

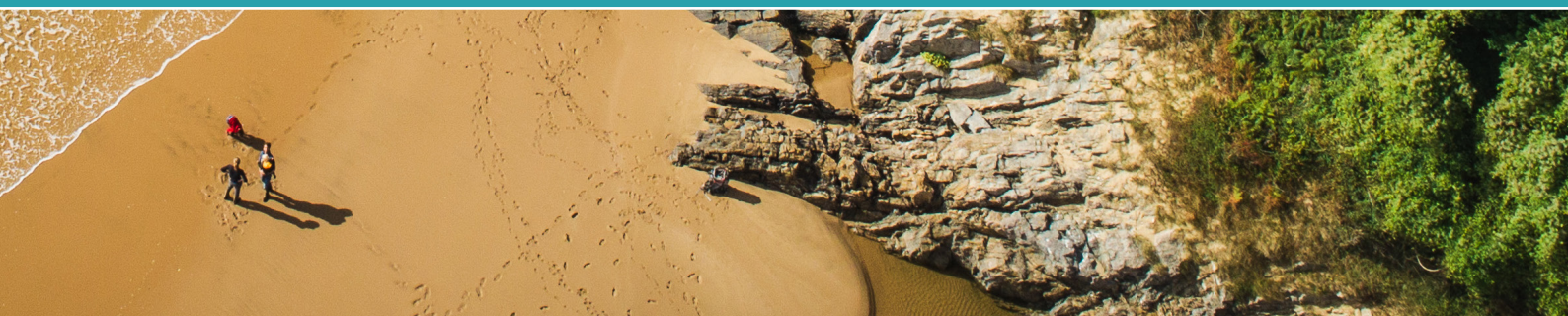


Llywodraeth Cymru  
Welsh Government



# Welsh National Marine Plan – Monitoring Report 2019-2022

November 2022





The Welsh Ministers must report to the Senedd at least every 3 years on the effect of the Welsh National Marine Plan. This is the first report.

The Welsh National Marine Plan (WNMP) is the first marine plan for Wales, it established a new marine planning system providing a high-level statutory framework for decision making by public authorities to support the sustainable development of Welsh seas. The WNMP also makes provision for supplementary material and planning tools. This enables Welsh Government to develop and issue spatial direction for sustainable development through the strategic planning framework established by the WNMP.

The Marine and Coastal Access Act (2009) (MCAA) sets a legal requirement to monitor and report (at least every three years) on the implementation of marine plans to understand:

- the Plan's contribution to meeting the High Level Marine Objectives (HLMOs) in the UK Marine Policy Statement;
- progress being made towards securing Plan objectives;
- the effects of the policies in the Plan; and
- the effectiveness of Plan policies in securing the Plan objectives.

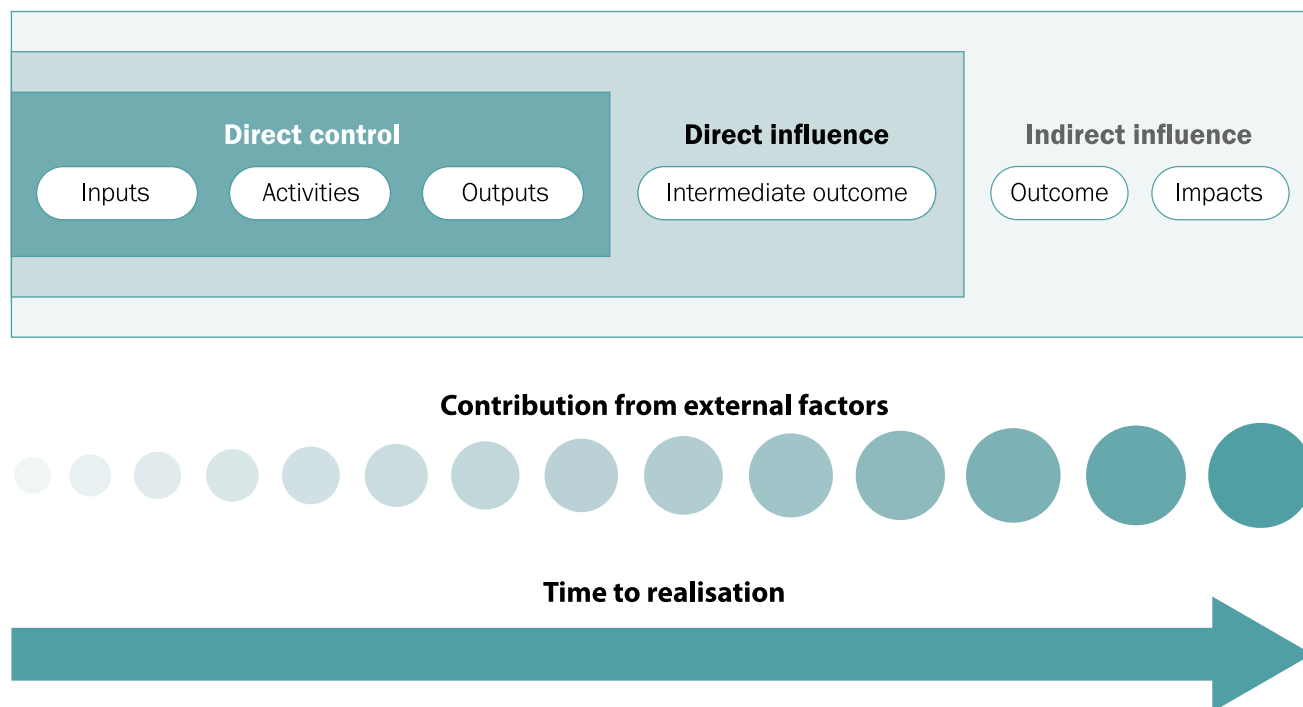
A set of indicators have been developed to help reporting, these cover:

- **Decision making monitoring:** indicators to assess effectiveness of the WNMP in enabling achievement of its objectives.
- **Objective/Policy monitoring:** the real-world outcomes (effects) to which Plan policies contribute. Where relevant, these indicators also aim to encompass whether plan policies are having a positive or negative effect on sustainability in line with the Sustainability Appraisal (SA) Report<sup>1</sup> and integrated Strategic Environmental Assessment (SEA) process undertaken for the WNMP.

Understanding the precise effect of a high-level, strategic plan is challenging – marine planning is one of many processes which affect our marine area. Wider contextual considerations relevant to progress in implementing marine planning include the Covid pandemic, exit from the European Union, new policy, other marine planning processes and other marine management measures and initiatives.

Figure 1 illustrates how for any policy intervention, the influence exerted by wider external factors increases both over time and as progress moves from specific activities and products (outputs) and towards the effects (outcomes and impacts) of the intervention. For this first three-year review, monitoring has focussed largely on progress with activities, outputs and intermediate outcomes, as these are the initial steps required for successful implementation of a plan led system of marine management.

**Figure 1: The relationship between inputs and impacts in a policy intervention and the increasing influence of external factors over time**



Source: *Three-year Report on the East Inshore and East Offshore Marine Plans for the period 2 April 2017 – 1 April 2020*



## Overview of the Welsh National Marine Plan (WNMP)

The Welsh National Marine Plan (WNMP) was adopted and published on 12 November 2019. It sets out the Welsh Government's policy for the sustainable development of our seas. As Wales's first marine plan, it represents the start of a strategic, plan-led approach to sustainably managing marine resources, respecting the environment and established uses of the sea whilst seeking lasting benefits for current and future generations from new opportunities. It does so by establishing a strategic planning framework to which further policy direction, guidance and spatial prescription will be added. This enables Welsh Government to develop and issue spatial direction for sustainable development, optimising the benefit of WNMP policy while responding to emerging priorities.

The WNMP was prepared and adopted under the MCAA for the purposes of Section 51 of the MCAA and in accordance with Schedule 6 of the Act. The Plan has been prepared in conformity with the UK Marine Policy Statement (MPS) (2011) and its objectives support the UK HLMOs. The WNMP, in conjunction with the UK MPS, are the relevant planning documents for the plan area.

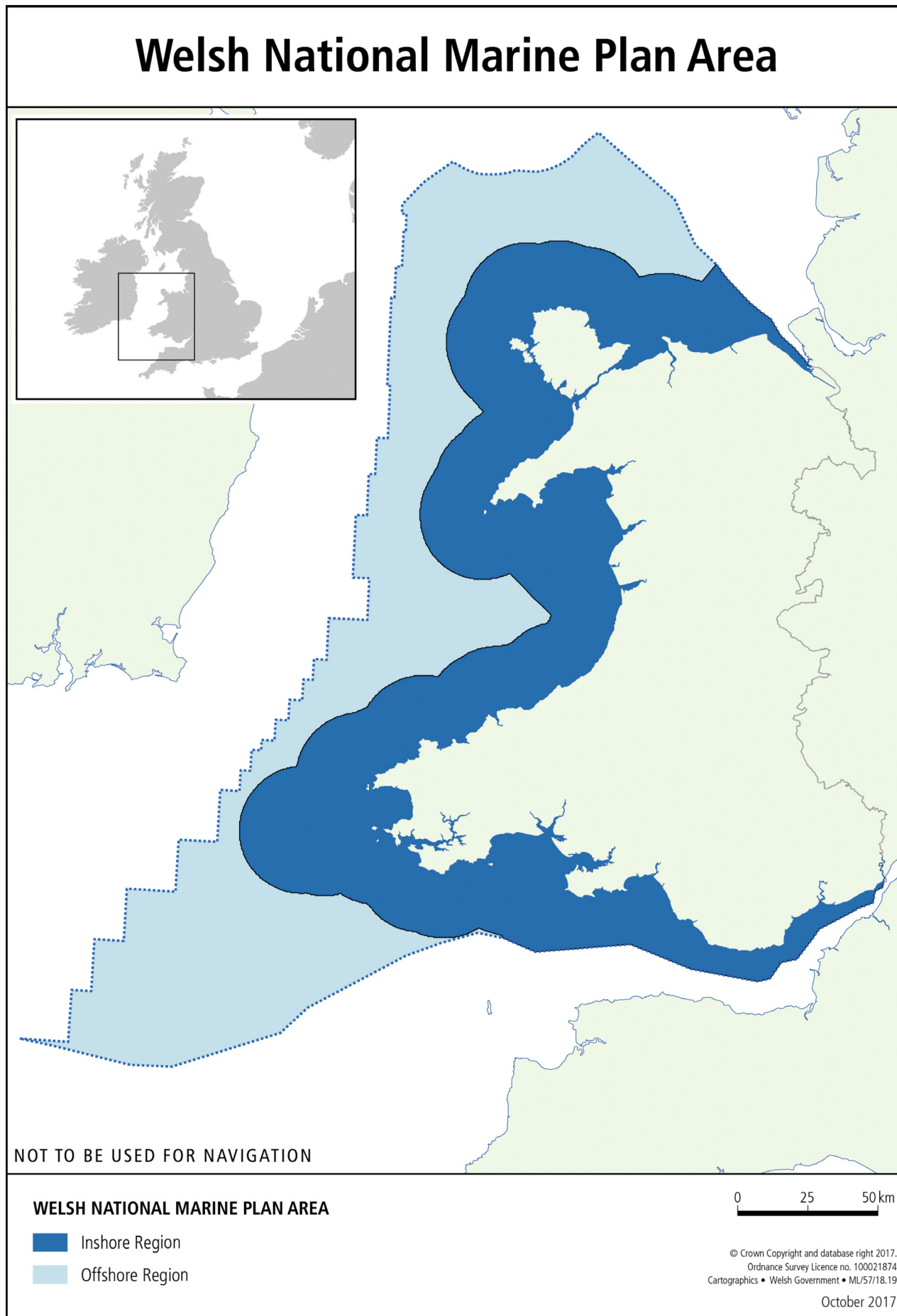
The WNMP has the following components:

- **Plan Vision:** the overarching statement describing the ambition for the future state of the marine plan area;
- **13 Plan Objectives:** statements of desired outcomes or observable behavioural changes that the WNMP is seeking to achieve to realise the Plan Vision;
- **11 Sector Objectives:** sector-specific statements of desired outcomes;
- **25 General cross-cutting Policies:** policies that apply to all sectors and activities and support the delivery of the Plan Objectives; and
- **17 Sector Policies:** these are sector specific policies applying to decisions related to a particular activity. They include supporting policies and safeguarding policies.

The WNMP makes provision for the introduction of Marine Planning Notices (MPNs) supplementary to the Plan, alongside other planning related material. At the time of writing no MPNs have been published.



Figure 2: Welsh National Marine Plan Area





## Welsh National Marine Plan Implementation

The WNMP has effect through guiding the decisions of public authorities. Authorisation or enforcement decisions taken by Public Authorities that have the potential to affect the Plan area<sup>2</sup> need to be in accordance with the WNMP, other decisions by public authorities must have regard to the WNMP unless relevant considerations indicate otherwise.

Welsh Government has taken a number of steps to support plan users and the proportionate implementation of the Plan, for example through production of guidance and development of evidence. We work closely with our Marine Planning Stakeholder Reference Group, experts from industry, marine regulators, the third sector and others, who help guide marine planning as it continues to develop.



2 [See s58 of the Marine and Coastal Access Act \(2009\)](#)



## Findings

We present our findings in this report, further details can be found in more detailed technical assessments published alongside this report.

Our findings for each indicator (decision making related, then objective/policy related) are set out in Table 1 and Table 2.

**Table 1: Decision making indicators summary of findings**

Indicator	Evidence source	Description	Progress (RAG)	Confidence
1. Guidance available	WG Decision makers Advisory bodies	Inventory of guidance documents relating to the WNMP available to support plan users.	Extensive suite of supporting material available (see Figure 3).	High
2. Application of WNMP policy in relevant decisions by public authorities	WG in liaison with decision makers	Evaluation of applications to determine whether WNMP policies are being applied as part of decision making by public authorities.	Evidence of increasing application of the WNMP in applications and Marine Licensing decisions.	Medium
3. Stakeholder views on WNMP effectiveness informed by user survey	WG Plan users	Responses to user surveys on the effectiveness of the Plan are obtained and show positive trends.	Some positive views on effect and role of the WNMP but also views that more prescriptive planning may be needed.	Low
4. Public funding schemes for projects addressing climate change adaptation/resilience at the coast refer to the WNMP	WG Natural Resources Wales (NRW)	Evidence that public funding/grant schemes for projects that support climate change adaptation/resilience at the coast are citing WNMP policies.	Some direct, albeit limited, examples of WNMP influencing public funding processes and priorities.	Medium
5. Public funding schemes for ecosystem restoration and enhancement projects refer to the WNMP	WG NRW	Evidence that public funding/grant schemes for restoration/enhancement of the coastal and marine environment are citing WNMP policies.	Some direct, albeit limited, examples of WNMP influencing public funding processes.	Medium



Indicator	Evidence source	Description	Progress (RAG)	Confidence
6. Developing the evidence base	WG NRW	Report on the provision and maintenance of WNMP implementation related evidence.	Clear progress in supporting material being made available – Marine Planning Portal, Sector Locational Guidance, Sustainable Management of Marine Natural Resources (SMMNR) Storyboards.	High
7. Spatial marine planning data use	WG	Evidence that plan users are accessing spatial data for use in applications and to support decision-making.	Evidence shows regular access to Marine Planning Portal, SMMNR Storyboards and Sector Locational Guidance, although it is noted there is no benchmark to assess against.	Medium

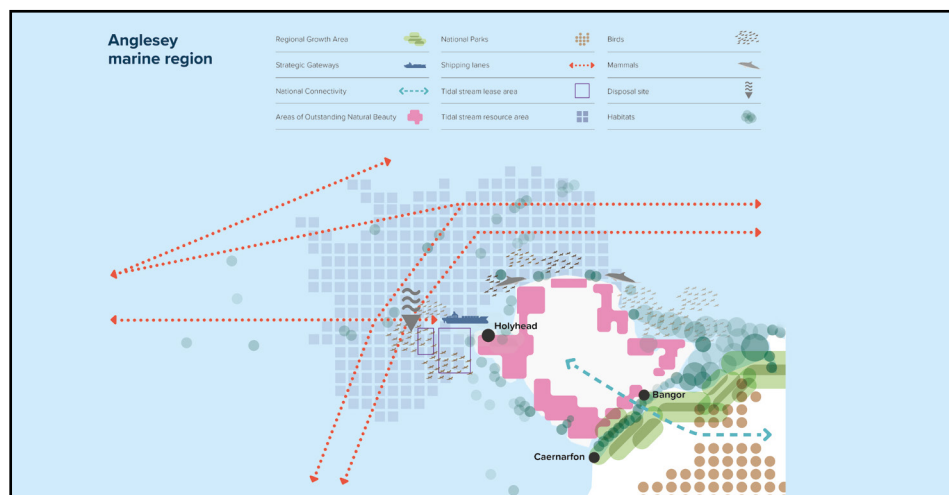
RAG status indicates progress in relation to the activity, output or intermediate outcome that the indicator relates to:

**Green** = positive progress or trends identified, **Amber** = partial progress identified, **Red** = no progress identified.

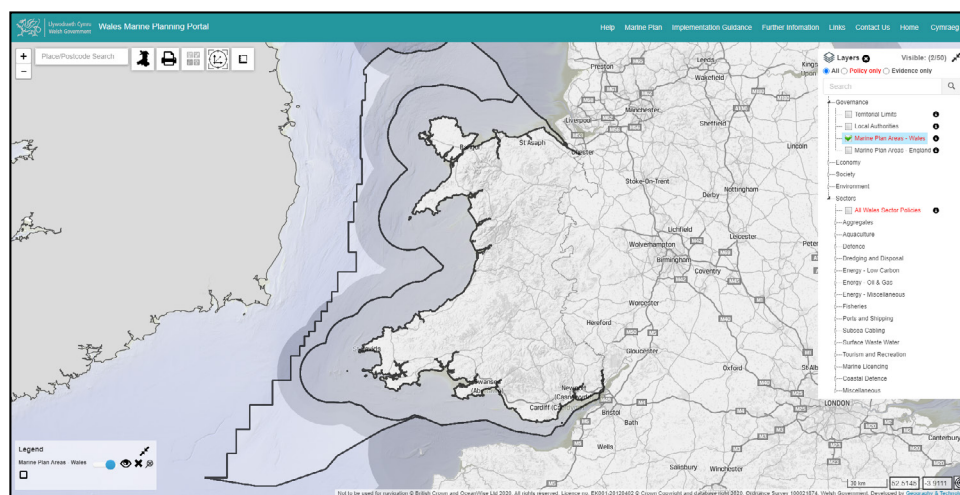
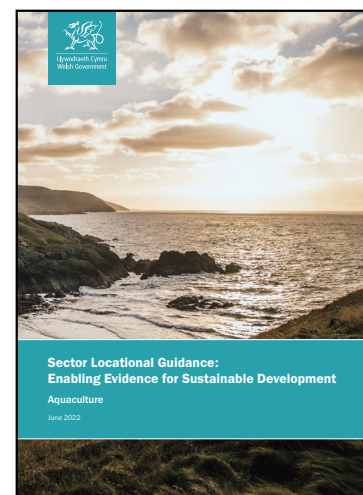
Confidence indicates the level of confidence with which progress against an indicator can be assessed, reflecting factors such as the strength and availability of evidence and the extent to which direct and quantifiable measures can be used.

As the decision-making indicators focus on post-WNMP implementation activity, the baseline is taken as zero at the time of Plan adoption. Broadly, good progress can be evidenced in relation to the decision-making indicators which relate particularly to WNMP objectives around good governance and evidence.

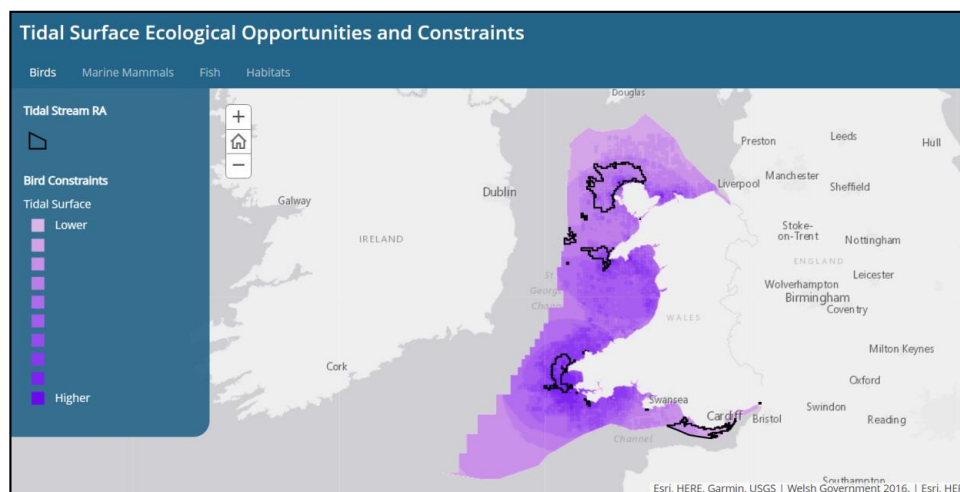
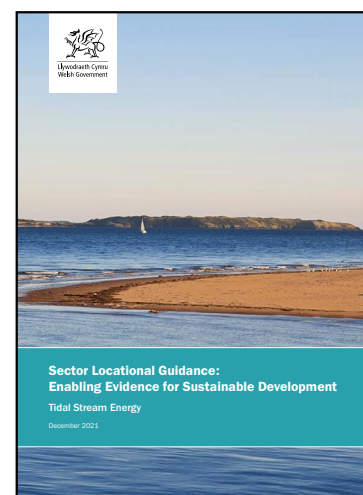
Figure 3: Examples of decision-making material produced to support WNMP implementation



High level representations of spatial considerations



Welsh Government Marine Planning Portal



SMMNR Storyboards  
Source: Welsh Government





### Case Study: NRW Marine Advisory Principles

As a principal advisor on the environment and natural resources, NRW has a key role in implementing the policies in the WNMP through its regulatory, evidence and advisory work.

A key aspect of the WNMP is a focus on proportionality, as the Welsh Government aim is for the Plan to deliver sustainable outcomes in a consistent and efficient way that minimises the burden on its users.

With the help of fellows of the Institute for Environmental Management and Assessment (IEMA) NRW developed a set of advisory principles to help guide its work by embedding a proportionate approach in its marine planning and development advice.

#### **NRW Marine Advisory Principles:**

We aim to provide marine advice that will positively influence policy, planning, development and decision making, to ensure that the marine environment and natural resources of Wales are sustainably maintained, enhanced and used, both now and in the future. Our advice will comply with relevant legislation and be:

1. Proactive, and focused on enabling consideration of key environmental issues and opportunities at an early stage.
2. Clear, concise and mindful of the intended audience.
3. Constructive, timely and consistent.
4. Based on sound science and the best available evidence.
5. Proportionate to the risk of a plan, development or activity.

NRW now uses these principles when formulating marine advice and guidance. The principles have also contributed to a wider programme of further development of the marine advisory service.

### Case study: Proportionality in decision making – Band 1 Marine Licences

To ensure a measured approach to applying the WNMP, the Plan includes policy requiring a proportionate and risk-based approach to decision-making in order to avoid excessive and unnecessary burden upon both regulators and industry.

The NRW Marine Licencing Team, on behalf of the Welsh Ministers, considers all applications for activities in the marine environment which require a marine licence. The range of activities which require a licence is broad, from very large complex projects to smaller, low risk works. To ensure applications are treated in a proportionate way, marine licence applications are designated as Band 1, Band 2 or Band 3 activities. Band 1 activities are considered to be low impact or low risk, for example the deposit or removal of marker buoys or replacement of decking on a pontoon.

Given the small scale of effects likely to result from Band 1 activities, the low-risk nature of the works, and in accordance with Policy GEN\_02 of the WNMP, NRW has pre-screened Band 1 applications. The approach allows NRW to conclude that all Band 1 activities are compliant with the WNMP policies and that, provided certain criteria are fulfilled, no more detailed consideration of the WNMP for these licences is required.

### Case Study: NRW Projects to Support Delivery of Sustainable Management of Marine and Coastal Ecosystems

**Restoring marine and coastal habitats in Wales: identifying spatial opportunities and benefits<sup>3</sup>** – this is a study which identifies locations that may be suitable for restoring six natural and important habitats in Wales: intertidal mudflats, coastal saltmarshes, seagrass beds, horse mussel beds, honeycomb worm reefs and native oyster habitats. The results are a first step towards a possible spatially explicit plan for marine and coastal restoration in Wales which can feed back into future marine planning considerations. The policy support contained within the WNMP for restoration of marine and coastal habitats is recognised by the study.

**Eco-enhancement project** – NRW has been working with ARUP and staff from the Ecostructures Project to look at the feasibility of fitting/retrofitting ecological enhancements to the NRW managed coastal flood defence structures. The project has helped to bring together key evidence and the identification of opportunities and any barriers to delivery. More recently the work has been expanded to work with partners who also manage coastal structures. Coastal Enhancements Guidance and an associated training toolkit has been produced to provide information and demonstrable evidence on the benefits and value for money case of using ecological enhancements in coastal flood defence schemes. The guidance identifies the WNMP as a policy driver for inclusion of enhancements.

<sup>3</sup> [Natural Resources Wales/NRW report identifies essential marine habitats that could be restored](#)  
Evidence Report 554 – available on request from NRW



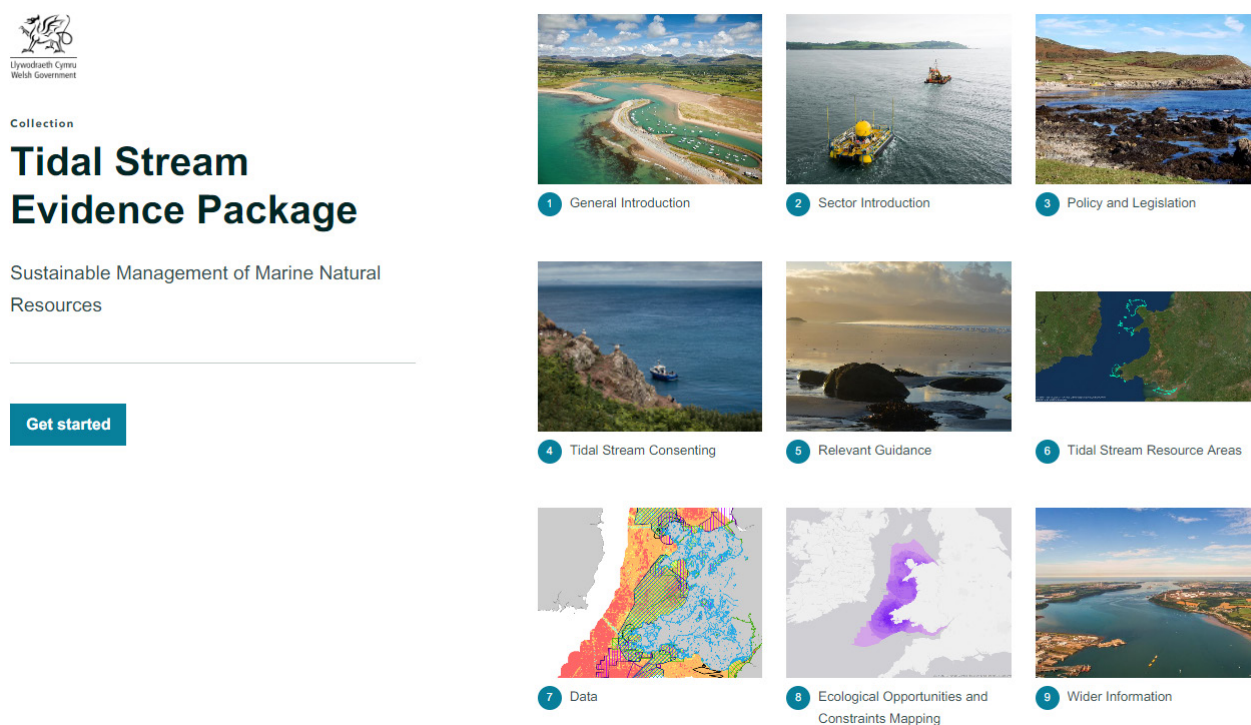
### Case Study: Evidence to support integrated decision-making for Welsh seas

The **Sustainable Management of Marine Natural Resources (SMMNR) project**<sup>4</sup> mapped natural resources and associated environmental sensitivities and considerations in relation to the tidal stream, wave energy and aquaculture sectors. In particular, it examined how the distribution and potential use of resources may relate to Marine Protected Areas (MPAs), and other sensitive habitats and species, while identifying potential opportunities for sustainable development.

The main output of the SMMNR project are online storyboard-style environmental mapping and evidence packages<sup>5</sup> for the tidal stream, wave energy and aquaculture sectors. For each focus sector, the online storyboards present mapping of natural resources and environmental opportunities and associated sensitivities, supported by commentary on key ecological considerations. The storyboards also provide contextual information on relevant policy, legislation and sources of guidance and an overview of consenting, key consents and environmental considerations relevant to the sector.

The SMMNR project received funding through the European Maritime and Fisheries Fund (EMFF, funded by the European Union and the Welsh Government). It is part of wider work to develop a spatial approach to marine planning and implementing the WNMP, increasing our understanding of the spatial distribution of marine natural resources and the associated opportunities and constraints in relation to their sustainable use.

Figure 4: SMMNR storyboards prepared by ABPmer and Welsh Government



Source: ABPmer and Welsh Government

<sup>4</sup> [Sustainable management of marine natural resources | GOV.WALES](https://gov.wales/sustainable-management-of-marine-natural-resources)

<sup>5</sup> [Marine Evidence packages | GOV.WALES](https://gov.wales/marine-evidence-packages)







**Table 2: Objective/policy indicators summary of findings**

Indicator	Evidence source	Description	Progress (RAG)	Confidence
8. Effective activity or resource safeguarding	Public authority decision making	Evidence of where decision making has facilitated consideration of a consented project, established activity or resource safeguarding.	There is limited evidence to date of the impact of safeguarding and coexistence policies upon decision making.	Medium
9. Developing our understanding of Marine GVA in Wales & 10. of Marine Employment in Wales	WG	Summary of understanding of annual Welsh marine GVA and employment for key marine sectors.	Significant data gaps and limitations identified for the data relating to Welsh marine GVA and employment.	Low
11. Scale of renewable energy sector	WG Marine Energy Wales	Report statistics on number and scale of installed renewable energy developments.	Period has seen continued growth and investment in the renewable energy sector as a whole with expansion of existing technologies and emergence of new sectors.	High
12. Volume and value of tourism related visits to the Welsh coast	WG, NRW, Local Authorities (LAs)	Summary statistics on the volume and value of tourism related visits to the Welsh coast.	COVID-19 pandemic has led to significant disruption to the tourism sector during the review period and also affected the availability of data for this indicator.	Medium
13. Recreational use of the marine environment	WG, NRW, LAs	Summary of current state of understanding of recreational use of the marine and coastal environment in Wales.	Currently there is no consistent baseline available for recreational activity for the Welsh marine plan area but work is ongoing to improve the evidence base for this sector.	Low
14. Historic Assets	Public authority decision making	Application of Historic Assets policy in relevant decisions.	Implementation of the heritage policies is being supported by relevant advisory bodies, which is supporting consideration of these policies in decision making by some public authorities.	Medium

Indicator	Evidence source	Description	Progress (RAG)	Confidence
15. Conformance with Shoreline Management Plan (SMP) policies	Public authority decision making	Review of relevant applications and their conformance with SMP policies.	All relevant NRW Marine Licensing decisions for 2021-2022 have complied with SMP policy.	Medium
16. UK Marine Strategy Good Environmental Status (GES)	UK Marine Strategy, WG, NRW	Review of progress towards targets or achieving GES under the UK Marine Strategy for the following descriptors: 16a Invasive Non-Native Species (INNS) 16b Marine litter 16c Status of commercial fish populations.	Baseline data for Welsh marine area identified for these descriptors under the Marine Strategy. Data for the review period is only available for marine litter.	Low
17. Designated site condition assessments	NRW	Review of the outputs of designated site condition assessments.	A baseline for this indicator is available but there is no additional information for the first three-year review period.	Low

RAG status indicates progress in relation to the intermediate outcome or outcome that the indicator relates to:

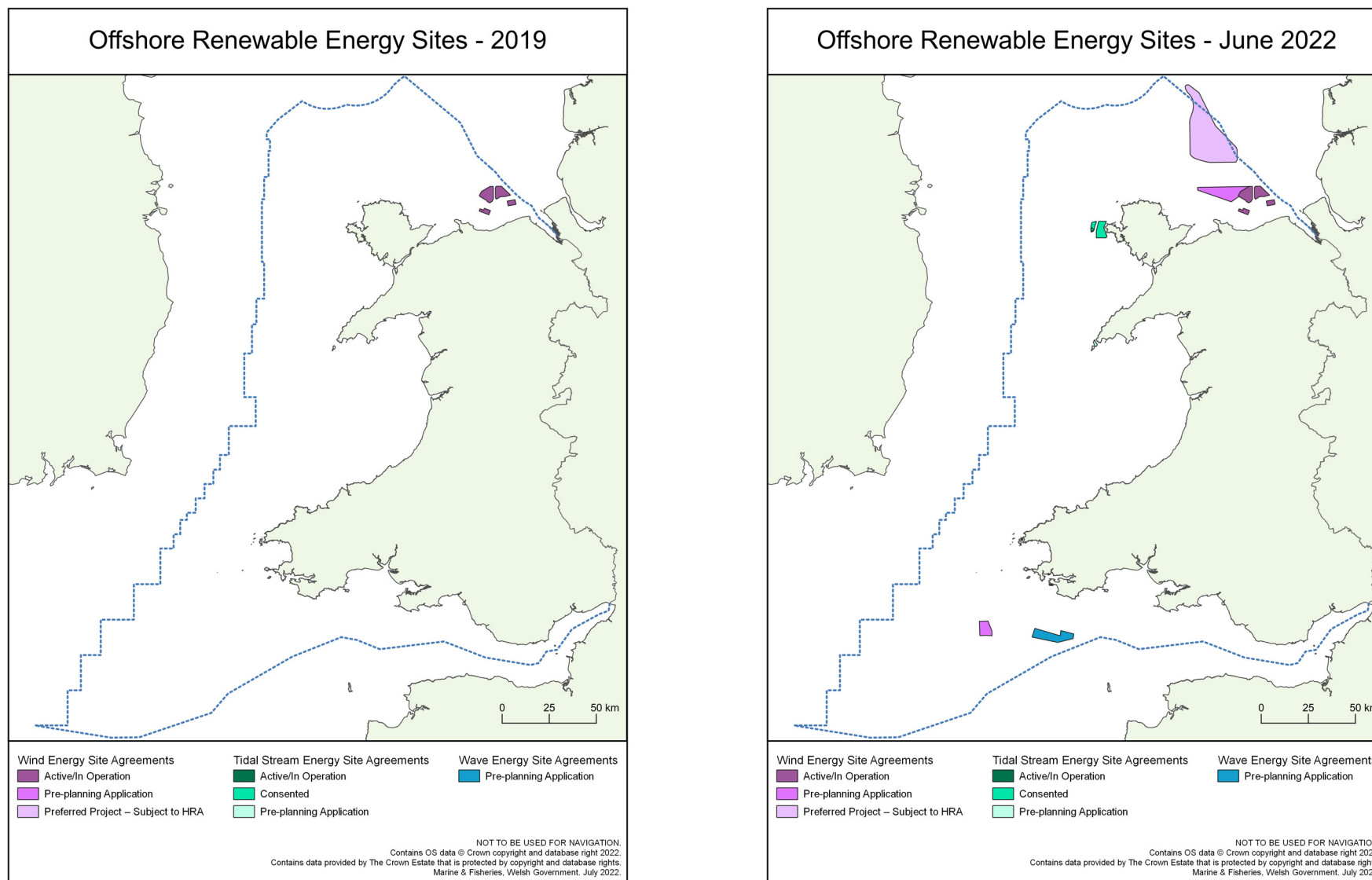
**Green** = positive progress or trends identified, **Amber** = partial progress identified, **Red** = no progress identified.

Confidence indicates the level of confidence with which progress against an indicator can be assessed, reflecting factors such as the strength and availability of evidence and the extent to which direct and quantifiable measures can be used.

Broadly, these objective/policy indicators suggest some progress has been made with respect to outcomes supporting the WNMP objectives for renewable energy, historic environment and coastal adaptation. However, for some policy areas there has been limited progress.



Figure 5: Maps showing location of marine renewable energy developments, leases and demonstration zones 2019 and 2022



Source: Marine and Fisheries, WG, July 2022

### Case study: Seascape Sensitivity to Visual Impacts of Offshore Wind Development in the Welsh Marine Plan Area

The Sustainability Appraisal for the WNMP predicted a potential significant negative impact on landscape and seascape of offshore wind development in the Welsh Marine Area.

In 2018, in preparation for the WNMP and the proposed Round 4 Offshore Wind Leasing round, NRW commissioned a strategic assessment and mapping of areas of visual sensitivity to offshore windfarm development around the coast of Wales. The aim of the project was to improve the evidence base and update guidance to reflect the likely scale of new offshore windfarm developments.

Final outputs were produced in three parts:

1. Visual effects ready reckoner showing the recommended distances from National Parks and Areas of Outstanding Natural Beauty in relation to different turbine heights up to 350m to blade tip.<sup>6</sup>
2. Guidance principles to minimise visual effects of wind turbines in the seascape.<sup>7</sup>
3. Seascape sensitivity assessment for offshore windfarms in Welsh waters.<sup>8</sup>

These reports support Implementation Guidance for the WNMP (paras 112-113) which emphasises that avoiding, minimising and mitigating seascape impact is most effective in the early stages of a project, or in developing plan options.

The Crown Estate Summary Feedback report<sup>9</sup> for Round 4 noted the significant concerns raised in relation to seascape in relation to the Anglesey region. Review of the above evidence provided by NRW resulted in the spatial extent of the Anglesey region being modified significantly, demonstrating how plan level policy and evidence can help support positive sustainable development outcomes.

6 [www.cdn.cyfoethnaturiol.cymru/media/689503/eng-evidence-report-315-seascape-and-visual-sensitivity-to-offshore-wind-farms-in-wales.pdf](http://www.cdn.cyfoethnaturiol.cymru/media/689503/eng-evidence-report-315-seascape-and-visual-sensitivity-to-offshore-wind-farms-in-wales.pdf)

7 [www.cdn.cyfoethnaturiol.cymru/media/689506/eng-evidence-report-330-seascape-and-visual-sensitivity-to-offshore-wind-farms-in-wales-copy.pdf](http://www.cdn.cyfoethnaturiol.cymru/media/689506/eng-evidence-report-330-seascape-and-visual-sensitivity-to-offshore-wind-farms-in-wales-copy.pdf)

8 [www.cdn.cyfoethnaturiol.cymru/media/689508/eng-evidence-report-331-seascape-and-visual-sensitivity-to-offshore-wind-farms-in-wales.pdf](http://www.cdn.cyfoethnaturiol.cymru/media/689508/eng-evidence-report-331-seascape-and-visual-sensitivity-to-offshore-wind-farms-in-wales.pdf)

9 [3994-TCE-R4 Document covers-V7.indd \(thecrownestate.co.uk\)](http://3994-TCE-R4 Document covers-V7.indd (thecrownestate.co.uk))



### Case study: Application of adaptive management to enable deployment of novel renewable energy technologies

The marine environment is complex and dynamic, meaning there are unknowns about impacts from developments. Adaptive management can allow developments to be consented when the environmental effects are less well understood. It is a systematic, iterative approach of “learning by doing and adapting as you learn with appropriate checks and balances to protect the environment”.

For some developments, such as marine renewable energy, adaptive management can enable deployments by helping reduce risks associated with uncertainty. It can also increase our understanding of development effects on the environment. NRW has recently published guidance on using adaptive management for marine developments<sup>10</sup> in support of this approach and in line with WNMP policy.

Morlais is a tidal stream energy Demonstration Zone project, off Holy Island, Anglesey. The project received consent from Welsh Government under the Transport and Works Act and a marine licence from NRW in December 2021. The project is phased and will gradually scale up over time towards a generating capacity of 240MW – monitoring and mitigating any potential effects as it is developed using an adaptive management approach.

As noted in the Ministerial Decision Letter for the Morlais Demonstration Zone<sup>11</sup>, the WNMP provides policy support for sustainable renewable energy projects, whilst also addressing the potential barrier to sustainable growth of the sector given the uncertainty around impacts of novel technologies in the marine environment. The Plan sets out that the use of demonstration zones should be supported and facilitated by using a risk-based approach to consenting, employing adaptive management where necessary and appropriate for the management of impacts that are hard to predict at the point of decision making, in line with WNMP Policy SCI\_01.

<sup>10</sup> [Natural Resources Wales / Using adaptive management for marine developments](#)

<sup>11</sup> [gov.wales/sites/default/files/publications/2021-12/morlais-demonstration-zone-welsh-ministers-decision-letter.pdf](https://gov.wales/sites/default/files/publications/2021-12/morlais-demonstration-zone-welsh-ministers-decision-letter.pdf)

### Case Study: Wales Activity Mapping (WAM)<sup>12</sup>

The Wales Activity Mapping (WAM) project is a study by the Pembrokeshire Coastal Forum (PCF) into the type, distribution and intensity of recreational activities carried out on the South-West Wales Coastline. It includes information on relevant infrastructure and management issues. WAM started in 2008 and was updated in 2019.

The objectives of the project were to:

- obtain a clear understanding of the key recreational activities within the study area;
- determine the scale and distribution of key activities on a site-by-site basis;
- ascertain actual and perceived negative impacts of activities on a site in terms of environment, community and human safety and identify conflicts between users;
- identify the greatest pressures on the resource including impacts on designated sites and protected species;
- provide an indication of likely future trends; and
- identify opportunities for recreation.

Outputs from the project include an online mapping system showing the location and intensity of different recreational activities around the coast. PCF has also utilised the information gathered to undertake a Recreation Impact Study to map the potential cumulative risk to marine conservation features from recreational activities across the south-west of Wales, and also pilot studies looking at the value of individual activities to the local economy.

Partner organisations have drawn upon the evidence set out by the project for a range of uses including:

As the evidence base for the Pembrokeshire Coast National Park Authority (PCNPA) Recreation Plan.<sup>13</sup>

To inform the recreation and access aspects of the Management Plan for the Carmarthen Bay and Estuaries European Marine Site.

Inclusion in the Welsh Government's Destination Management Toolkit looking at sustainable management of tourism destinations throughout Wales.

<sup>12</sup> [www.walesactivitymapping.org.uk/about/](http://www.walesactivitymapping.org.uk/about/)

<sup>13</sup> [www.walesactivitymapping.org.uk/uses/recreation-plan/](http://www.walesactivitymapping.org.uk/uses/recreation-plan/)

### Case study: Using technology to help people learn more about the coastal and intertidal archaeology of the Welsh Coast

The Royal Commission on the Ancient and Historical Monuments of Wales (RCAHMW) has contributed to the recently launched Wales Coast Explorer<sup>14</sup> mobile phone app to help people discover and learn more about the coastal and intertidal archaeology of the Welsh coast. As well as providing information on beaches around Wales and allowing users to track their progress along the Wales Coast Path, the app now provides information on different types of archaeological sites, from shipwrecks to submerged landscapes, as well as highlighting over sixty sites, with more to be added, that can be easily accessed from the Wales Coast Path. It draws on information and images available on Coflein, the RCAHMW's online database, and provides information on how to be responsible around historic assets. The Wales Coast Explorer App also allows users to report any new or unexpected archaeological sites that they see. Public reporting when archaeological remains are newly exposed, or suddenly appear/disappear, is a critical part of managing our shared cultural heritage.





## Conclusions and next steps

Understanding the real-world effect of the WNMP is challenging given the high-level and broad ranging nature of the planning policy it sets out. This is to be expected, given the new nature of the Plan it is anticipated the overall marine management system will take time to realign itself towards plan led decision making. Most evidence available in relation to the effectiveness of the WNMP is qualitative. This is common to other marine plan report findings across the UK.

There is good evidence that progress is being made in Plan implementation including through provision of new spatial tools and planning related guidance. The decision-making indicators were effectively zero at the time of Plan adoption and there is clear indication that progress has been made through provision of supplementary planning material. However, determining the effectiveness of this material in supporting Plan policy is not straightforward. Responses to the user survey indicate a desire for more spatially prescriptive planning that is better aligned with the terrestrial system and which continues to be a driver for evidence gathering particularly in relation to the environment. There is limited evidence that the supporting Implementation Guidance is being regularly applied and the Sector Locational Guidance and other spatial evidence has only recently been made available so any future report may be better able to determine the value of this supporting evidence.

Anecdotally, there are extensive examples of the benefits the WNMP has brought in encouraging collaboration and integration between policy areas and management processes.

In terms of quantifiable change, there is a clear trend that the WNMP is becoming a regular feature in Marine Licence decision making. The WNMP is being increasingly used in decision making by public authorities in relation to marine consenting and there is also good evidence that the Plan is influencing wider approaches to marine management, for example, adaptive management approaches.

Some good practice is emerging in relation to plan led decision making with clear links being made to Plan policies in project level decision making. Planning policy alignment statements are becoming a more regular feature of Marine Licence applications and are a feature of decision reports.

Despite awareness raising efforts and ensuring the user survey was of limited length and complexity, only a relatively small number of responses were received suggesting a limited reach and level of awareness of the Plan amongst the marine community, marine developers and decision makers. Responses were nevertheless revealing.

Plan policies are supporting delivery of Plan objectives, for example, marine renewable energy deployment, but the degree of progress in delivering Plan objectives varies considerably across policies. The final plan Sustainability Assessment predicted the range of effects of Plan policies; it has not been possible to systematically test these predictions at this stage but it will be important to learn what we can from the effectiveness of individual policies in terms of any future policy development.

It can reasonably be concluded the Plan objectives are contributing towards delivery of the HLMOs given the way they are focussed and framed but the degree to which they do so is hard to define.

As the Plan provides a strategic framework, it can be expected to have an increasing effect over time as more prescriptive and specific supplementary material is developed and tested. The supplementary material will have a range of effects from soft evidence provision to support more sustainable decision making to facilitating stronger policy application, for example the introduction of MPNs describing Strategic Resource Areas and giving effect to WNMP spatial policy. There is good opportunity to develop this spatial supplementary planning material to guide and provide greater spatial direction for development. It can also be expected to feed back into future plan development allowing more prescription where appropriate.

There is limited evidence available to enable a clear and precise identification of the effect of the WNMP upon real world outcomes given the range of wider factors which also influence the scale and pace of change in the marine environment. These factors have a strong bearing on the way we use and manage our marine environment including matters such as Brexit, the pandemic, new Government policy, technological change and market forces.

There are clear opportunities to further develop marine planning with some stakeholders of the view that there is a need for further prescription to guide sustainable development. It is recognised that the scale and pace of change in the Welsh marine area is significant with new technologies and demands developing rapidly. This is framed against a nature emergency and the urgent need to protect and recover our seas.

Marine planning has a clear role to play in setting the future direction for our seas, helping us shape the way we use them sustainably by bringing together a diverse range of marine users, managers, regulators and policy makers.

We recognise the calls for stronger intervention and clearer direction which will inevitably involve some difficult conversations and trade-offs but we need to act to ensure our beautiful, spectacular and vulnerable seas provide benefits not only for current but also future generations. In terms of next steps, in the short term our focus remains on supporting Plan implementation and maximising opportunities through our strategic marine planning framework to continue to put in place the wider guidance and evidence providing greater spatial direction for sustainable development.

## Our overall WNMP monitoring conclusions are:

- Most evidence available to allow an understanding of the effectiveness of the WNMP is qualitative; determining cause and effect of the WNMP is challenging.
- There is good evidence that progress is being made in Plan implementation including through provision of new spatial tools and planning related guidance.
- The WNMP is being increasingly applied in decision making by public authorities in relation to marine consenting and there is also good evidence that the Plan is influencing wider approaches to marine management.
- Some good practice is emerging in relation to plan led decision making with clear links being made to Plan policies in project level decision making. Some policies appear to be having a stronger effect than others.
- Only a limited number of responses were received to user surveys, suggesting limited reach and level of awareness of the Plan amongst the wider marine community, marine developers and decision makers.
- There is limited evidence available to enable a clear and precise identification of the effect of the Plan upon real world outcomes given the range of wider factors which also influence change in the marine environment.
- Plan policies are considered to be supporting delivery of Plan objectives, for example, marine renewable energy deployment, but the degree of progress varies. There is reasonable evidence to suggest Plan objectives are contributing towards delivery of the HLMOs.
- As the Plan provides a strategic framework, it can be expected to have an increasingly measurable effect over time.
- There are clear opportunities to further develop marine planning with some stakeholders of the view that there is a need for further prescription to ensure sustainable development. There is opportunity for Welsh Government to issue spatial direction for sustainable development through the strategic planning framework established by the WNMP.