Welsh National Marine Plan Monitoring – Technical Assessments

November 2022

Contents

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1. Monitoring and reporting

1.1 Why Monitor and Report?

Monitoring provides crucial feedback within the cyclical process of evidence-based policy-making. Any future plan-review and policy development should be underpinned and informed by the findings of monitoring.[1]

Section 61 of the Marine and Coastal Access Act (MCAA)[2] sets a legal requirement to monitor and report (at least every three years) on the implementation of marine plans. The purpose being to understand:

- the Plan's contribution to meeting the High Level Marine Objectives (HLMOs) in the UK Marine Policy Statement[3];
- 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.

Alongside the specific reporting duty, Section 54 of the MCAA places a "duty to keep relevant matters under review" and captures a broad requirement to maintain an overview in relation to contextual changes that occur to the plan area.

Further, the Environmental Assessment of Plans and Programmes (Wales) Regulations (2004) specifically require monitoring of the significant effects of implementing the Welsh National Marine Plan (WNMP), including unforeseen adverse environmental effects.

Welsh Government undertook a joint Sustainability Appraisal (SA)/Strategic Environmental Assessment (SEA) process for the WNMP and produced an SA report[4] that includes recommendations for monitoring indicators.

1.2 Approach to monitoring and reporting

A Monitoring and Reporting Framework for the WNMP[5] was published in January 2020. The Framework, developed in collaboration with stakeholders, outlines the approach Welsh Government is following to measure the effectiveness of the WNMP. The approach includes:

- **Marine Plan Decision Making indicators:** assessment of the effectiveness of the WNMP in enabling the achievement of its objectives. This monitoring is focused on the activities, outputs and intermediate outcomes relating to implementation of the marine plan policies.
- **Objective/Policy indicators:** assessing the real-world outcomes or impacts (effects) to which Plan policies contribute. Where relevant, this monitoring also aims to encompass whether Plan policies are having a positive or negative effect on sustainability in line with the SA Report and integrated SEA process undertaken for the WNMP.

1   development-plans-manual-edition-3-march-2020.pdf (gov.wales)
2   Marine and Coastal Access Act 2009 (legislation.gov.uk)
3   UK marine policy statement - GOV.UK (www.gov.uk)
4   gov.wales/welsh-national-marine-plan-sustainability-appraisal
5   gov.wales/welsh-national-marine-plan-monitoring-and-reporting-framework

In developing the approach to monitoring and reporting and the first three-year report, Welsh Government has:

- considered other UK marine plan reviews[6, 7, 8];

- engaged with decision makers and other stakeholders to shape the approach;

- considered options for plan indicators set out in the "Development of Indicators For Monitoring and Reporting of the Welsh National Marine Plan" report[9]; and

- drawn on guidance available for the terrestrial planning system in Wales.

We recognise recent calls for an independent review of the Plan to inform the report and have committed to an independent review to inform the next report.

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6   Marine planning: East Marine Plans three-year progress reports - GOV.UK (www.gov.uk), Three year technical report on the South Inshore and South Offshore Marine Plan - GOV.UK (www.gov.uk)

7   www.gov.scot/publications/national-marine-plan-review-2018-three-year-report-implementation-scotlands/, national_marine_plan_review_2021.pdf

8   assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/924176/MMO1151_Report_final_200929__002_.pdf

9   gov.wales/welsh-national-marine-plan-development-indicators-monitoring-and-reporting

2. Results of the first three-year review of the WNMP

2.1 Decision making indicators

The purpose of the WNMP is to guide the sustainable development of the plan area. It sets out how proposals will be considered by public authorities (PAs) in making decisions which may affect the plan area. Overall, the desired change intended through marine planning is to shift marine management away from what can be described in this context as a reactive and segmented approach, to being more strategic, integrated and 'plan-led'. The benefits of plan-led marine management are articulated via the UK HLMOs, in particular, under the themes of **Promoting good governance** and **Using sound science responsibly**.

The effectiveness of the WNMP in driving a move towards a plan-led system has been assessed using indicators and information related to **marine plan decision making monitoring**, which aims to answer two key questions: is the WNMP being used and is the necessary support for marine plan-decision making in place and effective?

Table A1 lists the indicators for this part of the assessment and their associated RAG status which indicates progress in relation to the activity, output or intermediate outcome that the indicator relates to.

Table A1: Marine plan decision making monitoring indicators

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 Table A2).	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 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 up-to-date WNMP implementation related evidence.	Clear progress in making supporting material available – Marine Planning Portal, Sector Locational Guidance, and 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 noted no benchmark to assess against.	Medium

In the following section, we present our detailed findings for each indicator including our view on overall progress in the form of a **Red**, **Amber**, **Green** **(RAG) status** which is also presented in Table A1 and indicates:

Red = no progress identified

Amber = partial progress identified

Green = positive progress or trends 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.

Indicator 1: Guidance available

Progress: Green

This indicator covers progress in provision of guidance to support the WNMP. Information on the extent to which guidance is being applied and stakeholders' perceptions on the usefulness of the guidance is covered by indicator 5. The baseline for this indicator is zero at the point of Plan adoption.

The Welsh Government has published a number of non-statutory guidance documents (Table A2) post Plan adoption. In particular, Plan Implementation Guidance (June 2020) provides information to guide the practical application of WNMP policy. In addition, other departments in Welsh Government have included reference to the WNMP in their guidance.

Web analytics shows the Implementation Guidance document is the most frequently viewed of the guidance documents with 376 views from 248 unique users between June 2020 and June 2022.

In Wales, marine planning and licensing are carried out by different bodies, with NRW carrying out marine licensing on behalf of The Welsh Ministers. NRW also has a range of other decision making and advisory functions that the WNMP relates to, and, as such, has a key role to play in Plan implementation (see case study: NRW Marine Advisory Principles).

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 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.

Evidence from this first three-year review period shows progress being made by Welsh Government and NRW in identifying the need for and producing guidance for the WNMP. We also recognise that more work is needed to identify if/how other plan users are incorporating the Plan into relevant guidance.

Table A2: WNMP supporting products

Welsh Government	Title
Marine Planning Guidance documents	• Welsh National Marine Plan: Overview • Welsh National Marine Plan: Vision, Objectives and Policies • WNMP Implementation Guidance • Considering marine plans in Terrestrial Planning Permission (infographic) • WNMP Stakeholder Mapping Report • Sector Locational Guidance (tidal stream, wave energy & aquaculture) • A review of the potential for co-existence of different sectors in the Welsh Marine Plan Area
Other Marine Planning communications	• Marine planning newsletter: Issue 1 – 18 online • Marine Planning webinars: Recorded webinars to explain key areas of the Marine Planning process and WNMP
Other WG Depts Marine Planning related documents	• Managing the Marine Historic Environment of Wales (Cadw, 2020): explains the Welsh Government's approach to the marine historic environment and offers best-practice guidance for its protection and management • Development Plans Manual, 3rd Edition (March 2020): now contains having regard to the WNMP as one of the "tests of soundness" for new Local Development Plans • Planning Policy Wales Edition 11, Feb 2021 and Technical Advice Note (TAN) 15: Development, Flooding and Coastal Erosion Risk, December 2021* (*N.B. paused until 2023), refers to the WNMP and the need for decision makers to take account of the Plan when considering development planning at the coast
NRW	
	• The relationship between the Environment (Wales) Act and the marine planning process in Wales • Marine Advice Principles, Nov 2019 – relates to SCI_01 policy • Internal Briefing notes on WNMP for NRW staff (Notes 1 – 3, June and November 2019) • GN059: Principles supporting restoration and enhancement in marine or coastal development proposals – relates to ENV_01 policy • Position on Sustainable management of marine and coastal sediment – relates to the D&D_01 policy but also ENV_01, _02 and SOC_09 • Marine Licensing Handbook – in production
Other Bodies	Maritime and Coastguard Agency – has raised awareness of the Plan internally and included a statement in its standard templates for various consultation types

Indicator 2: Application of WNMP policy in relevant decisions by public authorities

Progress: Green

WNMP policies take effect through decision making. This indicator assesses how effectively the WNMP is being taken account of by applicants and decision makers. The baseline for this indicator is zero at the point of Plan adoption.

As set out in the Monitoring and Reporting Framework, the scope of evidence to inform Indicator 2 will broaden over time, with an initial focus for this reporting period on NRW Marine Licensing decisions made under S58.1 of MCAA[10].

Evidence on this indicator has been gathered in relation to NRW Marine Licensing by reviewing marine plan 'compliance assessments' where they have been provided by an applicant or through other application documents, e.g. environmental statements, and marine licence decision documents.

In preparation for Plan adoption, the WNMP was added as a consideration to the marine policy section of the Marine Licensing Decision Documents, training materials for licensing officers were developed and delivered and a WNMP compliance form was developed and provided to applicants on request.

Our analysis of NRW Marine Licensing Team (MLT) applications and decisions shows:

Band 3 Licences

No WNMP compliance information was provided by applicants for the **Band 3 licences** determined in 2020, although all licence decisions were deemed to comply with the Plan by the NRW MLT. This is likely to reflect, in part, that some applications were submitted prior to Plan adoption.

In 2021 and in quarter 1 of 2022, all Band 3 applications included WNMP compliance information, the vast majority of which came in the form of a policy compliance table. According to Decision Documents for these applications, all Band 3 licences issued were deemed to comply with the WNMP.

Band 2 Licences

In 2020/21, only one Band 2 project proposer provided WNMP compliance information with their application. Nevertheless, all licence decisions for this period were deemed to comply with the marine plan by the NRW MLT.

In the period from January to May 2022, half of the Band 2 licence applications determined provided WNMP compliance information in the form of a completed policy compliance table, which indicates an improving trend in uptake of the approach whilst also reflecting the breadth of projects that fall into Band 2, i.e. ranging from relatively small scale maintenance works to projects that just fall outside of the larger Band 3 category.

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10   www.legislation.gov.uk/ukpga/2009/23/section/58

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 MLT, 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 have 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.

Other decision makers

An example of another decision maker applying the WNMP to inform consideration of an application is The Welsh Ministers' approval of the Morlais Demonstration Zone Order in December 2021 under sections 3 and 5 of the Transport and Works Act 1992[11].

As set out by the WNMP, as part of the determination, significant weight was given to Welsh Government's targets to increase renewable and low carbon energy generation and the support for the tidal stream energy sector set out in policy ELC_03. This policy includes specific support for demonstration zones, "...facilitated by using a risk-based approach to consenting, employing adaptive management where this is necessary and appropriate for the management of impacts that are hard to predict at the point of decision making in line with Policy SCI_01".

The WNMP was also highlighted in the decision letter in relation to seascapes whereby the relevance of policy SOC_07: Seascapes is noted but balanced against the acknowledgement elsewhere in the Plan that over the lifetime of the WNMP there is likely to be ongoing change to the seascape character of Wales, resulting most prominently from further marine renewable infrastructure, particularly off the North Wales and South Wales coasts and that these changes are *"...an inevitable result of our ambition for marine renewable energy to make an increasingly significant contribution to the overall energy mix"*.

11   gov.wales/sites/default/files/publications/2021-12/morlais-demonstration-zone-welsh-ministers-decision-letter.pdf

Other Plans – Local Development Plans (LDPs)

The March 2020 version of the Local Development Plan Manual lists having regard to the WNMP as one of the "tests of soundness" for new LDPs.

The COVID-19 pandemic has delayed finalisation and adoption of some LDPs but of those that have been drafted and/or examined since WNMP adoption, all LDPs with coastal areas have addressed the WNMP in their self-assessed soundness tests. The only LDP with an inspectors report available at the time of writing shows the inspector noted adoption of the WNMP in November 2019 and "considered that the Replacement LDP in question accords with the requirements of the Marine Plan".

The main policy areas planners considered relevant for consideration in terms of LDPs and the WNMP were climate change adaptation, flood risk, and protection of the natural environment.

Overall, therefore, good progress is being made towards the use of WNMP policies in marine licensing and ministerial decisions, but we recognise the need to develop this further for other relevant decisions, e.g. certain Town and Country Planning decisions.

Indicator 3: Stakeholder views on WNMP effectiveness informed by user survey

Progress: Amber

This indicator aims to understand awareness and use of the WNMP and its supporting materials, as well as users' views on how the Plan is performing.

An initial User Survey was conducted a year after WNMP publication, to establish a baseline for future surveys and inform future monitoring and reporting. The survey was targeted at stakeholders from across the marine sector and a second survey was conducted in May 2022.

Both surveys had low uptake in terms of number of responses received (25 and 18 respectively), meaning caution must be applied to any conclusions drawn from the survey data at this stage.

For both surveys the majority of respondents had at least some awareness of the WNMP and over half confirmed that their organisation used the WNMP in carrying out their duties. Respondents were asked what other resources they had used alongside the WNMP. The most common responses to this question were the Welsh Government Marine Planning website, The Wales Marine Planning Portal and the WNMP Implementation Guidance.

Some of the common themes in responses to questions on the effectiveness of the Plan were:

- a desire to see more spatially prescriptive marine planning that is more similar to and aligned with the terrestrial system;
- the need to address unregulated activities more effectively; and
- recognition of and support for the evidence Welsh Government has provided to accompany the WNMP, but also a need for further evidence to reduce consenting risk for developers and ensure the environment is protected.

Welsh Government has committed to an independent review of the WNMP to inform the next monitoring report[12] and we anticipate that this will take the place of User Surveys in providing an assessment or summary of stakeholder views on the marine plan.

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12   Welsh Government response to the Committees Report on the Welsh Governments Marine Policies.pdf (Senedd.Wales)

Indicators 4 and 5: Public funding schemes for projects addressing climate change adaptation or ecosystem restoration and enhancement refer to the WNMP policies

Progress: Amber

Availability of public funding for projects addressing coastal adaptation to climate change and/or restoration and enhancement of marine ecosystems will support implementation of WNMP objectives 8, 9 and 11. Indicators 4 and 5 consider whether the policy support in the WNMP for projects of this type is known and acknowledged as part of the funding schemes' decision-making process. The baseline for these indicators is zero at the point of Plan adoption.

Funding bodies update scheme documentation from time to time, so progress against this indicator is likely to take time to take effect.

An example of WNMP policy support for projects addressing coastal adaptation and ecosystem resilience is the Marine Area Statement (MAS)[13], published by NRW in 2020. The MAS outlines opportunities and actions needed for improving the sustainable management of the Welsh marine and coastal environment for the benefit of future generations. Priorities were identified collaboratively, with stakeholders, including the Welsh Government Marine Planning Stakeholder Reference Group, with whom the "Making the Most of Marine Planning" actions were developed.

The MAS recognises funding as a key tool in achieving sustainable management of marine and coastal ecosystems and work is ongoing to address this through actions identified under its **Resilient Marine Ecosystems** and **Coastal Adaptation** themes. Grants have been awarded using these MAS themes as a key driver in funding decisions.

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13   Natural Resources Wales/Marine Area Statement

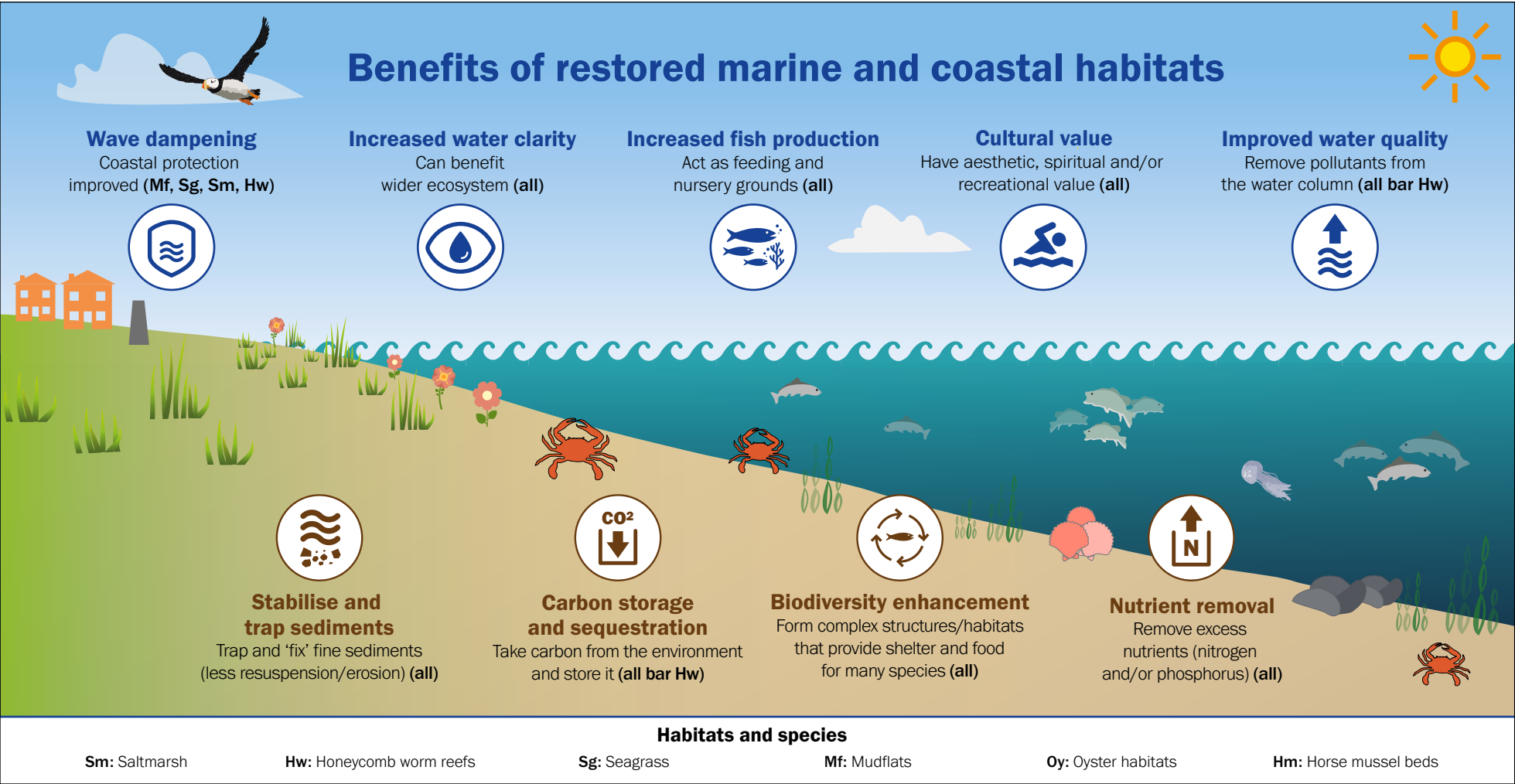**Case Study: NRW Projects to Support Delivery of Sustainable Management of Marine and Coastal Ecosystems**

Restoring marine and coastal habitats in Wales: identifying spatial opportunities and benefits[14] – 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 (see Figure A1). 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.

In terms of the effect of policy support set out in the WNMP for projects addressing coastal adaptation or restoration/enhancement of marine and coastal ecosystems, there is more work to be done to identify relevant funding mechanisms and raise awareness of the Plan with funding bodies, e.g. in relation to applications for the £2 million Resilient Communities grant programme launched in 2022.

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14   Natural Resources Wales/NRW report identifies essential marine habitats that could be restored - Evidence report 554: available from NRW on request

Figure A1: Summary image on ecosystem service benefits of restored marine and coastal habitats (source: Armstrong, S., Pearson, Z., Williamson, D., Frost, N., Scott, C. 2021. Restoring marine and coastal habitats in Wales: identifying spatial opportunities and benefits. NRW Evidence Report No: 554, 96pp, NRW, Cardiff)

Benefits of restored marine and coastal habitats

Wave dampening
Coastal protection improved **(Mf, Sg, Sm, Hw)**

Increased water clarity
Can benefit wider ecosystem **(all)**

Increased fish production
Act as feeding and nursery grounds **(all)**

Cultural value
Have aesthetic, spiritual and/or recreational value **(all)**

Improved water quality
Remove pollutants from the water column **(all bar Hw)**

Stabilise and trap sediments
Trap and 'fix' fine sediments (less resuspension/erosion) **(all)**

Carbon storage and sequestration
Take carbon from the environment and store it **(all bar Hw)**

Biodiversity enhancement
Form complex structures/habitats that provide shelter and food for many species **(all)**

Nutrient removal
Remove excess nutrients (nitrogen and/or phosphorus) **(all)**

Habitats and species

Sm: Saltmarsh   **Hw:** Honeycomb worm reefs   **Sg:** Seagrass   **Mf:** Mudflats   **Oy:** Oyster habitats   **Hm:** Horse mussel beds

Indicator 6: Developing the Evidence Base

Progress: Green

The ongoing development and maintenance of an accessible marine planning evidence base will improve our knowledge of our seas, inform their sustainable use and enable effective implementation of marine planning. It will also enable the further development of marine planning over time. Indicator 6 considers the extent to which up to date evidence is available and accessible by reporting on the provision and maintenance of WNMP related evidence.

The available evidence base for the WNMP at Plan adoption comprised of the Wales Marine Planning Portal, Wales Marine Evidence Report, Habitats Regulations Assessment and Sustainability Appraisal reports.

Welsh Marine Evidence Report

The baseline evidence used to develop the WNMP was set out in the Wales Marine Evidence Report (WMER)[15]. The WMER was an important step in the process of evidence based marine planning. Its core aim was to assess the spatial and temporal distribution of natural resources and human activities within Wales's marine area and to help understand the key issues that marine planning should consider.

Following adoption of the WNMP, an update to the WMER was published in 2020[16]. The update comprises the first full review of changes to the evidence base since 2015 and focuses on new evidence published since 2015.

Marine Planning Portal

The Marine Planning Portal[17] is an interactive mapping tool for Welsh waters. It shows human activity and marine natural resources via layers organised under the WNMP structure. The portal helps bring about the coordination of information and evidence so that decision makers, planners, developers and all other sea users and stakeholders can have access to the same data when considering the management of the Welsh marine area.

There were 321 layers on the Marine Planning Portal at the time of Plan adoption increasing to 384 layers by June 2022. Most new layers relate to additional environmental information and fisheries data. Layers showing evidence with lower confidence have been removed. During the period, improvements in performance and reliability have been made because of a move to DataMapWales infrastructure. Also, more detailed metadata (inotes), including licensing restrictions and links to source datasets has been included and the user interface improved.

Other relevant evidence

Since the WNMP was adopted, Welsh Government has worked with marine and coastal stakeholders to produce, through the strategic planning framework established by the WNMP, evidence reports supporting marine planning. These include:

- **SMMNR storyboards**[18] (see case study: Evidence to support integrated decision-making for Welsh seas).
- **Sector Locational Guidance**[19] – compilation of enabling evidence to support sustainable development of the Wave and Tidal Stream Renewable Energy and Aquaculture sectors.

15 Wales marine evidence report (WMER) | GOV.WALES
16 Update to Wales marine evidence report: January 2020 | GOV.WALES
17 Marine planning portal | GOV.WALES
18 Marine Evidence packages | GOV.WALES
19 Sector locational guidance project | GOV.WALES

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

The **Sustainable Management of Marine Natural Resources (SMMNR) project**[20] 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 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 Welsh National Marine Plan, increasing our understanding of the spatial distribution of marine natural resources and the associated opportunities and constraints in relation to their sustainable use.

Figure A2: SMMNR storyboards prepared by ABPmer and Welsh Government
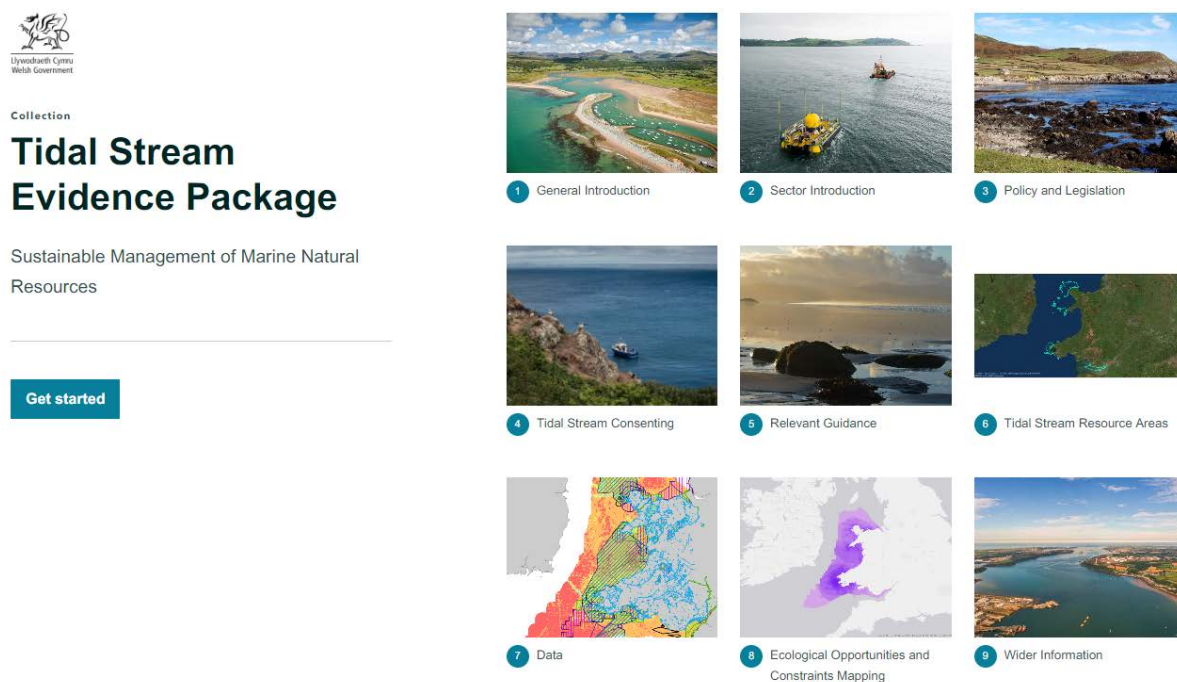
20 Sustainable management of marine natural resources | GOV.WALES

Welsh Marine Evidence Strategy

The joint Welsh Government and NRW Welsh Marine Evidence Strategy (WMES)[21], outlines high-level strategic marine evidence priorities to support marine policies and plans in Wales. The strategy provides a framework for collecting evidence including research and development, monitoring and surveillance, and secondary analysis and synthesis, whilst improving collaboration.

Evidence needs are identified under each of the HLMO themes. Welsh Government has recently produced a 2021 Progress Report for the WMES which provides on overview of progress.

Indicator 7: Spatial marine planning data use

Progress: Green

Indicator 7 relates to the effectiveness of the evidence base produced in support of the WNMP, i.e. are plan users accessing spatial evidence and data for use in applications and decision-making?

For the current review period, we are only able to gather quantitative information on web page views of WNMP-related data and evidence produced by Welsh Government and a small sample of feedback (via the User Survey) on how useful these products are.

Wales Marine Planning Portal

2020/21 User survey: 31% of respondents to the survey had used the Portal.

2021/22 User survey: 66% of respondents to the survey had used the Portal suggesting a positive increasing trend.

Analysis of web analytics for the Portal for the period November 2019 to November 2020 show an increase for all statistics, with 82% of views being new users.

In the period from December 2020 to June 2022, unique views have tended to level off and are generally lower year on year, with 50% of unique views being returning users.

Comparing 2022 statistics for the year-to-date with the previous year, the average amount of time spent on the Portal has increased from 2 minutes to 15 minutes.

Other marine planning evidence outputs

Marine plan related evidence produced by Welsh Government including the WMER Update, Sector Locational Guidance and SMMNR Storyboards show similar patterns in web analytics, i.e. a peak in views shortly after publication decreasing thereafter to a constant lower level of around 10 page views a month by unique users.

Examples of feedback on WNMP evidence products gathered from the User Surveys include:

"The Planning portal is useful and interesting tool to use. The sector locational guidance is a good idea".

"Very helpful resource"

"The Wales Marine Planning Portal is user friendly and intuitive to use, and the site also provides a good level of information. While the links to supporting guidance and other materials are welcomed (including to the WNMP) it might be helpful to have plan policy text within the portal to remove the need to leave the site to read which policies are of relevance in a given area."

2.2 Objective/Policy monitoring indicators

The second aspect of the monitoring framework is **Objective/Policy monitoring indicators**, which involves assessing real-world outcomes/ impacts (effects) to which policies (related to a number of Plan objectives) contribute.

Unlike the indicators in section 2.1, these indicators are:

- Subject to a wide range of external influences (see section 3) making it difficult to show attribution to any single influencing factor.
- Expected to take time to become apparent and more quantifiable.

In designing indicators for policy/objective monitoring, consideration was given to potential for overlapping policy effects, e.g. between sectoral supporting policies and the coexistence (ECON_02) and safeguarding (SAF_01) policies, all of which may contribute to the increased productivity of a particular sector. Whilst some policies may contribute to delivery of multiple objectives (see Table 3 of the WNMP), for the purposes of developing a focused and proportionate set of indicators, each policy was mapped against the primary objective it will deliver against.

Our approach applies the principle of **using existing information where possible**, to avoid unnecessary duplication or confusion with other monitoring and reporting processes. It is recognised that data availability is scarce for some topics e.g. socio-economic data.

Table A3 lists the indicators for this part of the assessment and their associated RAG status which indicates progress in relation to the intermediate outcome or outcome to which the indicator relates.

Table A3: 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 consented project, established activity or resource safeguarding.	There is limited evidence from this review of the impact of safeguarding and coexistence policies upon decision making.	Medium
9. Developing our understanding of Marine GVA in Wales 10. Marine Employment in Wales	WG	Summary of understanding of annual Welsh marine GVA and employment for key marine sectors.	Significant data gaps and limitations were identified for the currently available 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.	Over the review period there has been continued growth and investment in the renewable energy sector with expansion of existing technologies and the 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 affected the availability of data for this indicator.	Medium

Indicator	Evidence source	Description	Progress (RAG)	Confidence
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 whole 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 polices is being supported by relevant advisory bodies which is supporting consideration of these policies in decision making by some public authorities.	Medium
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 2021/22 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 the Welsh marine area has been identified for these descriptors under the Marine Strategy. Data for the three-year review period was only available for marine litter.	Low

Indicator	Evidence source	Description	Progress (RAG)	Confidence
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

In the following section, we present our detailed findings for each indicator including our view on overall progress in the form of a **Red**, **Amber**, **Green** **(RAG) status** which is also presented in Table A3 and indicates:

Red = no progress identified

Amber = partial progress identified

Green = positive progress or trends 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.

Indicator 8: Effective activity or resource safeguarding

Progress: Amber

This indicator considers the effectiveness of the WNMP in supporting management of multiple uses by identifying where marine plan-led decision making has facilitated consideration of co-existence and/or safeguarding of resources. For the review period we are only able to gather quantitative information by reference to Marine Licensing applications/decisions and feedback via the 2nd User Survey. For the next review period we hope to be able to broaden this understanding.

Review of Marine Licence applications determined in the review period found only three instances of safeguarding policies being expanded upon in applicant's policy compliance assessment or supporting documents. In each case, the applicant had either set out proposed mitigation measures to safeguard other sectors or amended their proposal following stakeholder/community engagement.

The WNMP User survey includes a question on… "Since adoption of the Welsh National Marine Plan, to what extent do you agree or disagree that the Welsh National Marine Plan has been a factor in guiding consideration of the following objectives…" including "Management of multiple uses of the Welsh marine area, either through coexistence or sector safeguarding"

2021 Survey: 36% respondents agreed, 14% disagreed, 41% didn't know.

2022 Survey: 50% respondents agreed, 16% disagreed, 33% didn't know.

Welsh Government has recently prepared draft 'Technical Statements' for the Ports and Shipping and Recreational boating sectors. The aim of these technical statements is to promote safeguarding provided through policy SAF_01 by highlighting areas of importance to the sectors, and considerations for developers and regulators when implementing the WNMP safeguarding policy.

The WNMP makes provision for the identification of Strategic Resource Areas (SRAs) to identify and safeguard key areas with potential for future sustainable use. Welsh Government has initiated work to map SRAs[22], with a focus on emerging marine renewable technologies (tidal, wave and floating wind), aggregates and aquaculture and anticipates consulting on any potential SRAs during the first half of 2023. Stakeholder input has informed and underpinned the approach.

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22   Proposed approach to developing Strategic Resource Areas to support implementation of WNMP safeguarding policy (gov.wales)

Indicators 9 and 10: Summary of current state of understanding of annual Welsh marine GVA and employment for key marine sectors and actions taken to improve knowledge in this area

Progress: Amber

Any assessment of whether the WNMP objective relating to employment and the economy is being achieved will require a robust baseline and reliable and repeatable data sources to measure progress. Previous research (for example[23, 24, 25]) has highlighted the challenges of gathering data relating to the marine economy of the UK, including difficulty in disaggregating data to the devolved administration level, a lack of distinction in some cases between marine and terrestrial activities and the lack of specific standard industrial classification (SIC) of economic activities codes for marine sectors.

In the first instance, therefore, these indicators focus on assessing the current state of understanding of the contribution of marine and coastal sectors to employment and the economy, against which future progress can be measured.

An evaluation of available data to establish a baseline in respect of GVA and employment concluded:

- that there continue to be significant data gaps;

- available data was largely unreliable due to age and/or not disaggregated;

- for GVA, aquaculture, defence and fisheries were the only sectors where sufficient data had been collected to inform a baseline; and

- for employment, shipping was the only sector where sufficient data had been collected to inform a baseline.

COVID-19 and the economy

In 2020, real gross domestic product (GDP) for the UK is estimated to have decreased by 9.7% on account of the widespread economic impact of the coronavirus (COVID-19) pandemic[26]. Of the four countries in the UK, Wales saw the largest decline in real GDP of negative 11.2% between 2019 and 2020. More recent data[27] indicates that GDP in Wales is recovering to at or near pre-pandemic levels for the sectors grouped under the headings of market services, with production and construction recovering at a slightly slower rate.

This review of the WNMP cannot fully take account of impacts to the economy and employment linked to the marine area due to the COVID-19 pandemic, as the full picture continues to emerge.

Alongside the GVA and employment indicators it is also important to consider evidence in relation to changes in sector activity in the context of the WNMP sector supporting policies. Over the review period, the following broad patterns have been observed for sectors (excluding renewables and tourism and recreation, which are described under indictors 11 & 12) operating in the Plan area:

- Aggregates – largely maintenance of the status quo; no issues raised relating to the sustainable development of the sector although as noted in the Sustainability Appraisal for the WNMP, this sector relies on use of a non-renewable resource.

23 MMO1119_-_Economic_baseline_assessment_for_the_North_East__North_West__South_East_and_South_West_marine_plans_final_report.pdf (publishing. service.gov.uk)

24 The marine economy of the United Kingdom – ScienceDirect

25 www.sudg.org.uk/wp-content/uploads/2019/08/ABPmer-soc-econ-SUDG-1.pdf

26 Regional economic activity by gross domestic product, UK - Office for National Statistics (ons.gov.uk)

27 Short-term output indicators: October to December 2021 (gov.wales)

- Aquaculture – no significant expansion of the sector is apparent other than some recent applications for seaweed aquaculture.

- Dredging and Disposal – no major new operations have been undertaken during the review period; a review of disposal site characteristics has been published by WG.

- Oil and Gas – no new development has occurred in the Plan area. There is ongoing use of non-renewable oil and gas through existing operations.

- Fishing – Brexit and COVID-19 have resulted in significant challenges for the fishing sector. There is some evidence of increased tensions between fishing operations and proposals for expansion of marine renewable energy in the Plan area.

- Ports and Shipping – largely maintenance of the status quo other than a notable impact resulting from Brexit. No new major port development has occurred during the review period although recent announcements relating to floating wind in the Celtic Sea highlight the potential need for more port facilities to accommodate construction and maintenance activities. Holyhead Port received consent to develop and funding was announced for Pembroke Port Marine to support marine renewable energy developments.

- Subsea Cabling – the number of cables, both interconnectors and connecting to new marine renewable energy development, is increasing in number; a marine licence was granted for the Greenlink interconnector, with construction planned for 2022.

Indicator 11: Scale of renewable energy sector

Progress: Green

This indicator identifies evidence on the number and scale of renewable energy developments in Welsh waters, to determine how the WNMP is supporting the sustainable development of the sector.

Baseline

Baseline information for this indicator was taken from the 2019 Marine Energy Wales (MEW) State of the Sector report[28], the Crown Estate's Offshore Wind Operational Report (2019)[29] and consenting information from NRW Marine Licensing and the Planning Inspectorate.

Prior to adoption of the WNMP in November 2019, installed capacity of Offshore Wind Farms in Welsh waters in 2019 was 726 MW (comprised of: Gwynt y Môr = 576MW, Rhyl Flats = 90MW, North Hoyle = 60MW).

A total of 16 marine energy developers were actively progressing projects in Wales with seabed agreements in place for over 350 MW of marine energy sites. An estimated £96.2 million had been spent to date in Wales on the development of the marine energy industry, with a number of international wave and tidal developers having relocated their headquarters to Wales. NRW issued one marine licence for a renewable energy development project in 2019 prior to Plan adoption, which was for the Bombora 1.5MW mWave Pembrokeshire Demonstration Project.

Review period (2020 – 2022)

No new offshore wind installation has taken place in Welsh waters in the review period but there have been a number of significant developments in this sector – agreements for lease have been secured for the Awel y Môr extension project (>500 MW) and the Round 4: BP/EnBW project (1.5 GW) which is located mainly in the Welsh Offshore area[30].

The Crown Estate have also published details of plans for floating wind leasing in the Celtic Sea with **a focus on two key project categories: full-commercial scale projects of up to 1GW, and smaller early-commercial scale projects (of circa 300-350MW)**. The leasing process could see rights awarded by the end of 2023, with projects delivered from 2030 into the early part of the next decade.

The Crown Estate is also supporting pre-commercial, smaller projects, which are an important part of developing new technologies for a range of seabed conditions and locations including:

- The proposed 96MW Erebus floating wind project, in the Welsh waters of the Celtic Sea (Marine Licence Application received by NRW in December 2021)
- The Llŷr 1 and Llŷr 2 projects, comprising two separate 100MW sites, located to the south of Pembroke on the Welsh coast.

NRW issued 2 marine licences for renewable energy projects in 2020 and 2021 which were for the META testing site in Pembrokeshire and for the Morlais tidal stream Demonstration Zone off Anglesey respectively. Changes in the distribution of marine renewable energy over the review period are shown in Figure A3.

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28 State of the Sector 2019 | Marine Energy Wales
29 offshore-wind-operational-report-2019.pdf (thecrownestate.co.uk)
30 offshore-wind-operational-report-1.pdf (thecrownestate.co.uk)

Information in the 2021 Marine Energy Wales (MEW) State of the Sector Report[31] indicates that 2020 and 2021 have seen continued growth and investment in the sector with expansion of existing technologies and the emergence of new sectors:

- The number of marine energy developers actively progressing projects in Wales increased to 20;

- 465 MW of marine energy sites now leased in Welsh waters and developments are underway to begin generating power;

- 3.4 GW of additional sites identified for future development by the Crown Estate;

- 4 test and demonstration sites (Morlais and Pembrokeshire Demo Zones and META testing sites 1 and 2) are under development; and

- £152.4 million spent to date in Wales on the development of the marine energy industry.

The wider economic benefits of this growth and investment are set out in the 2021 MEW report with an estimated 1,210 person years of skilled employment generated within the industry in coastal regions in Wales to date. Also highlighted is the significant investment secured by Anglesey and Pembrokeshire ports to increase their capacity in line with growth demand for marine renewable energy. These economic benefits support the assessment of the Sustainability Appraisal[32] for the WNMP, which predicted a significant positive effect of the Energy – Low Carbon (ELC) policies in the WNMP on the economy.

Supporting sustainable development of the marine renewable energy sector

There are a wide range of factors that influence the number and scale of renewable energy developments around Wales. However, it is notable that the 2020 MEW State of Sector report[33], in setting out how the Welsh Government is championing marine energy, highlights the support for sustainable development of the sector provided by the *"...recently adopted Welsh National Marine Plan which provides a framework for the sustainable management of Welsh seas where increasing marine energy is a priority"*.

Welsh Government is undertaking, or is involved in, a range of enabling actions, beyond marine planning, to support implementation of the renewable energy policies in the WNMP and contribute to our net zero ambitions whilst delivering socio-economic benefits to Wales, for example through delivery of a Marine Energy Programme.
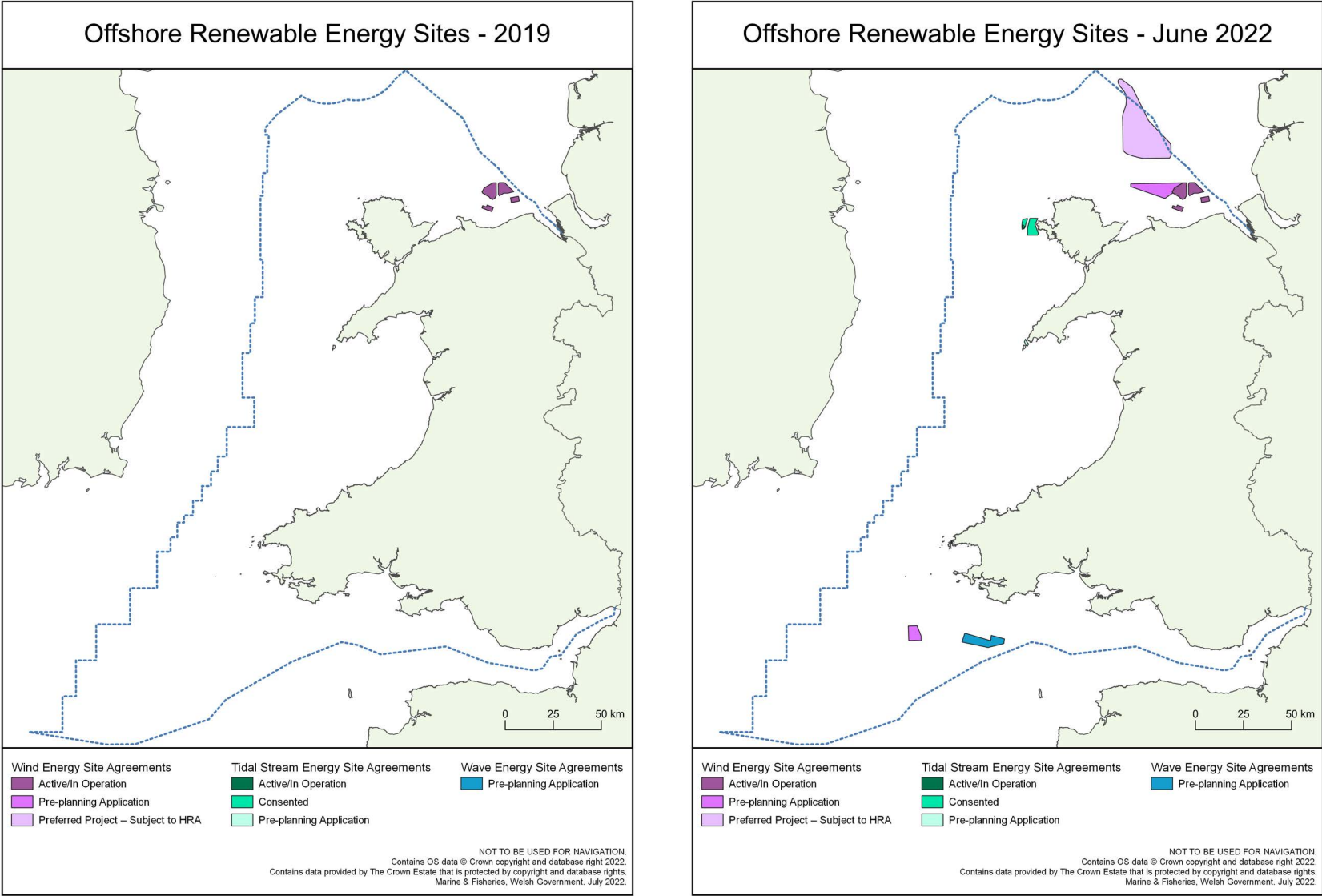
In line with the ELC_01b WNMP policy, the Welsh Government is working with the UK Government and the Crown Estate to support the further development of offshore wind through the Offshore Wind Enabling Action Programme and the Offshore Wind Evidence and Change Programme. Support in line with the ELC_02b and ELC_03b WNMP policies is being provided to the tidal stream and wave sectors through the Consenting Strategic Advisory Group (CSAG) and Science and Evidence Advisory Group (SEAGP), which follow a balanced and collaborative strategy to identity routes to help reduce the regulatory and environmental risks for the MRE sector.

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31   State-of-the-Sector-2021.pdf (marineenergywales.co.uk)

32   Welsh National Marine Plan: sustainability appraisal | GOV.WALES

33   State of the Sector 2020 | Marine Energy Wales

Figure A3: Maps showing location of marine renewable energy developments, leases and demonstration zones 2019 and 2022

Offshore Renewable Energy Sites - 2019

Wind Energy Site Agreements
- Active/In Operation
- Pre-planning Application
- Preferred Project – Subject to HRA

Tidal Stream Energy Site Agreements
- Active/In Operation
- Consented
- Pre-planning Application

Wave Energy Site Agreements
- Pre-planning Application

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Marine & Fisheries, Welsh Government. July 2022.

Offshore Renewable Energy Sites - June 2022

Wind Energy Site Agreements
- Active/In Operation
- Pre-planning Application
- Preferred Project – Subject to HRA

Tidal Stream Energy Site Agreements
- Active/In Operation
- Consented
- Pre-planning Application

Wave Energy Site Agreements
- Pre-planning Application

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Marine & Fisheries, Welsh Government. 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[34]

2. Guidance principles to minimise visual effects of wind turbines in the seascape[35]

3. Seascape sensitivity assessment for offshore windfarms in Welsh waters[36]

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[37] 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.

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34 cdn.cyfoethnaturiol.cymru/media/689503/eng-evidence-report-315-seascape-and-visual-sensitivity-to-offshore-wind-farms-in-wales.pdf

35 cdn.cyfoethnaturiol.cymru/media/689506/eng-evidence-report-330-seascape-and-visual-sensitivity-to-offshore-wind-farms-in-wales-copy.pdf

36 cdn.cyfoethnaturiol.cymru/media/689508/eng-evidence-report-331-seascape-and-visual-sensitivity-to-offshore-wind-farms-in-wales.pdf

37 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[38] 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 Natural Resources Wales 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[39], 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.

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38   Natural Resources Wales/Using adaptive management for marine developments

39   gov.wales/sites/default/files/publications/2021-12/morlais-demonstration-zone-welsh-ministers-decision-letter.pdf

Indicator 12: Volume and value of tourism related visits to the Welsh coast

Progress: Amber

The WNMP identifies tourism as having good potential for future development. This indicator aims to use existing statistics to understand the number of people, visits or expenditure from tourism activities in Welsh coastal locations.

Baseline

Great British Tourism Survey

The Great Britain Tourism Survey (GBTS)[40] is a national consumer survey measuring the volume and value of domestic overnight tourism trips taken by residents in Great Britain and provides detailed information about trip and visitor characteristics.

In 2019: 43% of trips to Wales were to Seaside/ Coastal places, a higher percentage than was recorded for England or Scotland. 47% of bed nights were for visits to Seaside/Coastal areas with an overall spend of £948 million.

Great British Day Visitor Survey

The Great Britain Day Visitor Survey (GBDVS)[41] is a survey of the total volume and expenditure of Tourism Day Visits.

In 2019: 19% of day trips in Wales were to Seaside/Coastal places, also a higher percentage than was recorded for England or Scotland. 17 million day visits (19% of total) in Wales were to Seaside/Coastal areas with an estimated spend of £650 million.

The trips do not include very local, short time users of the seaside undertaking regular activities (see Indicator 13). Data on international visitors are captured via the International Passenger Survey[42], which currently does not directly capture whether visitors stayed at or visited the seaside, so has not been used.

Wales Visitor Survey

The Wales Visitor Survey[43] looks at motivations for visiting Wales, activities undertaken and gathers feedback on visitor satisfaction. This survey is not undertaken annually and is not designed to provide robust visitor estimates but has been included to complement the GB Tourism Survey and reflect the sector objective for Tourism and Recreation. Table A4 presents data from the 2019 Wales Visitor Survey showing trends across the previous 6 years for % visitors stating visiting a beach was their main reason for travelling and % visitors who strongly agree that Wales is a sustainable destination. Both parameters show an increase between 2013 – 2016. A parameter that was added to the survey for the first time in 2019 was % visitors satisfied with the cleanliness of beaches in Wales, trends which will be examined in future WNMP reviews in relation both to this indicator and indicator 16b (marine litter).

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40 Great British Tourist Report 2019 (visitbritain.org)

41 www.visitbritain.org/sites/default/files/vb-corporate/gbdvs_2019_annual_report.pdf

42 International Passenger Survey – Office for National Statistics (ons.gov.uk)

43 Wales Visitor Survey: 2019 | GOV.WALES

Table A4: Data from 2019 Wales Visitor Survey including data for 2013 & 2016

	2019	2016	2013
Visiting a beach primary reason for visit (%)			
Day Visitors	35	36	32
UK Overnight Visitors	73	63	67
Overseas Visitors	69	58	55
Satisfied with cleanliness of beaches (%)			
Day Visitors	53		
UK Overnight Visitors	66		
Overseas Visitors	62		
Strongly agree that Wales is a sustainable destination (%)			
Day Visitors	69	41	35
UK Overnight Visitors	72	50	55
Overseas Visitors	61	39	

COVID Consumer Tracker Research

An additional source of evidence, relevant to this first three-year review period but not part of the baseline for future review, is the COVID consumer tracker research[44] commissioned by VisitEngland, VisitScotland and VisitWales (Welsh Government). The aim is to understand domestic intent to take overnight short breaks and holidays both within the UK and abroad, with particular focus around the recent barriers and concerns around travel and how these may evolve over time.

The **4 November 2021 to 10 January 2022** and **1 March to 9 May 2022** reports reflected higher confidence and comfort levels, with UK and Wales residents anticipating taking significantly more overnight trips in the next 12 months, than the previous 12 months. Wales is the 8th most preferred destination for an overnight trip in Winter/Spring (although interest rises to the latter part of this period), and the 6th most preferred in summer.

Consistent with 2021, the coastal areas of Llandudno/Colwyn Bay and Pembrokeshire were second after Snowdonia as the most popular destinations for an overnight trip in Wales across both time periods.

Welsh Government are mindful that the next review period may be more reflective of the recovery of the tourism sector, post pandemic, rather than showing an increase in volume and value of visits compared with 2019. Over the next review period, Welsh Government intends to gather evidence linked to the sustainability of coastal tourism to complement statistics on volume and value of visits, as well as more explicit evidence of any effects of WNMP policies on development of this sector.

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44   COVID consumer tracker research

Indicator 13: Recreational use of the marine environment

Progress: Amber

Current state of understanding

Effective safeguarding and/or supporting of sectors in the Welsh marine area requires a sound evidence base around current use and also future potential use, that can be used by project proposers and decision makers. Evidence is particularly challenging to obtain for activities such as recreational activities that are not licensed or subject to formal consenting processes. The need for a better evidence base for coastal tourism and recreation is identified in the WMES and also the 2020 SoNaRR report.

Welsh Government and NRW have assessed the current level of understanding of the type, distribution, and intensity of recreational activity around Welsh seas and coasts. This information could inform:

- **Marine Planning and decision making** – future strategic planning and/or decisions in relation to WNMP policies T&R_01, SAF_01b, SOC_01, SOC_02, SOC_07.
- **Marine Protected Areas management** – assessment and management of pressures from recreational activity on sensitive habitats and species.

- **Coastal Access and Recreation management** – management of resources for recreation to ensure fair access for all, maximising the positive impacts of marine and coastal access and recreation for health and well-being.

The available information tends to be either geographically specific (e.g. Wales Activity Mapping project), activity specific (e.g. RYA Atlas of Recreational Boating[45]) or undertaken with a particular purpose in mind e.g. understanding pressures on protected sites[46, 47, 48]. In addition, most data sets are a snapshot in time, so do not provide evidence of seasonal variation or temporal trends. These limitations, combined with uncertainty around longevity of observed shifts in tourism and recreation activity brought about by COVID-19 make it difficult to define a baseline for this policy area.

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45   uk-coastal-atlas-of-recreational-boating (rya.org.uk)

46   cdn.cyfoethnaturiol.cymru/media/694371/identifying-areas-of-welsh-seabed-potentially-vulnerable-to-anchoring-mooring-and-launching_report-no-556.pdf

47   cdn.cyfoethnaturiol.cymru/media/694733/impacts-of-recreational-sea-angling-in-wales_-nrw-evidence-report-455.pdf

48   James, N. & Nunn, J. 2019. Developing an approach to determining foot access intensity on the Welsh intertidal zone. NRW Evidence Report Series Report No: 352, 101pp, NRW, Bangor.

Case Study: Wales Activity Mapping (WAM)[49]

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[50].

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[51] looking at sustainable management of tourism destinations throughout Wales.

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49 www.walesactivitymapping.org.uk/about/

50 www.walesactivitymapping.org.uk/uses/recreation-plan/

51 businesswales.gov.wales/tourism/working-together#guides-tabs--4

The next marine planning monitoring report may be informed by new sources of information currently under development, for example the **People and Nature Survey** which NRW signed up to in 2021 and which now includes an additional sample of 6000 adults living in Wales. The online survey is delivered by the same organisation that carries out the Great British Tourism and Day Visitor Surveys, providing opportunities to cross compare data on tourism, recreation and connection to nature. All data is geocoded so it can be viewed in GIS.

Although ostensibly focused on approaches to determining foot access intensity on the Welsh intertidal zone, a 2019 report prepared for NRW by Land Use Consultants[52] provides an appraisal of options for gathering data on the distribution and intensity of recreational activity that could potentially be expanded to cover the Welsh coast more broadly. The report suggests there is potential for:

- The use of existing 'big data' sources such as those generated by activity trackers and other GPS enabled mobile apps to provide accurate and up to date information, although this would not be fully representative (ground truthing would be required) and would be costly;

- The use of a range of survey techniques to gather information about the intensity of recreational activity in the areas of interest. This could include interactive mapping as part of a questionnaire survey, the use of people counter technology, and engagement with expert stakeholders. Potential to build on the Welsh Activity Mapping project in South-West Wales; and

- The development and use of a rules based, predictive model, analogous to approaches such as the online Outdoor Recreation Valuation Tool (ORVal). Operation based on factors such as beach characteristics, proximity to access points and behaviour patterns informed by literature review. It is likely any methods would require testing, refinement and calibration. It could potentially draw on information generated by the first two options, if available.

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52   James, N. & Nunn, J. 2019. Developing an approach to determining foot access intensity on the Welsh intertidal zone. NRW Evidence Report Series Report No: 352, 101pp, NRW, Bangor.

Indicator 14: Historic Assets

Progress: Green

This indicator focusses on whether the historic asset policy (SOC_05) is being applied in relevant decisions by the MLT. The **baseline** is zero at the time of plan adoption in 2019.

Review period (2020 – 2022)

For the current three-year review period, we are only able to gather information on reference to policy SOC_05 in Marine Licensing decisions/applications and feedback via the User Survey. Although most relevant applications provided information relating to the historic environment, only two Marine Licensing Decision Documents highlighted compliance with policy SOC_05 as being relevant to the decision. Feedback from the second User Survey highlighted differences between developers in the offshore marine area and those working in the coastal zone, for example on coastal defence activities, who typically have less awareness of the historic environment and how to manage impacts on historic assets.

For the next review period we hope to be able to broaden understanding to other relevant decisions.

Supporting protection and enhancement of the historic environment

In support of policy SOC_05 implementation, Cadw have published guidance on Managing the Marine Historic Environment in Wales[53] which sets out the relevant policy and legislative framework and best-practice guidance for protection and management of the historic environment. Welsh Government have also bought together a group of decision makers and advisory bodies in a new Marine Historic Environment Working Group to facilitate discussion and collaborative working on priority workstreams related to decision making, evidence and guidance. The group has updated the Memorandum of Understanding between NRW Marine Licensing, Cadw and the Wales Archaeological Trusts to include the Royal Commission on the Ancient and Historical Monuments of Wales (RCAHMW) and a section on the WNMP, produced a reference document setting out key policy and evidence associated with the marine and coastal historic environment, and developed a new marine historic environment narrative to accompany the Marine Area Statement (Figure A4).

In the next review period the working group will be looking at progressing completion of local seascape character assessments and exploring the potential value of a marine Historic Environment Register.

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53   Managing the Marine Historic Environment of Wales (gov.wales)

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

The RCAHMW has contributed to the recently launched Wales Coast Explorer[54] 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.

Figure A4: Explanation of marine space, planning regimes and potential historic assets within each marine zone (credit: Dr J. Whitehead, RCAHMW, source: Marine Area Statement – Historic Environment and Natural Resources)
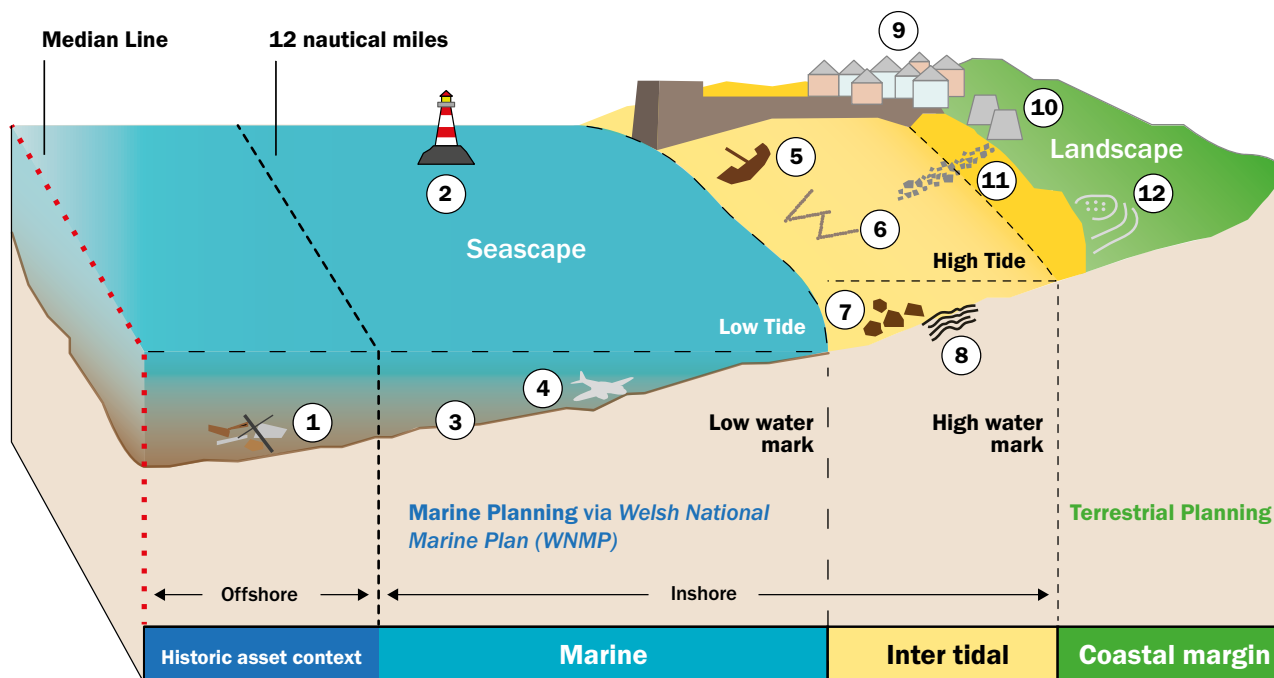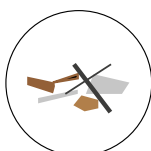

Median Line
The boundary between the maximum extent of the Wales 'Offshore' zone and the sea areas of adjoining nations (England, Northern Ireland, Republic of Ireland and the Isle of Man.

12 Nautical miles
The distance from the baseline (normally the mean low watermark) which defines 'territiorial waters'.
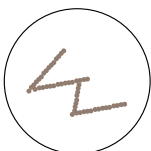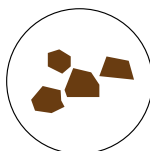
1) Shipwreck

2) Lighthouse

3) Paleolandscape

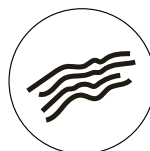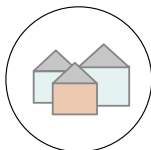4) Aeroplane

5) Shipwreck
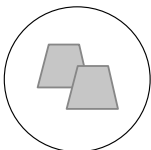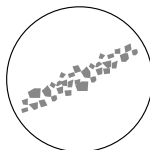
6) Fishtraps

7) Submerged forest

8) Peat deposit

9) Historic harbour

10) Lime kilns

11) Former quay

12) Promantary fort

Indicator 15: Conformance with Shoreline Management Plan policies

Progress: Amber

While SMPs are non-statutory, the WNMP encourages use of and compliance with SMP policies through reference in policy SOC_09[55] and in the Implementation Guidance for policies SOC_08 and SOC_11.

This indicator seeks to identify the impact of the WNMP in emphasising the Welsh Government's position that relevant strategic and local planning decisions should refer and adhere to the SMP policies. The indicator aligns with Measure 11 of the National Strategy for Flood and Coastal Erosion Risk Management in Wales[56], however, the first report on progress of the national strategy is not due until 2025. As an interim (and baseline) measure, we have reviewed MLT applications for coastal defence schemes. It should be noted that licence applications for maintenance of coastal defences are currently only required for third parties (NRW and LAs are exempt) so these will not be covered by MLT applications.

Review Period 2020 – 22

Since 2021, when NRW Marine Licensing added a section on SMP compliance to the MLT Decision Documents, all relevant decisions have been in compliance with SMP policy. In 2022, the role of the WNMP in supporting SMP policy and coastal resilience is evidenced by decision documents referencing compliance with policies SOC_08 and SOC_09.

In terms of work undertaken or underway in support of application of SMP policies in coastal development and management decisions, NRW have recently produced a new SMP webpage[57] to help raise awareness of the SMPs with stakeholders and communities. SMP policy units are also available to view in the context of other marine and coastal evidence via the Marine Planning Portal.

NRW are also working with partners in the Wales Coastal Group Forum to improve access to information and improve linkages between SMPs and the planning system at a local and strategic level.

Nature Based Solutions

The policy aim and implementation guidance for policy SOC_09 highlight that as far as practicable, proposals should identify solutions that work with natural processes and the local landscape/seascape and enable habitat creation opportunities (see Policies ENV_01 and 02; SOC_06 and 07). This is reflected in the Marine Area Statement theme: Nature-Based Solutions (NBS) and adaptation at the coast which has the following vision:

"Wales has a sustainable and resilient coastline through the delivery of coastal adaptation in line with Shoreline Management Plans and nature-based solutions as a part of coastal management wherever possible".

In response to stakeholder requests for more information on NBS, NRW has developed a dedicated Nature Based Solutions for Coastal Management webpage[58]. The purpose of the page is to collate all NBS for coastal management resources into one place to facilitate access to guidance and relevant evidence. Further information on the actions identified under the 'Nature-based solutions and adaptation at the coast' theme of the MAS can be found on the NRW website[59].

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55 "Proposals should demonstrate how they: • avoid significant adverse impacts upon coastal processes; and • minimise the risk of coastal change and flooding; Proposals that align with the relevant Shoreline Management Plan(s) and its policies are encouraged"

56 National Strategy for Flood and Coastal Erosion Risk Management in Wales | GOV.WALES

57 Natural Resources Wales/Shoreline Management Plans

58 Natural Resources Wales/Nature-based solutions for coastal management

59 Natural Resources Wales/Nature-based solutions and adaptation at the coast

Indicator 16: UK Marine Strategy Good Environmental Status (GES):

16a Invasive Non-Native Species (INNS) Distribution – Data on the presence of new or the spread of currently recorded INNS in the Welsh marine area.

16b Marine litter – Data on the presence, sources and types of marine litter.

16c Status of commercial fish populations – Populations of commercial fish species are being exploited within sustainable limits and have the necessary supportive systems at all stages of their life history.

Progress: Amber

Part 1 of the Marine Strategy (MS) provides a measure of the environmental status of UK Regional Seas, with specific targets against which progress should be measured. First published in 2012, an update was published in 2019[60]. Progress against targets provides an indication on improvements in the environmental status of our seas. The Welsh marine area forms part of the Celtic Seas region, along with English waters to the north and south. Where possible we have identified the underpinning data from Welsh waters that was used for the MS assessments. The reporting cycle for the MS means that the recent (2019) assessment will form the baseline here and the next three-year review will have the first assessment of changes in the introduction and spread of INNS since the Plan was adopted.

Indicator 16a INNS

Baseline

In the MS Part 1 (HM Government, 2012), the UK set out "Characteristics of Good Environmental Status (GES)" for non-indigenous species. This was a high-level, qualitative description of what the marine environment will look like when GES is achieved.

"The risk from pathways and vectors which facilitate the introduction and spread of non-indigenous species as a result of human activities is significantly reduced, leading to a reduction in the risk of introducing new species some of which may have adverse impacts."

SoNaRR 2020 notes marine INNS are present in Welsh waters and have varying levels of impact on both ecosystems and economic interests. Welsh Government has published a marine INNS priority monitoring and surveillance list to inform development of policy, action plans and contingency planning, including to help applicants and decision makers test conformance with WNMP policy ENV_03[61, 62]. Species on the INNS priority monitoring list are those that are present and breeding in Wales. Species on the surveillance list are those that are not known to breed in Wales, but in some cases are present or established in UK or neighbouring waters, e.g. the American lobster, *Homarus americanus*.

A new resource for WNMP users is the 2020 Welsh Marine Invasive Non-Native Species Pathways Assessment[63], which identifies coastal areas where INNS are more likely to be introduced to help to focus management efforts and identify sensitive areas which may be at a higher risk.

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60   MOAT (cefas.co.uk)

61   ENV_03: Invasive non-native species Proposals should demonstrate how they avoid or minimise the risk of introducing and spreading invasive non-native species. Where appropriate, proposals should include biosecurity measures to reduce the risk of introducing and spreading of invasive non-native species.

62   invasive-aquatic-species-priority-marine-species.pdf (gov.wales)

63   Contents (penllynarsarnau.co.uk)

Introduction of INNS

The 2019 update to the environmental assessment of UK seas states that the UK has not yet achieved its aim of GES for non-indigenous species (NIS). Our ability to detect new NIS has improved but there has been no significant change in the number of new records between 2003 and 2014.

In order to align as far as possible with the data used to assess the number of new introductions of INNS for the 2019 updated GES assessment, we have taken the number of new records in Welsh seas reported to OSPAR for the following periods to form the baseline for new introductions of INNS:
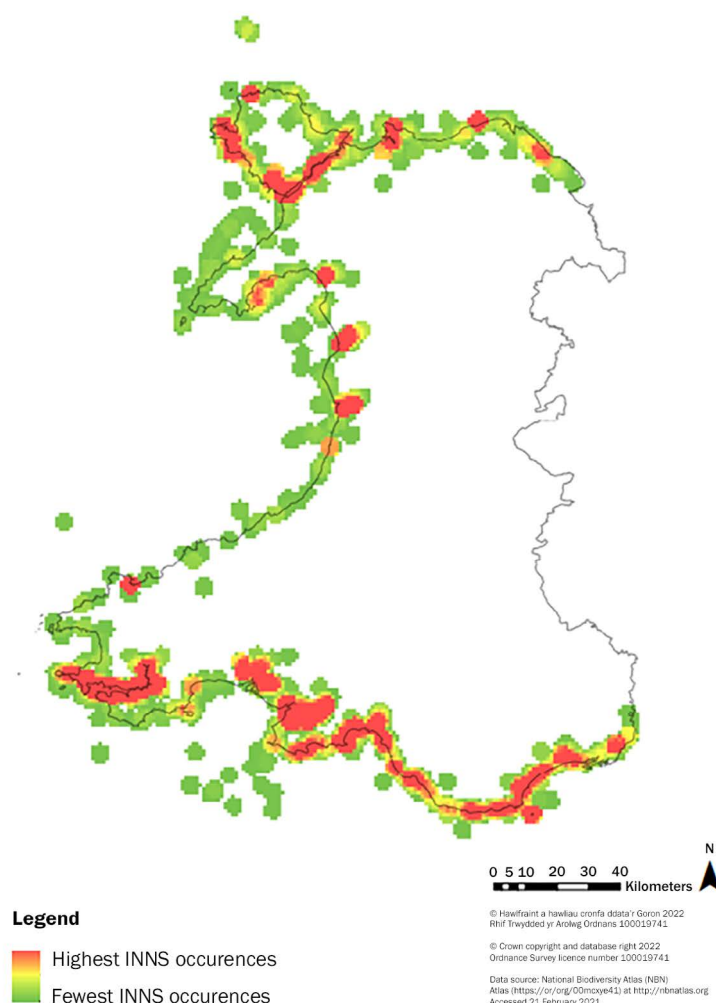
2003 and 2008 = 13

2009 and 2014 = 12

2015 and 2022 = 3

Distribution of INNS

In support of the second SoNaRR and future reporting on Sustainable Management of Natural Resources (SMNR), NRW have created the Wales Environmental Information Portal bringing together data about the natural environment in Wales, for example in the form of storymaps, including a storymap showing the distribution and impact of INNS in Wales[64]. The distribution heatmap of marine INNS published as part of the INNS storymap will form the distribution baseline against which future WNMP reviews will be considered (Figure A5).

Figure A5: Distribution heat map of occurrence records of priority INNS which impact marine ecosystems in Wales

0 5 10   20   30   40
Kilometers

N

© Hawlfraint a hawliau cronfa ddata'r Goron 2022
Rhif Trwydded yr Arolwg Ordnans 100019741

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Ordnance Survey licence number 100019741

Data source: National Biodiversity Atlas (NBN)
Atlas (https://or/org/00mcxye41) at http://nbnatlas.org
Accessed 21 February 2021

Legend

Highest INNS occurences

Fewest INNS occurences

Indicator 16b Marine Litter

According to the UK Marine Online Assessment Tool[65], GES under the UK Marine Strategy has not been achieved for marine litter in the Celtic Seas sub-region of which Welsh waters form a part. Marine litter (macro- and micro- particulate pollution) was cited as a main pressure or threat (ranked medium or high) for all seven Annex I marine habitats reported on at a Wales level for Article 17 reporting[66]. However, only one of 47 habitat features failed to achieve favourable condition on the basis of marine litter[67].

Baseline

Baseline information for this indicator is set out in the Marine chapter of the 2020 SoNaRR[68], and is drawn from Marine Conservation Society survey data.

In 2019, an average of 475 litter items per 100m stretch of beach were recorded.

Data from Welsh beaches indicates the following trends for the period 1993 to 2019:

- 26% increase in total litter
- 13% increase in plastic litter
- 412% increase in glass bottles
- 52% increase in sewage related debris, of which:
  - 11% increase in cotton buds
  - 361% increase in wet wipes since 2005
- 17% increase in fishing related material, this includes all material that helps recreational anglers and commercial fishermen catch fish and shellfish
- 135% increase in smoking related litter.

Review period 2020 – 22

2020: 2nd Three year Marine Litter Action Plan for Wales published. The Marine Litter Action Plan for Wales (MLAP) is delivered through a network who form part of the Wales Clean Seas Partnership (WCSP). Each partner has made a commitment to contribute to achieving the objectives of the MLAP over the next three years. Wales Clean Seas partners made a public pledge to collaborate and report on progress to tackle marine litter aligned to UN Clean Seas campaign.

The 2020 WCSP Review[69] highlighted the effects of the COVID-19 pandemic in terms of restrictions for organised beach cleans and influx of PPE related litter reported on Welsh beaches.

MCS held the Great British Beach Clean, during which over 3,000 metres of Welsh beach was cleaned and surveyed during 32 events, with 143 volunteers getting involved, including the Rt Hon Mark Drakeford MS, First Minister of Wales. An average of 237.5 litter items were found per 100 metres of Welsh coastline, with small plastic pieces remaining the most common form of litter, averaging 92.4 pieces per 100m of beach.

2021: Great British Beach Clean results[70] – an average of 414 litter items were found per 100 metres of Welsh coastline, continuing the trend of figures steadily dropping over the last five years in the country. 82% of litter collected from Welsh beaches this year was made of plastic or polystyrene and the number of cigarette butts found in Wales more than doubled from 2020 to 2021, with this year's average an all-time high for Welsh beaches.

65   MOAT (cefas.co.uk)

66   Fourth Article 17 Reporting 2019

67   naturalresources.wales/guidance-and-advice/environmental-topics/wildlife-and-biodiversity/protected-areas-of-land-and-seas/indicative-feature-condition-assessments-for-european-marine-sites-ems/?lang=en

68   Natural Resources Wales/SoNaRR2020: Marine

69   Wales Clean Seas Partnership – how COVID has affected our work: 2020 year end review in full (gov.wales)

70   Great British Beach Clean 2021 results | What you can do | Marine Conservation Society (mcsuk.org)

Indicator 16c Fish

The most recent assessment of GES for UK seas found that demersal fish biodiversity is recovering from a history of over-exploitation, but GES has not yet been achieved in the Celtic Sea. The UK has, however, achieved its aim of GES for some commercially exploited fish. In 2015, for example, 53% of marine fish (quota) stocks were fished below maximum sustainable yield (MSY). Most national shellfish stocks have either not yet achieved GES or their status is uncertain. The percentage of quota stocks fished below MSY and the proportion of marine fish spawning stock biomasses capable of producing MSY have increased significantly since 1990.

Baseline

To enable future reviews of the WNMP to assess the effectiveness of policy ENV_07[71] a meaningful baseline is required in terms of commercial fish and shellfish species. Because of the continuation and introduction of annual stock surveys, the Welsh onshore, offshore and observer monitoring programme, and the introduction of iVMS and CatchApp, Welsh Government now has a considerably improved understanding of stock status for scallop, whelk, skates and rays, cockles and pelagic finfish. The data collected is forming a baseline for Welsh Government to determine sustainability of fisheries resources in Welsh inshore waters.

Evidence relating to distribution of and potential pressures on spawning and nursery grounds of 11 species of "forage fish" that are prey for marine mammals and seabirds has been produced by Cefas for a NRW funded project managed by the RSPB. Project outputs include:

- Information on spawning and nursery grounds for the forage fish community in Welsh and surrounding waters, including the Irish and Celtic Seas and the western English Channel[72].

- Maps for several species for which no or limited historic maps were previously available here (sprat, poor cod and garfish) and the first maps of warm-water species in the study area (sardine and anchovy). The study also provides more up-to-date (recent data) and complete maps for those species covered in some of the previous studies on forage fish.

- A literature report aimed at identifying the main anthropogenic pressures on forage fish in Welsh waters[73].

- A summary of relevant environmental (mainly temperature) data sources in the region which could be used for future research.

In terms of research undertaken to develop methodologies for assessing impacts on fish, and in recognition of the need to improve evidence in relation to achievement of WNMP Objective 3[74], NRW has commissioned research[75, 76,] to identify how to collect data on the distribution and movements of key fish species around marine renewable devices in Wales. The review focuses on eight diadromous species, including Atlantic salmon, sea trout, twaite and allis shad, river and sea lamprey, European eel and European smelt.

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71 ENV_07: Fish Species and Habitats – Proposals potentially affecting important feeding, breeding (including spawning & nursery) and migration areas or habitats for key fish and shellfish species of commercial or ecological importance should demonstrate how they, in order of preference: a. avoid adverse impacts on those areas; and/or b. minimise adverse impacts where they cannot be avoided; and/or c. mitigate adverse impacts where they cannot be minimised. If significant adverse impacts cannot be avoided, minimised or mitigated, proposals must present a clear and convincing case for proceeding.

72 Campanella, F.& van der Kooij, J. (2021). Spawning and nursery grounds of forage fish in Welsh and surrounding waters. Cefas Project Report for RSPB, 65pp.

73 van der Kooij, J., Campanella, F.,Rodríguez & Climent, S. (2021).Pressures on forage fish in Welsh Waters. Cefas Project Report for RSPB, 35pp.

74 Support the opportunity to sustainably develop marine renewable energy resources with the right development in the right place, helping to achieve the UK's energy security and carbon reduction objectives, whilst fully considering other's interests, and ecosystem resilience.

75 report no_553.pdf (cyfoethnaturiol.cymru)

76 report no_552.pdf (cyfoethnaturiol.cymru)

Indicator 17: Designated site condition assessments

Progress: Amber

This indicator sets out the context that the ENV_02 policy is operating within. Over the longer term, the aim will be to assess whether the WNMP is adding value in terms of management and protection of MPAs.

Site condition assessments, undertaken every six years, define each MPA feature as either Favourable, Unfavourable recovering, Unfavourable or Destroyed (partly or completely). Statutory requirements to protect MPAs are the key driver in site management related decisions, therefore the contribution of the WNMP to designated site management is likely to remain uncertain.

Baseline

Indicative feature-level site condition reports all inshore SACs and SPAs published by NRW in 2018[77] indicate the network of MPAs is able to support significant populations of seabirds and marine mammals in favourable condition, as well as a variety of seabed species and habitats. The key findings are:

- 46% of all features are in favourable condition, with the majority assessed with high confidence in the evidence used to assess condition.

- 45% of features are in unfavourable condition, with around half assessed with high confidence.

- 9% of features are in unknown condition, meaning there is currently insufficient evidence to make an assessment of indicative condition.

- Marine mammal features, including bottlenose dolphin, grey seal and otter, are in favourable condition.

- Most seabird populations are generally stable or increasing.

- Where SPA features have been assessed as Unfavourable, the main reason is linked to UK, European or worldwide trends rather than site level issues.

- For SACs, water quality issues, pollution, non-licensable activities and invasive non-native species were identified as key pressures on feature condition.

- For the two MPAs wholly in Welsh offshore waters, Croker Carbonate Slabs SAC and the Irish Sea Front SPA, status of the features is 'Unknown'. This is largely due to the fact these MPAs are relatively recent designations and therefore there is limited site condition monitoring information available with which to infer condition.

The confidence rating associated with the assessments is an integral part of the indicative assessment. 57% of indicative assessments were made with high confidence; 21% with medium confidence; 13% with low confidence; and 9% were unknown.

SoNaRR 2020 sets out future prospects (outlook to 2030) for MPAs as "Improving". Improvements in management of MPAs are expected as part of the Welsh Government's MPA Network Management Framework and Action Plans, which set out the priority network-level actions for the network of MPAs in Wales. Of particular relevance to the WNMP is the Marine Protected Areas Network Condition Improvement Project which began in 2016 and is now part of the MPA Network Management Framework. This project is intended to address the recognised threats and pressures that can impact MPA features, grouped under priority work areas:

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77 naturalresources.wales/guidance-and-advice/environmental-topics/wildlife-and-biodiversity/protected-areas-of-land-and-seas/indicative-feature-condition-assessments-for-european-marine-sites-ems/?lang=en

- access and recreation – such as damage to habitats or disturbance of species
- water management and issues – such as coastal squeeze, flood, and coastal erosion risk management
- pollution and waste – such as marine litter and diffuse water pollution
- agriculture and land management
- marine fisheries.

MPA Network Completion Project

The MPA Network Completion Project was established to identify and designate Marine Conservation Zones to address a small number of shortfalls in the protection of the MPA network. With support from NRW and JNCC, Welsh Government has worked with a stakeholder task and finish group to develop Broad Areas of Search and then refine those into more focused Areas of Search.

The next step will be to launch a period of informal pre-consultation engagement on the Areas of Search. Welsh Government will then incorporate any feedback from the informal engagement and begin to draft boundaries for possible MCZs from within the Areas of Search.

Nature Networks

Nature Networks is the title of a new Welsh Government multi-year funded programme focussing on improving the condition of protected sites across Wales. The programme is worth around £15 million per year over three years, starting in April 2022. £3 million over three years has been allocated to support projects focussed on improving the condition of the Welsh MPA Network[78]. The projects will cover issues such as coastal squeeze, habitat restoration, INNS, and marine litter and improving our understanding of marine mammal populations and benthic habitats and species.

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78   Natural Resources Wales/New Marine Nature Networks Programme: Call for applications

2.3 Summary of policy impact and progress towards Plan Objectives

In this section we follow the presentation of indicator evidence with a high-level assessment of Plan policy effect and Plan policy contribution towards Plan objectives, presented in the context of the UK High Level Marine Objectives (HLMOs).

Understanding the real-world effects of individual policies and their contribution to delivery of WNMP objectives and the HLMOs is challenging but as set out in the preceding sections, some evidence is available to allow a high-level assessment.

Table A5 presents WNMP policies shown alongside the primary Plan Objective to which they contribute. The table shows our assessment of the impact the policy has had, based upon the available evidence, including that considered for each of the monitoring indicators above, alongside any other relevant information.

In the following table:

✓ indicates a policy has been assessed to have had a positive impact

O indicates no clear evidence of policy effect in this review

✖ indicates where there is evidence to suggest a policy has had an effect that is contrary to the policy intent set out in the WNMP.

Confidence in the above is indicated by icon size.

For context, the predictions of policy effects made by the plan SA are included in the second column (Symbols indicate broad conclusion of the SA for the WNMP. **+** = overall assessment was that the policy would have a net positive effect on sustainability. **+/-** indicates policy predicted to have mixed positive/negative effects. **+/--** = broadly positive effects, with one significant negative effect).

A summary RAG status for each WNMP Objective is presented from two perspectives representing progress in:

1) implementation of primary policy(ies) (activity monitoring) and

2) towards achievement of the objective (outcome monitoring).

Figure 1 in the main report shows where these different policy impacts lie in relation to each other.

Green = positive progress or trends identified

Amber = partial progress identified

Red = no progress identified

Table A5

WNMP Objectives	WNMP Policies mapped to primary objective (overall Sustainability Appraisal assessment of policy)	Policy Impact	Summary of progress in policy implementation/ towards achieving WNMP objective
HLMO Theme: Overarching			
Support the sustainable development of the Welsh marine area by contributing across Wales' well-being goals, supporting the SMNR by taking account of the cumulative effects of all uses of the marine environment.	**GEN_01** Planning Policy **(+)** **GOV_01** Cumulative Effects **(+)**	✓ ○	**RAG Status: GREEN/AMBER*** with **medium confidence** *Overall progress based upon assessment of all RAGs combined* There is good evidence that progress is being made in Plan implementation, including provision of new spatial tools and guidance. Good practice is emerging for plan led decision making with clear links being made to Plan policies in project level decisions. Plan policies are considered to be supporting delivery of Plan objectives and overall, there is reasonable evidence to suggest Plan objectives are contributing towards the UK High Level Marine Objectives. The plan provides a strategic framework, so can be expected to have an increasing effect over time as supplementary material is produced.

WNMP Objectives	WNMP Policies mapped to primary objective (overall Sustainability Appraisal assessment of policy)	Policy Impact	Summary of progress in policy implementation/ towards achieving WNMP objective
HLMO Theme: Promoting good governance			
Support proportionate, consistent and integrated decision making through implementing forward-looking policies as part of a plan-led, precautionary, risk based and adaptive approach to managing Welsh seas.	**GEN_02** Planning Policy **(+)** **GOV_02** Cross-border and plan compatibility **(+)**	✓ ✓	**RAG Status: GREEN/AMBER** with **medium confidence** With the support of Welsh Government, the WNMP is being increasingly considered in marine consenting decision making by public authorities. There is also good evidence that the Plan is influencing wider approaches to marine management, including in relation to cross border issues. We currently have only a partial understanding of if/how some decision makers are using the WNMP, with the limited number of User Survey responses suggesting a limited reach and level of awareness of the Plan amongst the marine community.
HLMO Theme: Using sound science responsibly			
Develop a shared, accessible marine evidence base to support use of sound evidence and provide a mechanism for the unique characteristics and opportunities of the Welsh Marine Area to be better understood.	**SCI_01** Using Sound Science Responsibly **(+)**	✓	**RAG Status: GREEN/AMBER** with **medium confidence** Plan implementation is being supported through provision of evidence, and new spatial tools e.g. the Wales Marine Planning Portal. There is a need to gather more evidence around if/how widely the evidence provided is being used in practice by decision makers or project proposers.

WNMP Objectives	WNMP Policies mapped to primary objective (overall Sustainability Appraisal assessment of policy)	Policy Impact	Summary of progress in policy implementation/ towards achieving WNMP objective
HLMO Theme: Achieving a sustainable marine economy			
Provide space to support existing and future economic activity through managing multiple uses, encouraging the coexistence of compatible activities, the mitigation of conflicts between users and where possible, by reducing the displacement of existing activities.	**ECON_02** Co-existence **(+)**	✓	**RAG Status: GREEN/AMBER** with **medium confidence** Welsh Government have initiated work to implement policy SAF_02 through exploring the potential for development of SRAs, with a focus on emerging marine renewable technologies (tidal, wave and floating wind), aggregates and aquaculture and anticipate consulting on potential SRAs during 2023.
	SAF_01 Safeguarding existing activity **(+/-)**	✓	
	SAF_02 Safeguarding strategic resources **(+/-)**	✓	Welsh Government recently prepared draft 'technical statements' for the Ports and Shipping and Recreational boating sectors to promote the safeguarding provided through policy SAF_01.
	DEF_01 Defence (safeguarding) **(+)**	○	There is limited evidence from this review of the impact of safeguarding and coexistence policies upon decision making.

WNMP Objectives	WNMP Policies mapped to primary objective (overall Sustainability Appraisal assessment of policy)	Policy Impact	Summary of progress in policy implementation/ towards achieving WNMP objective
Contribute to a thriving Welsh economy by encouraging economically productive activities and profitable and sustainable businesses that create long term employment at all skill levels.	**ECON_01** Sustainable economic growth **(+/-)**	✓	RAG status: **AMBER**/**AMBER** with **medium confidence** We have evidence from some decision makers that project applicants are using Plan policies to support their applications but given the lack of data for some sectors, we cannot currently draw any clear conclusions about progress towards the WNMP objective. An evaluation of available data to establish a baseline for Welsh marine GVA and employment found significant data gaps and where data was available it was in many cases unreliable due to its age and/or not disaggregated to a Wales level or between marine and terrestrial activities. During the review period, which has encompassed significant change or disruption to many sectors due to the pandemic and/or Brexit, the only sectors to progress continued expansion are subsea cabling and marine renewable energy (see above).
	AGG_01a Aggregates (supporting) **(+/-)**	✓	
	AQU_01a Aquaculture (supporting) **(+/-)**	✓	
	D&D_01 Dredging and Disposal **(+/-)**	✓	
	O&G_1a Oil and Gas (supporting) **(+/-)**	✓	
	FIS_01a Fisheries (supporting) **(+/-)**	✓	
	P&S policies Ports & Shipping (supporting) **(+/-)**	✓	
	CAB_01 Subsea cabling (supporting) **(+/-)**	✓	

WNMP Objectives	WNMP Policies mapped to primary objective (overall Sustainability Appraisal assessment of policy)	Policy Impact	Summary of progress in policy implementation/ towards achieving WNMP objective
Supporting the opportunity to sustainably develop marine renewable energy resources with the right development in the right place, helping to achieve the UK's energy security and carbon reduction objectives, whilst fully considering other's interests, and ecosystem resilience.	**ELC: Low Carbon Energy (supporting) (+/--)** policies and sector objective(s)	✓	**RAG status: GREEN/GREEN with high confidence** There is a good baseline and evidence on the scale and changes of the renewable energy sector in Welsh seas. In addition, we have evidence of recognition of policy support within the WNMP for sustainable development of renewable energy and the ongoing enabling work for this sector.
Recognise the significant value of coastal tourism and recreation to the Welsh economy and well-being and ensure such activity and potential for future growth are appropriately safeguarded.	**T&R_01: Tourism and Recreation (supporting) (+/-)**	◯	**RAG Status: AMBER/AMBER with medium confidence** There is limited evidence of policy impact upon sector activity and decision making for this review period. A baseline and ongoing source of data is available for the tourism sector. However, the impacts of the COVID-19 pandemic on visitor surveys has led to limited information being available for the first 3-year review period. Currently there is no consistent baseline available for recreational activity for the whole WNMP area or subsequent data/evidence for this first 3-year review period, but evidence is available for some areas and work is ongoing to improve the evidence base.

WNMP Objectives	WNMP Policies mapped to primary objective (overall Sustainability Appraisal assessment of policy)	Policy Impact	Summary of progress in policy implementation/ towards achieving WNMP objective
HLMO Theme: Ensuring a strong, healthy and just society			
Contribute to supporting the development of vibrant, more equitable, culturally and linguistically distinct, cohesive and resilient coastal communities.	**SOC_02: Well-being of coastal communities (+)** **SOC_04: Welsh language and culture (+)**	○	**RAG Status: AMBER/AMBER with low confidence** Limited available evidence linking these specific policies to decision-making, however, there is evidence of progress towards this objective with proposals seeking to ensure that opportunities are taken to contribute positively to the future well-being of coastal communities through compliance with Planning Policy Wales and consideration of other WNMP policies relating to cultural heritage, seascape and environmental quality.
Support enjoyment and stewardship of our coasts and seas and their resources by encouraging equitable and safe access to a resilient marine environment, whilst protecting and promoting valuable landscapes, seascapes and historic assets.	**SOC_01: Access to the marine environment (+)** **SOC_05: Historic assets (+)** **SOC_06: Designated landscapes (+)** **SOC_07: Seascapes (+)**	✓	**RAG status: GREEN/AMBER with medium confidence** Good evidence that implementation of the heritage polices (SOC_05, 06 and 07) is being supported by relevant advisory bodies and that this is supporting consideration of these policies in decision making. There is limited evidence for the 3-year review period of progress towards this WNMP objective for some of the contributing policies.

WNMP Objectives	WNMP Policies mapped to primary objective (overall Sustainability Appraisal assessment of policy)	Policy Impact	Summary of progress in policy implementation/ towards achieving WNMP objective
Improve understanding and enable action supporting climate change adaptation and mitigation.	O&G_1b & 02 Oil and Gas (avoiding) (+)	✓	RAG status: GREEN/AMBER with medium confidence No oil and gas activity has been consented in waters falling within the Welsh onshore licence area. No marine carbon capture projects have been delivered. Good evidence of ongoing work to support implementation of these policies, for example via the 'Nature-based solutions and adaptation at the coast' theme of the Marine Area Statement. There is some evidence of policies taking effect through decision making, e.g. conformance of marine licence decisions with SMPs and reference to WNMP policies in recently adopted Local Development Plans.
	SOC_08: Resilience to coastal change and flooding (+)	✓	
	SOC_ 09: Effects on coastal change and flooding (+/-)		
	SOC_10: Minimising climate change (+)		
	SOC_11: Resilience to climate change (+/-)		
HLMO Theme: Living within environmental limits			
Support the achievement and maintenance of GES and Good Ecological Status (GeS).	ENV_03: Invasive non-native species (+)	○	RAG status: AMBER/AMBER with low confidence Limited available evidence linking these specific policies to decision-making, although this can be linked in part to lack of availability of information around terrestrial decisions and relationships between these policies and existing legislation (e.g. WFD, EIA and HRA regulations). Baseline data for the Welsh marine area has been identified for three of the policies and their relevant descriptors under the Marine Strategy. Data for the three-year review period was only available for marine litter.
	ENV_04: Marine litter (+)		
	ENV_05: Underwater noise (+)		
	ENV_06: Air and water quality (+)		
	ENV_07: Fish Species and Habitats (+)		

WNMP Objectives	WNMP Policies mapped to primary objective (overall Sustainability Appraisal assessment of policy)	Policy Impact	Summary of progress in policy implementation/ towards achieving WNMP objective
Protect, conserve, restore and enhance marine biodiversity to halt and reverse its decline including supporting the development and functioning of a well-managed and ecologically coherent network of MPAs and resilient populations of representative, rare and vulnerable species.	**ENV_02: Marine Protected Areas (+)**	◯	**RAG status: GREEN/AMBER** with **low confidence** Limited available evidence linking these specific policies to decision-making. We have a baseline for this indicator but no additional information for the first three-year review period.
Maintain and enhance the resilience of marine ecosystems and the benefits they provide in order to meet the needs of present and future generations.	**ENV_01: Resilient marine ecosystems (+)**	✓	**RAG status: GREEN/AMBER** with **low confidence** Limited available evidence linking this policy to decision-making, however implementation of the enhancement aspect of this policy is now supported by new guidance and evidence. No evidence for this first three-year review on progress towards achievement of this objective.

Broadly, WNMP policies have made a positive contribution towards the relevant Plan objectives with evidence of good progress made in the provision, through the strategic planning framework established by the WNMP, of new spatial tools to guide sustainable development and guidance and good practice emerging for plan led decision making. In addition, we have evidence of recognition of policy support within the WNMP for sustainable development of renewable energy, conformity with SMPs and protection of coastal heritage.

Only limited policy effect is considered to have been achieved by the cumulative effects, defence, social, tourism and recreation and environmental policies. In part this can be ascribed to 1) some policy areas already having established practice and regulatory requirements in place (e.g. defence and environmental policies) and 2) some policies being relatively generic in nature and/or potentially challenging to apply in practice, especially given the impacts of the COVID-19 pandemic (e.g. cumulative effects and tourism and recreation).

3. Wider contextual information

The wider policy, legislative and socio-economic context within which the WNMP has been applied over the past three years will inevitably exert significant influence over the outcomes which WNMP policy seeks. This annex enables these wider drivers to be taken into account. Consideration and reporting of this contextual information contributes towards the duty under Section 54 of the MCAA, "...to keep relevant matters under review" including changes that have occurred since plan adoption.

The Programme for Government 2021 to 2026 and the Co-operation Agreement:

The Welsh Government's policy priorities are set out in the Programme for Government 2021 to 2026[79], including marine related commitments to:

- Develop a Tidal Lagoon Challenge and support ideas that can make Wales a world centre of emerging tidal technologies.

- Expand renewable energy generation by public bodies and community groups in Wales by over 100MW by 2026.

- Establish a targeted scheme to support restoration of seagrass and saltmarsh habitats.

- Oppose the extraction of fossil fuels in Wales.

The Programme for Government also sets out well-being objectives, including building a stronger, greener economy and embedding the response to the climate and nature emergency in everything we do.

The 2021 Co-operation Agreement[80] sets out specific policy commitments upon which the Welsh Government and Plaid Cymru will jointly work, including:

- Considering pathways to net zero by 2035, and the devolution of further powers, including the management of the Crown Estate and its assets.

- To work towards the creation of Ynni Cymru, a publicly-owned energy company for Wales.

- To agree that targets and an environmental governance body have a role to play in helping to protect and restore biodiversity.

- To invest in flood management and mitigation and plan to respond to the increased risk of flooding.

Net zero and marine renewable energy:

The 2021 UN Climate Change conference (COP26) in Glasgow, November 2021, culminated in the adoption of the Glasgow Climate Pact.[81] This included agreement on strengthened efforts to build resilience to climate changes and curb greenhouse gas emissions, and to provide the necessary finance to deliver actions.

The Welsh Minsters have made commitments in law to reach net zero carbon by 2050. Net Zero Wales, the Welsh Government's second emissions reduction plan for carbon budget 2 (2021-2025), was published in October 2021.

In November 2021, Wales became a core member of the Beyond Oil and Gas Alliance, an international coalition of governments and stakeholders working together to facilitate the managed phase-out of oil and gas production.

79 Welsh Government – Programme for Government
80 The Co-Operation Agreement (gov.wales)
81 The Glasgow Climate Pact – Key Outcomes from COP26 | UNFCCC

Welsh Ministers have set ambitious targets for the generation of renewable energy, including for Wales to generate 70% of its electricity consumption from renewable energy sources by 2030[82] and for 1GW of locally owned renewable energy capacity by 2030. In support of this, the Welsh Government has established a Marine Energy Programme to provide strategic leadership and to deliver the Programme for Government commitment for a Tidal Lagoon Challenge.

A Ministerial Deep Dive on Renewable Energy took place late 2021. Key themes include creating a national energy plan by 2024, developing grid infrastructure, facilitating investment in ports, maximising supply chain opportunities, local and community ownership, addressing strategic evidence gaps, developing greater understanding of areas suitable for development, the consenting process, and pursuing the devolution of the Crown Estate and the delegation of offshore advisory powers from the JNCC to NRW.[83] The Deep Dive recognised the role that marine planning has to play in supporting our Net Zero ambitions and has also led to a review of marine licensing delivery, with particular emphasis on marine renewable energy.

The Welsh Government is working with the UK Government and the Crown Estate to support further development of offshore wind through the Offshore Wind Enabling Action Programme and the Offshore Wind Evidence and Change Programme.

The impact of the war in Ukraine has placed increased focus on energy security and diversifying energy generation. The UK Government British Energy Security Strategy (BESS)[84], published in April 2022, includes plans to increase nuclear, wind, hydrogen and solar production.

It sets an ambition to generate up to 50GW through offshore wind power by 2030, including up to 5GW from floating offshore wind. Julie James, MS, Minister for Climate Change, issued a Written Statement responding to the BESS. While welcoming the focus on offshore wind, the Statement expressed disappointment with the continued focus on fossil fuels and the failure to recognise the potential of tidal renewable energy generation[85].

Marine Biodiversity and Blue Carbon:

In 2021, Senedd Cymru/the Welsh Parliament declared a nature emergency. The 2021 State of Natural Resources Report identified the effects of climate change, marine litter and water quality as key challenges facing the marine environment. The third Climate Change Risk Assessment, published in 2021, highlighted the increased risks affecting habitats and marine ecosystems due to warming seas, ocean acidification and sea-level rises.

Welsh Government has established a Marine Conservation Zone (MCZ) Task and Finish Group to support work on the identification of potential MCZs.

There has been increasing recognition of the role blue carbon can play in addressing both the nature and the climate crises. The Programme for Government includes a commitment to establish a targeted scheme for the restoration of seagrass and saltmarsh coastal habitats. Net Zero Wales includes a proposal to improve understanding of both how to account for and impacts on blue carbon habitats.

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82   Oral Statement on "Energy" delivered by the Cabinet Secretary for Environment and Rural Affairs to the National Assembly for Wales on 26 September 2017 (www.assembly.wales/en/bus-home/pages/rop.aspx?meetingid=4644&assembly=5&c=Record%20of%20Proceedings#C494225)

83   Renewable energy deep dive: recommendations [HTML] | GOV.WALES

84   British energy security strategy – GOV.UK (www.gov.uk)

85   Written Statement: UK Energy Security Strategy (8 April 2022) | GOV.WALES

A Ministerial Biodiversity Deep Dive commenced in spring 2022, considering actions to contribute to the global target of protecting 30% of the land and sea by 2030.

Marine Renewable Energy and Marine Biodiversity

There has been increasing recognition of the need to address Net Zero ambitions alongside the Nature Emergency and develop strategic approaches to help balance competing demands. In February 2022, the Senedd Climate Change, Environment and Infrastructure Committee undertook a 'snapshot' inquiry into Welsh Government's marine policies. The Committee made 20 recommendations relating to planning, licensing, evidence, nature conservation and blue carbon, with the main focus being balancing development, particularly marine renewable energy, with protecting biodiversity.

Welsh Government is working with UK Government to understand opportunities to develop a more strategic approach to marine environmental protection and recovery whilst supporting the deployment of offshore wind at scale and pace.

The UK Government has initiated a marine spatial prioritisation programme to better understand how protecting the marine environment and the interests of different marine activities (such as offshore wind and fisheries) can be prioritised.

Marine Planning across the UK:

The South-West of England and North-West of England marine plans were published in 2021. In 2020, Marine Scotland published a sectoral marine plan for commercial-scale offshore wind, identifying areas with potential for offshore wind and setting an overall national limit on generating capacity. Marine Scotland also initiated work in 2021 to develop a sectoral marine plan for smaller-scale offshore wind innovation and oil and gas decarbonisation.

The UK's withdrawal from the European Union:

While the WNMP was prepared and adopted under, and references, domestic UK legislation, the UK's withdrawal from the European Union is a major change which has occured whilst the Plan has been in effect, with the return of many functions to the UK and Welsh Governments. The full impact of this remains to be seen, with work ongoing to develop post-Brexit approaches to issues such as fisheries management and environmental regulation.

The COVID-19 pandemic:

The COVID-19 pandemic started a few months after the adoption of the WNMP and had a major impact on coastal communities and the economy, in particular sectors such as tourism and recreation. It also led to the suspension or scaling-back of many of the planned activities to support Plan implementation.

Ensuring a joined-up approach across borders:

The WNMP was developed to ensure compatibility with marine plans for neighbouring marine plan areas.

Welsh Government engages regularly with the other UK marine planning authorities and more widely, to share good practice and consider approaches to common issues. We work closely with marine planning officials in the MMO in relation to planning for cross border areas and we are working with the MMO to produce a joint cross-border marine planning guide.

The independent Hinkley Point C Stakeholder Reference Group, convened by the First Minister, reported in 2021, providing advice on a range of matters associated with the management of the marine environment around the Severn Estuary with respect to the Hinkley Point C development, including cross-border planning arrangements.

This report recognised the established engagement between Welsh Government and the MMO. It also highlighted the complex governance arrangements across the estuary as well as the importance of all projects with a potential impact upon Wales having regard to Welsh policy and legislation.

Future Wales, The National Plan 2040, the national development framework for Wales, was published in 2020. Future Wales includes recognition of the WNMP which helped to shape the policy. As noted by the plan, Future Wales and the WNMP work together to provide a framework for the management of change around our coast.