire for safer, more private surroundings may pull some towards the suburbs', Florida yet posits that 'other forces will push people back toward the great urban centres'. He adds that some of them will be artists and musicians drawn back by lower rents, thanks to the economic fallout from the virus allowing cities to 'reset and to reenergize their creative scenes'. Other commentators have echoed this view that such cities will see a churn of inner city populations and a 'youthification' of city centres.

A crisis for superstar cities – and the 'Cardiff difference' as a city fit for new times?

In this context, whatever actual dangers there may be from the densities in the mega cities on the global stage, there is a specific danger of cities like Cardiff being wrongly grouped with such cities as posing the same perceived health-risk when its own density of development, both residential and commercial, is much lower than cities some might speculate are 'high risk'.

The debate needs more nuance and an understanding of the extent to which COVID-19 might reinforce the negative externalities of bigger cities but actually accentuate the value of smaller ones such as Cardiff. The perceived problem around the superstar cities, while currently dragging all kinds of cities down, is an opportunity for secondary and smaller cities with the right assets. Cardiff has not become so agglomerated as to experience the diseconomies of growth experienced in over-agglomerated cities which were exacerbated as COVID-19 hit, leading to evidence of certain cohorts seeking to leave such cities.

Sell larger cities, buy Cardiff? An opportunity beyond the crisis

Cardiff, objectively, has a scale and structure which could hardly qualify it as a megacity. Its population matches that of a bigger London borough but there are 31 of those. If there are concerns about high-density tall office towers and COVID-19 – more perceived than real as we have seen – Cardiff has a total of only 17 office and residential buildings over 50 metres high, the official threshold to be considered a tall building – and none over 100 metres with the two tallest being just on 80 metres. Its dominant residential patterns are medium density terraces in the closer-in and older neighbourhoods and lower density suburban homes just a few kilometres further out.

Cardiff has therefore not developed many of the negative externalities of the superstar cities while building well towards the kind of activity, culture, cuisine and all other manner of human interaction we look for in cities. Add in the unique atmosphere and impact of major international sporting events – something which must be, and can be, with imagination and

collaboration, assured and you have a unique city offer developing, with more to come.

If dense cities were a pandemic risk – as yet unproven – Cardiff is essentially not that kind of city and wasn't on a track to be so. It is not Wuhan, Milan, or even a Hackney or a Camden with Cardiff having just over a quarter of the population density of such London boroughs. Despite having areas of high density, overall Cardiff is actually lower in residential density terms and also lower in commercial real estate density than Copenhagen the poster child for density done well and good urban planning. Nonetheless, Cardiff has many significant Capital city assets, such as world class parks, stadium, historic streets and buildings, waterside locations, cultural assets and residential neighbourhoods that are of outstanding quality and are a solid basis for developing a great capital city.

Also, objectively Cardiff thus has assets which help its comparative economic and wellbeing performance. Subjectively, with the right resilience and city regeneration strategy, the Council and its partners can choose to build on these assets and can strengthen the city further and in so doing establish its brand as a model city resistant to acute public health risks.

That city should be a liveable, inclusive and productive city of short journeys between jobs, homes and amenity; the city of great virtual and physical connectivity between its centre, its priority precincts, its many, diverse, flagship sites, its sustainable neighbourhoods and its regional heartland. We should bring public health experts to the urban design and planning table to offer a fresh perspective on neighbourhood design features that promote physical and mental well-being. The city in which the end-game was never density at any cost, but density done well. The city of human scale – the big-enough city – right for the times, resilient in the face of challenge. You could call it Cardiff 2040.

Managing a changing city centre as three challenges converge

As COVID-19 hit there were generic concerns in cities everywhere about trends underway beforehand but which have been accelerated in the wake of the pandemic. These are the shift to home working and the rise in online retail. Add to this the unique Cardiff issue of having a world-best stadium at the heart of the city and the related implication for all this for the hospitality sector in this special place – and you have a potential perfect storm of challenges for a city centre such as this. This represents a significant challenge of city centre management. Resources, capacity and focus, collaboration and imagination will be required to deal with this challenge.

Retail

Retail is the sector which has probably picked up the largest 'negative shock' from COVID-19- on top of its pre pandemic challenges: there is a dramatic shift underway and what has been called the 'Amazonisation' of our cities. The shift from 'bricks to clicks' is an existential threat to city centres – and needs to be responded to decisively by a coalition of the relevant public and private sectors. A range of creative approaches are being taken forward in cities in response from zoning for mixed uses and internal redesign of buildings to external animation of public space.

This shift will need to be a core focus. There are real opportunities to diversify city centres and make them more

engaging and appealing to more audiences, but imagination and capacity will be required to help make a successful transition. The Council will need to lead in 'curating' the city-centre, working with business and other tiers of government.

The same will apply to the impact on hospitality of changes to their customer base with councils needing to be flexible and creative around transition in uses but also in assisting the sector to grow out onto the streets even more. Cardiff will need to work creatively with the sector to restore momentum or to find alternative ways to ensure on-street vibrancy, by night and by day. The Barcelona Mayor has a slogan in another context which should inspire our collective cleverness around this key problem: 'Fill the streets with life'.

Offices

The shift to homeworking has clearly also had a radical impact. It is not clear how radical over the long term or whether the advent of a vaccine will restore office occupancy in city centres. Too much of the commentary on the future of offices was made at the start of the pandemic before office-leasers, users and employees had experienced any down-sides from home-working or began thinking creatively about how to re-invent city offices: the mood and response has been shifting as restrictions went on and companies and employees began to discover some of the diseconomies of homeworking.

We should not assume the 'new normal' implies the complete end of city centre office working. It does not. Some governments internationally, concerned about the economic crisis confronting their city centres and thus their nations, have begun to campaign to persuade employees of the importance and benefits of working in offices and to highlight some of the adverse economic and health consequences of working from home. Of course, some companies in the highest value locations are indeed thinking that if no one is coming to the office, why does the worker need to be in London when they could operate at lower costs elsewhere? As we have suggested: that could be Cardiff's opportunity.

It is doubtful that firms will continue to allow all staff to work from home for five days a week, but two days a week may become common, with workers dividing time between a city centre HQ and either their home or the kind of local, neighbourhood or small centre co-working spaces we are beginning to see emerge. In response the Council should develop with private sector and university partners a dynamic eco system in the city centre with a transformed retail and office offer, but also strengthening the economic potential of mixed-use centres across the city, ensuring an efficient transport network linking the 'hub' and the 'spokes'.

Events in the Capital city

The third objective challenge to the city centre is of enabling a stadium at the heart of the city to function successfully and of managing flows of people in a new era of public health concerns. It is pretty vital that there is a specific Cardiff-focussed strategy for events – a strategy that of course includes other venues which attract significant audiences for say cultural, entertainment or business events.

Despite this year of crisis, once community infection is suppressed audiences are keen to return. Sport and music will be key parts of a 'healthy city' branding going forward. It would also reflect the enhanced focus the Council is adopting on music and on nurturing a reputation for home grown talent, including the continued commitment towards delivering a new

Indoor Arena and initiating a unique Cardiff signature event to embrace the city's credentials as a leading UK destination for sport and music.

Curating the city-centre

Whatever the precise configuration is of the activities and businesses in the city centre following on from this crisis, we must assume the Council and collaborators will do more to draw people into and animate the city centre in which they have all already invested heavily. Of necessity it must become a destination of choice. The upstanding physical green and place assets the city has are often underplayed, or not made the most of. It is essential that the city undergoes a comprehensive regeneration and renewal process to create an outstanding and vibrant network of buildings, places, parks and streets in a single integrated whole that is accessible to all sections of the community and age groups. New strategies and resources will be needed. The coordination and 'curation' of 'place' by the Council will need a renewed focus, capacity and 'toolkit' of interventions: these are 'must haves' now not just 'nice to haves'.

A model city post-COVID-19?

Whenever 'the city' has been challenged before by pandemics, shifts in cultural preferences or changes in the needs of an economy, it has always managed to go one step back but two steps forward. It has redesigned itself to survive. It has been resilient, bouncing back stronger after absorbing lessons from previous threats. The best cities understand what in their city can be simply restarted, re-thinking what needs to be re-thought, and renewing what needs changing. The public mood shifts to a 'living with/life after' mentality concerned to secure the economic and health future, we are seeing people beginning to reclaim their city.

Reasserting the fundamentals of the 'good city'...

At one level COVID-19 reinforces some of the fundamentals of the 'good city', one that's healthy and uplifting to live in. Cardiff has the potential to become a fundamentally healthy city for those that live and work in it. This should be a priority. This also reminds us of the importance of things like clean air, public space, parks, and green areas in your neighbourhood. COVID-19 is breeding some desire for new thinking that achieves a better quality of life while preserving productivity, social inclusion and the environment. Central to this is a focus on place making, quality, landscape, architecture and design more generally.

As the shock of the crisis gives way to planning the future, we shall see post-crisis thinking turning to new thinking on integrated strategies to radically strengthen the resilience of our cities and how they can become more inclusive, accessible, greener, more circular and smarter. Part of this new thinking will be about enhanced Council involvement in helping to secure the health, well-being, skills and employment opportunities of the people they are accountable to.

COVID-19 has made us think more about 'place', not less. We all now realise how important it is to have safe and welcoming public and open spaces to have access to and places of agglomeration and interchange as foci of economic development and innovation.

Galvanising momentum around the green agenda

The crisis has enabled us to think about what long term trends mean for our cities, especially in relation to the climate agenda and the economy. There is momentum, galvanised by COVID-19, towards realising locally the Paris Agreement and the UN Sustainable Development Goals. This agenda has been summarised as 'zero carbon-zero poverty'. Housing is a key as part of a broader regeneration and place-making effort involving the retrofitting of existing settlements and the creation of new ones along a more mixed use, walkable and sustainable model – 'a 15 Minute City'.

Cardiff's 'networked governance'

A successful re-emergence of Cardiff in the wake of COVID-19 requires that the Council evolve its model of open and collaborative leadership. This model is as much about the council being the city's prime advocate and organising and convening allies as it is about being a producer of public services.

International Context Summary

- Whilst cities have always responded to challenges, the world's megacities were already finding that congestion and costs were beginning to outweigh the benefits of agglomeration.
- There is an opportunity for smaller cities like Cardiff where there is capacity for further agglomeration, whilst retaining its quality of life and cost benefits.
- Globally, cities are facing the same challenges in retail and office occupancy in city. Progressive responses are committed to using this as an opportunity to build better, more curated city centres.
- Demand for experiences will return – but it will be seeking more authentic and distinct offers.
- Public spaces will become a core part of city's economic infrastructure.
- Almost all cities are adopting a green recovery approach, investing in the sustainability of their cities whilst also creating jobs.
- Successful cities are responding in partnership – with governments, business and most importantly, their local communities.

10 key trends to shape Cardiff's renewal

1. **News of the death of cities has been greatly exaggerated:** Agglomeration, innovation, creativity will continue to drive economic growth and jobs. As Wales' core city Cardiff will continue to play a leadership role in the Welsh economy post-COVID.
2. **A new model of working will emerge:** Whilst agile and home working will inevitably change the way the office operates in the future, many businesses and workers want to get back into cities. Spaces and places in cities for people to collaborate will also become even more important for our economies.
3. **A reboot of the retail experience:** The accelerated shift to online retail may not reverse, having profound impact on the role of the city centre, district centres, and the labour market, particularly for young people. However, a new retail landscape will emerge, more authentic and more unique, and making the city centre and district centres more interesting places.
4. **The city as experience:** While the trend to online shopping may be irreversible, signs are that hospitality will bounce back as lockdown eases, and the role of food and drink, arts and culture in the city economy, and events, spaces and experiences that bring people together will remain important.
5. **The local, rediscovered:** Lockdowns have led to greater appreciation of local areas and demand for local services. Neighbourhoods, with easy and safe access to shops, schools, health care and green and blue spaces, giving more space to people, will be a central part of post-recovery cities.
6. **Digitisation – of everything – will continue:** In addition to zoom calls and online retail, citizens will increasingly access services online.
7. **Without concerted action, the gap between rich and poor will widen:** Poorest communities have faced a double whammy of health and financial hardship as a result of the pandemic. Unless concerted action is taken, the health inequalities that exist between the richest and poorest communities across the city will widen.
8. **Unlocking lockdown:** Over the short term, fear of the virus may continue to hit public transport, with a shift to car, cycling and walking. To avoid moving from lockdown to gridlock, cities are investing in pop-up parking, city-wide cycle-networks and in accessible, safe, district centres.
9. **Preparing for the next shock to the system:** Future risks, especially the climate emergency, will require planning to ensure city resilience, and also opportunities in the low carbon economy that need to be taken.
10. **Good governance matters:** Good governance is characteristic of cities that have responded well, with partnerships and relationships with public services, the private sector and other tiers of government being central to the ability of Council's to forge a city-wide response to the pandemic and recovery and renewal. For those that got it right, the pandemic has seen an increase in citizen satisfaction with increased trust in local government.

Engagement Exercise and Summary

A series of Greener, Fairer Stronger engagement sessions and stakeholder events took place from June to October 2021 focussing on the city renewal strategy. These events were hosted online, with the first an open event chaired by Professor Gillian Bristow, Head of Cardiff University's School of Geography and Planning. This event saw the city's recovery debated between Cllr Huw Thomas, the Leader of Cardiff Council and Dr Tim Williams, a leading expert of global cities.

Cardiff businesses were also invited to attend a further session with Dr Tim Williams alongside Cllr Russell Goodway, Cabinet Member for Investment and Development, to discuss the recovery from the business perspective.

Sustrans hosted an additional session focussing on liveable cities and towns for everyone. Facilitated by Christine Boston, Director, Sustrans it featured Cllr Caro Wild, Cabinet Member for Strategic Planning and Transport, Cardiff Council and Ali Abdi, Community Gateway Partnership Manager, Cardiff University.

A Communities of the Future engagement session was facilitated by Professor Gillian Bristow that looked at how cities will need to address the long-term drivers of health inequalities, including providing access to good jobs, housing and education to citizens in more deprived communities. Cllr Lynda Thorne, Cabinet Member for Housing and Communities, Cardiff Council and Bernadette Kinsella, Director Powell Dobson were the speakers for this session.

A series of officer led engagement sessions were also undertaken throughout the same period with the Economic Task Force, C3SC, FOR Cardiff (with separate sessions for directors and members), the Race Equality Taskforce, and the What Next? Cymru group.

The Council's Child Friendly City Team was also engaged to ensure that the opinions of the city's youth were captured, and this was achieved through a series of workshops that were undertaken in October 2021 with both primary and secondary schools across Cardiff. In addition, the Cardiff Youth Council have also identified a number of key missions as priorities for their consideration.

To supplement our activity further a Recovery and Renewal Survey produced by Cardiff Research Centre was undertaken that was open to all residents. There were 1,746 valid responses to the survey. A number of key themes have emerged from the engagement exercise, notably:

- Accessibility, cleanliness, and open spaces are important for the city centre
- Feeling safe is also important for city and district centres
- Concerns over homelessness, both for those impacted, and the impact on the city centre
- Recruitment issues persist in many foundational economy sectors
- Support for more open and green spaces across the city, and protecting existing space
- Better transport infrastructure underpinned almost all missions
- Skills and education were also critical to all missions
- Need to recognise the interconnection between health and economic outputs
- Need to promote and support activities for young people generally
- Comprehensive support for a 'culture and sport-led' renewal
- Accessibility to sport and culture for all was noted as important
- Support for a focus on supporting a tech-led renewal based on supporting skills and business development
- Comprehensive support for delivering the 'One Planet Strategy'

A further summary of the Key Missions is provided below.

Children and Young People Engagement Summary

- Accessibility, cleanliness, and open spaces are important for the city centre to attract young people.
- Young people are also concerned about the impact of homelessness and the needs of homeless in the city centre
- Cost was an issue for many young people, and a barrier for them taking part in events.
- A large number of young people had never been to the castle, or any stadiums in the city.
- Safety was an issue for a lot of young people too.

Key Issues - Mission 1: Reimagine the city centre

- Cleanliness, safety and accessibility were key issues raised in both engagement sessions and the survey feedback.
- Investment in public open space, including green space, was welcomed by all groups.
- Transport remains a critical component of the city centre.
- Recruitment issues were raised as important issues in the business engagement sessions.
- Supporting local home-grown businesses was also seen as a way of making the city centre more interesting.
- There were some differing priorities regarding transport, with support for both improved cycle infrastructure, whilst some were advocating for improved road infrastructure.

Key Issues – Mission 2: A City for Everyone

- The link between health and economic outcomes was also noted as a key issue, and the need for public services, housing and local regeneration to reflect health outcomes.
- Maintaining levels of support for rough sleepers was also recognised as a key project.
- Linking business and education was seen as important – as was recognising recruiting public sector workers is also a constraint to improving local services.
- Improved public transport was also raised as an essential part of improving access for all in the city.
- Anti-social behaviour was also raised by a number of respondents in the survey.
- Respondents from a minority ethnic background were also more likely to raise the need to provide additional support for young people, including extra-curricular activity.
- A need for data to understand the impact of policy on different groups was noted.

Key Issues – Mission 3: A 15 Minute City

- Improved transport connectivity was seen as the key issue in creating the 15 Minute City in both group discussions and the survey responses.
- The better curation of district centres was also supported in surveys and discussions, including a more prominent public services role.
- Investment in estate renewal and sustainable housing was also supported in engagement and survey work.
- The theme of 'safe, green and clean' emerged in all sessions and survey outputs.
- Conflicting views over the road infrastructure – for example there were some comments relating to the need and rationale for 20mph zones.
- Public services were highlighted as critical in the engagement sessions
- A number of respondents were also opposed to the new Velindre Cancer Centre development in the north of the city.

Key Issues – Mission 4: Culture and sport-led renewal

- Comprehensive support for the need to put art and culture at the heart of the city's recovery.
- Investing in creative infrastructure and skills was also widely supported.
- There was significant support for the city's Music Strategy and proposed new Signature Event.
- Accessibility for sporting and cultural uses was raised consistently, with the need to ensure that everyone benefits from all levels of investment.
- Questions were raised over the need to ensure that the impact of the new arena on communities was a positive one.

Key Issues – Mission 5: Tech City

- Need for a focus on knowledge-based industries to drive better growth.
- Infrastructure is critical – including digital connectivity.
- Public services play a role in procuring designing and delivering technological change.
- Support for establishing Cardiff as a 'Tech Hub'.
- Education is also critical.
- Recognised need to ensure that Cardiff can compete with cities in England and beyond.

Key Issues – Mission 6: One Planet Recovery

- Support for delivering the 'One Planet Strategy'.
- Flood protection also raised as a priority for many residents.
- Overall link between economic wellbeing, health and the environment were recognised in discussions.
- Retrofit schemes especially popular in the city's more deprived communities.
- Active and public transport also priorities for younger less affluent communities.
- The need to protect green space was also noted by a number of respondents.

Recovery and Renewal: Greener, Fairer, Stronger

The Missions

As the city emerges from the coronavirus pandemic whilst some things will change and some stay the same, the city, the nation and the world economy will be different. It is essential that as a city we respond to the challenges we face and grasp the opportunities on offer. To do this we will adopt a number of key missions:

- Mission 1: Reimagine the city centre
- Mission 2: A City for Everyone
- Mission 3: A 15 Minute City
- Mission 4: Culture and sport-led renewal
- Mission 5: Tech City
- Mission 6: One Planet Recovery

In delivering these missions we will work with public and private sector partners to identify potential funding and resources.



Key Missions

Mission 1: Reimagine the city centre

While the cities are expected to bounce back and continue to lead economic growth, the potential impact on city centres however is real and significant. This is especially true of Cardiff city centre, which has Wales' biggest concentration of employment, supporting around 70,000 jobs.

Although office workers are expected to return to city centres, it probably won't be in the same volume, as employers choose to maintain the flexible and hybrid working practices introduced during the pandemic. The city centre will, however, continue to act as Wales' primary commercial centre, and so we will maintain the momentum of our current projects improving the city's strategic business and transport infrastructure, wrapped around Central Station.

The retail and hospitality sector has been hit hard. The 'Amazonisation' of the high street will continue to see many familiar names disappear, and while the hospitality sector will bounce back, it will need additional support to do so safely over the remainder of the year. A dynamic approach to ensuring empty spaces are used productively will be needed to maintain the quality of the city centre. With international tourism impacted in the short term, Cardiff's visitor offer will become more localised, creating experiences and attractions for citizens and for the regional market.

Over the longer term, cities will need to respond to these challenges by taking a more active role in the management of their centres. As the economy restructures and space within the city centre gets repurposed we must make sure it does so in a way that adds to our city, whether it is better and more appropriate office and co-working space, new public squares and spaces, or simply a greener space.

In Cardiff, we will respond by reclaiming the streets for people, with more shared space, greater flexibility in how we use that space, and a focus on place-making.

In the recovery it is essential that we work to mitigate the threat to the thousands of jobs supported by our hospitality, retail and office sectors by attracting people back to the city centre when it is safe to do so.

We must maintain the momentum of our current projects, driving direct jobs through construction, but also improving our overall city infrastructure in the long term.

The response to shape the long-term future of the city centre needs to include measures to re-activate the night time economy, to improve the cultural offer, animate public spaces and diversify public transport options.

New governance arrangements will be needed to engage the full range of city centre stakeholders with joint initiatives to drive a collaborative response to recovery.

The engagement exercise also raised the need to reflect safety, cleanliness and accessibility issues in the city centre.

Key Issues

- The death of the city is greatly exaggerated – agglomeration will continue to drive innovation and creativity.
- But city centres face challenges, and office, retail and hospitality will change – we must actively encourage it to change for the better.
- Cities' role as a convener of people, for arts, culture, for work or shopping, or just to meet, will become more important.
- Spaces will change, and we need to actively manage how they do so.
- Retail and hospitality will increasingly value the local and authentic.
- Cleanliness, safety and accessibility were key issues raised in the engagement exercise
- Investment in public open space, including green space, was welcomed by all groups.
- Transport remains a critical component of developing the city centre.
- Recruitment issues were raised as important issues in the business engagement sessions.

Our Priorities

Make sure our city centre is safe, clean, welcoming and attractive for people of all ages and backgrounds.

Accelerate the completion of the central business district to support continued jobs growth.

Support existing businesses to grow and become more productive.

Improve existing - and establish new - public squares, streets, green spaces and open up our waterfront.

Take a more direct role in managing the future of the city centre to reflect the needs of residents, workers, businesses and visitors.

Put culture and arts at the centre of the recovery, embracing the role the sector plays in shaping our city centre.

Create a city centre that is fully accessible to all ages, and people of disabilities underpinned by a fully integrated transport system.

Proposed Projects

Complete Central Square and Central Quay as a new central business district, and Metro Central and the new Bus Station as a new the gateway to the city and Wales.

Bring forward the Canal Quarter development to create a major new city centre destination, reconnecting the city to its riverfront and opening up new public spaces.

Implement a new scheme to improve air quality and public realm and reduce congestion on Castle Street.

Explore proposals to develop a network of new squares, green streets with proposed new public spaces at St Mary Street south, Greyfriars Road, Park Place, and Metro Central south.

Bring forward plans for a new Metro link between Central Station and Cardiff Bay to provide first phase of the development of Cardiff Crossrail.

Complete a cycle loop around the city centre to connect each of the key city cycleways with each other.

Establish new safe and secure cycling hubs, commencing with a pilot initiative.

Invest in parklets, street greening and more flexible outdoor uses of public space across the city centre and keep Cardiff Castle open as a public park.

Increased cleansing activity in the city centre.

Establish new city centre management arrangements with a stronger partnership with the Business Improvement District, including establishing a Street Marshall scheme

Develop proposals for a new creative hub in the city centre to support production and performance.

Adopt a new 'home grown' events strategy and place animation programme.

Deliver further investment in Cardiff Market as a leading destination for local produce.

Mission 2: A City for Everyone

The health impact of the pandemic has not been felt evenly, with older people and those from deprived communities and from a minority ethnic background experiencing worse health outcomes.

The economic impact of COVID-19 has resulted in the greatest recession most of our city's residents will have experienced. This has led to a doubling of unemployment, over a 100% increase in Universal Credit applications and, ultimately, to a great many more families falling into poverty.

Across the UK, those working in front line jobs – often 'key workers' – have seen greater levels of infection and greater mortality than those able to work from home.

Overall, economic and health inequalities that existed before the pandemic have widened. Unless concerted action is taken, these gaps between communities will continue to grow.

Looking to the year ahead, we know the economic recovery will be uneven, with some sectors continuing to be impacted by the pandemic, particularly those sectors – such as hospitality and retail – that typically employ young people, women and those from a BAME background.

Over the months ahead there is an immediate need to ensure we respond by supporting those most impacted by the pandemic, whilst at the same time address the issues that are critical to narrowing health inequalities, including access to good jobs, good housing and education, and safe, clean and cohesion communities.

Focussed action will also be required in support of those most impacted by the pandemic, including children and young people, citizens from a minority ethnic background and the city's most vulnerable citizens.

The engagement exercise also raised the need to reflect health and anti-social behaviour in supporting a more equal city. Furthermore, accessibility to transport was also raised as a critical issue, with an asymmetry of accessibility found across the city. The survey work also

highlighted the support for maintaining current levels of support for rough sleepers. A need for better data to understand the impact of policy on different groups was also noted.

Key Issues

- The pandemic has widened inequalities, and without concerted city-wide action, the gaps between communities will grow.
- Unemployment has doubled and this is likely to be sustained for some time.
- It is expected that the young, women and those from a BAME background will feel the effects more than others.
- Life experiences of young people have been limited and there is a need for specific support in response.
- Cities will need to address the long-term drivers of health inequalities, including providing access to good jobs, housing and education to citizens in more deprived communities.
- Ensuring that development and regeneration supported all people was noted in both group discussions and the survey feedback.
- The link between health and economic outcomes was also noted as a key issue, and the need for public services to reflect health outcomes.
- Maintaining levels of support for rough sleepers was also recognised as a key project.
- Linking business and education was seen as important – as was recognising recruiting public sector workers is also a constraint to improving local services.
- Improved public transport was also raised as an essential part of improving access for all in the city.
- Respondents from a minority ethnic background were also more likely to raise the need to provide additional support for young people, including extra-curricular activity.

Our Priorities

Ensure that the benefits of the city's regeneration and development programme are felt across all the city's communities.

Become a Child Friendly City, where the interests of children and young people are at the heart of our response.

Ensure that the new models of support in place for the city's most vulnerable residents are maintained post-pandemic.

Address the long-term driver of health inequalities, including investing in housing, education and local communities.

Ensure that Cardiff is a city where we can all feel safe and welcome.

Proposed Projects

Gain status as a UNICEF Child Friendly City – the first UK city to achieve recognition and deliver a Child Friendly Recovery and Renewal programme.

Work with partners to deliver the Living Wage City initiative and encouraging all employers to become living wage accredited.

Work with Welsh Government to make sure all young people can access an offer of a job, training, education or voluntary opportunities.

Continue to invest in our Into Work team to provide support for people in our communities to get back into employment and training.

Continue our investment in new schools in the city's most deprived communities.

Provide additional support and mentoring for young people with a focus on hard-to-reach groups.

Deliver a programme of extra-curricular activity for Cardiff children, focusing on areas of deprivation.

Maintain the radical approach to supporting rough sleepers and the homeless population introduced during the pandemic.

Deliver over 2,000 new Council Houses as part of the most ambitious Council house building programme in Wales.

Support the Race Equality Task Force to address the long-term causes of racial inequalities.

Aim to establish social clauses within all major council contracts and capital programme to maximise local job creation and support local supply chains and local businesses.

Strengthen links between schools, higher education and business to increase the depth of digital, arts and STEM knowledge, skills and experiences offered to children and young people via the Curriculum for Wales 2022.

Mission 3: A 15 Minute City

The pandemic has brought to the fore the role of communities, local centres, our parks and the spaces on our doorstep. As the nation transitioned to a working day where the majority were working from home, and we saw big changes in the way we travelled, shopped and generally used the spaces around us.

It is clear that forms of agile working will remain in the post-pandemic world, and with it both a greater appreciation of the local. For the city this means there are opportunities to expand on those good things that happened during the pandemic such as increased active travel and a renewed focus on local economies. In responding we need to take steps to lock in the things that raised the profile of our local centres, whilst also investing in their future.

While curating and renewing the city centre and delivering major new developments, Cardiff will progress its version of a more interlinked city, a city of villages based on the existing network of successful local and district centres by making them more vibrant, busy and relevant to local communities. We will develop local areas with better and safe access by bike or foot to amenities and jobs on their doorstep, and with quick access also to the city centre. This fits with a hub and spoke approach to cities which may become more attractive after COVID-19, with more appetite for split-working between local centres and the central business district.

New opportunities come from public and active travel investment and improvements in local services, from investing in green and blue infrastructure – embracing our waterfronts and parks, and greening public spaces. These areas will provide minimum standards in terms of access to services, economic opportunity and green space. Improvements also come from investing in housing, jobs and public services in our communities.

The 'A 15 Minute City' concept will be supported by the delivery of a 'locality' approach to public services, with the colocation of public service teams in a network of Community and Wellbeing Hubs and a strengthened role for local schools in community life.

Achieving a 15 Minute City with integrated transport and land use also requires a strong regeneration and economic development capacity, which should be invested in as part of the establishment of 'place

infrastructure compact' style arrangements between the public and private sectors.

The Council will also need to take a more pro-active role in these areas to curate a city of networked centres that delivers for the economy, communities and our environment, where financial interests aren't the driver, but a means of supporting our communities.

The engagement sessions highlighted the central role of transport in delivering this mission, as well as a more active management of district centres.

Key Issues

- Working from home has led to a greater appreciation of our local communities and demand for local services.
- The use of parks and green spaces has increased massively as people have discovered their local green spaces.
- There are benefits that come from acting more local – from reduced congestion to community regeneration.
- Cities around the world are adopting the premise of the 'A 15 Minute City' in developing more liveable and sustainable cities.
- Improved transport connectivity was seen as the key issue in both group discussions and the survey responses.
- The better curation of district centres was also supported in surveys and discussions, including a more prominent public services role.
- Investment in estate renewal and sustainable housing was also supported in engagement and survey work.
- The theme of 'safe, green and clean' emerged in all sessions and survey outputs.
- Public services were highlighted as critical in the engagement sessions.
- The need to ensure that all corners of Cardiff are included in the 'Fifteen Minute City' concept was also raised by the Council's Economy and Culture Scrutiny Committee.

Our Priorities

Creating safe and accessible local centres for everyone, particularly children and older people.

Deliver a step change in the provision of public transport and active travel measures to link our communities, as outlined in our Transport White Paper.

Manage, curate and promote local and district centres across the city – to create vibrant centres by encouraging and promoting diverse local businesses, retail, workplaces, incubation spaces and social activity.

Invest in existing and establish new green spaces, whilst more actively embracing our waterfront.

Showcase and celebrate the diversity and culture of different parts of our city, including our city's historic assets.

Deliver a 'locality' approach to public services, with teams based in and able to respond to the needs of communities, built on the networks of Community and Wellbeing Hubs.

Support public service staff to work in an agile way, with community-based spaces in localities across the city.

Invest in estate renewal, enhancing existing housing estates and their neighbouring areas to deliver high quality sustainable low carbon housing, public realm and business space for our communities.

Proposed Projects

Establish a 15 Minute City toolkit for the Council and its partners.

Invest in a network of safe and segregated cycling routes between local centres as well as safe walking routes.

Establish 20mph speed limits in residential areas, creating safe urban environments where all people, children and families feel safe.

Transform public transport connectivity in district and local centres by working with Welsh Government and Transport for Wales to deliver investment in Cardiff Crossrail, City and Circle Lines and new train stations.

Develop proposals for a new urban park between the City Centre, Callaghan Square and Cardiff Bay, by greening Lloyd George Avenue to create Cardiff's equivalent of the New York Highline.

Provide active travel plans and effective safe active travel connections for schools.

Take forward the Channel View regeneration scheme and new Gasworks development to provide high quality, affordable, sustainable communities.

Develop and promote current assets such as the Wales Coastal Path to provide more outdoor attractions for residents and visitors across the city.

Expand and enhance our network of local multi-agency hubs, including a youth hub in the city centre.

Deliver major new large and small public realm and green infrastructure investment including a programme of re-greening our communities, improved footways, places, investing in trees, SUDs and new green spaces.

Support investment in co-working, innovation and start-up hubs within our city's communities, including touch-down hubs for public sector workers, focussing on areas of highest deprivation as a starting point.

Mission 4: Culture and sport-led renewal

Much of the creative sector has been devastated by the pandemic, with venues in particular closed by the restrictions for over a year. This has not only affected those businesses, but also those employed in the wider supply chain. There is an immediate need to ensure a sustainable renewal of the sector.

Sport came to a halt, affecting both professional and grassroots participation. For much of the past year attendance at sporting events has been restricted, whilst local clubs have been left unable to compete.

Even though the pandemic forced the doors to close on these sectors, it has too shone a light on their importance to city life, to the economy and to wellbeing.

During the periods of heightened restrictions, we have turned to music, literature and TV and film to fill our time. We've seen people engage with their own creativity, but we've also seen the desperation for people to see live performance, whether its theatre, cinema, music or sport.

Culture, creativity and sport shape cities as places to work, to live and to visit. In a world where the lines between these activities are increasingly blurred, maximising the impact of our creative and cultural assets is one of the ways in which we can create better lives for our communities and our workers, and to differentiate Cardiff from other cities for visitors.

Of course, this will still bring economic benefits, a productive and creative economy is now a prerequisite to a competitive economy. Cardiff has already staked its claim as a creative city, from producing the biggest budget TV shows in the UK, to its reputation for nurturing talent from grassroots to conservatoire musicians, to world class animators, games designers and artists.

Sport has also been a core component of our visitor economy, with our professional and national teams attracting millions of attendees each year. Our local talent has also been second to none.

Building on its strengths but also learning from weaknesses exposed by the pandemic in all cities, Cardiff will seek to develop its creative, cultural and sporting assets to support its economy, support the wellbeing of its residents, and to make the city a better place to live, work and visit. This will include reanimating the city centre to be safe and enjoyable as a unique place of interaction for business, arts, events and retail. It will be about providing space for our creative community to flourish. It is also about providing the facilities for people to participate.

We will also work to develop Cardiff Bay, with the new arena as a catalyst, to develop a cluster of creativity, bringing together the excellence already present in the city such as the Wales Millennium Centre, to create a focal point for the creative sector in Wales, a place where not only can you see the best performances, but also where the best productions are forged.

Sport is a big part of our culture, from our professional teams to our local talent, to the thousands of grassroots teams and clubs in our city. Part of our response is to recognise the benefits of supporting grassroots activity across all our communities.

There was comprehensive support as part of the engagement exercise for the need to put art and culture and the heart of the city's recovery. Investing in creative infrastructure and skills was also widely supported.

Accessibility for sporting and cultural venues was also raised consistently, as well as the need to ensure that the impact of the new arena on communities was a positive one.

Key Issues

- The pandemic has raised the importance of arts, culture and the creative use of space.
- The creative sector will be scarred, but raring to return.
- Culture, creativity and heritage (including sport) are important issues for Cardiff residents, but also attract business and visitors.
- Cities across the globe are embracing culture as a means of differentiation.
- Local experiences will become more important in attracting domestic and wider tourism.
- Culture is also increasingly recognised as a key wellbeing asset.
- Cities need to allow for and provide space for creative and cultural activities.
- The engagement exercise noted significant support for the city's Music Strategy and proposed new Signature Event
- Accessibility for sporting and cultural uses was raised consistently, with the need to ensure that everyone benefits from all levels of investment
- Questions were raised over the need to ensure that the impact of the new arena on communities was a positive one.

Our Priorities

Put culture at the heart of redevelopment, creating places and spaces that people want to be in and around, and supporting a more creative economy.

Invest in our creative infrastructure, from digital communication to low-cost artist workshops and studios, to makers' spaces and grassroots venues, enabling our skilled creatives to flourish, and recognising the role that culture and creativity can play in developing a better city.

Embrace Cardiff's Music City Strategy to make Cardiff the first city in the UK to incorporate music into its city structure – from planning and licensing to social wellbeing and tourism.

Support investment to unlock participation in sport at all levels.

Develop a new post-COVID Events Strategy with Welsh Government to support a home-grown focussed events sector that delivers a sustainable programme of events, supporting our own businesses in developing our visitor economy.

Proposed Projects

Deliver the new 15,000 seat arena in Cardiff Bay and establish an associated grassroots music support programme and embed the project in the local community.

Develop a new creative partnership for Wales in the heart of Cardiff Bay to develop more home-grown productions and support local jobs and businesses.

Develop proposals for public realm improvements in Womanby Street to create a cultural heart of the city centre.

Develop infrastructure to support the cultural, sporting and creative renewal of the city.

Establish plans for new creative hubs for businesses both in the city centre and in our district centres, providing flexible space for artists and creatives across Cardiff.

Deliver the Cardiff Music City festival as the first of the city's proposed new home-grown cultural events to kickstart the new events strategy.

Develop the business case for a new Centre of Contemporary Arts for Cardiff, with the intention of developing Wales' first internationally relevant exhibition space for contemporary art.

Explore the feasibility of Cardiff as a host city for the 2030 World Cup.

Deliver a new velodrome and outdoor cycling and running facility at the International Sports Village.

Publish a new Bilingual Cardiff Strategy to promote Welsh language and culture.

Mission 5: Tech City

The pandemic has seen a wholesale adoption of technology across almost all sectors, be it the almost instant adoption of flexible working practices for many, or the digital innovations in the hospitality sector have adopted throughout. Technology has both helped us to manage the health impact of COVID-19, whilst also supporting businesses who would have otherwise needed to close.

The UK response to the previous economic downturn was associated with a prolonged period of stagnation in productivity growth, manifesting itself in the low wage recovery that exacerbated income disparities. There is a need for cities to respond in a way that creates wealth for their citizens, and not just those in control of capital.

Productive cities however are not now reliant on natural resources or heavy industry. Today's successful cities are driven by the skills, knowledge and expertise of the people and businesses that live and operate there.

The pandemic has shown the impact that investment in technology can have in improving our lives and supporting business growth. As Cardiff emerges from the pandemic we need to build on our strengths as a liveable and clever city to grow our knowledge economy, creating not just more, but better, jobs.

To do this requires working with business, working with our universities, and working with our communities. We need to make sure we retain our talented people and provide them with the base to unleash their potential. This means creating the networks from which they can thrive, providing the working environment where they can collaborate, and having a great infrastructure backbone in place.

It's also important to note that tech businesses don't always need Grade A office space to flourish, the tech start-up of the future is just as likely to start in a co-working hub in the city centre, Bay, or in one of our communities. Investments such as Tramshed in Grangetown have shown the way for such spaces, and the internationally competitive businesses that can emerge from them.

We must however support tech at all stages of development and providing high quality space for businesses with the need to high spec spaces, or the

space to grow their operation is essential else we lose our city's best and brightest businesses. Projects such as Cardiff Parkway are integral to this, as is support for the city's emerging life sciences sector.

The engagement work supported the notion that Cardiff could attract tech companies previously attracted to larger UK cities, notably with some evidence of relocations already taking place. There was general support for the idea of developing Cardiff as Wales' 'Tech Hub'. There was also support for using tech to improve public services and city management.

Key Issues

- Agglomeration, innovation, creativity will continue to drive economic and wage growth.
- Hybrid working is here to stay – and the adoption of technology has been accelerated.
- There are opportunities for smaller cities to take advantage of the potential move away from the 'mega cities'.
- Technology has enabled business to operate and develop through the pandemic.
- Public services have also embraced and used technology to deliver services and improve performance.
- Competitive cities of the future will be reliant on a technology focused enterprise culture and an associated skilled workforce.
- The engagement work recognised the need for a focus on knowledge-based industries to drive better growth
- Infrastructure was raised as being critical to this mission.
- It was also noted that we must recognise the need to ensure that Cardiff can compete with cities in England and beyond.
- It was also noted that we should also ensure that we have equality of access to digital infrastructure, but also respect those who have difficulty in leading a 'digital first' life.
- The Economy and Culture Scrutiny Committee also highlighted the need for comprehensive digital access across the city.

Our Priorities

Establish Cardiff City Centre and Cardiff Bay as 'Tech Central' for Wales, retaining, developing and attracting the knowledge-based businesses of the future.

Support a 'start-up to IPO' tech eco-system creating a network of spaces for all stages of business development, and a programme of business and financial support for businesses with private sector partners.

Strengthen relationships between Cardiff and universities that focuses on public policy and economic development research for the city.

Invest in the infrastructure to support tech businesses in the city of all shapes and sizes, repurposing buildings to develop clusters of knowledge-based business.

Embed technology in the future delivery of public services and ensure equality of access across the city and alternative routes for those with difficulties in accessing digital services.

Proposed Projects

Deliver a new 'Tech City' approach that delivers dedicated programmes for support for the tech, finance, creative and life sciences sectors.

Support the development of a new Tramshed Tech network in the city to provide a full spectrum of support for emerging tech business, developing space, skills support, networks and links with finance for new and established businesses.

Support the development of a business case for a new Life Sciences Park with the Cardiff and Vale University Health Board that accelerates the development of the city-region's life sciences sector and attracts the best start-up businesses in the sector.

Support the delivery of Cardiff Parkway, a new business growth centre within the city, as an essential part of the city's business infrastructure offer.

Establish a new formal arrangement with the city's universities to share knowledge and expertise in developing public policy.

Develop a plan for Cardiff to become a Smart City to manage energy, traffic flows, congestion and air quality.

Work with partners to develop city to city rail links, including improved services to London, Bristol and Swansea.

Bring forward proposals for incubation space and business expansion space for the fintech, creative and cyber security sectors.

Develop the case for relocating a major UK Government department to Cardiff as part of the Places for Growth programme.

Work with infrastructure providers to ensure comprehensive digital accessibility across the city.

Mission 6: One Planet Recovery

Cities around the world are generally embracing a zero carbon, greener, cleaner and more sustainable response to the pandemic, creating better and more liveable communities.

The importance of local environment, including clean air, public squares, parks, and green spaces has been highlighted during the pandemic. More of us have been using these spaces, and they have become ever more important for our wellbeing. The temporary drop in emissions has improved otherwise congested spaces, as well as encouraging more active travel.

As Cardiff emerges from the COVID-19 crisis, the urgency, and radical nature of the interventions, which characterised the city's response to the pandemic must now be brought to bear on tackling the climate emergency.

The One Planet Cardiff strategy sets out an ambition for Cardiff to become a Carbon Neutral City by 2030. It outlines a wide range of activity to reduce carbon, whilst creating economic opportunities and promoting social well-being. The economic impact of COVID-19 has heightened the importance of this approach, and the Council will work to accelerate those carbon reduction projects that will create jobs and reduce living costs for those living in the city.

A number of major initiatives are already being progressed to help decarbonise the city. A city solar farm has recently been completed, generating 9MW of clean energy, construction of a major district heating network is about to commence, delivering an 80% carbon reduction heating emissions in connected buildings, and a housing energy retrofit programme is being developed with a longer-term ambition of making 2,000 homes per year warmer, greener and cheaper to run, especially in some of the most disadvantaged parts of the city. We're also setting a mission statement to significantly improve the energy performance of the Council's estate, moving towards Zero Carbon new build, and are implementing the Coed Caerdydd project which will see a significant increase in the area of the city given over to tree planting and enhanced biodiversity.

Measures are in place to improve air quality across the city, particularly in Castle Street. A £21 million programme of investment will dramatically improve air quality through transformational improvements to the urban realm, public transport and active travel infrastructure. In the short term, every effort will be made to ensure people feel safe and confident returning to using public transport. Over the longer term, the Council will progress the transformative package of transport projects set out in the Transport White Paper.

Our aim over the next ten years is to fundamentally transform the way people move around the city, reducing the dependency on private cars whilst adopting challenging modal split targets for active travel and public transport.

In response to the climate emergency the Council will also adapt its own organisational policies and practice to lead Cardiff's transition to a low carbon economy. Measures will include increasing the uptake of hybrid working and active travel amongst staff, driving our procurement activities to discourage and then remove all single use plastics from Council venues and pursuing the continued divestment from fossil fuels by the Cardiff and Vale of Glamorgan Pension Fund.

Equally important is the adoption of new technology. A cluster of innovative technologies is emerging, all of which will support a more innovative and productive economy. Forward looking cities are grasping these opportunities to create jobs and safeguard environment by establishing sizable investment programmes in green economy schemes. This is an important consideration given that the green economy has grown at around 5% over the last 10 years, making clear that economic growth in Cardiff must be green growth.

The engagement work showed comprehensive support for the city's One Planet Strategy. In particular the benefits for residents were noted, especially in areas such as fuel poverty. The link between the economy, the environment and health were also noted.

Key Issues

- Post-COVID, the climate emergency will remain as the greatest challenge and risk to cities.
- The pandemic has raised the importance of our local environment.
- The fall in emissions has created better environments and better spaces in otherwise congested city centre areas.
- Our use of parks and green spaces has risen and is expected to stay higher than pre-pandemic levels.
- The growth of the green economy represents a huge opportunity for jobs growth, with potential for immediate projects to create significant numbers of new jobs.
- Flooding will become a greater risk that will require mitigation through enhanced planning and investment in defences.
- Flood protection also raised as a priority for many residents and retrofit schemes especially popular in the city's more deprived communities.
- Active and public transport also priorities for younger less affluent communities.
- The need to protect green space was also noted by a number of respondents.

Our Priorities

Deliver the One Planet Cardiff Strategy, with the aim of becoming a carbon neutral city by 2030 and adopting 'zero carbon zero poverty' principles as we recover from the pandemic.

Use the market potential of the Green Recovery to create local jobs.

Develop planning policy and guidance to facilitate and maximise low energy, resource efficient and resilient development across the city.

Use the power of the Council's spending and investment decisions, and its own organisational policies, practice and partnerships to deliver maximum social and environmental gain.

Invest in sustainable homes and neighbourhoods, driving down both carbon footprint and energy costs for our communities.

Develop the infrastructure to make Cardiff the most Electric Vehicle (EV) friendly city in the UK.

Ensure the city is prepared for and protected from flooding events.

Proposed Projects

Work with regional partners to develop proposals for a mass retrofit programme for homes, upscaling and accelerating work to make existing homes more energy efficient, tackle fuel poverty, and stimulating new areas for skills development and employment.

Seek to establish a real time publicly accessible clean air monitoring network across the city.

Deliver 4,000 new sustainable homes, built to low carbon standards, at scale and pace focused on affordable, sustainable and low carbon mixed tenure homes.

Deliver an integrated and segregated cycle network, and develop Active Travel Plans and accessible walking and cycling routes for all schools.

Investigate a new pipeline of renewable energy generation projects on Council land to generate clean, renewable energy, both for direct local use and to help to further decarbonise National Grid electricity.

Deliver Phase 1 and Phase 2 of a Local Heat Network for Cardiff Bay and the City Centre.

Explore with partners proposals for tidal power to harness the energy potential of the Severn Estuary and establish a cluster of linked businesses.

Establish proposals for a programme of EV infrastructure investment.

Work with Cardiff Bus and other bus companies to green the city's bus fleet, including the introduction of new zero emission battery-electric buses as part of a modernisation and improvement for Cardiff Bus.

Promote healthy, local and low-carbon food through delivering the Cardiff Food Strategy.

Establish a City Tree Farm as part of the ambition to increase the city's tree canopy coverage and deliver the Coed Caerdydd Programme of mass planting of trees across the city.

Delivering the Missions

Working together to develop a Greener, Fairer, Stronger Capital City

The crisis has identified the need for cities, councils and government to reflect on how they enable recovery and transformation. The accelerated devolution of power, responsibilities and finance, and innovative partnership working between all tiers of government has underpinned successful cities internationally, and Cardiff should be part of that story.

Across the globe evidence on city performance suggest that they deliver most for their residents, region and nation when empowered to work in partnership with other tiers of government. Collaborative working, making the right decisions, at the right level, for the right purpose.

Cities also need to recognise that more than words are required to take forward their agenda, and to that end need to establish the means to do so.

In the case of Cardiff, this means establishing innovative governance arrangements between the Council, Welsh Government, Cardiff Capital Region, Western Gateway partners and UK Government, shaped by a common purpose whilst also recognising the city's need to determine its own agenda and to empower it to deliver.

This will also require new models of working that incentivises growth around public goals, bringing together governance structures and new financial mechanisms that encourage investment that drives public benefits.

For Wales it is also critical that the unique role of the capital city is recognised and reflected in its economic policy and development agenda.

To do this we will:

Drive competitiveness through collaboration

We will work with Welsh Government to support their economic agenda, and establish a modern, sustainable and inclusive capital city that delivers for our nation.

We will work with our local government colleagues in the Cardiff Capital Region to establish a Corporate Joint Committee that sees resources devolved to a regional level in a way that enables local government to support a stronger regional economy.

We will work with the Western Gateway to leverage investment on an international scale and recognise the potential for shared assets across the region to raise our overall competitiveness.

We will work with the UK Government as part of the Levelling Up agenda to establish Cardiff as a top tier UK city.

Establish new models of working

We will look at models such as Place Infrastructure Compacts, with a view to establishing a 'Capital City Compact' that leverages investment to benefit all of Wales.

We will explore the use of value capture models that incentivises sustainable development.

We will work with all levels of government to align external funding sources around a common purpose.

We will establish formal arrangements with our universities to maximise their impact on our economy and community development.

An International Capital City

We will reaffirm our international role through engaging in international networks.

We will work with our twin cities to establish a programme of professional exchanges for individuals and businesses.