

National Assembly for Wales

Climate Change, Environment and Rural Affairs Committee

The Welsh Government's progress on climate change mitigation:

Annual Report of the Climate Change, Environment and Rural Affairs Committee

May 2018



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Climate Change, Environment and Rural Affairs Committee

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Annual Report of the Climate Change, Environment and Rural Affairs Committee

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About the Committee

The Committee was established on 28 June 2016 to examine legislation and hold the Welsh Government to account by scrutinising expenditure, administration and policy matters encompassing (but not restricted to): local government; housing, community regeneration, cohesion and safety; tackling poverty; equality of opportunity and human rights.

Committee Chair:



Mike Hedges AM

Welsh Labour
Swansea East

Current Committee membership:



Gareth Bennett AM

UKIP Wales
South Wales Central



Dawn Bowden AM

Welsh Labour
Merthyr Tydfil and Rhymney



Jayne Bryant AM

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Dai Lloyd AM

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1. Introduction

1. In December 2016, the Committee agreed its approach to climate change scrutiny for the Fifth Assembly. This consists of:

- Annual scrutiny of Welsh Government, to include a Committee scrutiny session with the Cabinet Secretary for Energy, Planning and Rural Affairs and the Minister for the Environment;
- A plenary debate on the Committee's report arising from its annual scrutiny session with the Cabinet Secretary and Minister;
- Ad hoc scrutiny. For example, if there are significant policy changes or developments which have an impact on key sectors;
- Post-legislative scrutiny to coincide with key implementation milestones for the Environment (Wales) Act 2016 and the Well-being of Future Generations (Wales) Act 2015. This will include the development of carbon targets and budgets, new regulations and publication of Welsh Government policies to address climate change;
- Adopting a cross-Governmental approach to scrutiny. This will include scrutiny sessions and correspondence with relevant Cabinet Secretaries and Ministers on their climate change action, policies and progress;
- Requesting technical briefing on approaches to climate change modelling, carbon accounting and carbon budgeting from the UK Committee on Climate Change and other relevant experts;
- Consideration of how other UK legislatures are approaching climate change scrutiny; and
- Liaising with the UK Committee on Climate Change and welcoming appropriate exchange of information and engagement with the Welsh Government.

2. This report is of the Committee's first annual scrutiny session with the Cabinet Secretary for Energy, Planning and Rural Affairs and the Minister for the Environment.

Scrutiny of the Cabinet Secretary for Economy and Transport

3. In February 2018, the Committee published a report of its scrutiny of the Cabinet Secretary for the Economy and Transport. That report considers several issues relating to climate change. The report is available on the National Assembly for Wales' website.¹

Climate Change Expert Reference Group

4. On 6 October 2016, the Climate Change, Environment and Rural Affairs Committee agreed to establish a Group to support it in its scrutiny of climate change policies, action and progress. The Group's terms of reference are:

“To provide the Climate Change, Environment and Rural Affairs Committee with expert advice in support of its scrutiny of Welsh Government progress towards meeting climate change policy commitments, statutory targets and duties. This includes climate change mitigation and adaptation measures.

This will include:

- providing advice in support of an annual scrutiny round;
- supporting the Committee with its post-legislative scrutiny of the Environment (Wales) Act 2016 and the Well-being of Future Generations (Wales) Act 2015;
- proactively contacting the Committee in response to emerging issues across a wide range of sectors; and
- responding to specific requests for advice in relation to the Committee's work.”

5. The Group held four meetings between February 2017 and February 2018, including presentations and discussions of relevant issues with the Office of the Future Generations Commissioner and Baroness Brown, Chair of the Committee on Climate Change Adaptation sub-Committee.

6. Minutes of the Group's meetings are available on the Committee's website. A list of those who have attended meetings of the Expert Reference Group is attached at Annexe A of this report.

¹ www.assembly.wales/laid%20documents/cr-ld11426/cr-ld11426-e.pdf

7. The Committee is grateful to the Expert Reference Group for its work, which has informed the scrutiny process and this report.

2. The Welsh Government's progress on climate change

Welsh Government commitments

8. The Welsh Government's Climate Change Strategy (2010) committed to a reduction in total greenhouse gas emissions to a level 40% below 1990 levels by 2020. The Strategy also included a target to reduce emissions in areas within devolved competence by 3% each year from 2011, relative to a baseline of average emissions during 2006-2010.

9. The **Environment (Wales) Act 2016** (the Environment Act) placed new duties on the Welsh Government to reduce emissions, which include the following:

- The Welsh Government must ensure that net emissions for 2050 are at least 80% lower than the baseline (1990 or 1995);
- By the end of 2018, the Welsh Government must set interim emissions targets for 2020, 2030 and 2040;
- For each five year budgetary period the Welsh Government must set a maximum total amount for net Welsh emissions (a carbon budget), with the first two budgets to be set by the end of 2018; and
- The Welsh Government must take into account international agreements to limit increases in global average temperatures.

10. The **Well-being of Future Generations (Wales) Act 2015** (the Well-being of Future Generations Act) supports carbon reduction at a national and local level. The Act requires public bodies, including the Welsh Government, to work to achieve all seven well-being goals, three of which specifically reference climate change.

Progress against Welsh Government targets

11. The **latest emissions statistics** published by the Welsh Government, show that, in 2015, Welsh emissions were 19% below 1990 levels. This is against its own target of a reduction of 40%² by 2020. Over the same period, emissions across the UK fell by 27%.

² As set out in the Welsh Government's Climate Change Strategy (2010).

12. The UK Committee on Climate Change (UK CCC) has observed that “progress remains a long way short of the Welsh Government’s existing target to reduce [emissions] to a level 40% below 1990 levels by 2020”.

13. Progress has been slower in Wales than the UK as a whole, partly as a result of Wales having a much larger share of industry emissions. The UK CCC’s analysis of emissions in Wales demonstrates that:

- Power sector emissions have increased 17% since 1990, due to an increase in gas-fired generation and continued emissions from Aberthaw coal-fired power station. Aberthaw represented 51% of Welsh power emissions and 14% of total Welsh emissions in 2015;
- Industry emissions have been broadly flat since 2008, although they have fallen by around 31% since 1990. This fall is less than the 48% reduction in industrial emissions from the UK as a whole over the period to 2015;
- Direct emissions from buildings are 26% lower than 1990 levels, largely due to increased efficiency of boilers and improvements to building fabric;
- Waste emissions in Wales have fallen by 72% since 1990;
- Agriculture emissions have fallen 15% since 1990, but have risen slightly since 2009. The size of the land-use sink has decreased due to more land being converted to settlements and a reduction in tree-planting rates; and
- Transport emissions have been broadly flat since 1990.

UK Committee on Climate Change advice

14. The Welsh Government commissioned the UK CCC to provide it with advice, initially, on the *design* of Welsh carbon budgets and targets (April 2017), and, more recently (December 2017), on the *level* of emissions targets and carbon budgets required to meet its obligations as set out in the Environment (Wales) Act. The recommendations in the first tranche of UK CCC advice were accepted by Welsh Government in July 2017.

15. The second tranche of UKCCC advice makes several observations and recommendations:

- Achieving an 80% reduction in emissions in Wales by 2050 will be more challenging than the equivalent reduction for the UK as a whole (primarily due to the prevalence of “big emitters”);
- It recommends the following targets:
 - A 2020 target for an emissions reduction of 27% on 1990 levels;
 - A 2030 target for an emissions reduction of 45% on 1990 levels; and
 - A 2040 target for an emissions reduction of 67% on 1990 levels.
- These targets are on a path to an 80% reduction in Welsh emissions by 2050.

Carbon budgets

16. The UK CCC says there is little scope for new policies to meet the first carbon budget. It suggests that:

- For the first carbon budget (2016-2020), emissions should be limited to an average of 23% below 1990 emissions; and
- For the second carbon budget (2021-2025), emissions should be limited to an average of 33% below 1990 emissions.

17. The recommended levels of the 2020 target and the first two carbon budgets allow for continued, though declining, generation from the Aberthaw coal fired power station. If emissions from the station cease prior to 2025, these targets should be tightened in order to maintain the ambition embodied in the recommended 2020 target.

Expert Reference Group³ analysis

The Expert Reference Group was disappointed by the 2020, 2030 and 2040 targets recommended by the UK CCC. It suggested they demonstrate a lack of ambition and could be interpreted as a reward for a lack of Welsh Government progress to date. The Group felt that a duty should be placed on all Cabinet Secretaries and Ministers to make changes to meet the targets.

³ The Expert Reference Group was established by the Committee in 2017 to support its scrutiny of climate change policies, action and progress.

The Group believed that the targets do not adequately take into account the commitments made under the Paris Agreement, and that they should be more ambitious if Wales is serious about its global responsibilities. It was suggested that a higher target of 100% by 2050 is needed.

In relation to the second tranche of UK CCC advice, the Group considered there to be a lack of innovation, and that the majority of the suggested policy recommendations and mitigating actions had been attempted in the past with little success.

The Group was concerned about the extent to which the Welsh Government was engaging with the public on the challenges posed by climate change.

Welsh Government's evidence

18. In their written submission to the Committee, the Cabinet Secretary and Minister said the Welsh Government was evaluating the latest tranche of the UK CCC's advice, alongside other evidence, and would provide a further update in the summer of 2018 on its position. The Cabinet Secretary for Economy and Transport, in his response to the Committee's report on general and budget scrutiny (February, 2018) confirmed that:

"The Welsh Government will be publishing a response to the UK CCC advice around setting interim targets and carbon budgets before the summer recess."⁴

19. The Cabinet Secretary for Energy, Planning and Rural Affairs was asked why interventions to date had not put Wales on a trajectory to meet the 2020 target in the Climate Change Strategy. The Cabinet Secretary responded that:

"there are a number of factors that have limited our ability to be able to achieve this target, such as the role of the EU emissions trading system, the economic make-up and the sites we have across Wales...and the weather variability, which I think has been absolutely proven this year."⁵

20. The official accompanying the Cabinet Secretary clarified the Welsh Government's approach to its targets:

"if we look at the original climate change strategy, the 40 per cent target covers all emissions in Wales. The 3 per cent year-on-year

⁴ www.assembly.wales/laid%20documents/gen-ld11519/gen-ld11519-e.pdf

⁵ <http://cofnod.cynulliad.cymru/Committee/4550>

cumulative target relates to areas of broadly devolved competence...whereas the new framework that we are establishing: Ministers and the Cabinet have already made a decision that, under the carbon budgeting framework, all emissions in Wales, including international aviation and shipping, will be counted as part of the budget.”⁶

21. The official suggested that, as a result of this change in approach, there was a question as to whether the 3 per cent target would continue.

22. The Cabinet Secretary and Minister's written submission said that the Low Carbon Delivery Plan, due to be published in March 2019, will set out proposals and policies for the first carbon budget, broken down into areas of Ministerial responsibility. Welsh Ministers will have collective, long-term responsibility for delivering on climate change. In reference to the carbon budgets, the Cabinet Secretary said she expected the process for Assembly scrutiny to be similar to that for the Welsh Government's draft Budget. An official accompanying the Cabinet Secretary said:

“...we're currently working on the regulations for the first budgets and then by March we'll need to table our first plan, which will be a cross-Governmental plan, which will set out both the steps we're taking to reduce emissions as well as the steps that we're taking to support the transition to a low-carbon economy.”⁷

23. In response to a question about the extent of joint-working across the Cabinet, the Cabinet Secretary said:

“I think we are joining up better than we were, and certainly on carbon budgeting. Obviously, we're in the first carbon budget period now. While we're going through the process of setting the next three carbon budgets, we've met with all the Cabinet Secretaries and Ministers to be able to do that...We are seeing much more of a join up.”⁸

24. The Cabinet Secretary referred to a recent presentation that had been given to members of the Cabinet by a climate change analyst. She said:

⁶ <http://cofnod.cynulliad.cymru/Committee/4550>

⁷ *ibid*

⁸ *ibid*

“you could see the look on every Cabinet Secretary and Minister’s face – it was really stark, his analysis of all of our portfolios and all our policies and what we needed to do to decarbonise several aspects...”⁹

25. Describing the Welsh Government’s approach to carbon budgets, the Cabinet Secretary said that she expected “to look for advice from the UK CCC”. The UK CCC undertakes a similar function for the UK Government. Thereafter, the process for Assembly scrutiny is anticipated to be similar to that for the Welsh Government’s draft Budget.

26. In relation to energy generation, the Cabinet Secretary referred to the target of 70% of generation in Wales to be met by renewable resources by 2030. She believed this was “very ambitious, but also achievable”. She said she is convening a group, to include the National Grid, Ofgem and energy network operators, to consider future energy requirements.

27. In their written submission, the Cabinet Secretary and Minister said that officials were working with the Future Generations Commissioner’s Office to embed the ways of working and wider well-being commitments in the Welsh Government’s Decarbonisation Programme. It also said the Welsh Government would consult on how Wales can meet its long-term climate goals for decarbonisation.

Our View

The Welsh Government will not meet its targets for emissions reduction by 2020, as set out in its Climate Change Strategy (2010).

The Committee notes the three reasons – the EU ETS, the economic make-up of Wales and weather patterns – given by the Cabinet Secretary for this failure. The Committee believes that these variables should have been reflected in policy formulation and factored into the development of realistic and achievable targets.

Our Expert Reference Group was disappointed by the new, lower targets suggested by the UK CCC and believed that such an approach could be seen as “rewarding failure”. The UK CCC’s approach of setting lower targets is pragmatic and, given the lack of progress to date, necessary. However, it is regrettable that this is the case.

⁹ <http://cofnod.cynulliad.cymru/Committee/4550>

The Welsh Government faces an additional challenge arising from the number of “big emitters” in Wales. There is therefore a need to maximise the impact of interventions to reduce emissions in other areas, such as transport and housing. The Welsh Government must also explore with the “big emitters” how their emissions can be reduced and whether this can be supported by the Welsh Government. Currently, it appears that the Welsh Government is relying on the eventual closure of big emitters, such as Aberthaw, and the consequential reductions in emissions, to achieve its targets. While this is a pragmatic approach, it should not be the Welsh Government's primary policy response to climate change.

The Committee notes the Welsh Government's intention that all emissions in Wales, including international aviation and shipping, will be included in the carbon budgeting framework. The inclusion of emissions that arise from matters that are outside devolved competence should not, however, draw attention from matters where the Welsh Government has direct responsibility. The Cabinet Secretary will need to be vigilant to ensure this will not be the case.

We note the comments that, as a result of the carbon budgeting process, all Cabinet Secretaries and Ministers will have collective, long-term responsibility for delivering on climate change. The Committee welcomes the candour of the Cabinet Secretary's comments about joined up working having improved recently, as a result of the Welsh Government's work on decarbonisation.

However, this evidence suggests that, to date, the level of engagement by members of the Cabinet in climate change action has been insufficient. It suggests that joint working across the Cabinet has also been lacking. This may be a reason why the Welsh Government will not meet the targets in its Climate Change Strategy. The Committee is pleased to hear that these aspects are improving as a result of the statutory carbon budgeting process.

The Committee notes the Cabinet Secretary's comments on the process for carbon budgeting, but there is a lack of detail about the process with only one year until the publication of the Welsh Government's Low Carbon Delivery Plan. Furthermore, the Welsh Government is required to publish its first carbon budgets before the end of 2018. The lack of clarity at this late stage is a cause for concern.

The Cabinet Secretary has suggested that Assembly scrutiny of carbon budgets could undergo a similar process as for the draft Budget. A robust scrutiny process would, of course, be welcomed, but we believe the detail of that

process should be a matter for consultation both in the Assembly and with external stakeholders.

There is a need for external challenge of the Welsh Government's policy development, for example, in the form of a peer review process.

The Cabinet Secretary should provide further information about the Welsh Government's intentions for a public consultation on how the 2030 decarbonisation targets can be met and how the information that is collected will be used. The Cabinet Secretary should also provide information about how it intends to engage with stakeholders, including the Future Generations Commissioner, in the development of its carbon budgets.

Recommendation 1. The Cabinet Secretary should provide details of the specific actions she has taken and will take to improve engagement and joint working across the Cabinet in relation to climate change mitigation.

Recommendation 2. The Welsh Government should undertake a consultation in the Assembly and with external stakeholders on its suggested approach for Assembly scrutiny of carbon budgets.

Recommendation 3. The Welsh Government should set out its engagement thus far with external stakeholders in the development of its carbon budgets and its plans for future engagement.

Recommendation 4. The Welsh Government should explain how it will ensure that the climate change mitigation policies it develops are subject to independent, external challenge and review.

3. EU Emissions Trading Scheme (EU ETS)

28. The EU ETS is the world's biggest carbon market. It operates in 31 countries (all 28 EU countries plus Iceland, Liechtenstein and Norway) and covers around 45% of the EU's greenhouse gas emissions. Currently, there are 78 companies covered by the EU ETS in Wales, including Tata Steel, Aberthaw Power Station, Airbus, and Ford. In Wales, Natural Resources Wales (NRW) is the regulator for the scheme.

29. The EU ETS works on the "cap and trade" principle. A cap is set on the total amount of certain greenhouse gases that can be emitted by installations covered by the system. The cap is reduced over time so that total emissions fall. Within the cap, companies receive or buy emission allowances which they can trade with one another as needed. They can also buy limited amounts of international credits from emission-saving projects around the world. The limit on the total number of available allowances ensures that they have a value.

30. Each year a company must surrender enough allowances to cover all its emissions, otherwise heavy fines are imposed. If a company reduces its emissions, it can keep the spare allowances to cover its future needs or else sell them to another company that is short of allowances. Trading in this way aims to bring flexibility that ensures emissions are cut where it costs least to do so. A robust carbon price also promotes investment in clean, low-carbon technologies.

31. In March 2018, the UK Government published its analysis of areas of EU law that intersect with devolved competence. It refers to the EU ETS as one of 24 policy areas that are subject to more detailed discussion to explore whether legislative common framework arrangements might be needed, in whole or in part.

Welsh Government's evidence

32. As set out in the previous chapter, the Cabinet Secretary said that one of the reasons the Welsh Government would not meet its target of a 40% reduction in emissions by 2020 (Climate Change Strategy for Wales) was because of the EU ETS. The Cabinet Secretary also said:

"the EU ETS is for the whole of Europe, and I don't think it works as well as we anticipated for Wales, because it's looking at the whole of Europe. Within Wales, ETS emissions actually rose by 12 per cent between 2010 and 2016, and because these emissions account for greater than 50 per

cent of our total emissions, it then impacts on our ability to deliver the 40 per cent target.”¹⁰

33. An official accompanying the Cabinet Secretary said that there were several potential approaches that could succeed the EU ETS, once the UK has left the EU:

“There are a range of options we need to look at, ranging from staying within the current EU ETS to setting up, maybe, a UK ETS, or agglomerating at a sub-national level, so Wales having its own scheme.”¹¹

34. The official said that further discussions were needed with the UK Government and other devolved administrations to consider these options. The Cabinet Secretary said she was frustrated with the lack of progress on this matter.

35. The Cabinet Secretary referred to discussions that had taken place with the UK CCC about the potential impact of leaving the EU ETS on emissions targets and carbon budgeting. She said she would be asking the UK CCC to look at this matter in detail once the position became clearer. The official accompanying the Cabinet Secretary said:

“What they’ve done, as the Cabinet Secretary has outlined, is an assessment not just of EU ETS but all the legislation, and almost coming to the conclusion that if we have to deliver on our carbon budgets, be it at Wales or UK level, then it is clear that we currently depend on a lot of EU policies or directives to drive that—probably over 50 per cent, going forward. So, leaving the EU, we’ll need to think about not only maintaining a lot of those directives or policies, but, arguably, strengthening them. The EU ETS is one mechanism within that. I think they are waiting—. UK committee on climate change will wait to see what the policy direction is on Brexit more generally before they can then give more detailed advice about what future schemes or proposals might look like.”¹²

Our View

The Committee notes that the Cabinet Secretary is frustrated by a lack of progress in determining what will happen next with the EU ETS. The Cabinet

¹⁰ <http://cofnod.cynulliad.cymru/Committee/4550>

¹¹ *ibid*

¹² *ibid*

Secretary's position is that one of the reasons the Welsh Government will not succeed in meeting its energy emissions targets for 2020 is the role of the EU ETS.

However, the Welsh Government's vision for a successor scheme is unclear. If the Welsh Government believes that the current scheme is not right for Wales, it must seize this opportunity to influence the shaping of its successor to better meets Wales' needs.

Furthermore, the Committee believes that this is a crucial area, and is concerned that insufficient progress has been made at a UK level. The devolved administrations, including the Welsh Government, must press for more progress.

This Committee made the following recommendation to the Welsh Government on this matter in its report on general and budget scrutiny of the Cabinet Secretary for Economy and Transport (February, 2018):

"No later than 6 months of the publication of this report, the Welsh Government should: provide the Committee with details of what it believes should be the requirements of a replacement for the EU ETS; and report to this Committee on the progress of discussions with the UK Government on a potential replacement for the scheme."¹³

The Cabinet Secretary for Economy and Transport, in his response to that report, said:

"The Cabinet Secretary for Energy, Planning and Rural Affairs is working with her counterparts at the other Devolved Administrations and with the UK Government to determine if a framework is required or desirable. She will provide the Committee with an update of the discussions within 6 months."¹⁴

The evidence provided by the Welsh Government suggests that the majority of the mechanisms for delivering climate change and emissions reductions targets are derived from EU directives or regulations. Consequently, they will need to be replaced or even strengthened once the UK has exited the EU. It is helpful that the Welsh Government plans to seek further advice from the UK CCC on this matter.

¹³ www.assembly.wales/laid%20documents/gen-ld11519/gen-ld11519-e.pdf

¹⁴ www.assembly.wales/laid%20documents/cr-ld11426/cr-ld11426-e.pdf

Recommendation 5. The Welsh Government should: provide the Committee with details of what it believes should be the requirements of a replacement for the EU ETS

Recommendation 6. The Welsh Government should share with this Committee the UK Committee on Climate Change's analysis of the impact of leaving the EU on the Welsh Government's carbon budgets, targets and climate change policies.

4. Land Management

36. In 2014, agriculture and land use **accounted for 12% of total emissions in Wales**, and 21% of emissions within devolved competence. Emissions from these sectors decreased between 2006 and 2013, mainly due to a decline in livestock numbers and a reduction in nitrogen fertiliser use. There was a slight increase from 2013 to 2014, which is attributed to an increase in the number of dairy cattle and sheep.

37. Most emissions from agriculture come from nitrous oxide and methane, from fertiliser and manure use, soil processes and ruminant emissions. Additional emissions are created from cultivation and conversion between different land uses. This relates to the emissions and sinks from biomass and soils of different types. The land use, land use change and forestry sector is a net carbon sink. This sector is an area where the Welsh Government has several levers, although at present many of these are within EU Frameworks such as the Common Agricultural Policy (CAP) and the wider Rural Development Plan and regulatory requirements.

38. The 2010 Climate Change Strategy for Wales set out the following areas of focus for Welsh Government action on this issue:

- Agriculture and land management schemes targeted on actions to reduce greenhouse gas emissions;
- Additional woodland creation;
- Advice and support for farmers; and
- Red meat and dairy roadmaps.

UK Committee on Climate Change advice

39. The UK Committee on Climate Change, in its second tranche of advice, made recommendations on agriculture and forestry:

- The Welsh Government should put in place farming policies to reduce emissions that move beyond the current voluntary approach and replace the Common Agricultural Policy (CAP) with a framework that links support to measures aimed at emissions reduction and removals, and to improving the resilience of the natural environment to the impacts of climate change.

- Current planting rates in Wales fall below the Welsh Government's ambitious tree planting targets. The Welsh Government should simplify and streamline the process for supporting tree planting and reduce the barriers to action.

Welsh Government's evidence

Forestry and woodland

40. Forestry and woodlands have an important role in carbon sequestration. The Climate Change Strategy specifically called for: "...expansion of woodland in Wales by increasing the average planting rate from about 500 ha to 5,000 ha per annum maintained over 20 years". This equates to 100,000 ha of new woodland creation between 2010 and 2030. However, according to the **Woodland for Wales Action Plan (2015-2020)**, only 3,203 ha of new planting had taken place between 2010 and 2015.

41. The Minister for Environment confirmed that the Welsh Government remained "committed to that target". The Welsh Government's paper said that:

"The new planting aspiration is 2,000 hectares a year with the aim of around 1,000 hectares delivered through Glastir. The other half would be achieved through more privately funded planting or other means. Current planting rates are not delivering the target for new woodland. However, Welsh Government views this as a long term aspiration which will need time for a range of measures to make progress rather than a straight line annual progression."¹⁵

42. The Cabinet Secretary told the Committee that she had discussed the Valleys Landscape Park with the Cabinet Secretary for Local Government and Public Services, and that she believes this offers an opportunity to increase planting.

Agriculture

43. In their written submission, the Cabinet Secretary and Minister said that the Welsh Government is currently assessing the challenges of changes to trading conditions for farmers after Brexit, including the end of the CAP. This work includes the impact of Brexit on the need to meet international and domestic commitments to reduce emissions from the agriculture sector. The Minister and Cabinet Secretary went on to say:

¹⁵ <http://cofnod.cynulliad.cymru/Committee/4550>

“We want to keep farmers on the land. Our new policy should centre on Welsh land delivering public goods for all the people of Wales. This may include actions such as tree planting and peat bog restoration to increase the scale of the carbon sink in land use.”¹⁶

44. The Cabinet Secretary told the Committee she would be establishing a stakeholder group to consider the future links between land management and public goods, which would report to her by the summer.

45. The Cabinet Secretary said it is difficult to “come forward with policies”¹⁷ as the future funding for agriculture continues to be unclear. She has asked the Public Policy Institute for Wales to undertake exploratory work in relation to a long-term direction for agriculture policy and support. She had also discussed with Welsh universities the potential role they could play in similar work.

46. The written submission referred to the Agriculture Industry Climate Change Forum (AICCF), which is an industry led forum, providing evidence and expert opinion to the Welsh Government on options to achieve optimum change. The group is working with the Welsh Government to:

- Work with the wider food chain to implement a national approach to Carbon Navigation; and
- Develop and agree a national set of high level and sub set of performance indicators within a robust monitoring and evaluation framework to measure progress in the agriculture sector and Welsh food businesses.

47. In reference to agricultural pollution events, the Cabinet Secretary said she was “disappointed to see the number of agricultural pollution events that we’ve seen”.¹⁸ To tackle the issue she said she preferred an approach which was voluntary but involved some regulation. She recognised the urgency of this problem and had asked a group of representatives from the sector to draw up recommendations by the end of March 2018. She said that she would prefer to work in partnership with the sector, but if that did not work, she would look at the issue again.

¹⁶ <http://cofnod.cynulliad.cymru/Committee/4550>

¹⁷ <http://cofnod.cynulliad.cymru/Committee/4550>

¹⁸ <http://cofnod.cynulliad.cymru/Committee/4550>

Planning

48. In its second piece of advice, the UK Committee on Climate Change said that the planning framework is another useful lever that needs to be well aligned to objectives for emissions reduction in Wales, for example through encouraging walking, cycling, use of public transport and electric vehicle charging points. An official accompanying the Cabinet Secretary talked about the focus on “place making” in the Welsh Government’s “Planning Policy Wales” document that is currently out for consultation. He went on to talk about the concept of “net environmental gain”:

“if you’re developing something, can you actually have an environmental gain as part of that?”¹⁹

49. The official also said that the “place making” approach would be an opportunity to look more at tree planting in urban environments.²⁰

50. In response to a question about the consultation for the 10th edition of Planning Policy Wales and recent media coverage of its impact on the protection of ancient woodlands, the official accompanying the Cabinet Secretary said:

“the language is different, but the emotion behind it in terms of protecting woodland is the same. So, the words have changed, but we are still seeking to protect ancient woodlands. Obviously, it’s a consultation at the moment. If people have concerns, we’ll look again at the words.”²¹

Our View

Forestry and woodland

One of the key messages of this Committee’s report, “Branching Out: a new ambition for Woodlands policies in Wales” (2017) was concern about the severe lack of new woodland creation in Wales.

It is extremely unlikely that the Welsh Government will meet its target of 100,000ha of new woodland creation for 2010-2030 without a fundamental change in approach. In the first 6 years to which this target applies (2010-16), Wales created just 3,500ha of new woodland. To meet the target of 100,000ha

¹⁹ <http://cofnod.cynulliad.cymru/Committee/4550>

²⁰ <http://cofnod.cynulliad.cymru/Committee/4550>

²¹ <http://cofnod.cynulliad.cymru/Committee/4550>

of new woodland creation, Wales will need to plant 96,500ha during the last 14 years of the scheme.

Although the Welsh Government remains committed to reaching its planting target, there is no evidence that would suggest that the target is achievable or realistic, based on current performance. The “new planting aspiration” of 2,000ha per year is not sufficient.

In an oral statement to the Assembly in April, the Minister for Environment said that a refreshed Woodland Strategy would be brought before the Assembly in advance of the summer recess.

We note the Welsh Government's position that this is a “long term aspiration which will need time for a range of measures to make progress rather than a straight line annual progression”. The Welsh Government must provide evidence of a plan to increase planting rates.

A first step would involve providing further information on each of these measures, including what they are, the estimated planting that will result from each of them, and the timeline for when each measure will deliver its planting estimate.

The Welsh Government should publish on an annual basis information about planting rates in Wales and the types of trees that are being planted.

The Committee restates its belief, included in its report on Forestry and Woodland (“Branching Out”, 2017), that the Welsh Government should commit to a national target of 20% urban tree canopy cover. According to the Welsh Government, at the time of its response to that report, average canopy cover for Wales was 16.3%.

Agriculture

In its report “The future of land management in Wales” (2017), the Committee set out a vision for support for land management based on sustainable outcomes. Measures to tackle climate change should be central to any new approach to providing support. The Welsh Government accepted the Committee's recommendation, included in that report, that:

“The Welsh Government must ensure that future funding for land managers is based on the delivery of outcomes which contribute to the ambitious targets for climate change adaptation and mitigation set out in Welsh legislation such as

the Environment (Wales) Act 2016 and the Well-being of Future Generations (Wales) Act 2015.”²²

The Committee was interested to hear about the Agriculture Industry Climate Change Forum (AICCF) and would welcome further information about its operation, including its membership, terms of reference, and details of its meetings.

The number and frequency of agriculture pollution events is a cause for serious concern. The Committee is pleased that the Cabinet Secretary is seeking to progress this issue as a matter of urgency and would be grateful for an update on that progress as early as possible. This should include the recommendations that have been shared with her by representatives from the sector who had been tasked with that work.

Planning

The Committee was interested to hear the comments from the official accompanying the Cabinet Secretary about the focus on “place making” in the latest consultation of the Welsh Government’s “Planning Policy Wales” document. In particular, the Committee would be interested to hear more about the concept of “net environmental gain” and how the Welsh Government is taking forward this approach.

The Committee welcomes the comment from the official accompanying the Cabinet Secretary that there is no intention to reduce the protection for ancient woodland in Wales through the 10th edition of Planning Policy Wales.

The Welsh Government should explain how it intends to use planning enforcement to tackle environmental crime.

Recommendation 7. The Welsh Government referred to “a range of measures” that will contribute to achieving its long-term planting aspiration, but which will need time to progress. The Welsh Government should provide details of each of these measures, including what they are, the estimated planting that will result from each of them, and the timeline for when each measure will deliver its estimated planting.

Recommendation 8. The Welsh Government should commit to a national target of 20% urban tree canopy cover.

²² www.assembly.wales/laid%20documents/cr-ld10995/cr-ld10995-e.pdf

Recommendation 9. The Welsh Government should publish on an annual basis information about planting rates in Wales and the types of trees that are being planted.

Recommendation 10. The Welsh Government should provide the Committee with further information about the Agriculture Industry Climate Change Forum, including its membership, terms of reference, and details of its meetings.

Recommendation 11. The Cabinet Secretary should update the Committee as soon as possible on progress in addressing the number and frequency of agricultural pollution events.

Recommendation 12. The Cabinet Secretary should provide the Committee with further information about the Welsh Government's approach to planning in the context of the concept of "net environmental gain".

5. Transport

51. In 2014, **transport accounted for 12.77%** of total Welsh emissions, and 21.67% of emissions within devolved competence. Despite improvements in efficiency of transport, total emissions in the sector are only slightly lower in 2014 than they were in 1990. This is attributed to an increase in demand over the period. In terms of the 3% target for devolved emissions, these peaked in 2007 and have since declined. The narrative accompanying the Welsh Government emissions date states this is due to an increase in the fuel efficiency of vehicles, and the switch from petrol to diesel cars. The 2010 Climate Change Strategy set out a number of areas of Welsh Government action:

- Development of the Sustainable Travel Centres;
- Supporting behaviour change;
- Promotion of eco-driving;
- Promotion and support for walking and cycling;
- Investment in bus and rail services;
- Improved traffic management on the strategic road network;
- Active promotion of infrastructure for electric and hydrogen vehicles;
- Supporting the freight industry to reduce emissions; and
- Ensuring that land use planning decisions are informed by the need to reduce travel.

52. In its second piece of advice, the UK Committee on Climate Change's recommendations relating to transport focussed on:

- Public transport and active travel – the potential to recycle revenue from clean-air zones into cycling infrastructure and public transport, including procurement of ultra-low emissions buses; and
- Supporting uptake of ultra-low-emission vehicles.

Expert Reference Group²³ analysis

The Group expressed disappointment with the lack of progress in encouraging Active Travel and facilitating a modal shift. It suggested that the Welsh Government needs to reflect on why current policy is not delivering, and how progress in this area can be accelerated.

The Group also questioned to what extent the proposed M4 relief road had been factored into emissions reduction targets under the Environment (Wales) Act.

Welsh Government's evidence

Active Travel

53. The Economy, Infrastructure and Skills Committee has undertaken **post-legislative scrutiny** of the Active Travel (Wales) Act 2013. Public Health Wales said active travel is one of the most sustainable approaches to increasing physical activity and improving air quality by reducing vehicle journeys and emissions. However, several contributors to the Committee's work, including Public Health Wales, highlighted that nearly five years after the Act was passed rates of active travel are unchanged and in some sectors have declined.

54. The Cabinet Secretary and Minister's written submission said that:

"We allocated additional Capital funding for £8m for Active Travel schemes for 2017-18 which will boost existing schemes and fund additional projects in December 2017.

Funding for 2018-19 has been allocated for the three grants that are used by Local Authorities to put in place active travel improvements: £5m Local Transport Fund plus an additional £5m specifically for pre-works on active travel schemes to develop a pipeline of Active Travel projects."²⁴

55. On the possible lack of impact of the Active Travel Act, the Cabinet Secretary said:

²³ The Expert Reference Group was established by the Committee in 2017 to support its scrutiny of climate change policies.

²⁴ <http://senedd.assembly.wales/documents/s73301/Welsh%20Government%20paper.pdf>

“I think there is a big piece of work, which obviously Ken would lead on, but I’m very happy to continue those discussions with him. But it’s very disappointing that, as you say, the Act’s been in place for about five years-. It’s one of those-. It’s a bit like the Future Generations Act, people give it huge plaudits, but you really need the evidence to show that it’s working to be able to accept those plaudits.”²⁵

56. In reference to the recently announced Welsh Government consultation on congestion, including whether HGVs should be permitted to use bus lanes in certain circumstances, the Cabinet Secretary confirmed she had not discussed the matter with the Cabinet Secretary for Economy and Transport. The Cabinet Secretary confirmed that she did not believe that such an approach would encourage cycling.

M4 relief road

57. The written submission from the Cabinet Secretary and Minister said that detailed carbon calculations have been undertaken on the construction and use of the M4 relief road and “user emissions on the South Wales network, despite forecast increases in traffic levels, would in fact slightly reduce due to strategic traffic having a shorter more efficient route”. The Cabinet Secretary said:

“...the evidence has suggested that emissions will be reduced if we have the road, the new M4. Obviously, there’s a public inquiry going on at the moment. The inspectors are looking at the environmental statement, for instance. All the evidence will be given back to Ken Skates at the end of it and we’ll have a look at it. I think what’s more important from my portfolio’s point of view is what’s on those roads. So, I want to see more electric vehicles, more hydrogen cars – for me, that’s the important thing.”²⁶

58. An official accompanying the Cabinet Secretary said that Welsh Government officials in the transport department had undertaken a carbon assessment of the project. The report included proposed mitigation of negative impacts:

“for example new woodland planting of more than double the area taken and natural reed bed rainwater run-off filtration and attenuation ponds. The positive environmental impacts of the Scheme must also be

²⁵ <http://cofnod.cynulliad.cymru/Committee/4550>

²⁶ <http://cofnod.cynulliad.cymru/Committee/4550>

borne in mind, for example significant improvements in air quality and noise, most notably in urban areas adjacent to the existing M4.”²⁷

59. In relation to large infrastructure projects, the Cabinet Secretary said:

“I think the important thing is, when you’re carbon budgeting-. You’re always going to have these large infrastructures. It’s about making sure that you do other things to ensure that the emissions-. You have got to live within your budget limits.”²⁸

Electric and hydrogen vehicles

60. The written submission from the Cabinet Secretary and Minister said that the number of new electric and hybrid car registrations in Wales rose by 35% in 2017 and “plans are being developed for a network of public charging points along/near our trunk road network, focusing on areas where the market is unlikely to fill the gaps”.²⁹

61. On the charging infrastructure for such vehicles, the official accompanying the Cabinet Secretary said:

“We have introduced some standards in planning policy for charging on non-domestic planning applications. So, if you have a supermarket, we will be seeking charging points there. If you have a car park related to something else, we’ll be seeking charging points.”³⁰

Our View

Active travel

The Committee is concerned with the lack of progress since the introduction of the Active Travel (Wales) Act 2013. We welcome the Cabinet Secretary’s candour on this matter, in particular, her comments on the need to provide evidence of the impact of the Act.

The Committee notes that £8m of funding was allocated in 2017-18 for active travel and a further £10m has been allocated for 2018-19 via three grants that are used by Local Authorities to put in place active travel improvements.

²⁷ <http://cofnod.cynulliad.cymru/Committee/4550>

²⁸ <http://cofnod.cynulliad.cymru/Committee/4550>

²⁹ <http://senedd.assembly.wales/documents/s73301/Welsh%20Government%20paper.pdf>

³⁰ <http://cofnod.cynulliad.cymru/Committee/4550>

We agree with the Expert Reference Group's view that the Welsh Government must reflect on the reasons why this Act is yet to have the expected impact. Substantial amounts of funding are being allocated to this area and the Welsh Government must ensure value for money. We believe the Cabinet Secretary for Economy and Transport should consider this matter.

M4 relief road

The Committee would be grateful to receive the Welsh Government's carbon assessment of the M4 relief road project. The Committee notes that the assessment includes mitigation measures. Given that the assessment was prepared by officials in the transport department, the Committee would be grateful for further information about how the Cabinet Secretary and her officials were involved in the development of those mitigation measures.

The Committee would be grateful to see the evidence or modelling that supports the Welsh Government's position that improving traffic flow will reduce emissions. In its report on general and budget scrutiny of the Cabinet Secretary for Economy and Transport (February, 2018), the Committee recommended:

“The Cabinet Secretary should report to this Committee within the next 6 months setting out in detail how the carbon emissions arising from highway improvement schemes in general, and the A487, A470 and M4 relief road in particular, will be monitored in the medium to long term once they have been commissioned.”³¹

The Cabinet Secretary for Economy and Transport, in his response to that report, accepted the recommendation in principle and said:

“Since the publication of the final updated version of WelTAG in December 2017, the Welsh Government has reviewed its approach to the monitoring of commitments made in relation to the performance of major infrastructure schemes post opening.

The approach which is being developed will improve the scope of monitoring and evaluation work currently undertaken post opening. This new scope will ensure, that not only Carbon is considered, but the performance of the scheme against the original objectives is considered and evaluated; and that the same process is carried out for the commitments made in public documents which have informed the Cabinet Secretary's decision.

³¹ www.assembly.wales/laid%20documents/cr-ld11426/cr-ld11426-e.pdf

For Carbon this is likely to involve re-running the Air Quality assessment for Carbon Dioxide applied to the scheme when designs were being finalised, where there has been an increase in traffic against a “no scheme/do nothing” scenario; and comparing against any relevant transport planning objectives which have arisen from the WelTAG process.”³²

Electric and hydrogen vehicles

The draft transport budget includes £1m in each of 2018-19 and 2019-20 (£2m in total) for electric charging points. The Committee discussed this budget allocation with the Cabinet Secretary for Energy, Planning and Rural Affairs on 22 November 2017. She told the Committee that discussions with the Cabinet Secretary for Economy and Transport had been ongoing for the last 18 months, as “I think we’re falling behind in relation to installing them.”

The Committee is yet to see evidence of a planned approach to increasing the number of electric charging points. In its report on general and budget scrutiny of the Cabinet Secretary for Economy and Transport (February 2018), the Committee recommended:

“The Cabinet Secretary should report to this Committee within the next 6 months on progress relating to the allocation of funds for installing electric charging points.”³³

The Cabinet Secretary for Economy and Transport, in his response to that report, accepted the recommendation and added:

“We are currently working with local authorities and other bodies to develop a framework model for creating a national public network of electric charging, which deploys the £2 million public funding committed for this purpose in a way which maximises outcomes by attracting sustainable investment from the private sectors.”³⁴

Recommendation 13. The Cabinet Secretary for Economy and Transport should review the Active Travel (Wales) Act 2013 and report back to the Committee within 6 months of the publication of this report. The review should include the impact of the legislation on levels of active travel and any lessons learned in relation to the implementation of the legislation.

³² www.assembly.wales/laid%20documents/gen-ld11519/gen-ld11519-e.pdf

³³ www.assembly.wales/laid%20documents/cr-ld11426/cr-ld11426-e.pdf

³⁴ www.assembly.wales/laid%20documents/gen-ld11519/gen-ld11519-e.pdf

Recommendation 14. The Welsh Government should provide the Committee with the Welsh Government's carbon assessments of the M4 relief road project and any carbon assessments that have been undertaken for the A487 and A470 highway improvement schemes. The Cabinet Secretary should provide further information on the extent to which officials in her department have been involved in the development of mitigation measures featured in these carbon assessments.

Recommendation 15. The Welsh Government should provide evidence or modelling that supports its position that improving traffic flow will reduce emissions and improve air quality.

6. Housing and Buildings

62. In its second tranche of advice to the Welsh Government, the UK Committee on Climate Change (UK CCC) recommended that:

- Building standards should be used to ensure new buildings have a high standard of energy efficiency and are designed for low-carbon heating systems. As powers on building standards have been devolved to the Welsh Government, this is an area in which Wales can play a leading role;
- The retrofit of energy efficiency and low carbon heat measures to improve the energy efficiency of existing housing stock is of major importance. This will reduce emissions, energy bills and levels of fuel poverty, as well as enable deployment of low carbon heating systems.

Expert Reference Group³⁵ analysis

The Group expressed concern about the approach being proposed by the UK CCC in its second piece of advice to the Welsh Government. Members of the group outlined that:

- There is work ongoing by BRE (Building Research Establishment) and Defra on solid wall properties which suggests that the insulation measures taken are not achieving anticipated energy savings. As such, there are concerns that Wales will not achieve the anticipated emissions savings from insulating solid wall properties;
- The advice does not consider information from the **Future Trends Report**, such as the predicted growth in single person households;
- The models contained within the advice all assume a very high performance of energy saving interventions;
- Wales needs to at least halve the energy consumed in homes. Ministers need to resist the pressure from housebuilders not to impose stricter energy efficiency standards; and

³⁵ The Expert Reference Group was established by the Committee in 2017 to support its scrutiny of climate change policies.

- Wales could introduce the requirement for an energy efficiency certificate from landlords who wish to rent their properties.

The Group also expressed concern that, given the need to focus on retrofit, there has been a reduction in the funds allocated to the Arbed Programme.

In terms of building regulations, the Group suggested that the current building regulations do not align with the principles of the Well-being of Future Generations Act. It also suggested that Wales should be aiming for a standard of “zero carbon in use” from now on.

Welsh Government's evidence

63. The written submission from the Cabinet Secretary and Minister says a steering group is being established to understand the challenge and build consensus regarding the decarbonisation of existing housing stock. In relation to retrofit, the Cabinet Secretary said that:

“we plan, through our Warm Homes programmes, to address energy efficiency in 25,000 houses in this Government term. If I had the money, which I don't have, I would probably be able to do 10 times that number, and we still may not reach our target.”³⁶

64. On the issue of new build and innovation, the written submission said:

“Our existing housing stock is a huge challenge but we cannot ignore the new homes being built. We do not want to have to keep retrofitting. Prevention is far better than cure. So sitting alongside action on existing homes we also have an ambition to build 1,000 new types of homes across Wales through our Innovative Housing Programme which started very successfully in 2017-18. This is part of our 20,000 affordable homes target during this term of Government. The Programme seeks to test new models and learn from doing that, so in the future we know how to build quality homes quickly that also underpin our decarbonisation targets and outcomes.”³⁷

65. The Welsh Government is currently undertaking a scoping study on a review of Part L of the building regulations, which sets standards for the energy performance of new and existing buildings, and is aiming to start the main review

³⁶ <http://cofnod.cynulliad.cymru/Committee/4550>

³⁷ <http://senedd.assembly.wales/documents/s73301/Welsh%20Government%20paper.pdf>

before the end of 2018. The written submission from the Cabinet Secretary and Minister said the review will aim to deliver Near Zero Energy (NZE) as a minimum, and that “the requirement to achieve NZE is unlikely to require more than some fine-tuning to current standards”.³⁸

66. The Cabinet Secretary said that the Welsh Government had commissioned a housing conditions evidence survey. The survey results would be used to “re-assess the number that are actually in fuel poverty”.³⁹

67. The official accompanying the Cabinet Secretary said the Welsh Government would be establishing an advisory group to look at retrofit of existing housing stock to improve energy efficiency. The Cabinet Secretary said the group would be:

“taking a broader view, so not simply looking at it as a construction retrofit issue, but, as you said, the work that we might need to do with mortgage lenders and others in different financing options.”⁴⁰

Our View

At the time of the scrutiny session with the Cabinet Secretary and the Minister, the Committee was undertaking an inquiry into low carbon housing. The report of that inquiry will be published in summer 2018 and will contain the Committee's wider recommendations arising from that work.

One of the key messages the Committee heard during its inquiry was that, due to the nature of the housing stock in Wales, retrofitting existing housing stock must be a priority. At current rates of retrofitting, it would take decades just to retrofit the houses classified as being in fuel poverty in Wales.

The Welsh Government must do more to leverage investment to support an extensive programme of retrofit. This could include land transaction taxes and conditions attached to housing grants. The Committee would welcome further information on the advisory group that is being established by the Cabinet Secretary to consider such issues.

The Committee notes the Cabinet Secretary's comments about the housing conditions evidence survey, which will be used to re-assess the number of

³⁸ <http://senedd.assembly.wales/documents/s73301/Welsh%20Government%20paper.pdf>

³⁹ <http://cofnod.cynulliad.cymru/Committee/4550>

⁴⁰ <http://cofnod.cynulliad.cymru/Committee/4550>

houses that are in fuel poverty. The Committee requests further information on this matter as soon as possible.

The Committee notes the delays to the review of Part L and would welcome confirmation from the Cabinet Secretary of when the review is expected to be completed. In addition, the Committee requests further information on the work already undertaken by the Welsh Government to ascertain that only “fine-tuning” of current building standards is needed to achieve near-zero energy.

On April 23 2018, the Minister for Housing and Regeneration announced a review of affordable housing supply, to include an evaluation of the impact of moving to deliver zero carbon homes by 2020. The Committee notes however that, given that the review group is expected to report by the end of April 2019, this will leave very little time for the analysis to be considered and acted upon.

Recommendation 16. The Cabinet Secretary should share with this Committee further information on the advisory group she is establishing to consider how alternative sources of funding and support can be used to facilitate an extensive programme of retrofit.

Recommendation 17. The Cabinet Secretary should share with the Committee further information about the housing conditions evidence survey and any action it intends to take as a result of the survey.

Recommendation 18. The Cabinet Secretary should share with the Committee further information about when the review of Part L is expected to be completed. In addition, the Cabinet Secretary should share with the Committee the work already undertaken by the Welsh Government to ascertain that only “fine-tuning” of current building standards is needed to achieve near-zero energy.

Recommendation 19. The Welsh Government should clarify the timetable for its review of affordable housing supply. In particular, it should explain how it intends to act upon the evaluation of analysis of the impact of moving to deliver zero carbon homes by 2020, given that the review group is expected to report by the end of April 2019.

Annex A – Expert Reference Group Members

Member	Organisation
Keith Jones (Chair)	National Trust
Paul Allen	Centre for Alternative Technology
Mari Arthur	Cynnal Cymru
Martin Bishop	Confor
Steve Brooks	Sustrans
James Byrne	Wales Environment Link
Haf Elgar	Friends of the Earth Cymru
Professor Stuart Irvine	Centre for Solar Energy Research, Swansea University
Professor Nick Jenkins	Cardiff University
Chris Jofeh	Wales Low Zero Carbon Hub
Professor Calvin Jones	Cardiff University
Shea Jones	Institute of Welsh Affairs
Professor Ian Knight	Cardiff University
Jess McQuade	WWF Cymru
Sean O'Neill	Children in Wales
Professor Nick Pidgeon	Cardiff University
David Reilly	Wales Carbon Trust
Neville Rookes	Welsh Local Government Association
Professor James Scourse	C3W
Jeremy Smith	Renewable UK Cymru
Emma Thomas	Constructing Excellence in Wales
David Weatherall	Energy Saving Trust
Dr Lorraine Whitmarsh	Cardiff University
Matthew Williams	Federation of Small Businesses
Professor Gareth Wyn-Jones	Bangor University