

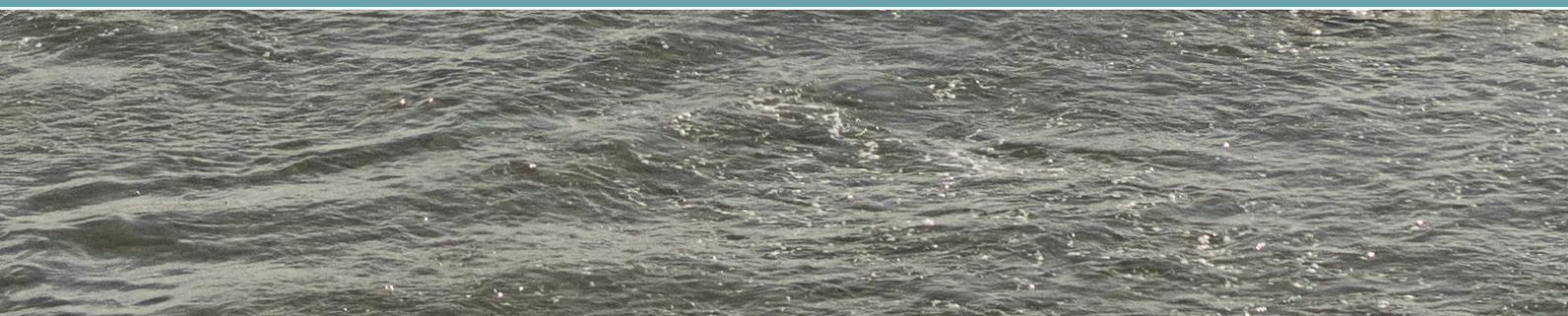


Llywodraeth Cymru
Welsh Government



Welsh National Marine Plan – Monitoring Report 2022–2025

November 2025



1. Introduction

The Welsh National Marine Plan (WNMP) was adopted and published on 12 November 2019. It sets out the Welsh Government's policy for the sustainable development of our seas. The WNMP established a strategic, plan-led approach to sustainably managing marine resources, respecting the environment and established uses of the sea whilst seeking lasting benefits for current and future generations from new opportunities.

The Marine and Coastal Access Act (2009) (MCAA) sets a legal requirement for Welsh Ministers to monitor and report to the Senedd at least every 3 years on the implementation of the WNMP. This is the second report.

2. Approach to monitoring

A Monitoring and Reporting Framework (gov.wales/welsh-national-marine-plan-monitoring-and-reporting-framework) for the WNMP was published in January 2020. The Framework, developed in collaboration with stakeholders, outlines the approach Welsh Government is following to measure the effectiveness of WNMP.

This report follows the same format as the first Report, published in November 2022. It reports on the same set of indicators:

- Decision making monitoring: indicators to assess effectiveness of the WNMP in enabling achievement of its objectives.
- Objective/Policy monitoring: the real-world outcomes (effects) to which Plan policies contribute.

All data, information and statistics used in this report relate to the period June 2022–June 2025.

Marine Planning in Wales is still a relatively new regime which does not work in isolation but is one of many processes which affect our marine area. As stated in the first monitoring report, understanding the precise effect of a strategic plan such as the WNMP is challenging. In the first report, monitoring focussed largely on progress with activities, outputs and intermediate outcomes, as these are the initial steps involved in successful implementation of a new plan led system of marine management.

3. Findings from the last report

The first monitoring report found there was good evidence that progress was being made to implement the Plan. This included through provision of new spatial tools and planning related guidance to support plan implementation. The WNMP was reported as being increasingly applied in decision making by public authorities in relation to marine consenting and there was also good evidence that the Plan was influencing wider approaches to marine management. Some good practice was noted to be emerging in relation to plan led decision making with clear links being made to Plan policies in project level decision making. It was noted some policies appeared to be having a clearer effect than others.

As has been the case for the rest of the UK, most evidence available for reporting effectiveness of the WNMP was qualitative, making determining cause and effect of the WNMP challenging in some cases. There was limited evidence available to enable a clear and precise identification of the effect of the Plan upon real world outcomes alongside and as part of the range of wider factors which also influence change in the marine environment and how it is used and managed.

Progress in implementing the WNMP was reported as broadly comparable to progress elsewhere in the UK.

Following the publication of the last monitoring report, the then Minister for Climate Change, Julie James, issued a Written Statement ([Written Statement: Taking forward marine planning following the three-year review of the Welsh National Marine Plan \(1 March 2023\)](#) | [GOV.WALES](#)). The statement set out that to make the best use of the policies within the plan,

more specific planning tools that can enable an increasingly spatial and prescriptive approach would be developed. Based on the findings of the last report and wider considerations, the then Minister concluded that it was not necessary to re-plan at that point in time.



4. Findings

The two tables below set out our findings for this second reporting period. The first table sets out the findings for the decision-making indicators and the second table sets out the findings for the objective/policy indicators. The table also sets out the progress since the last report.


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




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



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

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

Table 1: Decision making indicators summary of findings

| Indicator | Evidence source | Description | Progress (RAG) | Progress since 2022 |
|-----------------------|--|---|---|---|
| 1. Guidance available | WG Decision makers Advisory bodies | Inventory of guidance documents relating to the WNMP available to support plan users. | Further guidance published including extensive supporting documentation surrounding the consultation for and subsequent introduction of SRAs safeguarding key areas of resource for the tidal stream sector. Additionally, new technical statements have been published for sector safeguarding and also WNMP policy on protecting and enhancing marine ecosystems. Contextual guidance has also been published on marine sector governance, as well as a cross-border marine planning guide for the Severn Estuary. Confidence: High | Increasing  |

| Indicator | Evidence source | Description | Progress (RAG) | Progress since 2022 |
|--|------------------------------------|--|---|--|
| 2. Application of WNMP policy in relevant decisions by public authorities | WG in liaison with decision makers | Evaluation of applications to determine whether WNMP policies are being applied as part of decision making by public authorities. | Evidence of increasing application of the WNMP in applications and Marine Licensing decisions. 100% of Band 2 and 96% of Band 3 applications to NRW included compliance information and were deemed to have complied with the WNMP. There is also evidence of the WNMP being used in DCO processes but less clear evidence on use by wider decision makers such as Local Planning Authorities. Confidence: High | Increasing  |
| 3. Stakeholder views on WNMP effectiveness informed by user survey | WG Plan users | Evidence for positive stakeholder engagement and the effectiveness of the effectiveness of the Plan. | A stakeholder survey carried out for the first reporting period was not repeated. However, the independent review into Marine Planning Approaches provided evidence that engagement with stakeholders is effective and that the Plan is considered positively by stakeholders and broadly fit-for-purpose. Confidence: High | Increasing  |
| 4. Public funding schemes for projects addressing climate change adaptation/resilience at the coast refer to the WNMP | WG NRW | Evidence that public funding/grant schemes for projects that support climate change adaptation/resilience at the coast are citing WNMP policies. | No new evidence available that plan policies are guiding public funding schemes. Confidence: Medium | No change  |

| Indicator | Evidence source | Description | Progress (RAG) | Progress since 2022 |
|---|-----------------|--|---|---|
| 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. | No new evidence available that plan policies are guiding public funding schemes for ecosystem restoration and enhancement projects refer to WNMP. Confidence: Medium | No change  |
| 6. Developing the evidence base | WG NRW | Report on the provision and maintenance of WNMP implementation related evidence. | Clear progress in supporting material being made available via the Marine Planning Portal including 462 additional data layers including SRAs for Tidal Stream Energy, updated Refined Resource Area and constraints mapping for tidal and wave energy, floating offshore wind, aquaculture and marine aggregates. New layers also include updated NRW environmental considerations mapping. Confidence: High | Increasing  |










| Indicator | Evidence source | Description | Progress (RAG) | Progress since 2022 |
|-------------------------------------|-----------------|---|--|---|
| 7. Spatial marine planning data use | WG | Evidence that Plan users are accessing spatial data for use in applications and to support decision-making. | <p>There has been a small decrease in total number of page-views to the Marine Planning Portal (from 2750 to 2519), and in active users (from 1430 to 1209). However, there have been small increases in the number of views per active user (from 1.9 to 2.08), average engagement time per active user (from 2m 39s to 2m 59s) and event count (i.e. when a user selects a layer or views metadata) (from 25,671 to 28,607).</p> <p>Therefore, despite the slight decrease in active users and page-views, the data appear to show increasing engagement with the portal in terms of increasing time spent on the site, views per user, and increasing engagement with data layers.</p> <p>Confidence: High</p> | <p>Increasing</p>  |


Table 2: Objective/policy indicators summary of findings

| Indicator | Evidence source | Description | Progress (RAG) | Progress since 2022 |
|---|-----------------------------------|--|--|--|
| 8. Effective activity or resource safeguarding | Public authority decision making. | Evidence of where decision making has considered the safeguarding of an existing activity or resource as part of the consenting process. | <p>There is limited evidence to date of the impact of safeguarding and coexistence policies upon decision making. Only one Band 3 decision document referenced the safeguarding policy SAF_01. Four decision documents referenced co-existence (one Band 2 and three Band 3).</p> <p>The first Strategic Resource Areas (SRAs), safeguarding the future availability of key areas of resource for the tidal stream sector, were introduced in January 2025. Both the 2024 public consultation on these SRAs and the recent independent review of marine planning approaches provide evidence of support from stakeholders for the SRA approach.</p> <p>New technical statements have been published for safeguarding existing activity and interests for ports & shipping, recreational boating and subsea cabling.</p> <p>Confidence: Medium</p> | <p>Increasing</p>  |
| 9. Developing our understanding of Marine GVA in Wales & 10. of Marine Employment in Wales | WG | Summary of understanding of annual Welsh marine GVA and employment for key marine sectors. | <p>Significant data gaps and limitations identified for the data relating to Welsh marine GVA and employment.</p> <p>Confidence: High</p> | <p>No change</p>  |

| Indicator | Evidence source | Description | Progress (RAG) | Progress since 2022 |
|---|---------------------------|---|--|---|
| 11. Scale of renewable energy sector | WG Marine Energy Wales | Report statistics on number and scale of installed renewable energy developments. | <p>The reporting period has seen continued growth and investment in fixed and floating offshore wind development. Marine Energy Wales' State of the Sector Report for 2023 indicated that spending and investment totalled £103.4 million. This included the awarding of a Marine License for Wales' first floating Offshore wind development, Erebus and the fixed offshore wind development of Awel y Môr. The 2024 State of the Sector Report indicated investment of £29.9 million, which despite being lower, is still the second highest spend to date. The map on page 14 shows the scale of renewable energy development in Welsh waters over time.</p> <p>Confidence: High</p> | <p>Up</p>  |

| Indicator | Evidence source | Description | Progress (RAG) | Progress since 2022 |
|--|----------------------------------|---|---|--|
| 12. Volume and value of tourism related visits to the Welsh coast | WG, NRW, LAs | Summary statistics on the volume and value of tourism related visits to the Welsh coast. | There is limited availability of data for this indicator to maintain a consistent baseline. Data sources used for the 2019–2022 report are either no longer produced or have undergone methodological changes making comparison difficult. Other tourism data sources do not disaggregate marine and coastal tourism from other forms of tourism. No clear data is available to evidence an increase or decrease. Confidence: Low | No change  |
| 13. Recreational use of the marine environment | WG, NRW, LAs | Summary of current state of understanding of recreational use of the marine and coastal environment in Wales. | Currently there is no consistent baseline available for recreational activity for the Welsh marine plan area. Confidence: High | No change  |
| 14. Historic Assets | Public authority decision making | Application of Historic Assets policy in relevant decisions. | Implementation of the heritage policies are being routinely considered and applied as part of the marine licensing application process where relevant. Four marine licensing decision documents referenced SOC_05 explicitly (one Band 2 and three Band 3). Confidence: High | No change  |
| 15. Conformance with Shoreline Management Plan (SMP) policies | Public authority decision making | Review of relevant applications and their conformance with SMP policies. | Three NRW Marine Licensing decisions have complied with Shoreline Management Plan (SMP) policy. (Two Band 2 and one Band 3). Confidence: Medium | No change  |

| Indicator | Evidence source | Description | Progress (RAG) | Progress since 2022 |
|---|-----------------------------|--|--|--|
| 16. UK Marine Strategy Good Environmental Status (GES) | UK Marine Strategy, WG, NRW | <p>Review of progress towards targets or achieving GES under the UK Marine Strategy for the following descriptors:</p> <ul style="list-style-type: none"> • 16a. Invasive Non-Native Species (INNS) • 16b. Marine litter • 16c. Status of commercial fish populations | <p>The achievement of GES with respect to INNS is uncertain for both the Celtic Seas and the Greater North Sea due to data limitations and a lack of comprehensive INNS monitoring in UK waters.</p> <p>The UK has not met GES for marine litter. Overall marine litter levels remain high, although we are seeing encouraging reductions in beach litter and plastics found in the stomachs of fulmar. Currently stomach contents are not assessed in Wales due to a lack of an appropriate indicator species.</p> <p>Overall, commercially exploited fish and shellfish have partially met GES across UK waters. By integrating the criteria for both indicators (fishing pressure and reproductive capacity), our assessment (for the period 2016-2021) shows 42% of marine quota fish stocks and 11% of non-quota shellfish stocks have achieved GES. This is an increase of 9% for marine quota and 6% for non-quota shellfish stocks.</p> <p>Confidence: Medium</p> | <p>No change</p>  |

| Indicator | Evidence source | Description | Progress (RAG) | Progress since 2022 |
|---|-----------------|---|--|--|
| 17. Designated site condition assessments | NRW | Review of the outputs of designated site condition assessments. | NRW published the first comprehensive <u>condition assessments</u> for inshore Special Areas of Conservation and Special Protection Areas found wholly in Wales in June 2025. Confidence: Medium | No change  |

5. Conclusion

Our overall WNMP monitoring conclusions are:

- Most evidence available to allow an understanding of the effectiveness of the WNMP is qualitative; determining cause and effect of the WNMP remains challenging.
- There is good evidence that progress is being made in Plan implementation including through provision of new spatial tools and planning related guidance.
- The WNMP is routinely being applied in decision making by public authorities in relation to marine consenting and there is also good evidence that the Plan is influencing wider approaches to marine management.
- Some good practice is emerging in relation to plan led decision making with clear links being made to Plan policies. Some policies appear to be having a clearer effect than others.
- The recent independent review into marine planning approaches provided evidence that engagement with stakeholders is recognised as effective and that the Plan is considered by stakeholders as broadly fit-for-purpose.
- Plan policies are supporting delivery of Plan objectives, for example, the sustainable expansion of marine renewable energy deployment, but the degree of progress varies. There is reasonable evidence to suggest Plan objectives are contributing towards delivery of the High-Level Marine Objectives (HLMOs) with plan objectives being aligned to HLMOs.

Figure 1. Maps showing location of marine renewable energy developments, leases and demonstration zones 2019, 2022 and 2025.

