Cyngor Abertawe Swansea Council

Dinas a Sir Abertawe

Hysbysiad o Gyfarfod

Fe'ch gwahoddir i gyfarfod

Pwyllgor Cyflawni Corfforaethol yr Economi ac Isadeiledd

Lleoliad: **Cyfarfod Aml-Leoliad - Ystafell Gloucester, Neuadd y Ddinas / MS Teams**

Dyddiad: **Dydd Iau, 23 Mawrth 2023**

Amser: **2.00 pm**

Cadeirydd: **Y Cynghorydd Philip Downing**

Aelodaeth:
Cynghorwyr: C R Doyle, W G Lewis, P Lloyd, N L Matthews, P M Matthews, S J Rice, W G Thomas a/ac T M White

Gwylio ar-lein: http://bit.ly/3mo9wAV

Agenda

		Rhif y Dudalen.
1	**Ymddiheuriadau am absenoldeb.**	
2	**Derbyn datgeliadau o fuddiannau personol a rhagfarnol.** www.abertawe.gov.uk/DatgeluCysylltiadau	
3	**Cofnodion:** Cymeradwyo a llofnodi cofnodion y cyfarfod(ydd) blaenorol fel cofnod cywir.	1 - 3
4	**Cynllun Cyflawni Bae Abertawe.**	4 - 292
5	**Cynllun Gwaith**	293

Cyfarfod nesaf: Dydd Iau, 20 Ebrill 2023 am 2.00 pm

Huw Evans

Huw Evans
Pennaeth y Gwasanaethau Democrataidd
Dydd Iau, 16 Mawrth 2023
Cyswllt: Gwasanaethau Democrataidd - (01792) 636923

Agenda Item 3

City and County of Swansea

Minutes of the Economy & Infrastructure Corporate Delivery Committee

Remotely via Microsoft Teams

Thursday, 23 February 2023 at 2.00 pm

Present: Councillor P Downing (Chair) Presided

Councillor(s)	**Councillor(s)**	**Councillor(s)**
C R Doyle	W G Lewis	P Lloyd
N L Matthews	P M Matthews	S J Rice
T M White		

Officer(s)

Gail Evans	Principal Regeneration Manager
Phil Holmes	Head of Planning & City Regeneration
Paul Relf	Economic Development & External Funding Manager
Jonathan Wills	Lead Lawyer
Samantha Woon	Democratic Services Officer

Apologies for Absence
Councillor(s): W G Thomas

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29 Disclosures of Personal & Prejudicial Interests.

In accordance with the Code of Conduct adopted by the City & County of Swansea, no interests were declared.

30 Minutes:

Resolved that the Minutes of the Economy and Infrastructure Corporate Development Committee held on 26 January 2023 be approved and signed as a correct record.

31 Tawe Riverside & Levelling Up.

The Principal Regeneration Manager referred to the report presented to the Economy and Infrastructure Corporate Delivery Committee (CDC) in December 2022 which set out the planning policy context for the Tawe Riverside and Hafod Morfa strategic development area and reflected on the work undertaken on a draft Tawe Riverside Strategy (2019). Whilst the draft Strategy document had informally guided development and investment in the area, it was agreed that a further report would be brought back to CDC during the Spring of 2023 to consider priorities, funding opportunities, deliverability and next steps with regard to longer term actions.

Projects identified in the draft Tawe Riverside Strategy were included in the successful 2023 Lower Swansea Valley Levelling Up bid. This second update report therefore outlines the key projects included in that funding bid, along with progress to date with other regeneration schemes in the Tawe Riverside corridor. The report is intended to be an interim report with a fuller review of actions and programmes in due course and at a date to be agreed.

The Principal Regeneration Manager assisted by the Economic Development and External Funding Manager presented images and plans in respect of:

- Tawe Riverside Strategic Regeneration Area.
- Lower Swansea Valley Levelling Up Fund Bid 2023 (Projects 1, 2 and 3).
- Project 1A Hafod Morfa Copperworks: Rolling Mill.
- Project 1B The Laboratory.
- Project 1C Musgrove and Vivian Engine Houses.
- Project 2 Community and Water space Accessibility.
- New pontoons at Morfa and Morfa Road/Riverfront.
- Project 2 Strand Arches.
- Project 3 Swansea Museum.

The Economic Development and External Funding Manager referred to timescales and detailed the benefits for the City as a result of the Levelling Up bid.

The Principal Regeneration Manager detailed the Hafod Morfa Copperworks wider programme which included the Skyline Luge Leisure Proposal, the River Pontoon, Morfa Road Regeneration Area and Riverside Walkway, Lower Swansea Valley and Hafod Morfa Heritage Trails.

She stated that the Levelling Up funding would be a significant boost to support the next stages of regeneration for a number of projects along the river corridor. Those projects would act as a catalyst for development and further regeneration in due course as we work towards the objective of delivering a new destination for Swansea's riverside waterfront.

In terms of next stages for the projects identified in the Levelling Up bid, resources would be allocated to work up designs and feasibility where required and programmes developed to secure delivery. These were substantial areas of work with a programmed end date of 31 March 2025.

Further work were required to develop and refine the Masterplan for Hafod Morfa Copperworks, to respond to the outputs from technical studies and incorporate a number of development requirements which were emerging for the site. The Council would continue to work with Skyline Luge and Urban Splash to ensure the scheme aligns with strategic planning and placemaking objectives and responds to planned consultation and feedback from stakeholders and communities.

A number of further projects were identified in the draft Tawe Riverside Strategy (2019) which could be explored further, and there may be other new initiatives which could be added to these proposals and actions. However, there would be resourcing and funding issues, which would require detailed consideration of prevailing priorities for the Regeneration and External Funding Team who would lead on the delivery on a number of these alongside the commitments that will emerge from the recent Levelling Up funding bid approval.

A further report would be brought to the CDC later this Spring to evaluate the scope for further projects and report back on progress with the LSV Levelling up projects and regeneration of key sites.

Member discussions focussed on:

- West Riverside Walk - work is ongoing in relation to site investigation feasibility work, designs, potential planning permission, funding (including Section 106) with tenders and construction towards the end of next of year. Officers to provide a progress update to the Committee in due course.
- Riverside Walkway/nature trial walks consultation/engagement with of local interest groups and schools.
- Potential revenue generation as a result of letting commercial space within the proposed buildings.
- Funding in respect of the Skyline Scheme.
- The sensitive extension of storage facilities and exhibition space within Swansea Museum to ensure the building retains its original charm.
- Opportunities for local interest groups to take on renovation projects for pieces of equipment currently in storage (e.g. locomotive engines etc).

The Chair thanked Officers for their informative presentation.

Resolved that:

- the report be noted; and
- Officers develop an action plan in terms of future priorities/improvements and grant opportunities.

32 Work Plan

The Chair introduced the 'for information' Economy & Infrastructure CDC Work Plan 2022-2023.

The topics for discussion at the following meeting were noted:-

- 23 March 2023 – Introduction to Swansea Bay Strategy.

The meeting ended at 2.38 pm

Chair

Agenda Item 4

Cyngor Abertawe
Swansea Council

Report of the Interim Director of Place

Economic and Infrastructure Corporate Delivery Committee – 23 March 2023

Swansea Bay Delivery Plan

Purpose:	To provide a summary of progress made in accordance with the Swansea Bay Strategy Action Plan 2008 – 2023.
Policy Framework:	Swansea Bay City Region Economic Regeneration Strategy Swansea Local Well-being Plan
Consultation:	Legal, Finance, Access to Services.

Recommendation: that the Committee:

1) Agrees that the South West Wales Regional Economic Delivery Plan will inform a programme of works for Swansea, in association with the Destination Management Plan and Swansea Bay Strategy Action Plan;

2) Considers and proposes priorities/schemes for inclusion in the Plan for approval by Cabinet;

3) Considers the governance structure for the Swansea Bay Delivery Plan to be included as part of Regeneration Programme Board to ensure; delegation, reporting and monitoring protocols;

4) Considers the proposal to facilitate a feasibility study;

~~5)~~ Makes appropriate recommendations to Cabinet for informing, agreeing adequately resourcing the Swansea Bay Delivery Plan.

Report Author:	Geoff Bacon
Finance Officer:	Ben Smith
Legal Officer:	Debbie Smith
Access to Services Officer:	Rhian Millar

1. Background

The **Swansea Bay Strategy Action Plan** (Appendix A) was commissioned on 28th February 2008.

In collaboration with the; City Centre Strategic Framework (Roger Tym & Partners), Tawe Riverside Corridor (Hyder Consulting) and Swansea Tourism Strategy (Steven & Associates), the ambition was to complement the SA1 development, together with enhancements at Morfa and Swansea Enterprise Park.

The aim was to deliver enhancements within key focal areas over a period of fifteen years. The priority was outlined within an indicative programme (Short term 1-3 yrs, Medium term 3 -5 yrs and Long term 5 -15 yrs).

1.1 The aim of the strategy was to cover three main elements, comprising:

- **A Vision for the Bay**, which presents an holistic view of what it can offer in terms of recreation and tourism and includes an analysis of issues, constraints, policy context, extensive market research and consultations with various stakeholders, landowners and Council officers;

- **An Action Plan**, which considers the potential development at identified key destinations, and environmental and infrastructure enhancement proposals between those destinations; and

- **A Delivery and Implementation Plan**, which sets out the potential mechanisms for bringing forward development and enhancement.

1.2 The Swansea Bay Strategy focuses on the 8.5 kilometres of waterfront of Swansea Bay from the West Pier in the east to Mumbles Pier in the west.

1.3 The eastern end of the study area includes the land around the Civic Centre and the link up West Way to the bus station. The National Maritime Museum and LC are on the north of the Marina close to the Civic Centre. The study area excluded the city centre, River Tawe and the SA1 areas of the City, as these were subject to separate initiatives.

1.4 The western end of the study area includes Oystermouth, Mumbles and Mumbles Pier

2. Progress

2.1 Scoping Exercise

2.1.1 The Head of Property Services has allocated resource with the aim to; capture the progress made to date, identify stakeholders, and identify new opportunities and risks within the policy framework of the existing Swansea Bay Strategy Action Plan .

It is envisaged the collaborative approach will limit duplication, whilst informing a viable programme of works to ensure delivery.

2.1.2 The **Swansea Bay Strategy Action Plan** outlined proposals over a fifteen-year period.

2.1.3 The **Destination Management Plan (DMP)** (Appendix B) and Tourism Strategy were also considered.

It is acknowledged that whilst the DMP is currently under review, the purpose of Swansea as a destination is less obvious.

2.1.4 During December 2020, South West Wales local authorities together with Welsh Government commissioned the **South Wales Regional Economic Delivery Plan (SWREDP)** (Appendix C).

The plan outlines and an ambitious 'route map' for the development of the region's economy, identifying priorities for intervention and articulating how business, government, education, voluntary, community and social enterprise organisations and other partners should work together to bring them forward.

The **South West Wales Regional Economic Delivery Plan Project Pipeline Supplement** (Appendix D) has been drafted to outline priorities aligned with the three missions;

1. Establishing SWW as a UK leader in renewable energy and a net zero economy
2. Building a strong, resilient and embedded business base
3. Growing and sustaining the 'experience' offer

Cabinet (20th January 2022) approved and adopted the South West Wales Regional Economic Delivery Plan as the Council's over-arching economic regeneration policy to replace the Swansea Bay City Region Economic Regeneration Strategy.

2.1.5 Stakeholders have been identified to include; sponsoring Cabinet Member/s and service leads from Cultural Services, Regeneration, Highways and Transportation.

2.1.6 These stakeholders will analyse proposals they have already identified, which will be grouped in six destinations - to enable easier management and reporting.

2.1.7 The six destinations have been derived by forming clusters from appreciating priorities outlined within the Swansea Bay Strategy Action Plan, together with new commitments to include the South West Wales Regional Economic Delivery Plan. This will enable priority to be given to targeted destinations.

Destination 1. City Centre – City Waterfront
Destination 2. Sketty – St. Helen's
Destination 3. Blackpill – West Cross
Destination 4. Mumbles – Pier

Destination 5. Bays
Destination 6. SA1
Destination Misc – Toilet Strategy, South West Wales Regional Economic Delivery Plan Missions 2 & 3

2.2 Governance

2.2.1 The Head of Property Services has allocated resource to support the scoping exercise. It is envisaged that task and finish group/s will be established for particular schemes. Reporting and monitoring will be governed by the Regeneration Programme Board.

3.2 Opportunities

Fifty proposals have been identified across six destinations. Several proposals are in the process of being developed as agreed priorities with approved funding from Welsh Government and the Economic Recovery Fund, to include;

- Coastal Flood Defence Works (Oystermouth Square – Knab Rock)
- Changing Places (Knab Rock)

Urban Splash will also be working with Swansea Council as part of £750m agreement.

Sponsoring Cabinet Member/s were keen to seek investment opportunities within Blackpill, whilst encouraging deliverables to complement the wider strategy for promoting Swansea as a destination.

Schemes will need to be linked to the following missions (note. Initiatives shown are those explicit to Swansea forming several of the fifty pipeline proposals associated with the SW REDP);

1. Establishing SWW as a UK leader in renewable energy and a net zero Economy

   Dragon Energy Island Swansea Bay (Now Blue Eden)
   Major renewable energy infrastructure project, harnessing the power of the world’s second highest tidal range at Swansea.

2. Building a strong, resilient and embedded business base

   Swansea Central North Swansea
   Delivery of an office hub as the next phase of a comprehensive programme to regenerate Swansea city centre (building on the completion of the first phase at Copr Bay).

   Local supplier development Swansea
   Increase in use of local suppliers

3.Growing and sustaining the ‘experience’ offer

Smaller Towns and Coastal Zones Swansea
Targeted investment to support the leisure, visitor and town centre offer in smaller centres in the county of Swansea

Regional Waterways Project Swansea, with scope for wider regional application
Measures to open up the waterways across Swansea’s River Tawe, adding new routes, re-routing existing routes and developing new tourism infrastructure and access to the historic environment.

Lower Swansea Valley Heritage and Destination Swansea
Series of investments opening up the heritage offer at the Hafod Morfa works, improving access along the Tawe and enhancing the museum and heritage assets in Swansea City Centre.

In addition, it would be beneficial to develop a management plan that incorporates both a caretaking and cleansing regime, together with a specification for street furniture for ease of maintenance.

3.3 Limitations

3.3.1 Budget

Cost plans are to be developed for agreed priorities.

3.3.2 Resource

Dedicated resource will need to be established and approved for agreed schemes.

The last twelve months has highlighted the impact of limited technical and specialist resource within both the public and private sectors.

This has presented a challenge to recruit In house expertise, together with the cost of resource and programming of works.

3.3.3 Inflationary pressures

During the last twelve months, the sector has been impacted with inflation due to material shortages, haulage and energy rises. This would clearly suggest that there needs to be contingency within any budget allocation. That does leave the Council exposed to wider inflationary risks as reserves can of course be spent only once.

4. Integrated Assessment Implications

4.1 The Council is subject to the Equality Act (Public Sector Equality Duty and the socio-economic duty), the Well-being of Future Generations (Wales) Act 2015 and the Welsh Language (Wales) Measure, and must in the exercise of their functions, have due regard to the need to:

- Eliminate unlawful discrimination, harassment and victimisation and other conduct prohibited by the Acts.
- Advance equality of opportunity between people who share a protected characteristic and those who do not.
- Foster good relations between people who share a protected characteristic and those who do not.
- Deliver better outcomes for those people who experience socio-economic disadvantage
- Consider opportunities for people to use the Welsh language
- Treat the Welsh language no less favourably than English.
- Ensure that the needs of the present are met without compromising the ability of future generations to meet their own needs.

4.1.1 The Well-being of Future Generations (Wales) Act 2015 mandates that public bodies in Wales must carry out sustainable development. Sustainable development means the process of improving the economic, social, environmental and cultural well-being of Wales by taking action, in accordance with the sustainable development principle, aimed at achieving the 'well-being goals.

4.1.2 Our Integrated Impact Assessment (IIA) process ensures we have paid due regard to the above. It also considers other key issues and priorities, such as poverty and social exclusion, community cohesion, carers, the United Nations Convention on the Rights of the Child (UNCRC) and Welsh language.

4.2 Each scheme will require a project specific IIA screening form, which will form a part of the decision making process.

5. Financial Implications

5.1 Whilst the approval of The South West Wales Regional Economic Delivery Plan informs the development of a programme of works for Swansea, in association with the Destination Management Plan and Swansea Bay Strategy Action Plan, the ultimate delivery of any of the schemes within that programme shall be subject to appropriate budget scrutiny and allocation of capital in consideration of the availability of 3rd party capital and whether to commit any of the Council's own or borrowed capital at that time and shall be subject to appropriate consideration via the usual governance channels.

6. Legal Implications

6.1 Any legal implications will be considered on a scheme by scheme basis.

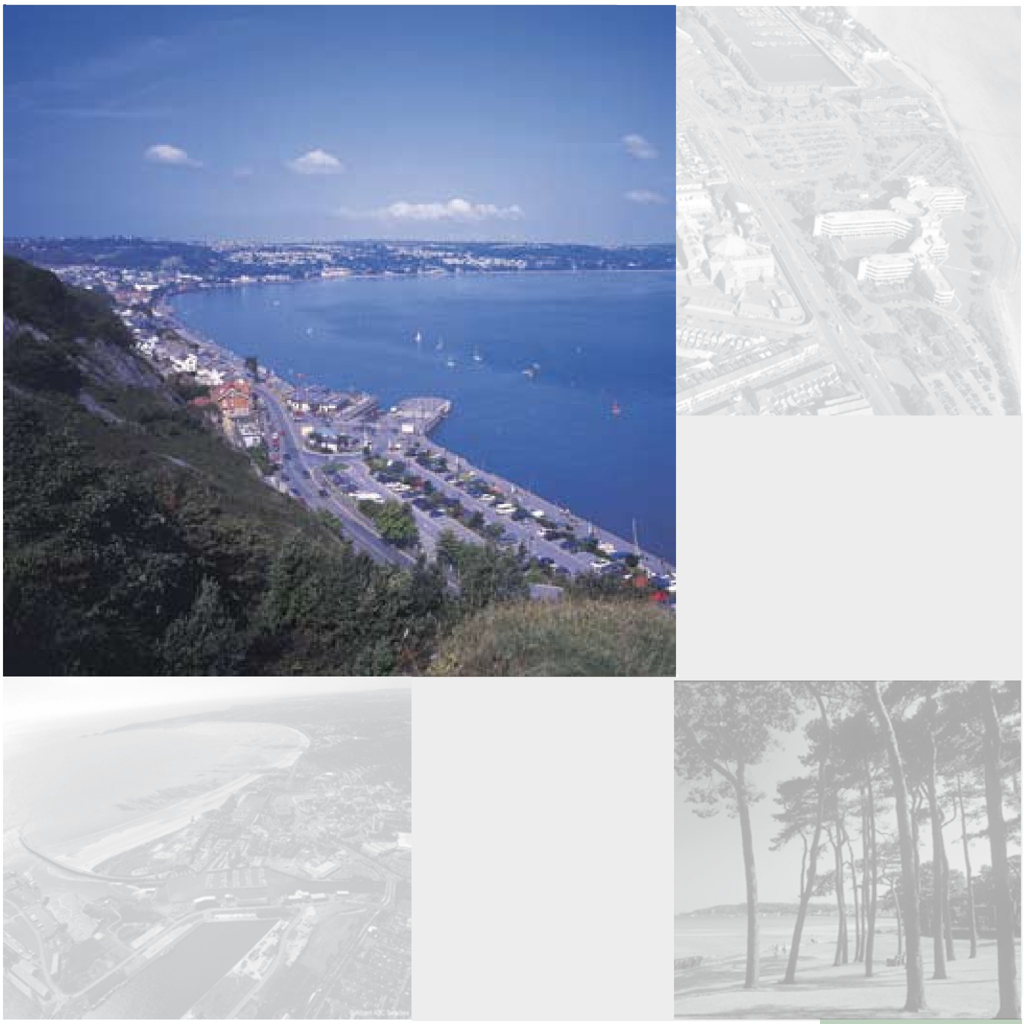
Background Papers:
Cabinet held at 10.00am on Thursday, 20th January 2022
https://democracy.swansea.gov.uk/documents/g10565/Printed%20minutes%20Thursday%2020-Jan-2022%2010.00%20Cabinet.pdf?T=1&LLL=0

Appendices:

Appendix A	Swansea Bay Strategy Action Plan
Appendix B	Destination Management Plan (DMP)
Appendix C	South Wales Regional Economic Delivery Plan
Appendix D	South West Wales Regional Economic Delivery Plan Project Pipeline Supplement
Appendix E	IIA Screening Form

Appendix A

White Young Green



Action Plan

Swansea Bay Strategy

28th February 2008

White Young Green Planning
21 Park Place, Cardiff CF10 3DQ
T: 029 2072 9000
F: 029 2039 5965 E: planning.cardiff@wyg.com
www.wyg.com

in association with

DTZ Consulting

Report status: Version 1
Date: 27 June 2007
Job number: A028066rep[2]070627v1.indd

Action Plan
Swansea Bay Strategy

CONTENTS PAGE

1. INTRODUCTION

1.1 Background

Swansea Bay Strategy is one of a series of interrelated initiatives that the City and County of Swansea is developing to improve the long-term performance of the city and the facilities for residents, visitors and businesses. The other initiatives are:

- City Centre Strategic Framework (Roger Tym & Partners);
- Tawe Riverside Corridor (Hyder Consulting); and,
- Swansea Tourism Strategy (Stevens & Associates).

These studies will provide a framework to guide development and compliment the SA1 development and the retail, sports and employment schemes in Morfa and Swansea Enterprise Park.

White Young Green Planning with sub-consultants DTZ Consulting were commissioned in January 2006 to prepare a Strategy for Swansea Bay with the aim of providing a vision for the Bay and an integrated assessment of its potential for new development and enhancement.

1.2 The Study Area

The Swansea Bay Strategy focuses on the 8.5 kilometres of waterfront of Swansea Bay from the West Pier in the east to Mumbles Pier in the west. It is an attractive area of the city offering panoramic views over the bay and a range of facilities serving residents and visitors. It demonstrates the very clear connection of the city's retail and civic functions to the marina, beach and waterfront.

The eastern end of the study area includes the land around the County Council offices and the link up West Way to the proposed redeveloped bus station. The new National Maritime Museum and redeveloped Swansea Leisure Centre are on the north of the Marina close to the Council offices. The study area does not include the city centre, River Tawe or the SA1 areas of the city, which are subject to separate initiatives.

The central area from St Helen's to Blackpill has a strong landscape setting, providing amenity space and sports facilities alongside Swansea University and Singleton Hospital, which are separated from the waterfront by the Oystermouth Road dual carriageway. The western end of the study area includes Oystermouth, Mumbles and Mumbles Pier, which have a traditional seaside charm and attractive promenade.

1.3 The Brief

The Brief to Consultants, dated November 2005, stated that the strategy would consist of three main elements, comprising:

- A Vision for the Bay, which presents an holistic view of what it can offer in terms of recreation and tourism and includes an analysis of issues, constraints, policy context, extensive market research and consultations with various stakeholders, landowners and Council officers;
- An Action Plan, which considers the potential development at identified key destinations, and environmental and infrastructure enhancement proposals between those destinations; and,
- A Delivery and Implementation Plan, which sets out the potential mechanisms for bringing forward development and enhancement.

This report is the second part of the study: the Action Plan, and identifies the projects and initiatives to be developed in the bay, based upon the key initiatives identified in the Vision for the Bay report.

The report sets out the vision for the bay and describes how this will be implemented through six key destinations and a bay wide set of initiatives. An action plan is then provided for the bay as a whole and for each destination.

2. VISION FOR THE BAY

2.1 The Vision

Swansea is unique in Wales as being a city located directly on the waterfront, with miles of accessible golden sand and a gently curving bay offering distant vistas to picturesque destinations. Yet the arc of Swansea Bay, although providing an attractive amenity area for the city, does not provide the quality destinations required of a truly European city.

Over the last 40 years the area has seen minor changes, whilst other parts of the city have undergone major regeneration. The special character of the city is partly derived from its strategic location on the bay and relationship to the waterfront, but little has been done to enhance or develop this characteristic.

If Swansea is to take its place as a European waterfront city, it must make the most of its strategic assets. The bay is Swansea's premier strategic asset and it must play a more positive role in the economic development and vitality that the city has to offer. The vision for Swansea Bay is therefore set out below.

The bay provides the recreational space for the city. It is the place where people should be able to relax and unwind or re-energise themselves through sport. It should be the destination for culture, art, good food, quality places and a place to meet people. The bay should be a symbol of the quality of life that Swansea can deliver for residents and visitors. It is city life at the water's edge.

Sustainability must be at the heart of the revitalisation of Swansea Bay. The uses, the movement pattern, the ecology and design of new buildings must address all aspects of sustainability to ensure that the principles set out in Planning Policy Wales, Wales Spatial Plan and Local Agenda 21, and CCS Sustainable Developer's Guide are achieved.

2.2 Objectives of the Vision

Swansea Bay is where city life meets the waters edge and is a place that will through a high quality and sustainable environment:

Stimulate: the senses with the sight, sound, taste and smell of the sea;

Re-energise: the body through activities on the beach, water and land;

Encourage: new visitors with an exciting range of attractions;

Inform: through history and the natural environment;

Celebrate: the achievements of the people of Swansea; and,

Provide: opportunities for all ages to enjoy the bay.

2.3 Delivering the Vision:

The vision will be delivered over the next fifteen years through a series of initiatives both on a baywide level and specific to the six key destinations.

Baywide Initiatives

- Create a unified waterfront park which extends from Mumbles in the west to the Tawe Riverside Park in the east, linking the key destinations.
- Create a unified Swansea Bay identity.
- Celebrate the quality and diversity of the environment and landscape.
- Improve accessibility from the City Waterfront to Mumbles Pier.

Plan showing the varying character of the Bay and the location of the six key destinations

Destination Initiatives

City Waterfront

- Open up County Hall to visitors, introducing new public facilities.
- Connect the city centre to the waterfront.
- Redevelop Paxton Street and surplus car park land.
- Create new visitor facilities and beach activity zone.
- Improve properties along Oystermouth Road.
- Widen the promenade from County Hall to the Slip Bridge.

St Helen's

- Prepare a site specific development brief in consultation with the local community, and other relevant landowners and stakeholders.
- Create new visitor facilities and car parking next to the beach access.

Sketty Lane

- Strengthen the sports village.
- Develop a new waterfront park.
- Provide visitor facilities supporting adrenaline beach and water related activities.
- Improve pedestrian and cycle access from the University and boating lake to the waterfront.

Blackpill

- Improve links to Clyne Park and Clyne Gardens.
- Improve the Lido as a family visitor attraction.
- Create an iconic feature in the design of the new pedestrian/cycle bridge that signals the start of Gower.

Mumbles

- Develop Oystermouth Square as a focal point for retail and visitor activities.
- Enhance Newton Road retail area and develop a niche retail offer.
- Revitalise the area between Oystermouth Square and Knab Rock, improving visitor facilities.
- Enhance Oystermouth Castle and promote as a visitor attraction.
- Develop a niche cafe and restaurant market, focused on locally procured produce.

Mumbles Pier

- Refurbish and redevelop Mumbles Pier as an improved visitor attraction and venue.
- Promote new visitor water trips between the pier and marina.
- Increase the profile of Mumbles Pier, developing additional family visitor attractions.
- Promote the mixed-use redevelopment of land fronting the pier and beach area.

2.4 Achieving the Initiatives:

Section 3 identifies four key baywide themes and describes seventeen actions required to successfully implement the baywide initiatives. Similarly section 4 describes the various actions required to implement the initiatives for each destination.

Environment and Landscape Vision Plan

3. ACTION PLAN: BAYWIDE INITIATIVES

Environment and Landscape Vision

Swansea Bay - a unified, high quality contemporary waterfront which extends from Mumbles in the West to Tawe Riverside Corridor in the East. A place that will accommodate a wide variety of spaces for multi purpose uses, include landmark features, open views, protect and enhance environmental quality and raise awareness of the diversity of habitats.

BW1: Waterfront Park

- Create a high quality, contemporary Waterfront Park between St Helen's and West Cross, which will become an important destination central to the bay, incorporating the Common and linking directly with the Clyne Valley. The park will enhance the Oystermouth Road frontage to create a consistent foreshore appearance.
- Commission an international design competition for the design of the Waterfront Park and aspire to the high standards of design and maintenance of other major European waterfront parks.
- Accommodate a variety of spaces that incorporate multi-purpose uses, a range of activities, and allow for formal and informal play/ active use, ensuring flexibility is a central design theme.
- Extend and improve the existing trim trail through the park as a free outdoor health and fitness facility providing an alternative to the indoor gym.

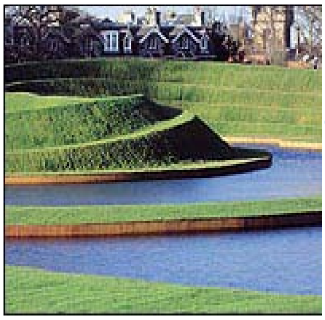
BW2: Landmark Features and Views

- Create a series of landmark features along the foreshore which form recognisable markers to destinations, thereby helping to draw the visitor from one destination to the next.
- Incorporate the landmarks into the lighting strategy to create a legible, safe promenade for evening use (see action BW6).
- Open up key views across the bay, through rationalisation of planting, and improve the quality of existing views.
- Maintain clear unimpeded views of the beach and key landmarks.
- Open up views of the beach in key locations between Sketty Lane and Blackpill to encourage its increased use.


Attractive foreshore


Visitor information points


Well maintained park setting


Incorporating land art


Public art, for everyone


Quality city seafront, Cannes


Quality corniche, Cannes


Learning about the environment


Public art features, Barcelona

Legible City, Bristol

BW3: Natural Environment

- Protect, enhance and celebrate the quality and diversity of the natural environment.
- Develop a bay wide approach to create a place where there are rich and varied ways of learning about and experiencing the natural environment.
- Raise awareness of the diverse habitats and species to be found at the existing attractions of Clyne Valley, the Botanic Gardens, Mumbles Hill Nature Reserve and bird watching opportunities through a series of information boards.

BW4: Beach Quality

- Deliver and maintain quality, award winning beaches.
- Improve existing access to the beach to allow for universal access.
- Enhance the edge between the promenade and the beach whilst ensuring consistency of approach and improving the quality of views of the city from the beach.
- Open up views of the beach in key locations to encourage its increased use.
- Raise awareness of the diverse species supported by the mud and sand inter tidal zone within the SSSI at Blackpill.

BW5: Flooding

- Update Flood Risk Assessment of Swansea Bay to identify the risk of flooding to the key development sites.
- Detailed studies of key development sites will include Flood Risk Assessment.

Identity Vision


Beach furniture, PPS

Swansea Bay - the destination that matters, the playground of the city. Swansea Bay is one destination with three character areas: the city on the waterfront, the Waterfront Park and Mumbles waterfront. The design of the public realm, together with the public art and events strategy, must combine to give a unified place with specialist character zones.

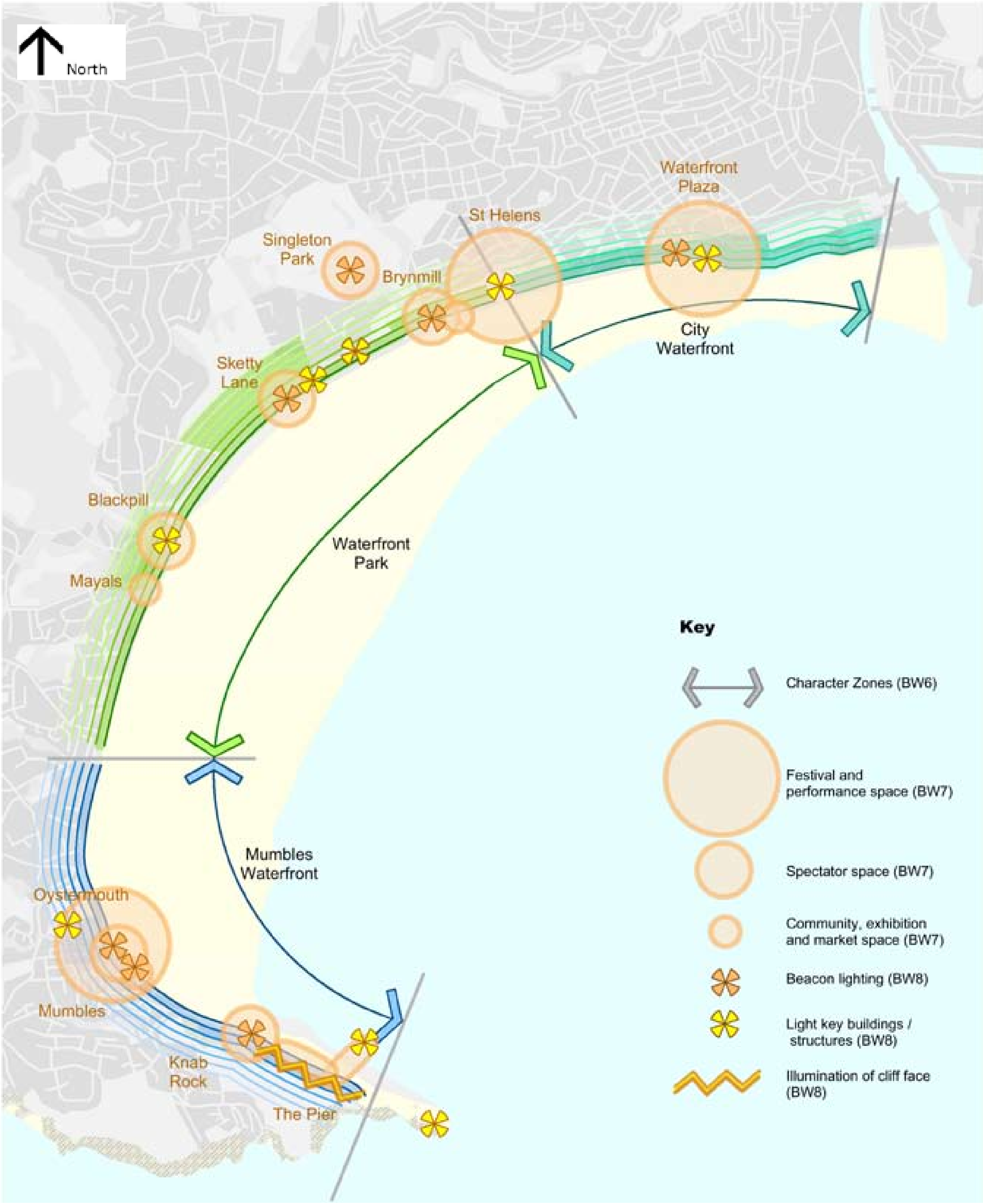
BW6: Public Realm Strategy

- Establish a palette of materials and street furniture that provides a consistent design for the continuous waterfront edge.
- Create ways of distinguishing between the different character zones of the bay, empathising the civic, formal edge of the City Waterfront, the softer natural yet active feel of the waterfront park and the lively, functional qualities of Mumbles Waterfront.
- Accommodate passive users, commuters, parades and festivals.
- Adopt a comprehensive management and maintenance programme.
- Commission a public art strategy to provide a coordinated approach to the inclusion of public art and maximise its potential benefits in enhancing the existing identify. Public art should help unify lighting, seating and parking in a creative way and can involve local community groups and professional artists to celebrate cultural and historic elements along the bay.

BW7: Events

- Develop a Bay Events Strategy, and market a calendar of events, with a local, regional and international flavour.
- Develop venue spaces along the waterfront capable of hosting a variety of events, locating Festival and performance space at City Waterfront Plaza, the Waterfront Park, Singleton Park and Oystermouth Square;
- Spectator space at the bottom of Brynmill Lane, Sketty Lane and Knab Rock;
- Market space at Oystermouth Square and along the approach to Mumbles Pier;
- Exhibition and presentation space at Oystermouth Square and on Mumbles Pier, and;
- Community space within the Waterfront Park.
- Establish links with the transport strategy to manage the safe movement and control of visitor, spectator, local and through traffic.
- Develop a coordinated approach to bidding, funding and hosting events.
- Promote uses both day and night.
- Provide a year round experience.

Identity Vision Plan (BW6, BW7 BW8)



BW8: Lighting Strategy

- Promote a bay wide lighting strategy that links the key destinations in a coordinated and innovative way.
- Minimise potential adverse impact of light production into the night sky, on nature conservation, residential areas and the road network.
- Develop an energy efficient lighting system using advanced technology.
- Ensure the ongoing management and monitoring of the lighting strategy before and after implementation.
- Introduce a family of bay wide lighting systems, creating a clutter free environment that feels safe and secure after dark.
- Introduce feature lighting of key buildings for major public landmarks
- Consider ways of reinforcing the three distinctive character areas of the bay.
- Consider the sensitive introduction of beacon lighting to signal where events are taking place in and around the bay.

Newcastle Quayside

Net lighting, along the promenade

South Shore Promenade, Blackpool

Lighting the centre, Bristol

Lighting , Delray Beach, PPS

Bay wide accessibility plan

Accessibility Vision

Swansea Bay - an accessible destination with improved public transport and access through the area. The new Metro system with interchanges around the bay, a robust new parking and signage strategy, and an extension to the land train route will contribute towards the improvement of the public transport network around the Bay and improve public access through the area. This, together with the new pedestrian/cycle system will improve accessibility and create a more vibrant destination.

BW9: Promenade / Cycling / Land Train

- Create a continuous high quality waterfront experience with an extended promenade linking all the destinations and developments along Swansea Bay from the River Tawe to Mumbles Pier.
- Promote the journey of the bay, encouraging walking, cycling, jogging and skating.
- Maximise opportunities for sitting, socialising, people watching and taking in the views.
- Consider the potential to widen the promenade between County Hall and St Helen's, at Southend Gardens and along the cliff approach to Mumbles Pier.
- Provide dedicated cycling lanes as part of the promenade to minimise user conflict. Identify links to the wide National Cycle Network through the signage strategy (BW13) and at cycle hire centres.
- Improve access across Oystermouth and Mumbles Road with enhanced at grade crossings (road level) and a new high level lightweight bridge of quality design.
- Locate cycle hire and support facilities at County Hall, Sketty Lane, Blackpill and Knab Rock and provide cycle racks and safe storage at key destinations, car parks and attractions.
- Extend the land train to run from Bracelet Bay in the West and to the West Pier Maritime Quarter in the East. This will be made feasible through the promenade widening noted above.
- Introduce additional, environmentally friendly land trains, focused towards an adult market, to encourage their use as part of the public transport system. These would complement the existing child/family orientated trains and the design could reflect the original Mumbles trains.


Cannes

Bike hire facilities along the foreshore


Promenade, Battery Park, PPS


Award winning parks and gardens


Kite flying fun on the beach

Accessing the water, Knab Rock

The new Swansea Metro

Signage Riis Park, NYC, PPS

Existing Swansea land train route

Historic Mumbles Train, Knab Rock

BW10: Beach / Water

- Promote beach access for all, locating key drop off areas for senior and disabled access, with platforms and adapted wheelchairs for access and use on the beach.
- Promote the beach for active use, designating children zone areas along the beach for on beach play facilities and supporting active uses such as kite boarding, land yachting and blokarting.
- Promote access to the water from the northern and southern edges of the bay, supporting larger boating activity around the marina, continued watersports at Knab Rock and facilitating water taxis and recreation boat trips between Mumbles Pier and the River Tawe.
- Encourage safe use of the water through management of activities and designation of uses to specific areas.
- Formalise boat storage to improve use of available space and introduce a new pricing strategy.

BW11: Improved Public Transport Network

- Locate metro interchanges along the bay, encouraging mutli-modal bay travel, providing ticket kiosks, timetable information and public conveniences. Introduce dedicated metro routes between the city centre and County Hall.
- Develop a new pricing strategy with on bus ticketing, rover tickets and multi-modal options.

BW12: Baywide Parking Strategy

- Prepare a parking strategy, with a variable charging system.
- Investigate the potential to provide a park and ride facility in the west and additional car parking at St Helen's and Mumbles. Increase parking provision at St Helen's, Sketty Lane, Blackpill, Oystermouth Square and Mumbles Headland. Provide new car parks on the foreshore at Blackpill and on street parking provision between Southend Gardens and Mumbles Pier.

BW13: Signage Strategy

- Develop a Swansea Bay signage strategy. Provide electronic signage along Oystermouth and Mumbles Roads, displaying public transport, car parking, festival and event and water quality information.
- Provide interactive signage along the promenade with links to the environment, education and health.
- Investigate ways of incorporating signage with street furniture through action BW6 to ensure environmental clutter is minimized.

Quality Vision

Swansea Bay - the quality recreational destination in West Wales. An improved range of visitor facilities along the bay, with food and drink, public art, lighting, toilets and shower facilities, events space, facilities for boating activity and children's play facilities, together with information signs that celebrate the industrial heritage and historical rail links between Mumbles and the City. Through improved maintenance and management coordination, a high quality public realm will be enhanced.

BW14: Visitor Facilities

- Focus public conveniences at key arrival areas around the bay including County Hall, St Helen's car park, Victoria Park, Sketty Lane Adrenaline Sports Centre, Blackpill Lido, Oystermouth Square, Knab Rock and Mumbles Pier.
- Provide shower facilities at City Waterfront, St Helen's, Sketty Lane Adrenaline Centre, Black Pill Waterpark and Knab Rock.
- Extend/enhance existing cafes, bars and restaurant facilities at County Hall; Patti Pavilion; Blackpill Waterpark; Knab Rock and Mumbles Pier. Provide new facilities that support both day and evening entertainment at City Waterfront; Sketty Lane Adrenaline Sports Centre and Oystermouth Square.
- Kiosks should be supported at Victoria Park; the bottom of Brynmill Lane; Westcross and Knab Rock.

BW15: Water Activity

- Support continued water boating activity around Mumbles and the Marina with increased facilities at Knab Rock and the Pier for water users.
- Improve and extend the slips at Southend Gardens and Knab Rock providing supporting facilities for water users, including: public conveniences; shower facilities; information points and safe storage provision.

BW16: Children's Play

- Increase the provision of safe children's play areas at Blackpill and Southend Gardens, providing additional all weather facilities.
- Locate Kids Zones on the beach at County Hall and Blackpill providing temporary and permanent entertainment.

BW17: Historic, cultural and nature links

- Create a themed culture and heritage trail that extends the length of the bay. Extend the trail through Castle Acre to a new visitor centre located within the grounds of Oystermouth Castle.


Water play, New Zealand


Existing facilities, Knab Rock


Event space, Park Andre Citroen


Place for sports and events, Barcelona


Carnival, Swansea

Bay wide facilities plan

BW18: Establishing a bay management group

- Develop a Bay Management Group to coordinate efforts, deliver the vision and facilitate development throughout the bay.
- Pool resources and knowledge, encouraging the continued involvement of key stakeholder including user groups, community groups, environmental protection organisations, Swansea Futures, Tourism Swansea and other organisations that can help facilitate development throughout the bay.
- Strengthen cross-departmental working to ensure the Bay Management Group is effective . A coordination group should be established with representatives from Planning and Economic Regeneration, Environment and Conservation, Parks and the Environment, Tourism and Leisure, Transport and Accessibility, Foreshore Management and Environment and Health.
- Establish an annual programme of meetings with statutory consultees, including the Environment Agency and Countryside Council for Wales, to discuss bay wide issues.
- Maintain a continued dialogue with local communities and local businesses, encouraging active involvement, innovation and creativity in the bay.
- Ensure the on-going management and maintenance of Swansea Bay is continued following the completion of development works.
- Management of wind blown sand is to be coordinated by the Bay Management Group.

BW19: Ensure the quality and sustainability of all development

- Ensure that all development and initiatives are of a high quality, sustainable design and accord with the principles and guidance set out on the Wales Spatial Plan and Local Agenda 21, Planning Policy Wales Technical Advice Notes, in particular TAN 15: Development and Flood Risk; TAN 5: Nature Conservation and TAN 12: Design
- City and County of Swansea to prepare development briefs for each of the waterfront development areas.


Sailing in Swansea Bay

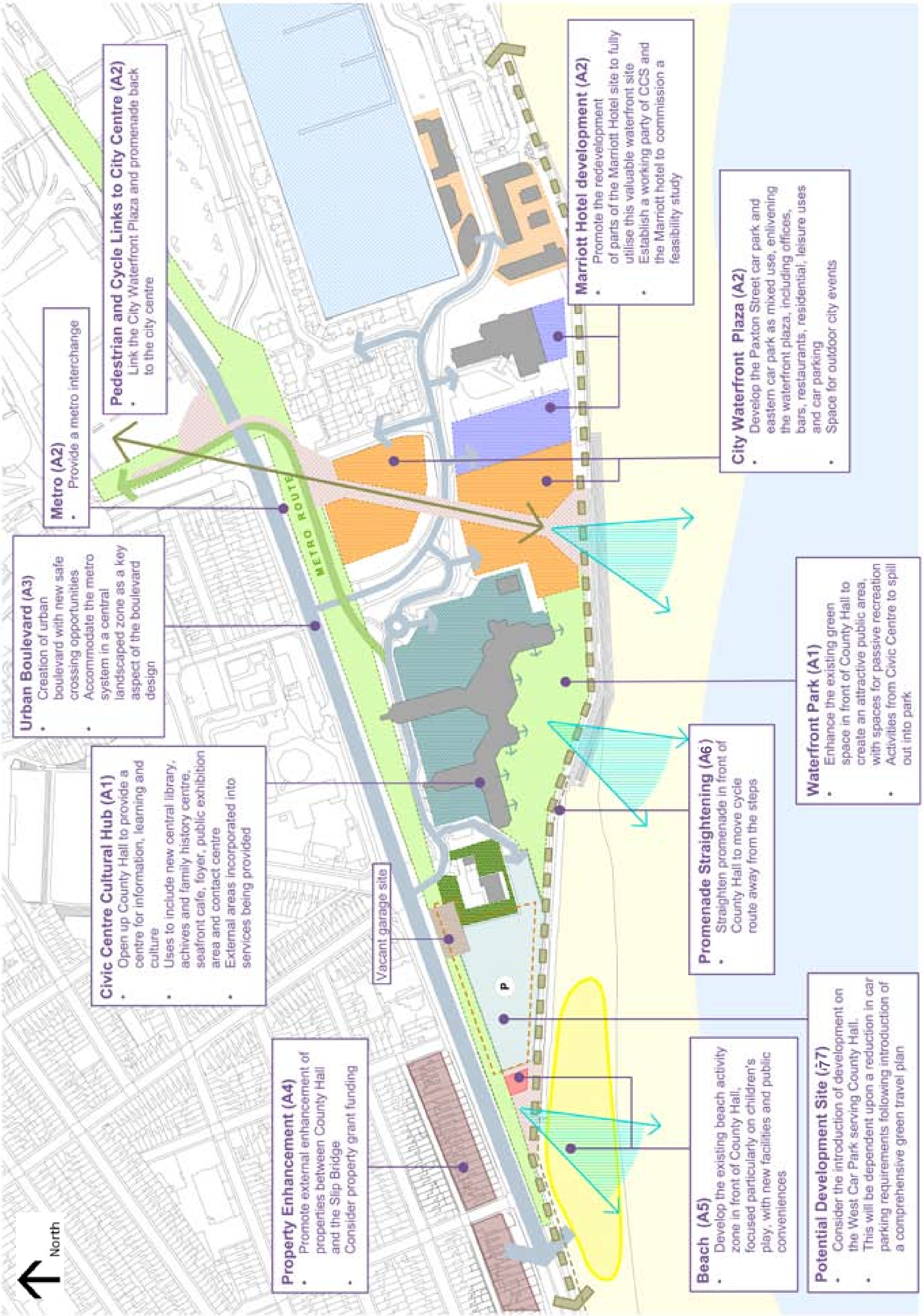

Beach play, Barcelona


Celebrating Oystermouth Castle


Spectator sports in the Bay


Stimulate the sense, Clyne Gardens

City Waterfront Concept Plan



4. ACTION PLAN: DESTINATIONS

4.1 City Waterfront

City Waterfront is where city life meets the sea and the hustle and bustle of urban living reacts with the sun, surf and sand of Swansea Bay. City Waterfront is where the residents and visitors naturally cross Oystermouth Road to access an exciting range of visitor facilities that spill out onto the promenade and beach. It is a place to meet and be seen and to start a journey exploring the delights of the new Swansea Bay.

- A1: County Hall Development: Open up County Hall to provide a welcoming centre for information, learning and culture. The new Civic Centre will house a new Central Library, archives and family history centre, seafront cafe, customer contact centre and foyer and public exhibition area. The redevelopment could include the rationalisation of the external areas between the wings of the building.

  Enhance the grassed area in front of County Hall to create an attractive public park area, which takes advantage of the spectacular views of the bay and provides a range of spaces for passive recreation. Activities from the Civic Centre will spill out into the park.

- A2: City Waterfront Plaza Site: Create a high quality mixed use waterfront development on Paxton Street car park and the eastern staff car park, as advocated in the Swansea City Centre Strategic Framework. The development will be focused around a City Waterfront Plaza on the promenade, which links back to the city centre through a linear public route with active ground floor uses. Where the linear route crosses Oystermouth Road, a new public space will be created, which includes a metro interchange. The Waterfront Plaza will be enlivened by the various activities and uses aimed at attracting city dwellers, visitors and business users, which include: offices, bars, restaurants, residential apartments, leisure uses and car parking.

  Promote the redevelopment of part of the Marriot Hotel site to fully utilise this valuable waterfront area. Establish a working party of the City and County of Swansea and the Marriot Hotel to investigate development options for this area.

- A3: Urban Boulevard: Create an urban boulevard along Oystermouth Road with safe crossing opportunities for pedestrians and cyclists. Accommodate a dedicated metro route within the landscape zone between West Way and County Hall.

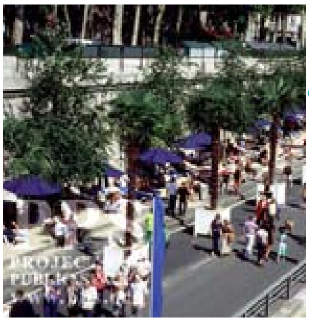
- A4: Property Enhancement: Promote the external enhancement of properties between County Hall and Saint Helen's Road to create a unified attractive place. Consider property grant funding.

- A5: Beach Activity and Visitor Facilities: Develop the existing beach activity zone, focused towards children, with new visitor facilities, including public conveniences and temporary kiosks.

- A6: Promenade Straightening: Straighten the promenade in front of County Hall to move the cycle route away from the steps and provide opportunity for the extension of the land train route.

- A7: Potential Development Site: Following the creation of the Civic Centre cultural hub, review car parking requirements on the west car park, taking account of green travel plan initiatives, to ascertain whether the area could be a future development site.


Aerial view of County Hall

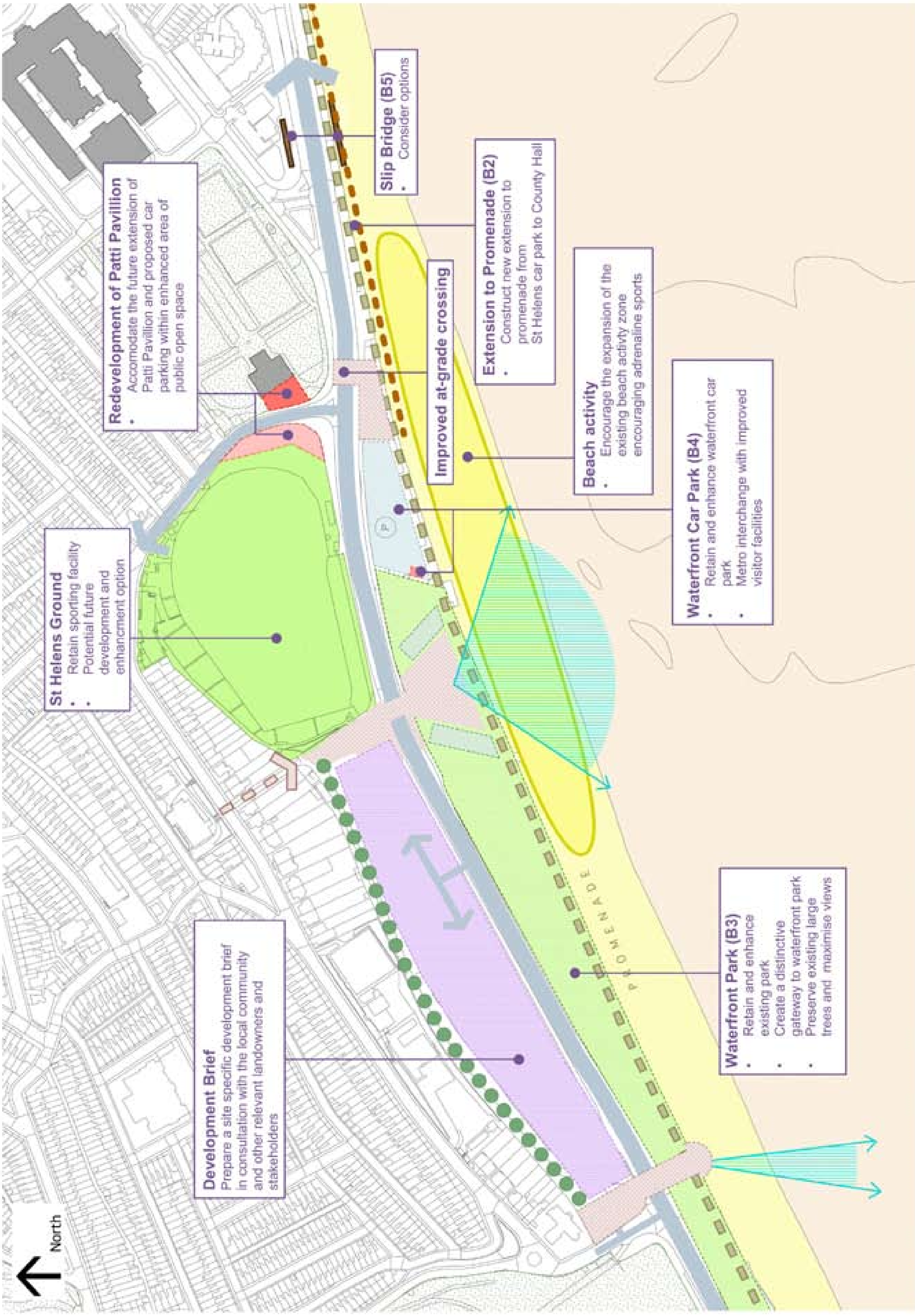

Paris Plage, PPS


Cross walk, Champse Eylse, PPS


Activity both day and night


City beach

St Helen's Concept Plan



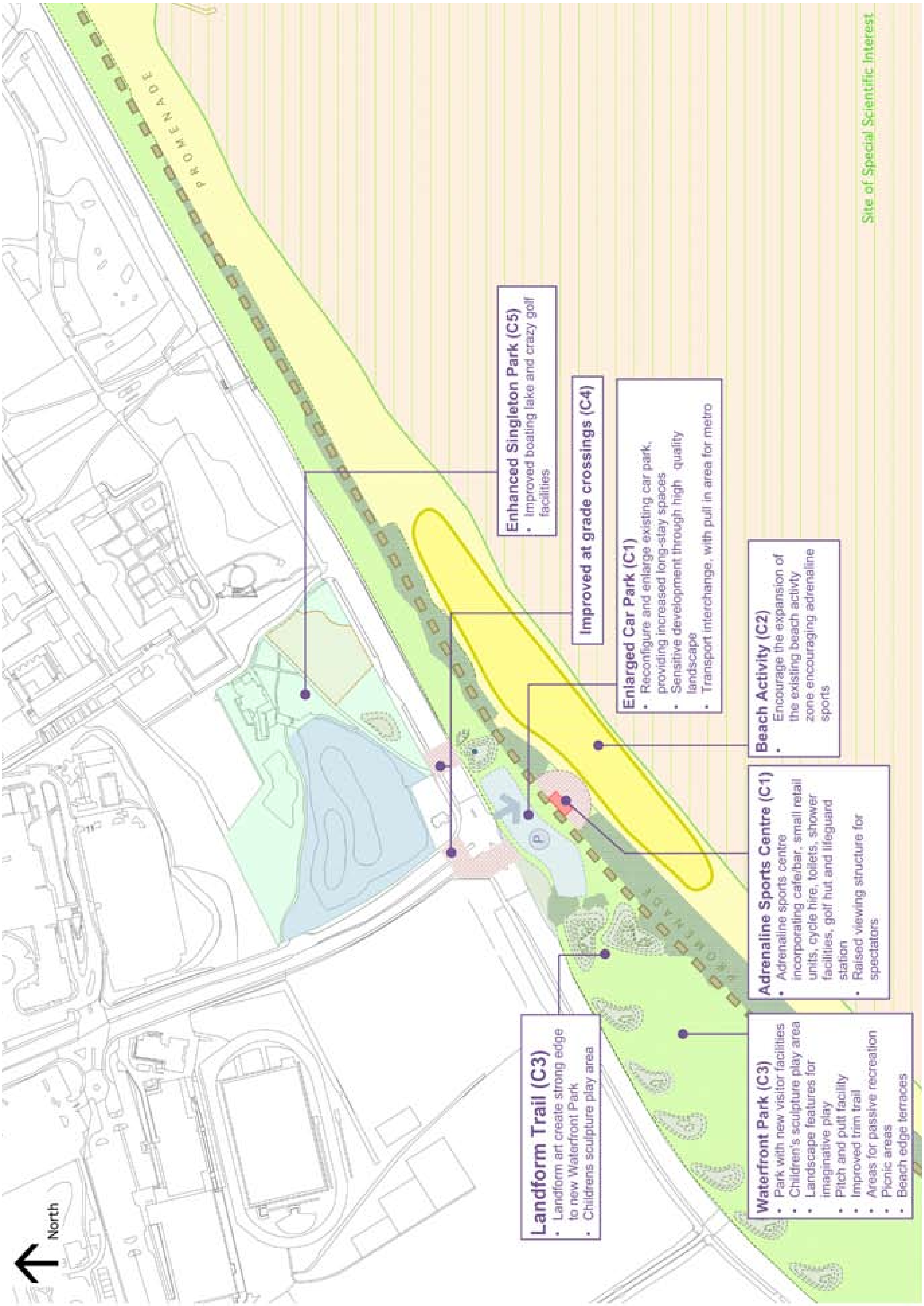
4.2 St Helen's

Aerial view, St helen's

St Helen's is where the Bay changes character from the urban to the landscape, where space gives opportunities for both quiet reflection and a host of activities. St Helen's is a place to celebrate Swansea's unique position on the waterfront, with potential space for new visitor facilities and public entertainment.

- B1: Development Brief: Prepare a site specific development brief in consultation with the local community and other relevant landowners and stakeholders.
- B2: Promenade Widening: Consider the potential for widening the promenade over the edge of the beach, from St Helen's car park to County Hall, providing improved access to the beach and helping to eliminate user conflict along the promenade. The extension will need to maintain access to sewer inspection chambers.
- B3: Waterfront Park: Enhance the existing foreshore park to create a distinctive gateway to the Waterfront Park, see action BW1 above. A balance will need to be achieved between preserving existing large trees, which lend maturity and character to the area, and removing poor quality vegetation to allow full advantage of the spectacular views available. Existing features such as the cenotaph and other memorials would be retained.
- B4: Visitor Facilities and Car Park: Retain and enhance the waterfront car park, with an improved at-grade crossing between the Patti Pavilion and the Waterfront. Provide a new building at this location to house public toilets, ticket booth, bus/metro shelter and cycle hire facilities. The public toilets will replace those previously removed from the site of the McCarthy & Stone development.
- B5: Slip Bridge: The slip bridge historically was a major hub for accessing the beach. However activity patterns have changed and the focus for land and beach activities has moved away from this narrow stretch of promenade, and will again re focus as a result of new development at St Helens. Reinstatement of a bridge using the existing stepped supports, would require significant infrastructural works to be fully accessible. However, there may be scope to consider using one of the abutments as a kiosk facility for a leisure related use subject to the proposal being commercially viable. The City and County of Swansea will consider the long-term future of the Slip Bridge, including the possible re-instatement of a bridge crossing on the present abutments as part of the enhancement and development proposals for the St Helen's area.

Sketty Lane Concept Plan



4.3 Sketty Lane

Sketty Lane is the recreational heart of the city, focused on the new Waterfront Park, providing a wide range of sporting and recreational activities, with adrenaline sports on the beach, boating, golfing and children's play within the park, all linked to the sporting centre of excellence.

- C1: Adrenaline Sports Centre: Redevelop and enlarge visitor facilities in Sketty Lane to provide a new Adrenaline Sport Centre overlooking the beach, with improved car parking and beach access, including:
    - Café/restaurant, toilets and shower facilities, equipment store, pitch and putt golf hire, and niche retail.

  Enlarge existing car park and introduce a transport interchange, with dedicated pull in area for the metro, shelter and ticketing facilities.

  The CCS will prepare planning guidance to identify planning, design and environmental issues concerning the development of the site.
- C2: Beach Activity: Encourage a range of beach activities including kite surfing and wind surfing and linking to the beach at St Helen's.

  The proposed development and activities will need to fully consider environmental issues, and demonstrate no significant effect on the SSSI.
- C3: Waterfront Park: Provide a Waterfront Park which is a continuation of the park described in action B4 above. The quality and ideas for the park are described under action BW1 above. The park will provide a range of facilities:
    - a children's sculpture play area, with a series of landscape features for non prescriptive imaginative play;
    - an improved trim trail providing fun physical activity for adults and children of all abilities;
    - a pitch and putt facility, albeit a reduced size;
    - a raised viewing structure and space for spectators in front of the Adrenaline Sports Centre; and
    - areas for passive recreation including mown grass areas, picknicking areas and beach edge terraces.
- C4: Pedestrian Crossing Facilities: Enhance the at grade (ground level) pedestrian and cyclist crossing facilities on Oystermouth Road, particularly at Sketty Lane junction to improve pedestrian and cycle access from the University and boating lake to the waterfront.
- C5: Boating Lake: Enhance the boating lake activity areas, including facilities supporting the boating lake and the crazy golf area.

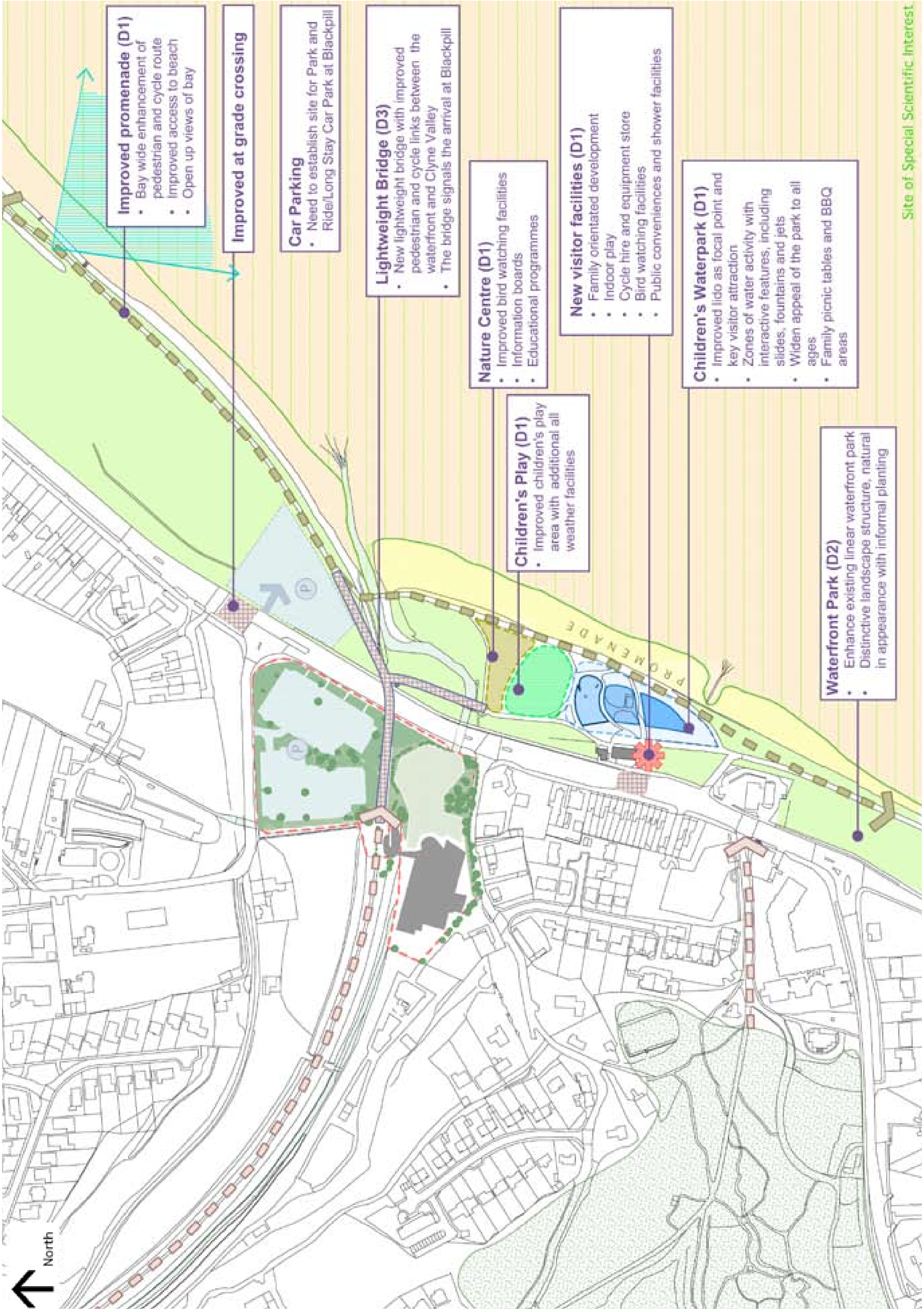

Cairns, outdoor performances


Waterside housing, Barcelona


University life


The Imaginarium, @ Bristol

Blackpill Concept Plan



4.4 Blackpill

Blackpill is a place for fun and family entertainment, based on an expanded water park play area with a wide range of support facilities, linked to the surrounding assets of the Clyne Valley, Clyne Gardens and the bird life on the foreshore. Improved bus and car parking opens up Blackpill as the first stop on the Mumbles experience.

- D1 Waterpark / Visitor Facilities: Expand and improve the children's waterpark with new features to raise the profile of Blackpill. Provide different zones of water activity including slides, fountains and jets of water to extend the appeal of the park to all age groups and provide a year round attraction, with its use as a winter skating rink.

  Provide new visitor facilities to include a family orientated development with opportunity for indoor play; cycle hire; equipment store and public conveniences and shower facilities.

  Provide a new nature centre building with improved bird watching facilities, planting and habitat creation works, and information boards. Promote educational programmes drawing on links with the sea, SSSI and Clyne Valley.

- D2: Waterfront Park: Continue the Waterfront Park through Blackpill (refer to actions C3 and BW1). Key features of the park specific to Blackpill are:
  - Removal of poor quality vegetation to allow full advantage of spectacular views. Areas of poor quality will be subject to detailed assessment.
  - Creation of a play landscape with series of landscape features for non prescriptive, imaginative play adjacent to the waterpark to help relieve the demand at busy times.
  - Creation of spaces for casual and passive recreation including picnicking areas and beach edge terraces.
  - Incorporation and enhancement of the skateboard park as part of the Waterfront Park.
  - Celebration of the history of the Mumbles Train as a feature in the Waterfront Park, and a key marker along the bay wide culture, heritage and nature trail.
- D3: Lightweight Bridge: Construct a high quality, visually exciting lightweight bridge over the dual carriageway, improving pedestrian and cycle links between the waterfront and Clyne Valley.
  - Create an iconic feature in the design of the new pedestrian/cycle bridge that signal the start of Gower.
- D4: Waterfront Car Park: Provide a new car park for the Waterpark, marking the arrival at Blackpill. Reconfigure the existing land side car park, providing for health club parking.
- D5: Beach Activity: Promote beach activities, encouraging kite flying on the beach, with displays and competitions featuring in the Bay Festival of Light and Colour.

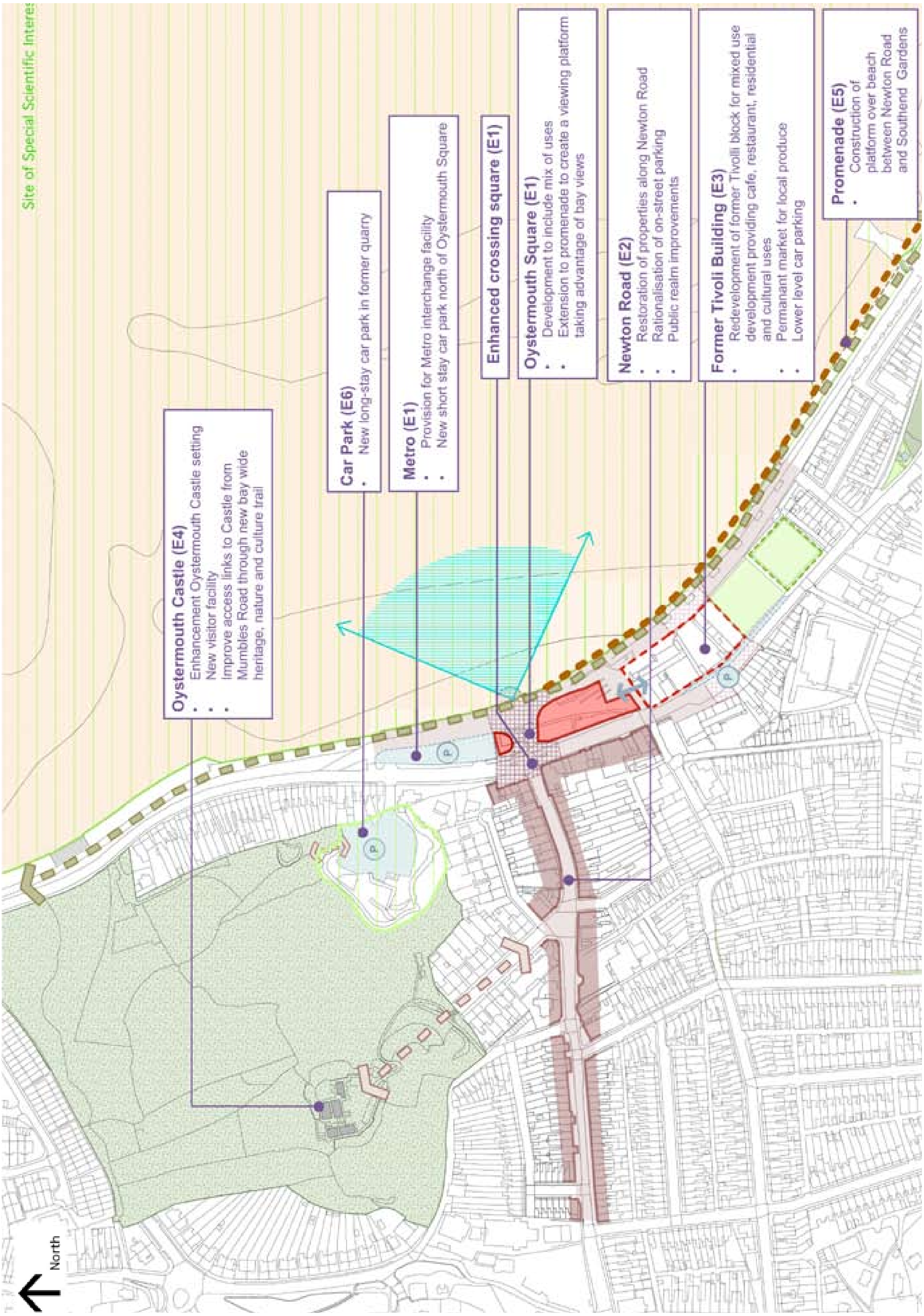

Aerial view of Sketty Lane


Beach play, Barcelona


Landform feature


Activity on the beaches

Oystermouth Concept Plan



4.5 Mumbles

Mumbles is a vibrant seaside resort with an attractive retail area and a wide range of visitor facilities linked to a well designed and managed esplanade that is focused on the dramatic panoramic views of Swansea Bay and the wide range of water activities.

- E1: Oystermouth Square Development: Develop Oystermouth Square for a range of uses which may include retail on ground or ground and first floors, professional and financial services, food and drink outlets, gallery/display areas, hotel, function suite, residential on upper floors only, and provide an extension to the promenade to create enhanced opportunities for viewing the bay.
- E2: Newton Road Enhancement: Strengthen the boutique and niche market retail offer of Newton Road, by property improvements, rationalisation of car parking and improved public realm works.
- E3: Tivoli Block Development: Commission a feasibility study to review the role of the block south east of Oystermouth car park , which includes the Tivoli building, to provide a mixed-use development with lower level car parking. Create a new square within the scheme to connect to the waterfront and accommodate various activities including the local produce market, establishing greater links between the retail centre and waterfront. Create active uses at ground floor level, encouraging the location of cafes, restaurants and cultural uses.
- E4: Visitor Facilities / Amenity: Provide improved visitor facilities at Knab Rock, with new building to house public conveniences, showers, cycle hire and kiosks, supporting the continued presence of Verdi's attraction and the opportunity for future enhancement works to Verdis' building.

  Provide a new visitor facility building within an enhanced setting of Oystermouth Castle. Strengthen the links between Mumbles Road and Oystermouth Castle and link with a baywide heritage, nature and cultural trail (see action BW16).

  Provide amenity areas including a new all weather children's play facility in Southend Gardens, with improved visitor and family facilities including public conveniences.
- E5: Promenade: Create a wider linear promenade route between Southend Gardens and Knab Rock, with an extension of the promenade over the beach. Commission a study to review the rationalisation of on street parking, access, roads, facilities and boat storage, whilst retaining green space.
- E6: Car Parking Strategy: As part of the baywide car parking strategy (see action BW10 above), introduce
  - A metro/bus stop facility north of Oystermouth Square, with short stay car parking provision;
  - On-street car parking along Newton Road with 20 minute limit and Mumbles Road, in front of bowling green; and,
  - On-street car parking between Southend Gardens and Knab Rock, and the tennis courts and bowling green, with 1 hour limit; and
  - A long stay multi-storey car park within the Quarry car park. This would need to be sensitively designed to respect the geological interest of the cliff face (SSSI) and residential amenity.


Aerial view of Blackpill


Louvre Fountain, PPS


Granvil Park, Vancouver, PPS


Stimulate the sense, Andre Citroen


Water play

Market Appraisal

Travelling west along Swansea Bay, as you near Oystermouth Square, the experience changes from broad Avenue along the seafront to a more compact seaside environment. Newton Road rising from the seafront provides an opportunity for niche shopping and a visit to the castle. Oystermouth Square development as proposed will enhance the experience, particularly if as a knock on effect it brings about the redevelopment of the Tivoli and the creation of a new market square and event space. In a similar approach to Oystermouth Square, we would suggest that a development brief is prepared for the area from the Tivoli through to the bowling green. The development brief should be agreed in conjunction with relevant land owners and the delivery mechanism agreed in principle to include predetermined public realm benefits etc.

In order to sustain activity along Newton Road and the proposed Oystermouth Square development and potential ancillary development, there is inadequate car parking in this part of the Mumbles. Increased parking should be provided and rates should be geared to enable short-term visits to the shops as well as more prolonged visits.

Over the last few years, the range of shops, cafes and restaurants around Newton Road have developed into popular destinations for local residents, with the offer of the area significantly changing. This is also helping to change wider perceptions of the area and attract a different customer base to the area. The proposals to further enhance the public realm and the changing perceptions of the area will help to attract further high quality restaurants and bars, building on the success of nearby Verdi's. The provision of high quality bars and restaurants in the area will help to capture the spend of visiting families and the population in the area. The development at Oystermouth Square will add a new dimension to the offer at this location. The development will provide retail units with street frontage and space for bars, cafes and restaurants to enjoy piazza and waterfront aspects.

In addition to the range of bars, cafes and restaurants improving over the last few years, so has the retail offer of Newton Road. A number of specialist boutique shops exist in the area, including units relating to activity sports. Activity related holidays and days trips are forecast to continue to increase in the future. The increased provision of niche shops related to these will help to increase visitor spending in the area. The general public realm improvements in the area and wider Bay improvements combined with the forecast increase in activity related holidays and day trips will help to support more niche retailers in this area, further strengthening the Bay's overall offer.


Knab Rock, Swansea

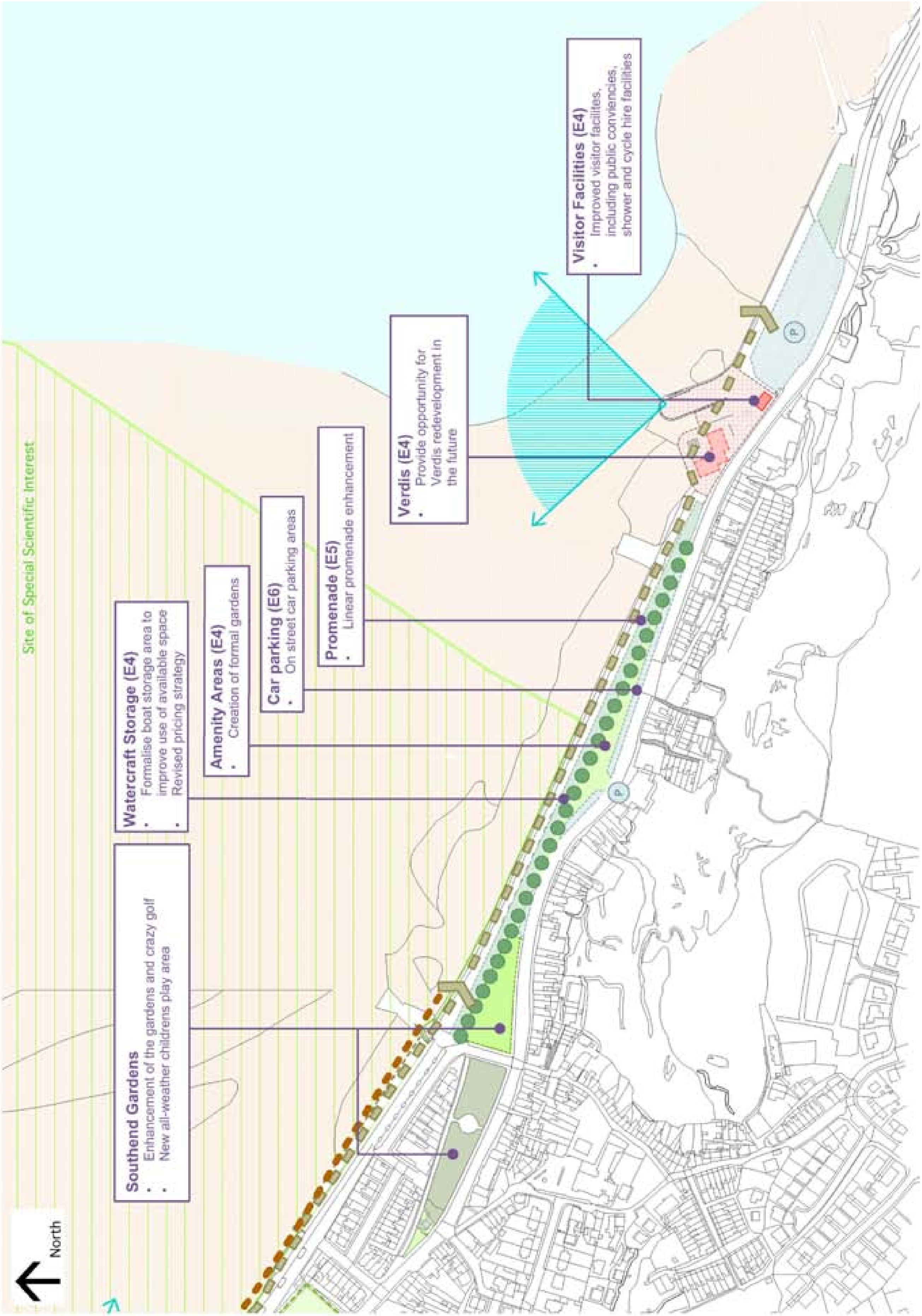

Beach play, Barcelona


Outdoor cafe

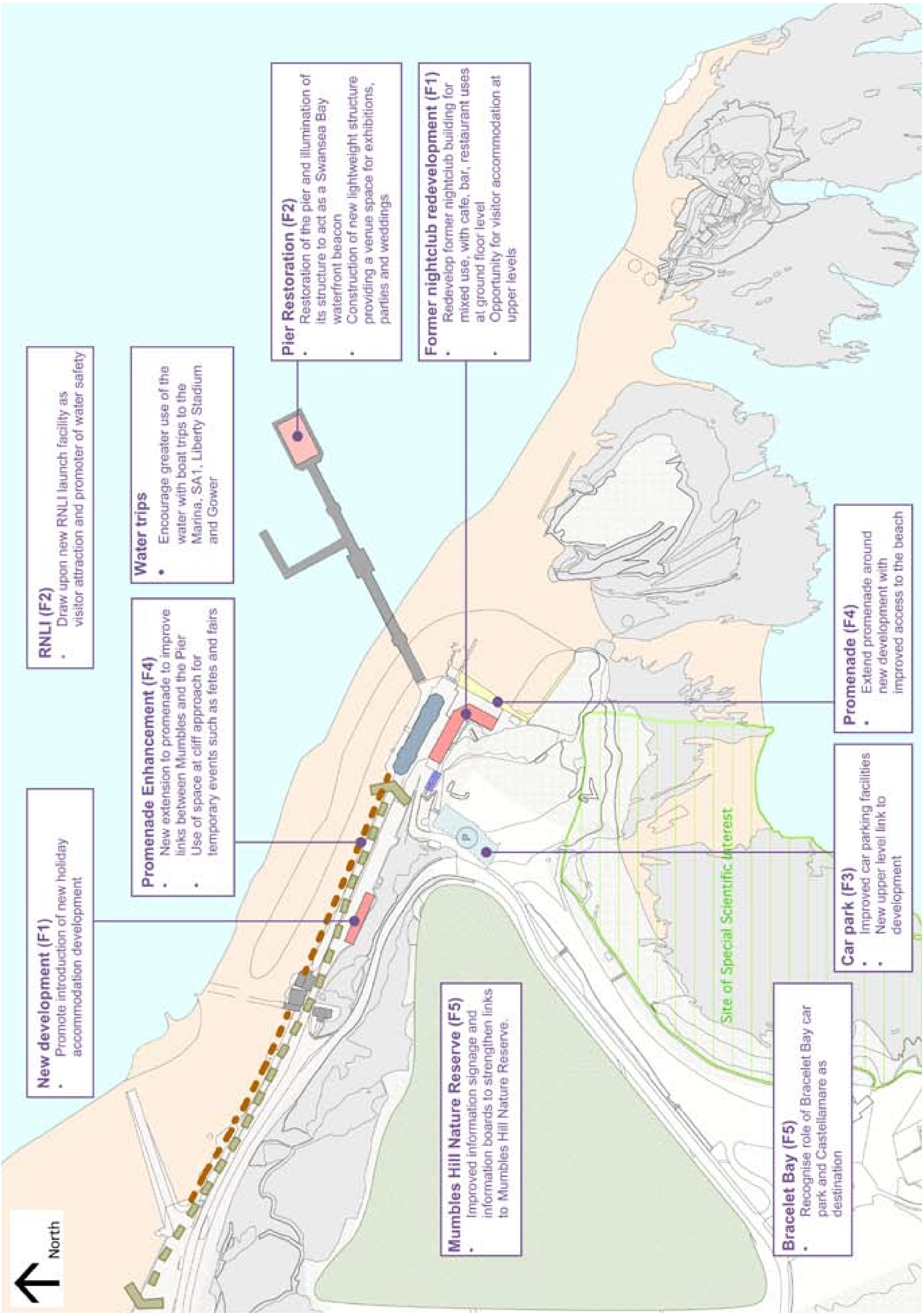

Brooklyn, Botanical Gardens, PPS


Local produce market

Southend Gardens and Knab Rock Concept Plan Masterplan



Mumbles Pier Concept Plan



4.6 Mumbles Pier

Mumbles Pier - the traditional family seaside attraction at the end of Swansea Bay, providing beach, pier and water activities supported by visitor accommodation, cafes, amusements, restaurants and bars.

- F1: Redevelopment Sites: Encourage the redevelopment of the former nightclub building into a development of up to five or six storeys, exploiting the southerly aspect with cafe, bar and restaurant uses at ground floor level and potential for visitor accommodation above. The new building could provide a focal feature to complement the pier. However the height of the building in relation to the cliff is a sensitive issue and this would need to be subject to a detailed visual appraisal and environmental impact assessement.

  Provide a new public area overlooking the beach and allow the cafe to provide outside sitting areas.

  Promote the external enhancement of the existing amusement building.

  Promote the introduction of development on the pier approach to provide holiday accommodation with integral parking at ground level.

- F2: Pier Restoration: Promote the restoration of the pier and the construction of a lightweight tensile structure at the end of the pier and along the walkway to provide a hire venue for exhibitions, events, parties and weddings.

  Support the continued presence of the RNLI and encourage the redevelopment of the existing slipway and boat hall to support future requirements. Encourage the provision of training facilities and visitor access.

- F3: Car Park: Provide improved long stay car parking facilities on the headland above the pier, with a possible link to the upper storeys of the new development (F1).

- F4: Promenade Enhancement: Consider widening the promenade to improve accessibility between Mumbles and the pier. Promote the cliff approach to the pier as a temporary space for fairs and fetes. Extend the promenade around the cliff, providing improved access to the beach.

- F5: Bracelet Bay / Nature Reserve: Improve links to Mumbles Hill Nature Reserve through signage, footpath improvement works and information boards.

  Recognise the role of Bracelet Bay car park and Castellemare as a destination, particularly for group travel visits, and promote enhancement of this area. The area could provide a final destination and turning area for the metro.


Aerial view, Mumbles Pier


Flags decorating the street, PPS


Effective lighting


Saltburn Pier illuminated

Actions		High Priority	Short term	Medium term	Long Term
BW1	Waterfront Park	•			
BW2	Landmark Features / Views				
BW3	Natural Environment				
BW4	Beach Quality				
BW5	Flooding	•			
BW6	Public Realm Strategy				
BW7	Events				
BW8	Lighting Strategy				
BW9	Promenade / Cycling / Land train				
BW10	Beach / Water				
BW11	Public Transport	•			
BW12	Car Parking Strategy	•			
BW13	Signage Strategy				
BW14	Visitor Facilities				
BW15	Water Activity				
BW16	Children's Play				
BW17	Historic / Cultural / Nature				
BW18	Bay Management	•			
BW19	Quality and Sustainability	•			
A1	County Hall Development				
A2	City Waterfront Plaza	•			
A3	Urban Boulevard				
A4	Property Enhancement				
A5	Beach Activity / Visitor Facilities				
A6	Promenade Straightening				
A7	Potential Property Development				
B1	Redevelopment Sites	•			
B2	Promenade Widening				
B3	Waterfront Park	•			
B4	Visitor Facilities and Car Park				
B6	Slip Bridge				
C1	Adrenaline Sports Centre				
C2	Beach Activity				
C3	Waterfront Park	•			
C4	Pedestrian Crossing Facilities				
C5	Boating Lake				
D1	Waterpark / Visitor Facilities	•			
D2	Waterfront Park	•			
D3	Lightweight Bridge				
D4	Waterfront Car Park	•			
D5	Park and Ride				
D6	Beach Activity				
E1	Oystermouth Square Development	•			
E2	Newton Road Enhancement				
E3	Tivoli Block Development	•			
E4	Visitor Facilities / Amenity				
E5	Promenade				
E6	Car Parking Strategy	•			
F1	Redevelopment Sites				
F2	Pier Restoration	•			
F3	Car Park				
F4	Promenade Enhancement				
F5	Bracelet Bay / Nature Reserve				

5. IMPLEMENTATION

5.1 Programme

The development programme opposite shows when each of the actions should be developed and implemented over the next 15 years. The implementation of this programme will be dictated by the availability of funding, the interest of private developers and the outcome of detailed assessments required to ascertain whether certain actions are feasible, such as an environmental appraisal, a flood consequences assessment and a traffic appraisal.

Each action has been given a priority according to the following:

- Short term: implementation is anticipated in 1 to 3 years time.
- Medium term: implementation is anticipated in 3 to 5 years time.
- Long term: implementation is anticipated in 5 to 15 years. In addition, a number of actions have been identified as priority projects.

In addition, a number of actions have been identified as priority projects.

5.2 Delivery and Implementation Plan

The separate Delivery and Implementation Plan report provides details on the implementation of the various actions.

6. ACKNOWLEDGEMENTS

We would like to thank all those who took part in the meetings, workshops and discussions that have led to the preparation of this report.

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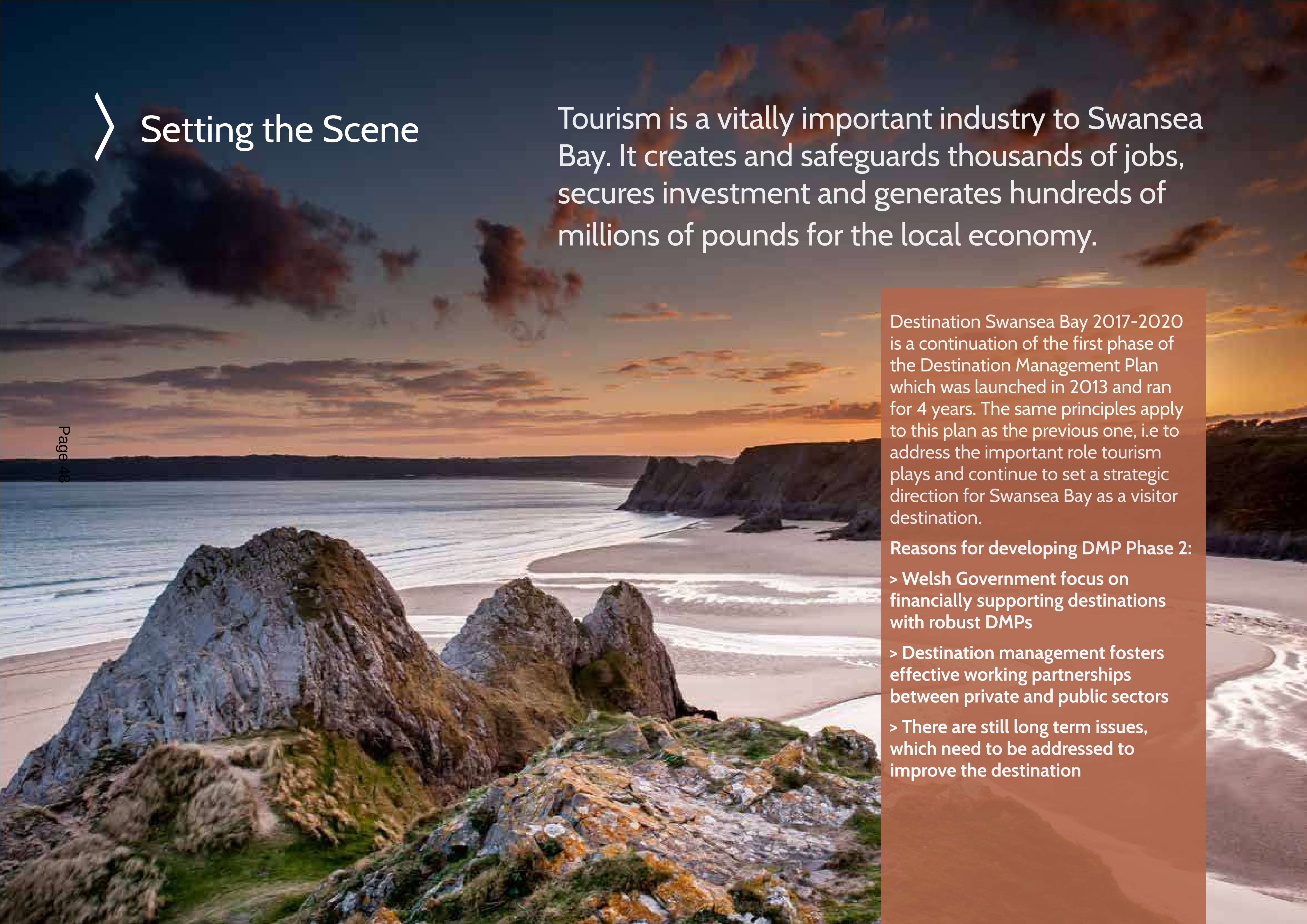
Apppendix B

DESTINATION SWANSEA BAY

The destination management plan for Swansea Bay, Mumbles and Gower Phase 2: 2017 – 2020



Setting the Scene

Tourism is a vitally important industry to Swansea Bay. It creates and safeguards thousands of jobs, secures investment and generates hundreds of millions of pounds for the local economy.

Destination Swansea Bay 2017-2020 is a continuation of the first phase of the Destination Management Plan which was launched in 2013 and ran for 4 years. The same principles apply to this plan as the previous one, i.e to address the important role tourism plays and continue to set a strategic direction for Swansea Bay as a visitor destination.

Reasons for developing DMP Phase 2:

> Welsh Government focus on financially supporting destinations with robust DMPs

> Destination management fosters effective working partnerships between private and public sectors

> There are still long term issues, which need to be addressed to improve the destination

The Local Picture - Tourism in Swansea Bay

STEAM (Scarborough Tourism Economic Activity Model)

	2014	2015	2016	2017
Value £	394M	401M	400M	417M
Visitors	4.4M	4.5M	4.6M	4.6M
Staying Visitors	1.5M	1.5M	1.5M	1.6M
Jobs	5.5K	5.7K	5.6K	5.7K

Bedstock - no. of establishments

Serviced 158

Self Catering 384

Caravan & Camping 54

TOTAL: 606 establishments
(April 2018) 32K bedspaces

2017 Occupancy figures

Serviced average	70.9%
Self Catering average	59.9%

Wales average	61.2%
Wales average	57.6%

The Local Picture - Economic Profile

Gross Value Added (GVA) in 2012:

Swansea
£4.1 billion
£16.9K per head
73% of UK average

South West Wales
£10.5 billion
£15.3K per head
66% of UK average

Wales
£52.1 billion
£16.9K per head
72.9% of UK average

Source:
Office of National Statistics 2018
via StatsWales

Gross Value Added (GVA) in 2016:

Swansea
£4.6 billion
£18.9K per head
71.7% of UK average

South West Wales
£12.1 billion
£17.4K per head
66% of UK average

Wales
£59.6 billion
£19.1K per head
72.7% of UK average

Employment rate: 68%
Economic activity rate: 71%

A City of Events

250k

attended the Wales Airshow in 2018

Highlights 2018

Highlights 2018 Highlights 2018 Highlights 2018 Highlights 2018

> BBC Music's Biggest Weekend

> Clyne in Bloom

> Headline Concerts: The Killers / Little Mix

> JCP Swansea Half-Marathon

> Wales Airshow

> Swansea International Festival

> Admiral Swansea Bay 10k

> Waterfront Winterland

Visitor Profile

- Affluent 'Empty Nesters' aged 45+ years
- Affluent early retired couples aged 45+ years
- Younger affluent professionals aged 25 - 45 years
- Mid income families with children
- 'Hotel' is the main type of accommodation used
- The average length of stay for overnight visitors is 4.7 nights
- Where they come from (UK): Midlands, London, South East, M4 Corridor, West Country and other parts of Wales
- Main reasons to visit remain the coast/beaches and scenery/landscape
- Walking continues to be the main activity undertaken by visitors
- Overnight visitors spend an average of £500 during their stay, day visitors spend an average of £60
- 97% of visitors would recommend a visit to Swansea Bay

Source: 2015 Visitor Survey

The Big Picture

Swansea City Centre will be the focus of major regeneration development and transformation over the coming years. The DMP Partnership must ensure the benefits of these significant projects are spread across the entire destination and not contained to the City Centre alone.

Swansea Bay City Region Deal

> £1.3bn of private and public money to be spent over 15 years
> Four councils taking part - Swansea, Neath Port Talbot Carmarthenshire and Pembrokeshire
> Eleven projects including: a “cloud” enterprise zone; using the internet to improve health diagnostics; a steel science centre

City Centre Regeneration Scheme - ‘Swansea Central’

> Improved links between the city centre and waterfront
> A 3,500-seat digital indoor arena for concerts and events
> A new hotel, shops, cafés and restaurants

Civic Centre ‘hydro hub’ site

> Cafés, restaurants and new public space
> A public aquarium

Kingsway urban park development

> Remodelling of The Kingsway vehicular route
> More green spaces for residents, workers and visitors

River Tawe Corridor

> Hafod Morfa Copperworks
> Penderyn Distillery

Skyline Development

> Major tourist attraction on Kilvey Hill
> Cable car ride, toboggan ride, zip wire rides and restaurant

Tidal Lagoon

> Swansea Bay Tidal Lagoon will be the world’s first tidal lagoon power plant
> A tourism and recreation hub with the potential to attract circa 100,000 visitors per year
> A playground, beach and rockpools, art installations and an Offshore Visitor Centre

Evening & Night Time Economy Strategy

> Retention of Swansea’s Purple Flag status, the only area in Wales to have this accolade
> Achievement of Best Bar None accreditation for multiple venues
> Enhanced branding, marketing and safeguarding measures

DMP successfully delivered a number of projects since 2013 including:

- Successful major shift to digital marketing
- P4G funding secured to develop a Beaches Management Plan and Group for Swansea Bay's Blue Flag beaches
- Road Signage audit of Gower and recommendation report
- Successful delivery of the RDP Rural Accommodation Grant Scheme (held up as an exemplar project in the RDP Business Plan 2 Review)
- Introduction of the Visitor Information Point (VIP) scheme - working in partnership with local operators to offer a complete visitor provision experience
- Visit Wales funding secured to complete several DMP projects e.g. welcome panel at Swansea Bus Station, targeted marketing campaigns in Bristol and Reading, and the Swansea Bay Surfari Bus Summer Tour
- Improved Trade Engagement through training and development workshops, Annual Stakeholder Day, Swansea Bay Tourism Awards, Swansea Bay Food Tourism Conference

The DMP successfully establishes an effective working partnership between public and private sectors

Over 100 representatives so far have attended Delivery Group meetings during the course of the DMP delivery process.

Over 40 organisations and Council departments have been involved:

> Swansea Council
> Tourism Swansea Bay
> Visit Wales / Welsh Government
> The National Trust
> Swansea University / University of Wales Trinity Saint David
> Community Development Trusts
> Swansea BID and City Centre Management
> Natural Resources Wales
> Local Tourism Operators

The Delivery Groups were identified as an element that should remain as part of future DMP delivery

The DMP helps to propel tourism to the top of the local political agenda, reinforcing its importance as a sustainable and viable industry for Swansea Bay

Key lessons learnt from DMP (Phase 1):

> Avoid vague and generic action points with no prospect of being delivered
> Identify funding for projects to ensure delivery
> Think outside the box – consult far and wide, look what's being done elsewhere

The Way Forward...2017 - 2020

Our Vision

"Create a world class tourism destination, which delivers a high-quality visitor experience in a pleasant, clean and well-maintained environment.

This will be achieved by building on the existing working partnership that will, in turn, drive improved tourism provision, effective management and high-quality promotion of Swansea Bay, Mumbles and Gower as a destination".

The Strategy

This DMP must ensure that tourism continues to be a significant contributor to the Swansea Bay economy

The main focus of this DMP will be a streamlined Action Plan only including actions that show strong potential for delivery and link to the 4 strategic themes of partnership working, quality, seasonality and sustainability.

Priorities – Actions – Impacts = Outcomes

Priorities

- > Focus on Partnership
- > Increasing Quality
- > All Year Round Destination
- > Ensuring Sustainability

Actions

Protect and enhance natural environment

Develop high quality tourism product

Improve visitor experience

Continue to deliver strong marketing for the area

Improve infrastructure and facilities

Develop strong partnerships between public, private and third sector

Monitor destination performance

Identify relevant funding

Impacts

Well-managed natural and built environment

Reduced seasonality

Improved tourism offer

Increased visitor number and spend

Better trained workforce

Strong destination brand

More tourism businesses accessing relevant training and funding

Outcomes

A well-managed tourism destination which delivers a world-class visitor experience in a pleasant and clean environment

An effective working partnership between public, private and third sectors

A well-informed tourism industry with easy access to relevant training and funding

Strategic Fit

The DMP will continue to work to meet the priorities set out on a local and national level.

Swansea Council's corporate priorities are:

> Safeguard people
> Improve education and skills
> Transform our economy and infrastructure
> Tackle poverty
> Maintain and enhance Swansea's natural resources and biodiversity
> Transformation and future Council development

Visit Wales continues to implement the 'Partnership for Growth' tourism strategy 2013-2020 and the recent review highlighted that tourism in Wales is performing strongly.

The refreshed VW strategy has set out the following priority actions:

> Promoting the brand
> Product development
> Major events
> People development
> Place building
> Profitable performance
> Partnership

The DMP will work towards the 7 goals identified in the Well-being of Future Generations (Wales) Act 2015.

A Prosperous Wales
A key action of the DMP is for the tourism industry to be in a position to employ local people throughout the year.

A Resilient Wales
Managing and preserving our natural environment, which is a key reason to visit, versus the need for development, will continue to be a tough ask.

A healthier Wales
Investing in and maintaining our walking / cycling infrastructure, beaches, parks and promenade provide local people and visitors free and direct access to facilities, which can help improve their physical and mental well-being.

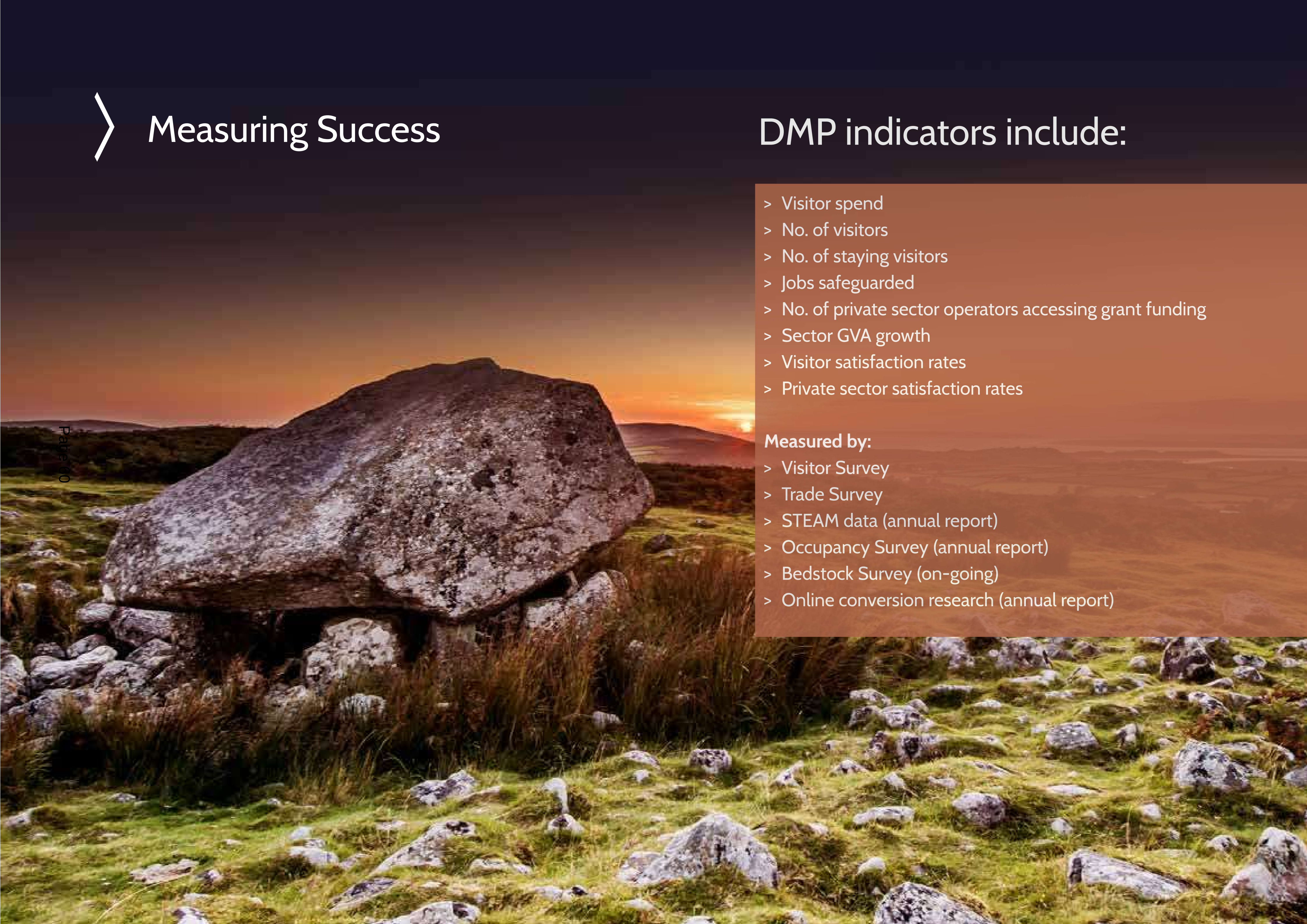
A more equal Wales
Many international students work in the sector to improve their linguistic skills, whilst the free movement of labour over the last decade has seen the sector employ people into roles, which have often proved difficult to fill.

A Wales of vibrant culture and thriving Welsh language
This is at the heart of what makes the destination unique and our commitment to promoting and encouraging our residents and visitors to participate in the Arts, Sport and Recreation.

A Wales of cohesive communities
The DMP aims to create attractive, viable, safe and well-connected communities for residents and visitors alike.

A globally responsible Wales
The DMP recognises the principles of sustainable development and how tourism impacts upon the built and natural environments. When doing anything to improve the economic, social, environmental and cultural well-being of Wales, takes account of whether doing such a thing may make a positive contribution to global well-being and future generations.

Well-being of Future Generations (Wales) Act 2015



Measuring Success

DMP indicators include:

- Visitor spend
- No. of visitors
- No. of staying visitors
- Jobs safeguarded
- No. of private sector operators accessing grant funding
- Sector GVA growth
- Visitor satisfaction rates
- Private sector satisfaction rates

Measured by:

- Visitor Survey
- Trade Survey
- STEAM data (annual report)
- Occupancy Survey (annual report)
- Bedstock Survey (on-going)
- Online conversion research (annual report)

DESTINATION SWANSEA BAY

If you would like this information in another format or language please contact:

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Cyngor **Abertawe**
Swansea Council

Appendix C

September 2021

South West Wales Regional Economic Delivery Plan

SQW

Contents

Executive Summary

Background

1. South West Wales has a diverse economy and a unique set of natural and cultural assets, underpinned by the quality of its coastal and rural environment, industrial heritage and capacity and university presence. In 2014, partners in South West Wales jointly published an Economic Regeneration Strategy, setting the strategic groundwork for the Swansea Bay City Deal, a £1.3 billion investment package supported by the UK and Welsh Governments.

2. Seven years on, much has been achieved. However, there is more to be done to unlock the region's potential and to ensure that growth is resilient, sustainable and inclusive. In December 2020, the South West Wales local authorities, working closely with the Welsh Government, commissioned a new **Regional Economic Delivery Plan**. Looking ahead to the next ten years, this sets out an ambitious 'route map' for the development of the region's economy, identifying priorities for intervention and articulating how business, government, education, voluntary, community and social enterprise organisations and other partners should work together to bring them forward.

The economic and policy context

3. In the years leading up to the Covid-19 pandemic, the South West Wales economy performed strongly in generating new jobs: By 2019, there were some 322,000 jobs in the region, an impressive increase of 20,000 on the 2013 figure. However, there is still a large and persistent productivity gap with the rest of the UK.

4. Analysis of the region's economy highlights that:

   - **The region's economic weaknesses are largely structural**, linked with long-term processes of industrial change (which in some respects are still ongoing), and are shared with other regions in Wales and the UK.
   - **However, the region has a series of distinctive strengths and opportunities.** These are especially linked with the region's energy potential, university-industrial links, strong cultural identity, environmental assets and quality of life offer..
   - **There is a 'window of opportunity' to build on and capture some of these,** especially in relation to the green energy and net zero opportunity, where the region has specific advantages, but where other parts of the UK (and beyond) also have ambitious plans and technology and the dynamics of investment are changing rapidly. **Having the capacity to exploit these opportunities will be important and the timing of this matters greatly**.
   - **The region contains much diversity**, especially within the rural/ urban dimension. Despite diversity across the region, there is substantial commonality, and some of the big opportunities have a region-wide footprint. However, some of them extend beyond the

region itself, and 'out-of-region' links (for example, the South Wales Industrial Cluster and the links through to Cardiff Capital Region) will be of relevance.

- **'Transformational' growth opportunities need to be balanced with the conditions for incremental improvements in resilience, capacity and capability across the economy.** This was a key theme emerging from consultation as part of this Plan. There are distinctive opportunities at the 'leading edge' – but long-term employment resilience and wage growth will depend on the sustainability, productivity and expansion of the wider stock of regional SMEs.

5. The Plan has also been developed against the backdrop of a rapidly evolving policy context, as the region recovers from the Covid-19 pandemic and adjusts to a new trading and funding landscape following Brexit. However, looking to the next ten years, the climate emergency, the pace of (and adaption to) technology change and the need to ensure that the benefits are captured locally and are widely distributed will be central to economic strategy.

Our Ambitions and Missions for the next ten years

6. Over the next ten years, we will build on our distinctive strengths and opportunities summarised above to develop a more prosperous and resilient South West Wales economy.

7. To help plan for the future, we have identified three **Ambitions** (statements about the nature of the South West Wales economy that we want to work towards), supporting three complementary **Missions**:

Figure 1: Our strategic framework

Source: SQW 2021

8. Our three 'Missions' will guide future activity over the next ten years and beyond. They are designed to give a clear direction of travel, while remaining sufficiently broad to accommodate a wide range of potential investments that will come forward over time. The three high-level Missions are as follows:

- **Establishing South West Wales as a UK leader in renewable energy and the development of a net zero economy:** Taking forward the region's major energy related projects and driving the benefits through the region (via industrial decarbonisation, supply chain opportunities, university-linked innovation, etc.).
- **Building a strong, resilient and embedded business base:** Understanding and growing the business stock, supporting widespread social and commercial entrepreneurship, creating stronger supply chain and innovation networks, making public sector support sustainable; driving forward technology adoption and diffusion.
- **Growing and sustaining the 'experience' offer:** Linking environmental quality, quality of life and community character to create a region that retains and attracts talent and investment, and to promote this consistently and powerfully to the outside world.

Delivering the Plan

9. To translate our Missions into practical interventions, we have prepared a **project pipeline**. This sets out a schedule of interventions, describing how they contribute to our Ambitions and Missions, their current development status and the actions that need to be taken to bring them forward. This will be kept 'live': it will regularly be reviewed by regional partners and will evolve to embrace new investment proposals as they emerge.

10. Currently, the projects within the pipeline have a combined value of around £3 billion. While some are at an early stage of development, and costs will be determined through the business case process, this gives an indication of the scale of the opportunity ahead. Building on the success of the current Swansea Bay City Deal, we will pursue the creation of a further, flexible **Investment Fund** to co-invest alongside the private sector in projects that will deliver our Missions, where business cases are robust.

11. To oversee the strategic direction of the Plan, a new **South West Wales Corporate Joint Committee (CJC)** has been established, enabling the four local authorities to work closely together alongside the Welsh Government and to share resources. Building on our recent success, and alive to the immediacy of our current challenges and opportunities, the CJC will drive forward our Delivery Plan – building a South West Wales that is *"resilient and sustainable; enterprising and ambitious; and balanced and inclusive".*

1. Introduction

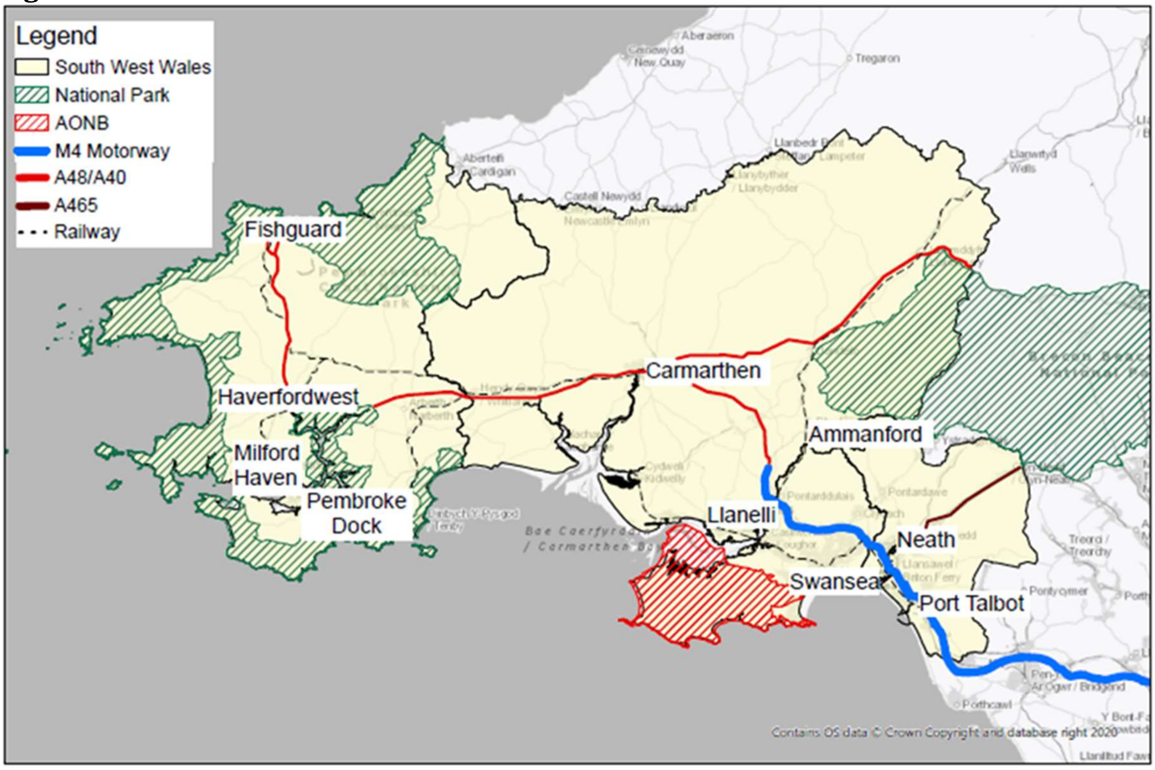
Welcome to the ***Regional Economic Delivery Plan*** *for South West Wales. Looking ahead to 2030, this Plan sets out our ambitions for a resilient, broad-based and sustainable economy – and outlines where we will focus our efforts in the next few years to realise them.*

Introducing South West Wales

1.1 Extending from Neath Port Talbot in the east to Pembrokeshire in the west, via Swansea and Carmarthenshire, South West Wales has a diverse economy and a unique set of natural and cultural assets.

1.2 Economically, our industrial heritage combines with some of the UK's most significant marine energy potential, driving major opportunities for decarbonisation and the growth of the UK's Green Economy. Environmentally, the coastline and countryside – including the Pembrokeshire Coast and Brecon Beacons National Parks and the Gower Area of Outstanding Natural Beauty – contribute to a superb visitor offer and quality of life. Culturally, the region encompasses the dynamic, growing university city of Swansea, a diverse and distinctive network of rural towns and an increasingly vibrant Welsh language.

Figure 1-1: South West Wales in context



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A bold and inclusive new economic delivery plan

1.3 In 2014, partners in South West Wales jointly published an **Economic Regeneration Strategy**, setting the strategic groundwork for the Swansea Bay City Deal, a £1.3 billion investment package supported by the UK and Welsh Governments.

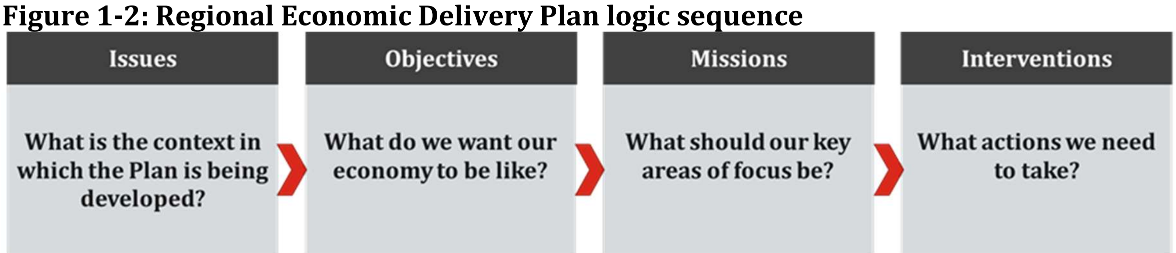
1.4 Seven years on, much has been achieved. The region's knowledge and research capacity has been supported through the delivery of major facilities such as the Swansea Bay Campus and continued investment in industry-academic links. The economic opportunities associated with the growth of the health economy have been reinforced through the development of the new Institute of Life Sciences and the start of work on the Pentre Awel health and wellbeing campus in Llanelli. S4C's new headquarters has opened in Carmarthen, accompanied by a concentration of creative media businesses; substantial investment has continued to flow into Pembrokeshire's offshore renewable opportunities; and Swansea city centre's ambitious regeneration programme is well underway. There has been major investment in our digital connectivity, with exciting plans for a more sustainable regional transport system through Swansea Bay and South West Wales Metro.

1.5 This provides a strong platform for future growth. However, as the analysis in Chapter 2 makes clear, there is more to be done to unlock the region's potential and to ensure that growth is resilient, sustainable and inclusive. Looking to the next ten years and beyond, the South West Wales local authorities, working closely with the Welsh Government, have prepared this **Regional Economic Delivery Plan** to ensure that we make the most of the exciting growth opportunities that are ahead of us.

Combining strategic clarity with delivery flexibility

1.6 In developing the Plan, we have followed a sequential approach. First, we started with a fresh view of the **evidence**, considering the 'state of the region' and the outlook for the future. This informed our high-level **objectives**, setting out *"what we want our economy to be (more) like"*. These provided a framework for a series of clearly-defined **missions**: key areas of focus for the next ten years, and the **interventions**, or project activities, needed to achieve them:

Figure 1-2: Regional Economic Delivery Plan logic sequence



Source: SQW

1.7 However, we live an uncertain and dynamic world, and over the lifetime of this Plan, we will need to respond to new challenges and opportunities (and new ideas and investments that are yet unforeseen). **A resilient plan is a flexible and agile plan:** while this document provides strategic clarity and focus on our priorities, we anticipate that project actions and investments will evolve over time.

Navigating the changing strategic context

1.8 This Plan is developed in the context of (and contributes to) a range of plans and strategies developed at local, national and UK level. Looking across the strategic landscape, a number of themes are especially relevant to this Plan:

- First, the **Well-being of Future Generations Act 2015** requires public bodies in Wales to consider the long-term impact of their decisions across all aspects of wellbeing. The Act outlines seven 'wellbeing goals' – and public policy should contribute to all of them, not just one or two. For an economic plan, that means that in delivering "a prosperous region", we should also contribute to a region that is more resilient, equal, healthy, cohesive and globally responsible, and which enjoys a vibrant culture and Welsh language[1]. The principles of the Act are explicitly embedded in the Welsh Government's *Economic Resilience and Reconstruction Mission*[2] (and its principles of "Prosperous, Green and Equal") and are central to this Delivery Plan.
- Second, there is an overarching and firm **commitment to decarbonisation and the achievement of 'net zero' by 2050.** The UK and Welsh Government is legally committed to net zero carbon emissions (over a 1990 baseline) by 2050, a process that will involve far-reaching changes in industrial processes, transport networks and heating systems. The Welsh Government's *Programme for Government* commits to "acting decisively to tackle the nature and climate emergency"[3], and this is reinforced in the establishment of the Minister of Climate Change portfolio and (for example) in the clear prioritisation of sustainable and active travel within *Llwybr Newydd*, the new transport strategy. From an economic strategy perspective, the decarbonisation imperative creates opportunities for innovation and technology development, as well as an urgent need for adaptation to support industrial resilience.
- Third, a broader policy focus on the **opportunities and challenges presented by technological and demographic change** featured in the UK Government's former *Industrial Strategy* and remains prominent in its successor, the *Plan for Growth.* A series of reports to the Welsh Government have also set out approaches to digitalisation[4] and the adoption of an innovation strategy focused around meeting societal need[5].
- Fourth, **the response to the UK's exit from the European Union.** Over the coming years, we will need to adapt to changing patterns of trade. The impact of this is not yet fully

[1] Future Generations Commissioner for Wales, *Well-being of Future Generations Act (Wales) 2015*
[2] Welsh Government (February 2021), *Our Economic Resilience and Reconstruction Mission*
[3] Welsh Government (June 2021), *Programme for Government*, p.3
[4] Welsh Government (September 2019), *Wales 4.0: Delivering economic transformation for a better future of work*
[5] Rick Delbridge, Dylan Henderson and Kevin Morgan (May 2021), *Scoping the future of innovation policy in Wales*

apparent, although for some sectors will be far-reaching (for example, the adaption of agriculture to the new Environmental Land Management system). Brexit also means a significant change for South West Wales in terms of the public investment available for economic development: historically, the region has been one of the UK's largest beneficiaries from EU funding. Looking to the future, it is likely that we will need a new, perhaps more 'investment and return' based approach.

- Finally, this Plan is developed in the context of a wider approach to **regional economic development** in Wales, with South West Wales forming one of the regional 'building blocks' of *Future Wales*, the new national spatial development plan[6]. Plans have also been advanced for new approaches to regional governance and delivery (described in Chapter 5), as well as the Regional Economic Framework, which has been developed by the Welsh Government in conjunction with the local authorities alongside this Plan.

Plan structure

1.9 The remainder of this Plan is structured in six chapters:

- Chapter 2 sets out the **economic landscape** within which the Plan has been developed, outlining the strengths, weaknesses, opportunities and threats facing the regional economy and the key issues that need to be addressed.
- Chapter 3 introduces our **strategic framework**, setting out our ambitions for the future and the type of economy that we want to help develop.
- Building on this, Chapters 4-6 explain our three **key 'missions'**: the specific goals that we want to achieve over the next decade.
- Finally, Chapter 7 sets out **how we will deliver the Plan**, including the role of the Corporate Joint Committee and options for future implementation arrangements.

1.10 In addition, **Annex A** provides a summary SWOT analysis. **Annex B** provides an assessment of this Plan against the Wellbeing of Future Generations Act (Wales) 2015. **Annex C** explains the process of developing the Plan, and how partners were engaged and priorities identified.

1.11 Two supplementary documents support the Plan:

- First, an **Evidence and Policy Landscape Review** provides further detail in support of the narrative in Chapter 2

  Second, while this Plan takes a long-term view, specific actions will evolve over time as business cases are progressed and new investment opportunities come forward. Alongside the Plan, we have prepared a **supplementary Project Pipeline document**, setting out known and emerging interventions and the next steps involved in taking them forward.

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[6] Welsh Government (February 2021), *Future Wales: The National Plan 2040*

2. South West Wales: The economic landscape

South West Wales has performed strongly in recent years in generating new jobs and driving forward priority investments. Despite continuing productivity challenges, there are major opportunities ahead for sustainable growth, linked with our energy, innovation, business and community assets. This chapter sketches a picture of the region's economy, outlining recent economic performance, key strengths and assets, and the major 'transformational' trends that will impact on future growth.

Places and connections: The region's economic geography

A distinctive heritage and a diverse economy…

2.1 With a population of around 705,000 across four counties, South West Wales is a diverse region. Historically, much of the area was an industrial pioneer, driven initially by the coal and metals industries and later by petrochemicals and manufacturing. Over the past 40 years, economic change has meant a challenging period of readjustment, which is to some extent still underway. But our industrial heritage has bequeathed an important legacy, including some of our leading research and innovation capabilities, our large advanced manufacturing sector and the character and form of our towns and cities.

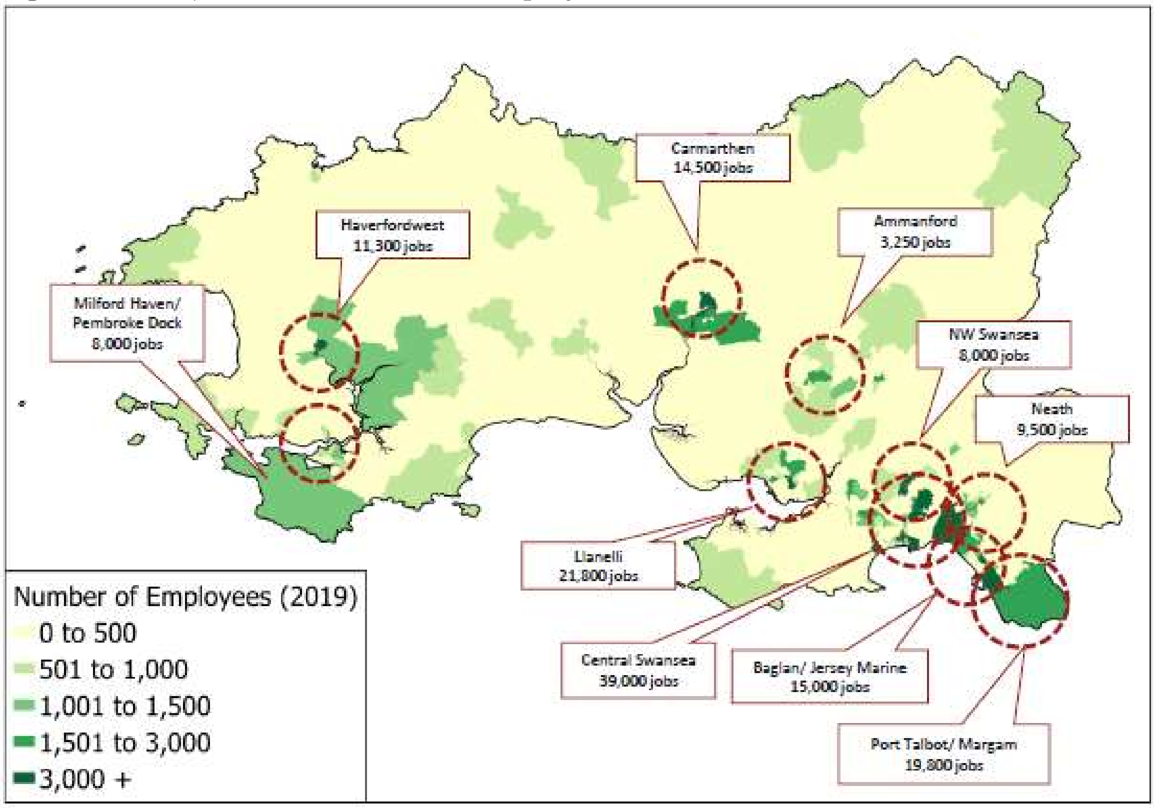
2.2 Reflecting the region's population distribution and historic industrial development, the largest concentrations of employment are in the east, around Swansea Bay, as Figure 2-1 illustrates. Swansea itself accounts for around 40% of jobs in South West Wales (and is its main commuter destination), and the area around Swansea Bay and Llanelli is defined in *Future Wales* as a 'National Growth Area' for new jobs and housing[7]. The east of the region also contains a distinctive and extensive concentration of manufacturing activity at Port Talbot, including the UK's largest steel plant and the Port Talbot Waterway Enterprise Zone.

2.3 Further west, around 20% of national energy supplies enter Britain via Pembrokeshire, with the Haven Waterway a major centre for existing energy infrastructure and the exploitation of new opportunities. More broadly, Carmarthen and Haverfordwest have important roles as regional centres, supporting an extensive rural economy and food production industry. Reflecting the environmental quality highlighted in Chapter 1, the region enjoys extensive environmental designations, including the two National Parks and AONB and special protections along much of the coast. This environmental quality supports a large, important

[7] Welsh Government (February 2021), *Future Wales: The National Plan 2040*, Policy 28. Policy 29 defines Carmarthen and the Haven Towns (Haverfordwest, Milford Haven, Pembroke and Pembroke Dock) as 'Regional Growth Areas'

and growing visitor economy as well as delivering significant wellbeing benefits to our local residents.

Figure 2-1: Major concentrations of employment



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2.4 Across the region, around 208,000 people speak Welsh – about 31% of the total population, and an increase of around 23% in the decade to 2020[8]. The Welsh Government's *Cymraeg 2050* strategy sets out a positive strategy to develop "a thriving, sustainable economy in rural areas" and to promote the Welsh language through the media and the growth of the cultural sector – a goal recently reinforced by investment in S4C's headquarters presence in Carmarthen.

… with important links beyond the region

2.5 Connections beyond the region are important too. The ports at Fishguard and Pembroke Dock provide the main gateway between the south of the UK and Ireland. Looking east, there are strong links (and important commuter flows) between the manufacturing clusters at Port Talbot and neighbouring Bridgend; shared issues across the Western and Central Valleys and the South Wales industrial base; and relatively easy access to opportunities in Cardiff and beyond. While our Plan focuses on what is needed *for* the region and *within* the region,

[8] Reflecting the region's diversity, the proportion of Welsh speakers is substantially higher in Carmarthenshire, at over 50% of the population.

economic boundaries are fluid: the key point is that South West Wales is not self-contained and homogeneous; it is outward facing and diverse, and it makes sense to work together.

The medium-term economic outlook

2.6 This Plan has been developed following the substantial economic shock precipitated by the Covid-19 pandemic. The UK economy contracted by 9.9% in 2020 – an unprecedented fall in annual output in modern times – as public health restrictions effectively closed some sectors (notably hospitality, a key industry in South West Wales). Across the region, the claimant count was 74% higher in December 2020 than it had been at the start of the year, with the full employment impact mitigated by the furlough scheme and the extensive series of business grant, loan and rates relief measures brought in by the Welsh and UK Governments.

2.7 At the time of writing, **the outlook for economic recovery from the pandemic is positive**. In July 2021, independent forecasters anticipated UK GDP growth of 6.9% in 2021 and 5.5% in 2022, sufficient to restore the economy to its pre-pandemic size[9]. In South West Wales, the percentage of employments furloughed fell from 12.5% in December 2020 to around 5% in June 2021[10], the claimant count had started to fall, and many employers were reporting staff shortages.

2.8 However, the pandemic has accelerated disruptive trends that are likely to have longer-term impacts. Structural changes in the retail sector have impacted on town and city centre uses. Remote working has expanded and is likely to become more permanent – presenting opportunities for people to access a wider range of jobs, but also potentially creating additional housing and service delivery pressures in rural and coastal areas. At the time of writing, the Covid crisis has not come to a conclusion and its consequences are still not yet fully known – but they are likely to have a longer-term influence over the period of this Plan.

The state of the region: Recent economic performance

2.9 Looking back over a longer period, the regional economy has grown since the previous Economic Regeneration Strategy was prepared. But on many indicators, there is still a significant gap between outcomes in South West Wales and the rest of the UK. The *Economic and Strategic Landscape Review* which accompanies this Plan explores our recent economic performance in more detail: the following paragraphs provide a snapshot of the 'state of the region'.

We have seen growth in jobs and economic activity, but there is capacity for more

2.10 The 2014 Strategy anticipated a relatively slow recovery in employment terms from the recession following the 2008/09 financial crisis. However, **performance has been much**

[9] HM Treasury (July 2021), *Forecasts for the UK Economy: A comparison of independent forecasts*
[10] Slightly below the Wales and UK averages, and accounting for around 14,400 employments furloughed.

stronger than anticipated. By 2019, there were some 322,000 jobs in the region, an increase of 20,000 on the 2013 figure. Despite some net job losses in 2016, growth until the start of the pandemic was stronger than in the rest of Wales.

2.11 **However, there is still 'spare capacity' in the labour market.** Although the 'jobs density' (the number of jobs per working age resident) has grown steadily, it is still lower than the UK and Wales averages[11]. Notably, despite Swansea's importance as a regional centre and inbound commuter destination, the city's jobs density is low relative to Cardiff and Newport[12].

2.12 There have been steady improvements in the economic activity rate over the past 15 years – at a faster pace than in the rest of the UK. However, **South West Wales' economic activity rate continues to fall behind the UK average** (and slightly behind the Wales average). If the gap between the 2019 regional economic activity rate (73.8%) and the UK rate (78.9%) could be bridged, it would bring an additional 21,000 people back into the labour market.

Economic output has grown, within the context of structural change

2.13 **Economic output (measured in gross value added) was around £13 billion in 2018** – equivalent to 21% of total Welsh output. The region's GVA increased by around £630 million in 2013-18 (representing growth of about 5% over the period). Within this overall expansion, some sectors grew strongly: combined, wholesale and retail; warehousing; real estate; information and communications; and health and care contributed an additional £689 million to GVA. But some sectors contracted over the period, with the metals, electrical products and machinery sector reducing its output by around £322 million.

2.14 This suggests a continuing process of adjustment within the economy, which is also reflected in employment growth (and a strengthening share of employment) in hospitality, health, distribution and administrative activities. Nevertheless, manufacturing is of fundamental importance to the regional economy, accounting for 13.6% of total output (and over 25% of output in Neath Port Talbot).

There is still a large productivity gap, which impacts on local prosperity

2.15 Productivity (the amount of GVA generated for every filled job) was around £45,100 in South West Wales in 2018. The gap with the rest of the UK has narrowed slightly over time. But it is still substantial: in 2018, productivity was around 80% of the UK level.

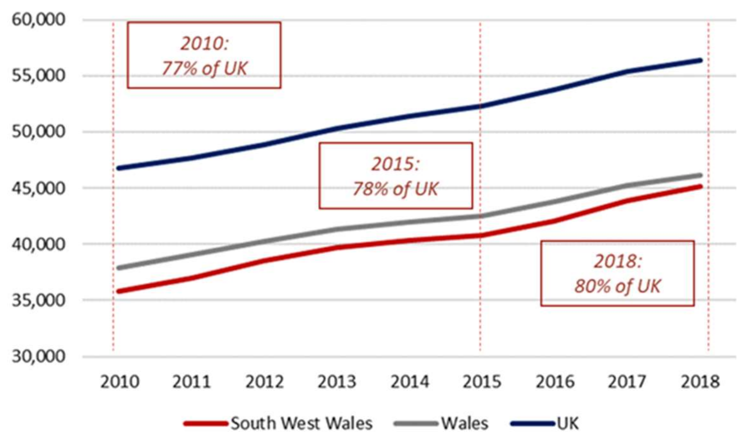
2.16 Our analysis of productivity in South West Wales leads to three observations, which are critical to the strategy advanced within this Plan:

- **Productivity growth isn't 'everything'…. But it is *necessary* for long-term economic wellbeing, even if it isn't *sufficient*.** More 'productive' activities ought to lead to higher

[11] 0.75 jobs per resident aged 16-64 in South West Wales in 2019 (compared with 0.77 in Wales overall and 0.86 in the UK).
[12] Swansea's jobs density was 0.8 in 2019, compared with 0.98 in Cardiff and 0.91 in Newport.

average pay[13] and more opportunities for people to build careers and businesses in the region. But productivity can be seen as a somewhat abstract measure: a highly 'productive' economy might not necessarily be a sustainable or equitable one, and not everything that society values generates high levels of monetised output. So, as well as generating higher output per worker, **the key challenge is ensuring that the productivity gain is captured locally in pay, conditions and business opportunities.**

Figure 2-2: Productivity: GVA per filled job (£), 2010-18



ONS, Subregional productivity: labour productivity by local authority district and labour productivity by UK NUTS2 and NUTS3 subregions, 2010-18

- **Productivity growth is not *just* about growing 'more productive' sectors, or those firms at the leading edge.** The structural shift in South West Wales from relatively high value-added manufacturing to lower value services has presented a long-term challenge. Part of the gap is also explained by the type of activities that take place in different locations within the same industry – with headquarters activities, research and development and so on typically contributing to higher value output per worker[14]. But recent research also highlights the gains that can be made in all sectors (including those within the 'foundational economy' as well as within 'export'-like industries) through investment in management capacity, technology adoption, supply chain capabilities, skills development and so on[15]. This is likely to be especially important in South West Wales: in a region with relatively few large firms, **a broad-based approach that supports SME growth and entrepreneurship across the board and increases the local 'stickiness' of investment is likely to be important.**

- **Productivity growth is likely to be gradual over time.** It may be accelerated by major transformational investments – but 'narrowing the gap', and ensuring the gain is captured regionally in higher pay and local business growth, is a long-term endeavour, demanding sustained investment across the economy[16].

[13] Currently, gross median pay in the South West Wales local authority areas ranges between 86% and 92% of the UK average.
[14] Welsh Government (2018), *Welsh Budget 2018: Chief Economist's Report*, p.12
[15] Jurgen Maier (2017), *Made Smarter Review: Report to the UK Government;* Institute for Government (2021), *Productivity: Firing on all cylinders – why restoring growth is a matter for every UK sector*
[16] Note also the challenges in 'narrowing the gap': other regions will also grow at the same time, and some (principally London and the Greater South East) will have more favourable starting-points.

The evidence reveals mixed progress against wider drivers of productivity

2.17 Linked with the region's overall productivity performance, there has been mixed progress in relation to wider 'drivers of productivity':

In relation to skills…

2.18 Recent years have seen a strong emphasis on strengthening links between providers and employers, with the Regional Learning and Skills Partnership playing an increasingly important role in brokering relationships, identifying employer need and providing better labour market intelligence[17].

2.19 **Over time, there has been a steady improvement in qualification levels**: in 2019, 35% of the working age population was qualified to NVQ4+, compared with 22% in 2004, and the proportion with no qualifications halved over the same period (partly as new entrants to the labour market gradually replace those who leave). But in *relative* terms, there is still a gap with the rest of the UK[18]**,** and substantial variation across the region[19].

In relation to connectivity…

2.20 **There has been transformational progress in the delivery of digital connectivity** since the 2014 Regeneration Strategy. Commercial investment and public support through Superfast Cymru and successor programmes have increased access to superfast broadband to over 90% of premises. However, beyond superfast, there is still a still a significant rural/ urban digital divide, with ultrafast penetration in Pembrokeshire among the lowest in the UK[20]. The Digital Infrastructure programme across South West Wales aims to address this – but applications for new technology continue to advance rapidly: staying ahead of the curve will be important as digital technology transforms working practices and business models.

2.21 The picture is perhaps less positive in relation to **transport connectivity**. There has been some disappointment in the scaling back of plans to electrify the South Wales Mainline to Swansea. However, proposals are being advanced to take forward the **Swansea Bay and South Wales Metro** as the core of a better-integrated regional transport system (highlighted further in Chapter 4); Transport for Wales plans to increase services between Swansea and Manchester from 2022; and work progresses in taking forward active travel measures across the region. While the future policy presumption is against new strategic road schemes, investment has started on much-needed improvements to the A40 in Pembrokeshire and

[17] See South West Wales RLSP (2019), *Regional Employment and Skills Plan 2019*
[18] Between 2004 and 2019, the gap between South West Wales and the UK actually widened, from 3.6pp to 4.8pp.,
[19] For example, in 2019, only 29% of the Neath Port Talbot 16-64 population was qualified to NVQ4+, compared with 37% in Swansea.
[20] In September 2020, around 77% and 58% of premises in Swansea and Neath Port Talbot respectively were able to access 'ultrafast' download speeds of up to 300 Mbps, although this is largely confined to urban areas where it is commercially viable.

beyond the region, major improvements on the A465 Heads of the Valleys road are improving connectivity with the English Midlands.

In relation to the business stock…

2.22 **The size of the region's business base grew in the years leading up to the start of the pandemic.** In 2020, there were around 23,800 active enterprises in South West Wales, a number that had steadily increased over the preceding five years – and survival rates keep pace with the rest of Wales and the UK. But the region's 'enterprise density' (the number of enterprises relative to the working age population) and the start-up rate remain lower than in the rest of the UK[21]. Recent research has highlighted that while overall entrepreneurial activity in Wales is broadly in line with the rest of the UK, there is a shortfall in perceptions of the availability of good start-up opportunities[22].

In relation to sites and premises for business growth…

2.23 South West Wales benefits from some substantial sites for industrial expansion, including the large strategic site at Baglan Energy Park, future phases of the Cross Hands development in Carmarthenshire, and key sites at Felindre and Fabian Way in Swansea and the Haven Waterway. However, **there is a widely-recognised gap between demand and supply for industrial sites and premises**, as low rents (and in some cases high remediation and infrastructure costs on ex-industrial land) make viability challenging, especially west of Swansea. The evidence is that this acts as a brake on business expansion, both to new investors and to existing local businesses seeking 'grow-on' space[23].

Inequalities remain significant

2.24 Despite jobs growth over time and improvements in economic activity, recent research highlights the extent to which rising living costs (especially housing costs) have impacted on the real incomes of the lowest paid, a situation which has accelerated during the pandemic[24].

2.25 Across the region, concentrations of disadvantage are significant, principally in the main urban centres of Swansea, Llanelli, Neath, Port Talbot and Pembroke Dock, and in the upper Western Valleys. Many of these concentrations are persistent over time and reflect the long-term impact of industrial change: while they highlight the importance of 'supply-side' measures to reduce economic inactivity and bring people back into the labour market, most

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21 In 2020, there were 11 business starts to every 100 active enterprises, compared with 14 in the UK overall.

22 Karen Bonner *et al* (2018), *Global Entrepreneurship Monitor UK: Wales report 2018*

23 SQW/ Welsh Government (March 2020), *Commercial Property: Market analysis and potential interventions*

24 Bevan Foundation (June 2021), *A snapshot of poverty in spring 2021*

households on low incomes are already in work[25]. For a regional economic strategy, **driving demand and creating "better jobs, closer to home" is a key goal and challenge**[26].

Building on strengths: Key assets

2.26 Overall, the review of economic performance over recent years suggests good progress, especially in terms of job creation. But there is a persistent gap in outcomes between the region and the rest of the UK. This is partly because most change is incremental: the investment secured through City Deal (for example) will not yet have translated into improvements in the economic data. It also reflects the 'structural' nature of many of the region's challenges, some of which (including the productivity deficit) are shared with other parts of Wales and the North of England.

2.27 However, South West Wales contains some **distinctive economic strengths and opportunities** which provide a good platform for future growth. Realising each of these presents a challenge for future strategy, which we have set out below.

We have nationally and internationally significant university research assets

2.28 There is a strong higher education presence in the region, anchored by Swansea University and University of Wales Trinity St David's campuses in Carmarthen and Swansea[27]. Both universities have expanded in recent years, have made an important contribution to the region's physical regeneration (e.g., through the Swansea Bay campus and the SA1 development in Swansea city centre) and are key economic 'drivers' in their own right.

2.29 Beyond this, Swansea University's research is ranked as 'world leading' in several (mostly STEM-related) subjects[28]. Across both universities, key research capabilities relate to:

- **Advanced data science,** where Swansea's assets include the Computational Foundry (bringing together computer science and mathematical expertise, and working with industry) and the CHERISH-DE Digital Economy Centre.
- **Health and medicine**, with a strong focus on the application of data science in health, linked with wider computer science expertise, and including one of six Health Data Research UK (HDR-UK) sites nationally.
- **Engineering and manufacturing**, especially in materials research, and with relevance to the energy and decarbonisation opportunities discussed further below.

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[25] Joseph Rowntree Foundation (November 2020), *Briefing: Poverty in Wales 2020* (Annex A)
[26] "Better jobs, closer to home" is a stated Welsh Government objective, as set out in the *Economic Action Plan* and the Valleys Task Force strategy *Our Valleys, Our Future.*
[27] In addition to a smaller University of South Wales presence at the Hydrogen Centre in Baglan.
[28] Swansea University is assessed as 'world-leading' in 14 units of assessment within the 2014 Research Excellence Framework.

2.30 **There is a long history of collaboration between both universities and local industry**, especially in the manufacturing sector. Examples of recent programmes include ASTUTE 2020, supporting industrial research, development and innovation in manufacturing businesses; and UWTSD's Manufacturing for Advanced Design Engineering (MADE) programme, designed to support collaboration with SMEs. Many industrial collaboration initiatives have been supported with European funding: as this draws to a close, **it will be important to maintain the momentum and capacity that has been built up in recent years, while expanding opportunities for collaboration across the wider regional SME base.**

2.31 The commercial research base is somewhat smaller. But there has been investment in recent years (for example, TWI's Technology Centre Wales and Advanced Engineering Materials Research Institute at Baglan), adding value to the university-based presence.

Our energy infrastructure is extensive, and we have some of the UK's greatest low carbon energy generation potential

2.32 South West Wales has long had an important energy sector, especially associated with Pembrokeshire's oil and gas industry. The infrastructure and skills associated with this will be important in taking advantage of the region's vast potential in renewable energy. Several opportunities are currently being developed through the emerging South West Wales Regional Energy Strategy. These include:

- **Wave and marine energy off the Pembrokeshire coast**, with a series of commercial and pre-commercial projects underway and in the pipeline
- **The proposed Dragon Energy Island** scheme in Swansea Bay, offering scope for tidal, wave and potentially solar energy generation
- **Onshore capacity**, including the UK's largest onshore wind farm at Pen-y-Cymoedd and a range of opportunities in wind, biomass and waste-to-energy.

2.33 There is also substantial research and development capacity to support the region's renewable energy potential. The Offshore Renewable Energy (ORE) Catapult has a presence at Pembroke Dock and, with several other universities, is engaged in progressing new opportunities off the Pembrokeshire Coast. Swansea University's SPECIFIC Innovation and Knowledge Centre has expertise in the capture and storage of solar energy, while the University of South Wales' Hydrogen Centre at Baglan is supporting the experimental production of hydrogen energy storage systems.

2.34 Our energy potential is therefore a key asset to exploit – both for South West Wales and indeed the rest of Wales and the UK. **The challenge over the next few years will be in realising the opportunity, recognising that some technologies remain relatively nascent – and in ensuring that the benefits can be captured locally.** A long-term perspective will also be important in developing business cases for some of the region's major energy projects –

recognising that while they have the potential to be transformational, the full benefits may take several years to be realised

Our business community offers scope for growth

2.35 We noted earlier the region's relatively low levels of enterprise density and its relatively low start-up rate. But **business is central to future economic strategy** – put simply, employment is either created by existing businesses expanding, new businesses starting up, or businesses from elsewhere deciding to locate in the region.

2.36 Recent years have seen the loss of some larger, externally-based firms (note, for example, recent job losses in some of the region's automotive supply chain). We retain relative strengths in manufacturing, food production and hospitality, with evidence of start-up and inward investment activity linked with the data science strengths highlighted above[29]. However, the region's business stock is broadly-based: 'high growth' SMEs are quite widely distributed across sectors (and across the region)[30]; ownership models are diverse[31]; and there are opportunities for productivity growth across the sectoral landscape[32]. Following our analysis of the 'productivity deficit' above, **the challenge is to strengthen the 'breadth and depth' of the business base, recognising scope for growth across the economy, including *(but not just)* in those activities at the 'leading edge' of technology and innovation.**

Environmental quality and 'sense of place' are key assets

2.37 South West Wales' combination of 'place-based' assets is distinctive and rich, including the National Parks, the coastline, the sport and leisure offer and a university city offering both 'compactness' and a wide range of metropolitan amenities.

2.38 Beyond this range of functions and amenities, **the region's distinctive identity forms an important part of the offer**. There are two aspects to this:

- First, **'quality of life' offer clearly forms part of the proposition to visitors, investors and potential new residents**, and one which plays a key economic role. There is an important balance to be struck between environmental quality and community and environmental sustainability.

  Second, **the region's identity relates to the importance of 'community', the associations that businesses and other institutions have with the places in which they are based**, and the stake that they have locally. This is harder to pin down in conventional economic terms, but relates to the extent to which value and ownership can

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[29] See the *Evidence and Strategic Landscape Review* for further examples.
[30] SQW analysis of regional distribution of FastGrowth 50 award winners, 2009-20; Beauhurst records of 'fast growth' firms in South West Wales
[31] Consultation as part of the development of this Plan. See also Co-operatives Wales
[32] Institute for Government (2021), *Productivity: Firing on all cylinders – why restoring growth is a matter for every UK sector*

be captured or embedded locally and the challenges in growing the business and employment base highlighted above[33].

Looking to the future: Key transformational trends

2.39 Future strategy will also be influenced by wider 'transformational' factors that will impact all aspects of economic life. While these apply to all advanced economies, the way in which they are addressed and how they interact with our existing economic structure and strengths will be fundamental. Three 'macro trends' are especially important, relating to **decarbonisation, digitalisation** and **demographic change**. We consider each in turn below.

Decarbonising South West Wales

2.40 As we highlighted in the earlier overview of the policy context, the UK and Welsh Governments' commitment to net zero by 2050 will have an impact on all aspects of policy.

2.41 In headline terms, Wales has been successful in reducing carbon emissions while maintaining economic growth: between 1990 and 2018, total CO2 emissions fell by 20%, and the country was on track to meet its 2020 carbon reduction targets[34]. However, around 85% of the cut in emissions came from the power sector[35]. While most other sectors also achieved reductions (especially manufacturing), these were substantially smaller, and the surface transport sector actually generated a net increase. Looking to the future and the net zero commitment, the Climate Change Committee recommended a *"leadership driven pathway"* requiring far-reaching action over the next thirty years[36].

> **The actions required to achieve the targets – including full decarbonisation of the power sector, full switchover to electric vehicle sales, installation of low-carbon heating, and decarbonisation of manufacturing – go beyond those required from the world on average, in line with Wales' responsibility as a richer nation with larger historical emissions.**
>
> **Climate Change Committee**

2.42 This presents South West Wales with some distinct challenges. Currently, **regional carbon emissions are much higher than the Wales and UK average.** These mostly reflect the role of the huge Tata works at Port Talbot, an industrial installation of national significance that remains reliant on coal inputs. **The challenge for future strategy is enabling the transition of the region's industrial base, while ensuring wider action to decarbonise the transport, housing and manufacturing systems** – and making sure that South West Wales

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3333 This is also at the centre of discussions about the concept and role of the foundational economy. See Joe Earle *et al* (2017), [What Wales Can Do: Asset-based policies and the foundational economy]() (CREW/ Foundational Economy)

34 Climate Change Committee (December 2020), *Progress Report: Reducing emissions in Wales*

35 Principally through the decommissioning of the Aberthaw coal-fired power station

36 Climate Change Committee (December 2020), *Advice Report: The path to a net zero Wales*

remains competitive with other regions. Our renewable energy potential will play an important role in this, which we explain further in Chapter 4.

Digital transformation

2.43 **'Digitalisation'** refers to the transformation of the economy through massively increased use of data and the development of digital technologies such as artificial intelligence, machine learning and robotics. Digitalisation isn't about change within a single industry; rather, it is about the use of 'general purpose' technologies with a wide range of applications across industries.

2.44 Digital transformation is not new: the period since the publication of the last Swansea Bay Economic Regeneration Strategy has seen a transformation in the everyday use of new digital technologies, and it has been recognised as a key driver of economic strategy for some time. Three aspects of the transformational impacts of digitalisation are especially relevant:

- **Disruptive effects on industry:** Use of digital technology leads to greater efficiency, with firms that have the capacity and capability to invest and adopt more likely to benefit from productivity gains and improved competitiveness. But its 'transformative' power is in the convergence of technologies to drive entirely new industries (wearable devices or gaming, for example), which in turn drive applications elsewhere. A consequence is the breakdown of traditional industry sectors and markets, leading to a recognition of digitalisation as the 'fourth industrial revolution'.

- **Impacts on the labour market:** Estimates of the potential impact of automation on jobs vary greatly, although most studies suggest that while new technologies will substitute for labour in some sectors, this is likely to be more than offset by job creation[37]. However, technology is changing the *way* in which work is done, with the potential for positive and negative impacts on working conditions; the need and opportunity for job changes over the course of the working life; changing demand for skills; and the ability to work remotely.

- **Impacts on services**, potentially helping to overcome relative remoteness, and including the development of new ways of accessing health and care, which in turn impact on the development of new goods and services and demand for jobs.

2.45 Across all of these, the message for future strategy is that responding to digitalisation is not just about ensuring the 'supply' of new technology and connectivity (although that is important). It is also about **driving economic *demand* for new skills and technologies** – both at the 'leading edge' of innovation and throughout the economy.

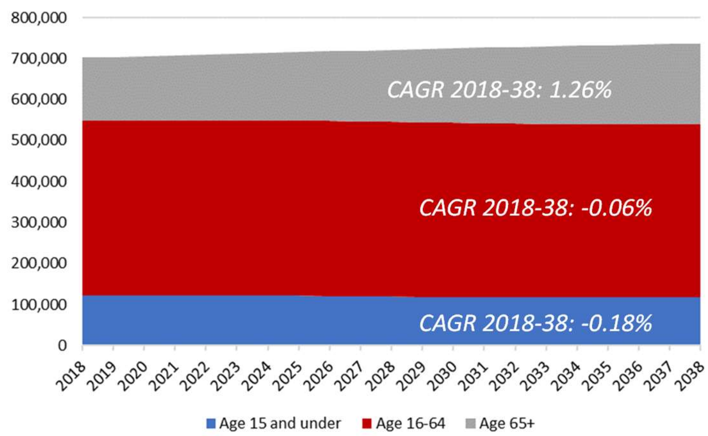
[37] Welsh Government (September 2019), *Wales 4.0: Delivering economic transformation for as better future of work* (Professor Philip Brown's review of digital innovation for the economy and the future of work in Wales), pp.22-26

Responding to demographic change

2.46 South West Wales has a growing population. However, the 'working age' population has fallen slightly over the past decade. Over the next 20 years, the 'working age' population is expected to fall by around 1%, representing a net loss of around 4,700 people aged 16-64 over the period[38].

2.47 The gradual ageing of the population is a long-term trend. Key implications for future economic strategy include:

Figure 2-3: Population change (compound annual growth rates) by age group, 2018-38



Source: StatsWales, 2018-based population projections

- **Changing working lives:** The concept of 'working age' is becoming increasingly fluid, as people work for longer, and more flexibly (although individuals' ability to work for longer will depend on job type and conditions and the ability to adapt to new roles and technologies over time).
- **Changes in service demand:**
  As the analysis of recent economic performance demonstrates, there has been strong growth in employment and output associated with health and social care, as demand increases from an ageing population. Changing demographics will support changes in wider demand for goods and services as well.
- **Rising dependency ratios:** While changing demographics are driven by life expectancies and birth rates, they also partly reflect the balance of migration, with gradually falling populations in some post-industrial and rural communities, and in-migration, especially from older people, along parts of the coast[39]. This is a gradual process – but retaining and attracting younger people also helps to support community resilience and sustainability, and itself depends on generating local economic activity and demand.

Bringing it together: key issues for the Delivery Plan

2.48 Summarising the 'state of the region', our key assets and the long-term 'macro' trends that will impact across the economy, we can see that:

[38] Although note that the picture varies across the region, with a sharp projected fall in the working age population in Pembrokeshire, but continued growth in Swansea.
[39] Gerald Holtham (June 2021)), Rejuvenating Wales (Hodge Foundation/ CLEC)

- **The region's weaknesses are largely 'structural'**. They are linked with processes of long-term industrial change, are shared with many other parts of the UK, and map onto the region's relatively low productivity.
- Set against this, **there has been strong progress in recent years,** especially in creating new jobs and in driving forward transformational projects. This provides a strong foundation on which to build.
- **South West Wales enjoys some distinctive strengths and opportunities** – especially linked with the region's renewable energy potential, university - industrial links and its quality of life offer. These also have the potential to make a positive impact in relation to the long-term environmental, technological and demographic trends.
- **There is a 'window of opportunity' to build on and capture some of these strengths**. Some are still at a relatively early stage (for example, elements of the renewable energy opportunity and the potential for industrial decarbonisation), but the technology is developing fast, and some other regions will offer fierce competition for investment.
- **We are a very diverse region**, with a distinctive balance of urban, rural, national park, coastal and industrial assets. But there is substantial commonality across South West Wales, and some of our big opportunities have a region-wide footprint. Some also extend beyond the region itself, and outward-facing links will be important.
- **'Transformational' growth opportunities need to be balanced with the conditions for incremental improvements in business resilience and capacity** across the regional economy. There are some distinctive opportunities at the 'leading edge' – but long-term employment resilience and wage growth will depend on the sustainability, productivity and expansion of the wider stock of regional SMEs – not just the 'pioneer' firms.

2.49 Based on this understanding of our economy and its potential, the next chapter introduces our strategic framework, to guide our actions over the next decade.

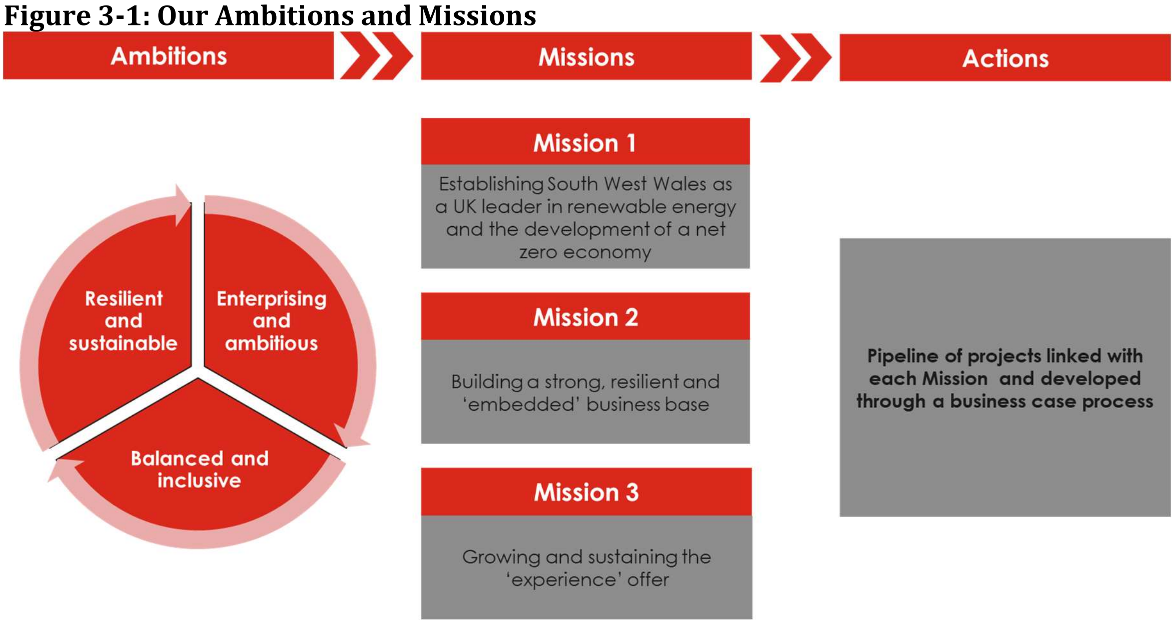
3. Our ambitions to 2030

Building on the evidence base, this chapter introduces our ambitions for the South West Wales economy. It explains the changes that we want to see over the next decade and introduces the three 'Missions' that will guide our shared activity.

From the evidence to a strategic framework…

3.1 Over the next ten years, we seek to build on the distinctive strengths and opportunities identified in the previous chapter to develop a more prosperous and resilient economy. To help plan for the future, we have identified three **Ambitions** (statements about the nature of the South West Wales economy that we want to work towards), supporting three **Missions** (priority areas on which our shared **Delivery Plan actions** will be focused):

Figure 3-1: Our Ambitions and Missions



Source: SQW 2021

Unpacking our Ambitions

3.2 Our three Ambitions are broadly cast. They recognise that achieving sustainable, long-term prosperity and the "South West Wales we want" is about more than the pursuit of economic growth as a goal for its own sake – and that prosperity will itself be enabled by progress across a number of fronts.

3.3 Our Ambitions seek an economy that is, over the long term, more resilient and sustainable; enterprising and ambitious; and balanced and inclusive.

Table 3-1: Unpacking our Ambitions: The economy we want

Resilient and sustainable
• **Resilient to technology change and the impacts of digitalisation:** ➢ Supporting firms in adopting and adapting to new technology ➢ Building labour market resilience through the skills system from schools through to adult learning • **Resilient to climate change and decarbonisation:** ➢ Increasing the resilience of the region's manufacturing base (including in its (currently) relatively carbon-intensive foundation industries) ➢ Supporting adaption and adoption throughout the economy (across sectors and through the building stock and transport system) ➢ Delivering robust digital connectivity to support changing working practices and better access to employment. • **Supporting resilient and more 'embedded' firms and supply chains** ➢ Developing the local business base through access to support, finance, networks and procurement ➢ Embedding best practice and resilience throughout the supply chain ➢ Continuously building management capacity and capability.
Enterprising and ambitious
Enterprising and ambitious • **Ambitious in relation to our long-term energy opportunity** ➢ Ensuring capacity to drive forward our potential ➢ Integrating our natural renewable energy advantages with our university and industrial strengths • **Enterprising in relation to changing market conditions, technology and opportunities** ➢ Investing in the skills system across the economy and driving demand for higher level and technical skills, as well as influencing supply ➢ Investing in the commercial property stock – for local businesses scaling up as well as new investors • **Driving new investment, innovation and funding models** ➢ Developing sustainable alternatives to European funding ➢ Promoting the region as a location to invest, work and visit
Balanced and inclusive
Balanced and inclusive • **Balanced between innovation at the leading edge and sustainable growth across the economy** ➢ Developing opportunities for 'new to the firm' innovation, as well as R&D and new technology and product development ➢ Recognising the opportunity for a diverse range of business and ownership models • **Balanced spatially, across the region** ➢ Celebrating regional diversity and a wide distribution of opportunity • **Creating long-term growth, while sustaining and enhancing core environmental and community assets** ➢ Recognising and enhancing the inherent value of the environment to the quality of life and quality of place proposition ➢ Supporting community ownership of economic assets, where this can support local opportunity and generate a sustainable return.

Realising our Ambitions

3.4 The Ambitions set out above are extensive, and are consistent with the Wellbeing of Future Generations Act. They are also all interlinked: they are not so much 'themes' as a vision of how we want the economy to evolve. Over the next ten years, **all the actions that the South West Wales local authorities take in support of regeneration and economic development will contribute to achieving them** – whether they are delivered at regional scale, or are more locally focused.

3.5 But to deliver our overall goal of a more "resilient and sustainable; enterprising and ambitious; and balanced and inclusive" economy, there are clear actions on which we will need to focus over the next decade. We have called these our three **Missions**, which we will use to guide delivery. These are:

- Establishing South West Wales as a UK leader in renewable energy and the development of a net zero economy
- Building a strong, resilient and 'embedded' business base
- Growing and sustaining the experience offer.

3.6 The following chapters explain each Mission, setting out what we seek to achieve, the opportunities, challenges and risks that we need to address, and the solutions and projects that we aim to progress. Although we explain each Mission in turn, they should be seen as integrated: establishing South West Wales as a UK leader in renewable energy and a net zero economy is, for example, a key aspect of the other two Missions.

4. Mission 1: A UK leader in renewable energy and the net zero economy

Looking to 2030, we aim to make South West Wales a UK leader in renewable energy. That means taking advantage of our natural assets and our industrial and R&D capabilities to build an internationally-significant presence in future fuel technologies and to drive the decarbonisation of our industrial base and the wider economy.

Figure 4-1: Summary of assets, opportunities, challenges and actions

Current assets	Next opportunities	Key challenges	Key actions
Concentration of onshore and offshore opportunities at different stages of market readiness Emerging Regional Energy Strategy and Welsh Government support University R&D assets and growing corporate capacity for industrial decarbonisatioin	Linking energy generation with industrial decarbonisation Making the most of opportunities presented by the existing knowledge/ research base Translating early stage projects into investable propositions	Countervailing pressure of existing high carbon intensity industry Securing/ maintaining capacity to drive the strategic agenda, and major projects forward Competition from (and establishing collaborations with) other regions Securing Government support	Additional capacity to drive forward the agenda Progressing the region's major renewable energy generation projects Attracting and driving forward new industrial investment Decarbonising transport and the housing stock

Understanding the case for the Mission: the core rationale

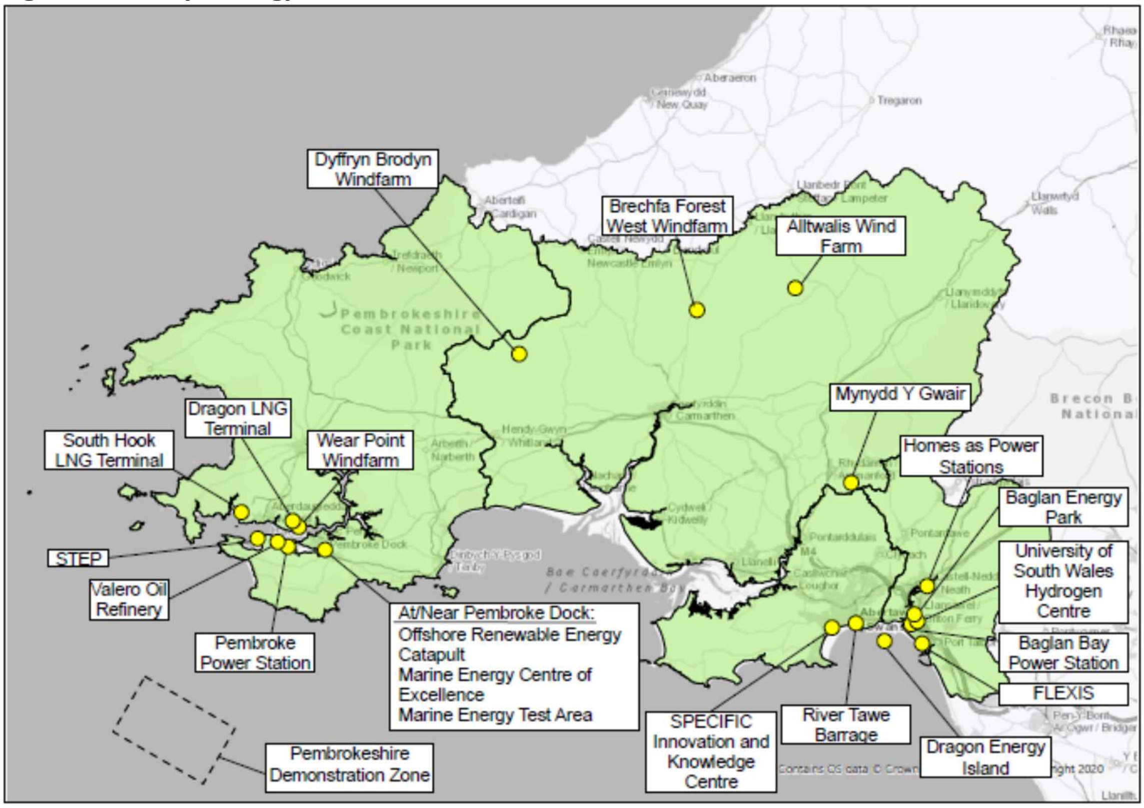
4.1 As set out in the evidence base the decarbonisation imperative is global, and in Wales is mandated by the UK and Welsh Governments' net zero commitments and the need to take urgent action now. There is a clear overall policy direction, which has been reinforced by the emerging suite of strategies at UK Government level ahead of COP26 in autumn 2021[40] and by the renewed and re-emphasised climate change focus of the Welsh Government. With a clear and compelling direction of travel, there is an opportunity for South West Wales to capitalise on its renewable energy assets and ensure that it is on the 'front foot' in adapting to change.

Delivering the region's low-carbon energy projects at scale

4.2 In South West Wales, our potential is clearly articulated, and is linked with both our natural environmental assets and infrastructure and skills base resulting from our long history in energy-related activity. The range of existing and emerging projects and assets is extensive, as illustrated in Figure 4-2:

[40] For example, the new UK Hydrogen Strategy (August 2021)

Figure 4-2: Key energy assets



Source: Produced by SQW 2021. Licence 100030994 Contains OS data © Crown copyright [and database right] [2020]

4.3 Key renewable energy assets include the combination of marine energy activity associated with **Pembroke Dock Marine** and the proposed tidal, wind and potentially solar energy scheme at **Dragon Energy Island** in Swansea Bay**.** They also include a range of onshore wind and waste-from-energy schemes across the region, and a potential nuclear fusion prototype scheme in Pembrokeshire. The **Hydrogen Centre** at Baglan focuses on experimental development of renewable hydrogen production and storage, as well as R&D in hydrogen vehicles, fuel cell applications and energy systems. The **Flexible Integrated Energy Systems (FLEXIS)** project is delivering a smart energy demonstration zone in Port Talbot, focused on local energy systems, heat recovery and the adoption of low emission vehicles.

4.4 However, while the scale of activity is substantial, there is a risk that the potential may not be fully realised, for three reasons:

- **Technologies are, in some cases, at a relatively early stage**. They are also complex, and in many cases will require long-term funding, commercially or from Government. Some of this will need to come forward in conditions of some uncertainty: for example, the Welsh Government's *Hydrogen Pathway* notes that *"there is uncertainty regarding the exact role hydrogen will have in supporting decarbonisation in Wales.... [but despite this], there is still an urgent need to take the first steps to develop the skills, expertise and supply chain for hydrogen scale-up in Wales"*[41].

[41] Welsh Government (January 2021), *Hydrogen in Wales: A pathway and next steps for developing the hydrogen energy sector in Wales,* (consultation document), p,11

- **Competing areas and technologies may move faster** within this dynamic technology environment. South West Wales has distinctive assets – but if additional capacity and investment is directed elsewhere, some of these advantages could diminish.
- **Local benefits are not *automatically* captured through the energy generation process.** The good news is that there is a solid R&D base in South West Wales to capitalise on the opportunity (see, for example, the Hydrogen Centre referred to above; Swansea University's SPECIFIC Centre), as well as schemes (such as the Marine Energy Engineering Centre for Excellence project at Pembroke Dock) to build supply chain opportunities with SMEs. It will be important that these are driven hard, to ensure that the region benefits from the added value of renewable energy investment.

4.5 Delivering the region's renewable energy opportunities at scale – and ensuring that they are integrated with wider policy and maximise local benefits for local businesses and communities will be central to regional strategy over the coming years:

Key action areas

- **We will build capacity and expertise to maximise South West Wales' renewable energy and net zero potential.**

  There are several public bodies with knowledge and expertise, including (for example) the Welsh Government Energy Service and Marine Energy Wales, as well as UK Government agencies such as the ORE Catapult. But the agenda is complex: establishing a regional 'decarbonisation system' could help to address region-wide goals (including in relation to skills and infrastructure) and coordinate investment priorities beyond the delivery of specific initiatives.

- **We will seek to secure new investment in renewable energy infrastructure**

  Linked with the capacity building described above, we will work with the Welsh and UK Governments and with the private sector to make the case for investment in 'nationally significant' schemes such as Dragon Energy Island and the Pembrokeshire marine proposition, as well as smaller-scale schemes, including on public land.

- **We will work to deliver the Regional Energy Strategy**

  The Regional Energy Strategy has been developed in parallel with this Plan and will be published in 2021. We will work to take forward pilot and successor Local Energy System projects (such as the pilot currently underway at Milford Haven Energy Kingdom), and we will seek to link the energy system objectives of the Energy Strategy with opportunities for local business engagement and supply chain development.

Decarbonising our industrial base

4.6 The high carbon intensity of some of South West Wales' industrial activity is a vulnerability: while the region's relatively high carbon emissions in the data is largely caused by the steel industry, oil and gas are also important to the region, as well as our large manufacturing base.

4.7 Work is currently underway to develop a programme for industrial decarbonisation through the **South Wales Industrial Cluster (SWIC)** initiative, funded by UK Research and Innovation and including several energy and heavy industrial firms in South West Wales (including Tata, Valero and RWE, the operator of the Pembroke refinery)[42]. The focus of the programme is on the production and use of hydrogen and on mechanisms to secure large-scale industrial decarbonisation through 'fuel switching': as with some of the initiatives discussed above, the proposition is in its relatively early days, although achieving large-scale change will be important for the region's future competitiveness. More broadly, there is an opportunity to attract additional investment into the region, beyond the decarbonisation of the existing stock: 'transformational' projects such as the forthcoming **Global Centre for Rail Excellence** provide examples of investments supported with public funds, but the existing combination of energy-related activity will be an important factor in attracting new business locations.

4.8 Building on the region's growing presence in renewable energy and the current focus on industrial decarbonisation:

Key action areas

- **We will progress the opportunity presented by SWIC and seek to secure future investment to support the region's future industrial competitiveness**

  As with other aspects of the low carbon agenda, technology is developing rapidly and the scale of investment in demonstration projects and initiatives such as SWIC is substantial. Through our increased capacity to drive forward the decarbonisation agenda, we will seek to secure sequential investment, working with the UK and Welsh Governments as appropriate.

- **We will grow the wider low carbon industrial base and promote the region's potential to new investors**

  Linked with actions to promote the region as an investment destination, we will highlight our potential to new investors (including our university presence, skills base and access to sites and premises) and will press forward major proposed investments such as the GCRE.

[42] https://www.swic.cymru/news

Decarbonising the wider economy

4.9 Decarbonisation will extend beyond the industrial base, and will impact on housing and domestic heating, non-domestic properties and the transport network. Much is already underway:

- In relation to the **housing stock**, Pobl Housing is leading one of the UK's largest community-based retrofit, energy generation and smart energy management projects at Penderry, Swansea, the outcomes of which will inform the larger, City Deal-funded Homes as Power Stations scheme.
- In relation to **transport,** all the local authorities are engaged in programmes of fleet decarbonisation, and the **Swansea Bay and South West Wales Metro** will be at the core of the region's lower carbon, more sustainable transport system.
- In relation to **re-using and preventing waste**, Wales already has some of the world's highest municipal recycling rates – with all South West Wales authorities (and Wales as a whole) experiencing a rapid increase in recycling rates over the past twenty years[43].

4.10 Linked with the Regional Energy Strategy, over the coming years:

Key action areas

- **Building on existing schemes, we will progress the decarbonisation of the housing and business stock**

  From an economic development perspective – and our wider ambitions to secure a more 'embedded and resilient' business base, this should provide opportunities for local supply chain development and community-based employment solutions (as well as, in some cases, local community ownership).

- **We will press forward the development of Swansea Bay and South West Wales Metro**

  As well as the Metro itself, this will lead to a better integrated and more sustainable transport network through the incorporation of bus and active travel services and the development of opportunities to work and access services closer to home.

- **We will work to achieve a circular economy**

  Building on our performance in reducing waste and transforming recycling rates, there are opportunities to increase re-use of goods and materials offering potential for community-based solutions to increase repair and the use of technology to increase the scope for re-use of materials and reduced food waste.

[43] Welsh Government (2019), *Beyond Recycling: A strategy to make the circular economy in Wales a reality*; StatsWales (2021), Combined municipal re-use, recycling and composting rates

5. Mission 2: Building a strong, resilient and embedded business base

Business is at the centre of our strategy to 2030: it will be through the expansion of existing firms and the start up and attraction of new ones that new employment will be generated and productivity growth secured. That means supporting sustainable business growth– both at the 'leading edge' of technology and innovation and across the economy.

Figure 5-1: Summary of assets, opportunities, challenges and actions

Current assets	Next opportunities	Key challenges	Key actions
Strong university-industrial links Local business networks, emerging clusters and some anchor businesses Growing policy interest in encouraging locally 'embedded' businesses and local supply chains Wales-wide institutions (e.g., Development Bank)	Supporting dynamism (through entrepreneurship and early-stage expansion) Supporting resilience (through technology adoption, management capacity and succession) Supporting local supply chain development Building an effective (and broad) innovation 'ecosystem'	Weak 'infrastructure' offer (e.g., commercial property, impeding start-up and expansion) Skills and capacity challenges Limited private sector support base Access to growth finance Barriers to commercialisation Limited business density and 'leakage' out of region	Accelerated adoption and innovation support (linked with recommendations of Wales 4.0 in relation to business, skills and innovation support) 'Progressive procurement' within a local business and supply chain development system

Understanding the case for the Mission: the core rationale

5.1 The review of the evidence in Chapter 2 highlighted positive employment outcomes in recent years, growth in the business stock, and a strong record in translational research activities between the university knowledge base and industry.

5.2 However, the economy remains to some extent in a process of 'restructuring', away from traditional strengths in parts of the manufacturing sector and towards growth in areas such as information and communications and health care (as well as in activities linked with the growing energy sector highlighted in Mission 1). Changing trading relationships also present challenges (notably, but not only, in agriculture and food production), some of which have yet to fully work through)[44].

5.3 This transition will bring opportunities within those sectors that are growing – and as highlighted earlier, opportunities for growth and productivity gain are cross-sectoral. However:

[44] Janet Dwyer (2018), *The implications of Brexit for agriculture, land use and rural areas in Wales* (Wales Centre for Public Policy)

- Even where job losses in one industry are replaced with jobs in another, there is the risk that they may not generate the same level of output (and therefore command the same pay).
- The wider economy of South West Wales has a *relatively* narrow business base: business density is relatively low, and there are few indigenous large or larger medium-sized businesses. However, the prospect of inward investment at scale has reduced over the past twenty years. The risk is that as the economy evolves, losses may not be fully offset by gains, and the 'productivity gap' remains or widens.

5.4 In response, our Mission to create a **"strong, resilient and embedded business base"** seeks to encourage a continued focus on innovation and the growth of capabilities at the 'leading edge', balanced with an approach aimed at achieving greater resilience, growth potential and capacity for sustained employment across the region's wider business base, linked with the decarbonisation imperative in Mission 1.

Growing the innovative edge and accelerating diffusion

5.5 Innovation policy in Wales is at a point of transition, as the European funding that has sustained several major programmes (including the 'core' SMART programmes delivered via the Welsh Government[45] and the wide range of sector or thematic schemes (such as, in South West Wales, ASTUTE and RICE[46]) come to an end; and the range of actors involved in innovation policy (including, potentially, a more active role for UK Government), increases.

5.6 At the same time, there is a consensus, highlighted in a recent review for the Welsh Government, that the role of innovation policy has evolved, to be less narrowly focused on technology, and more embracing of actions focused on addressing social challenges (perhaps especially important given the growth of the health and care sector and the long-term demographic challenges highlighted in Chapter 2) and the impact of climate change[47]. The review also emphasises a need to further develop translational research activities and to link innovation support activity more clearly with the range of finance, advisory, networking and other programmes that contribute to a successful innovation 'ecosystem'.

> **Today, innovation is about so much more than science and technology**
>
> **Future of Innovation Policy report**

[45] SMART Innovation (advice and support to business); SMART Cymru (financial assistance to business); and SMART Expertise (financial support to higher education).
[46] Reducing Industrial Carbon Emissions (RICE) is led by University of South Wales and Swansea University and works with Welsh supply chain companies to test how CO2 produced from heavy industrial processes can be used to make high value products and industrial chemicals.
[47] See Kevin Morgan, Dylan Henderson and Rick Delbridge (May 2021), *Scoping the future of innovation policy in Wales* (Cardiff University, Centre for Innovation Policy Research)

5.7 It will be important that regional activity in South West Wales adds value to and aligns with evolving Welsh national policy (and the wide range of programmes and institutions at UK level). Over the next few years:

Key action areas

- **We will explore a better-integrated regional innovation offer, in the form of a 'virtual Research and Technology Organisation' for South West Wales**

  The universities are key regional assets and have a strong history of translational research with industry. However, the wider landscape is somewhat fragmented, and may become increasingly so as current programmes come to an end. We aim to achieve a model where there is "no wrong door", making the most of our university capabilities and enabling them to meet industry need. This could extend across a range of sectors and technologies, linked with (for example) future plans for the development of the research and development offer linked with Pentre Awel at Llanelli, and the close involvement of University of Wales Trinity St David and the development of Yr Egin and its associated creative cluster. It may also embrace wider innovation capabilities, including support in management skills and capacity and (linked with our wider approach to regional skills development) access to talent to enable innovative SMEs to reach their potential.

  There may be several options in taking this proposal forward – but the key point is that we maximise the value of our shared assets to deliver a joined-up service across government, higher education and the private sector.

Growing productivity and resilience across the economy

5.8 Across the wider business stock, there have been changes in the support landscape since the last Regeneration Strategy was produced. Nationally, Business Wales provides a central gateway to a range of support products, and since 2017, the Development Bank of Wales has consolidated publicly-backed loan and equity support into an 'arms-length' and widely-recognised vehicle. In addition, the Welsh Government provides some direct investment (generally in relation to larger, often manufacturing firms), and all the South West Wales local authorities offer support services (in addition to the often university-linked innovation services highlighted above).

5.9 A recent review of the Welsh business support landscape highlighted three challenges, which are relevant to the strategy set out in this Plan[48]:

- First, Wales' **relative vulnerability to economic shocks:** a function of the continuing process of restructuring highlighted in the evidence base. This has contributed to the

[48] Jack Watkin (February 2021), *A Better Balance: Business support policy for the foundational economy* (CREW/ Institute of Welsh Affairs)

more recent policy focus on indigenous business growth. However, while economic 'shocks' are often seen through large 'one-off' events (plant closures, redundancy programmes, and so on), economy-wide technology-driven transformation is larger in its overall impact, and the ability to adapt and respond will be important across firm sizes and sectors.

- Second, the **scale** of the support offer, and the relatively small number of firms that it reaches (the inference being that there is a much wider range of SMEs that could benefit from interaction with the support system, were the reach to be greater).
- Third, **dissemination of benefits**, in particular the extent to which gains in business performance are captured in wages and tax and in which benefits to the supply chain accrue regionally. The Welsh Government has placed a greater emphasis on this in recent years, through the development of the 'economic contract' proposed in the *Economic Action Plan*

5.10 Over the coming years, we want to create a better integrated system across local and national government, within which a strengthened 'support' offer is linked with the supply of skills and premises, the role of the public sector as a purchaser and commissioner within the local economy and in ensuring that there is widespread access to fair and sustainable work:

Key action areas

- **We will seek a better co-ordinated support package for business**

  The scope of this, and the interaction between delivery at different geographical levels, will need to be explored. But the proposition is that there is a need to drive business density, start-up rates and entrepreneurship, and resilience and 'adaptability' to change across the SME base – recognising that 'enterprise' embraces a range of organisational types and ownership models[49].

- **We will link this with public sector purchasing power**

  Recently, there has been a focus on the role that public procurement can play in supporting local economic growth. This has been reflected in the Welsh Government's review of procurement, which has explored the concepts of 'community wealth-building and the 'anchor institutions' in the procurement process[50], and the South West Wales local authorities are all committed to the proactive and progressive use of procurement. The aim here is to ensure that local SMEs are able to successfully tender for work (linked with the business support offer above), and to use this as a springboard for future growth.

[49] Including social enterprises, employee-owned businesses, and so on.
[50] Welsh Government (2020), *Progress towards the development of a new procurement landscape in Wales*

Key action areas

- **We will invest in bringing forward access to sites and premises**

  The evidence shows that there is a persistent market failure in the delivery of commercial property. This has the effect of blocking the expansion of local SMEs (as well as presenting a barrier to attracting larger investors). Across the local authorities and Welsh Government, we will seek to bring forward development on the region's key strategic sites at Baglan, Port Talbot Waterfront, Fabian Way, Felindre, Cross Hands and the Haven Waterway, as well as within the wide range of smaller sites that will help to support distributed growth across the region, consistent with our wider decarbonisation objectives. We will also work to bring forward new city centre office accommodation in Swansea city centre, building on recent investment and continuing the city's transformation.

- **We will actively promote South West Wales as an investment location**

  While the focus of this Mission is on growing our locally-based business stock, inward investment has historically been important in South West Wales, and it remains a key driver of skills and employment and a source of demand for local suppliers. We welcome new investment: we will actively promote the region's assets (linked with its quality of life and visitor economy offer described in Mission 3) and we will work with investors to ensure access to skills and supply chain links, embedding them further in the local economy.

- **We will continue to invest in the region's skills capacity**

  Recent years have seen an improvement in the region's skills profile, and we have a strong track record in building an understanding of employer demand and linking it clearly with provision. Alongside the measures within this Plan to increase skills demand and employer engagement, we will continue to invest in strengthening supply at all levels, through specialist infrastructure, investment in access to employment and a continued focus (building on the region's Skills and Talent Programme) on responding to local economic demand and opportunity.

- **Across all our actions, we will improve access to fair and secure employment**

  Despite the region's success in creating jobs, economic inactivity remains higher than in the rest of the UK. While in-work poverty is a significant issue - and one which our focus on productivity and resilience across all sectors seeks to tackle – there is strong evidence that being in work supports positive outcomes across a range of measures[51]. Building on our experience of successful programmes such as Workways+, we will ensure a range of support to enable people to enter and progress in the labour market.

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[51] Welsh Government (2019), *Employability Plan*, p,9

6. Mission 3: Growing and sustaining the South West Wales 'experience' offer

South West Wales enjoys a superb environment and a unique 'quality of life' offer. This is a key asset for the region, and one which we must protect and enhance. We will make South West Wales known for the quality and breadth of its 'experience offer', bringing together urban and rural environmental quality, 'quality of life' and culture. This will support a high-value visitor economy – but it will also be locally owned and a central part of our investment proposition.

Figure 6-1: Summary of assets, opportunities, challenges and actions

Current assets	Next opportunities	Key challenges	Key actions
Unique combination of assets (natural environment; sport and leisure opportunities, urban and rural mix; unique cultural and heritage character) Important existing tourism offer, closely linked with environmental quality	Securing increased value from the 'South West Wales experience', in the context of increasing demand for quality and sustainability and growing opportunities for dispersed and remote working Building and raising awareness of the local 'brand'	Balancing economic, environmental and community sustainability considerations. Countervailing pressures on town and city centres as they need to repurpose in the light of structural change	Targeted and coordinated capital investment, including in town and city centres Balance of initiatives at regional, local and community-driven scale

Understanding the case for the Mission: the core rationale

6.1 South West Wales' 'experience offer' is a key strength. It is also multifaceted and interlinked: while it includes the region's substantial visitor economy, it recognises that the visitor economy is itself dependent on the quality of the region's cultural and environmental offer. At a national level, this is reflected with the statement of 'Wales' core offer' within the Welsh Government's *Priorities for the Visitor economy* (set out in Figure 6-2). This highlights the importance of 'sense of place' within the Welsh offer, with the visitor economy helping to act as a showcase for local food and drink and celebrating the Welsh language as a central part of local and national identity[52].

6.2 In South West Wales, the range of experiences the region has to offer is diverse and impressive. It is this diversity that provides much of the region's distinctiveness: the proximity of the university city of Swansea to the beaches of the Gower for instance, or the region's range of landscape types (including the Pembrokeshire Coast and Brecon Beacons National Parks) and network of smaller rural towns. This also makes the region attractive as a place to live, and ought to be a central part of the region's investment proposition. This

[52] Welsh Government (January 2020), *Welcome to Wales: Priorities for the visitor economy, 2020-25*, p.9.

Mission focuses on **investment** in the 'experience economy' and how we can **promote** it to new and diverse audiences.

Figure 6-2: The Welsh 'core offer' to visitors

Source: Welsh Government (2020), Welcome to Wales: Priorities for the visitor economy, 2020-25

Investing in our experience economy

6.3 The 'good news' is that several visitor economy trends coincide with some of South West Wales' inherent strengths: in particular, the increased interest in sustainability, green tourism and nature and a desire for 'authentic' experiences. These, and the inherent value of local communities and identity, form part of the wellbeing 'offer' to residents as well. However, with the exception of Swansea, all parts of the region are forecast to see falling working age populations over the next twenty years. New employment opportunities should help to reverse this – but there is also an opportunity through the acceleration of remote working and increasing flexibility to retain more of our young people and university graduates, and to attract a wider demographic to the region.

6.4 Over the next decade, this will mean investment focused both on the quality of the visitor offer and the appeal of South West Wales as a place to live and work – recognising that these are inherently interconnected:

Key action areas

- **We will invest in the region's 'experience infrastructure'**

  We will seek to broaden the range of attractions and opportunities across the region, especially where they contribute to an increasingly sustainable offer, linked with the region's heritage (including in relation to local food and drink produce), culture and natural environment. This will include ensuring that the delivery of key national

Key action areas

initiatives (such as the proposed National Forest) contribute to our wider economic ambitions.

- **We will invest in our city, town and community centres**

  Our towns and cities are the gateways to our region, and the focal points for community, commercial and civic life. Much investment has taken place and much is underway – with (for example) the Swansea Arena and its bridge link to the city centre opening in 2021, creating a further milestone in the city's regeneration. However, there is more to do: across the region, many of our town and community centres have been impacted by structural change in the retail sector – with the process of repurposing requiring complex action on a number of fronts.

  Building on our experience of working together across the region, and in the spirit of the Welsh Government's Transforming Towns initiative, we will prioritise further investment in our town and city centres, ensuring that they are sustainable focal points for the long term.

- **We will make the 'experience economy' work for everyone**

  Not all parts of the region benefit from the excellent quality of life that the region has to offer – and in some places, our ability to retain and attract younger people is impacted by deteriorating housing affordability (an issue which has the potential to worsen further in an economy increasingly characterised by remote working). Linked with our decarbonisation and net zero objectives, we will continue to invest in affordable housing solutions and long-term community renewal.

Promoting the region

6.5 The quality of South West Wales' assets present an opportunity to better promote the region – to visitors and investors and to raise the region's profile on the wider stage. This should extend to encompass the renewable energy potential and industrial opportunities highlighted earlier: the region's future in a greener economy (and the opportunities that presents) combining with its cultural and environmental quality:

Key action areas

- **We will take a more coordinated approach to promoting the South West Wales opportunity**

  Recognising that each part of the region has a distinct identity and 'brand', we will work to ensure coordination across the visitor, education, local produce and investor

Key action areas

marketing channels to ensure that South West Wales has a clearer 'external' profile and a complementary offer.

- **We will invest in quality**

  Welcome to Wales, the Welsh Government's strategy for the visitor economy, places a strong emphasis on *quality* of the whole experience offer – accommodation, food and drink, the public realm, environment, and so on – as the route to a higher-value, more sustainable economic base. Across all of the actions above, we will invest – with business – in quality and excellence.

7. Moving forward: Delivering the Plan

This Plan provides a framework for taking forward the priorities that we have identified in our Ambitions and Missions over the long term. Delivery will depend on a range of investment sources and the coordination over time of specific projects which combine to deliver our objectives. This chapter explains our approach to funding and delivery, and how we will prioritise and monitor our progress.

From a framework to a pipeline of complementary projects…

7.1 This Plan takes a long-term view. Recognising that new opportunities will emerge over time, it is intended to be flexible, with specific actions described at a relatively high level.

7.2 To convert these into practical interventions, we have prepared a **project pipeline**. This sets out a schedule of interventions, describing how they contribute to our Ambitions and Missions, their current development status and the actions that need to be taken to bring them forward. This will be kept 'live' and will be regularly reviewed by regional partners. This will enable new interventions to come forward where opportunities arise (for example, commercial proposals may lead to propositions that have not yet been identified), and for project information to be updated as schemes progress.

7.3 The projects within the pipeline are at different stages of development. Consistent with the approach used by HM Treasury and the Welsh Government (and adopted by the City Deal), projects will be brought forward through the business case process set out in the 'Green Book' appraisal guide. In summary, this means that projects will be considered against the following headings:

Table 7-1: Project business case considerations

Consideration	Description
Strategic fit	• How strong is the evidence of economic demand or need? • Does the project add 'net regional value' (i.e., is it additional to activity already taking place in the region, and if there is any duplication, is this mitigated?) • Does the project contribute to the overall strategic framework (i.e., will it support delivery of an economy that is *"resilient and sustainable; balanced and inclusive; and enterprising and ambitious"*?
Options appraisal	• Have a range of options been considered, and is there a clear case for the preferred option?
Value for money	• Does the project represent good value, in terms of the outputs and outcomes it will achieve, relative to anticipated public costs?

Consideration	Description
Affordability	• Does funding for the project exist, and/ or is there a clear route to funding? • Is the funding model compliant with Subsidy Control and other regulations?
Deliverability	• Have procurement options been considered and is there a clear route to successful procurement? • Are governance and management arrangements in place, and is there sufficient delivery capacity?

Source: SQW

It will be important that the action plan is seen as a dynamic document and that it is regularly updated by partners. In broad terms, projects include:

- **Region-wide initiatives to build capacity to take advantage of the opportunities identified in the Plan**. These are highlighted within each Mission, and include:
  - Building capacity and expertise to maximise South West Wales' 'net zero' potential
  - The creation of a 'virtual innovation agency' to coordinate and galvanise links between industry and the knowledge base, especially as European funding comes to an end
  - Support at scale for enterprise and entrepreneurship
  - Public investment in the commercial property offer, to enable investment, business growth and greater environmental sustainability
  - Delivering a coordinated approach to investment marketing and support, linked with the 'experience' economy.
- **High profile strategic capital investments**, such as the Swansea Bay and South West Metro

7.4 **Major local projects** contributing to the overall objectives and Missions. Not all will *directly* benefit all parts of the region. However, in aggregate they will offer substantial regional benefit.

Funding the Plan: A longer-term investment fund

7.5 Funding to take forward the Regional Economic Delivery Plan and its component projects will come from multiple sources, and some individual funding packages are likely to be complex. At the time of writing, there is some uncertainty regarding future funding, as European sources (historically an important part of the funding mix in South West Wales) draw to a close. However, potential sources may include:

- Private investment, especially in bringing forward some of the energy related investments set out in relation to Mission 1, and in respect of major regeneration and development schemes

- The proposed Shared Prosperity Fund (or alternative successors to the European Structural Funds)
- Joint investment across the local authorities, or between the local authorities and the Welsh Government
- UK Government funds (such as the Strength in Places Fund and the Levelling Up Fund).

Key action areas

- **We will seek to secure a devolved regional Investment Fund**

  The nature of the funding sources identified above will change over time. However, given the scale of the opportunity (and the regional challenge) in South West Wales, we will seek to secure a devolved **regional investment fund**, which would offer the region the ability to lever in additional funding and bring projects forward on a flexible basis. Such a fund could be structured to give a partial financial return on investment, as well as an economic and social return, depending on the nature of the project. This would require investment expertise and capacity, but could lead to the development of a regional portfolio of projects, derived from the emerging project pipeline and building on the successful implementation of the existing City Deal. Currently, the projects within the pipeline have a total value of around £3 billion over the coming decade: while costs will be determined through the business case process, this provides an indication of the scale of the challenge and opportunity ahead.

Monitoring progress

7.6 Our proposed projects are all currently at different stages of development. Through the business case process, we will set out a series of performance indicators against which progress can be monitored. These are likely to include:

Table 7-2: Indicative performance measures

Indicator	Description
Private investment	Additional private investment secured in the region as a result of public support through the REDP
Gross value added	Estimated additional GVA generated as a result of investment
Firm creation and survival	New business starts as a result of REDP-backed activity and survival rates over time
Jobs	Jobs created and safeguarded as a result of investment. The REDP emphasises the quality of jobs (in line with the Economic Contract) and this should be reflected in the performance measure (e.g., employment at or above Real Living Wage and sustained over time).

Indicator	Description
Access to employment	People entering employment (or increasing hours) as a result of intervention
Innovation	Research and development into new products, goods and services as a result of intervention. Adoption of 'new to the firm' products or processes as a result of intervention
Carbon reductions	CO2 savings as a result of investment
Modal shift	Increased journeys on public transport/ increased use of active travel as a result of investment.
Visitor spend	Increased visitor spend as a result of investment

Source: SQW

Governance

7.7 The Regional Economic Delivery Plan will be 'owned' and overseen by the **South West Wales Corporate Joint Committee** (CJC). This will be one of four CJCs established in Wales under new legislation, enabling the constituent local authorities to exercise joint functions relating to strategic planning, transport and measures that will improve the economic wellbeing of their regions.

7.8 Supporting the CJC, the Regional Regeneration Directors will keep track of progress and will be responsible for developing business cases, securing investment and ensuring delivery on the CJC's behalf. It will be important to secure sufficient capacity – within individual partner authorities and jointly – to do this, given the scale of the opportunities and challenges. The CJC will also establish mechanisms for a strong non-government voice (e.g., from business and the third sector) in influencing priorities and maintaining oversight.

Annex A: Summary SWOT analysis

A.1 The Evidence and Strategic Landscape Review prepared to inform this Plan contained an analysis of the region's strengths, weaknesses, opportunities and threats. This formed the basis for the analysis within Chapter 2 of the Plan, and is summarised below:

Table A-1: Summary SWOT analysis

Strengths	Weaknesses
• Nationally and internationally significant university research assets, with a strong record of industrial collaboration in the region and recent and planned investment in new university facilities • Outstanding natural environment, supporting quality of life and a distinctive location proposition for visitors and investors • Relatively strong record in job generation and in increasing economic activity • Some established sectoral strengths (e.g., engineering and advanced manufacturing; food production) • Some major site development opportunities • Growing and diverse SME base • Community strengths and capacity and strong sense of identity	• Projected decline in working age population and rising dependency ratio • Relatively low productivity, reflected in relatively low wages • Relative peripherality, leading to weak transport and digital connections in some places, and viability constraints on physical developments • Few large firms and company headquarters • Some constraints on firm expansion, linked with workforce skills shortfalls (although qualifications levels are rising) and limited commercial property options • Market change impacting on viability and vitality of town and city centres • Persistent concentrations of disadvantage
Opportunities	**Threats**
• Talent pool generated by the region's universities and further education system; opportunity to retain and grow the skilled workforce and business stock • Opportunities for growth in areas of activity relevant to the region's historic strengths (e.g., advanced manufacturing) and in current research and technology capabilities • Opportunity for location-specific growth in the energy sector and in decarbonisation more broadly • Distance might become less important as remote working becomes 'normal' (potentially increasing the appeal of SW Wales' quality of life offer and helping to change perceptions • Closeness to the natural environment and ability to offer unique sporting, cultural and environmental offer – helping to retain and attract young and talented people	• High carbon intensity of part of the industrial base • Risk of loss of major employers, with potentially significant labour and spatial impacts • Risk of outflow of talent and of younger workers, if there are insufficient opportunities locally • Wider Brexit-related uncertainties relating to export markets, port-related activity and future farm payments • Impacts of the Covid-19 pandemic, including higher unemployment as mitigation measures wind down and accelerate changes in the role of High Street/ town centre functions • Risk that existing inequalities could be exacerbated.

Strengths	Weaknesses
• Opportunities to build on a track record of collaboration between the public sector, academia and industry • Potentially significant infrastructure investments (e.g., Swansea Bay Metro) • Economic policy innovation in Welsh policy context • Major site opportunities (e.g., Baglan Energy Park) and ambitious plans for investment and development, including as part of Swansea Bay City Deal • Opportunities for business innovation	

Source: SQW

Annex B: Well-being of Future Generations Act assessment

Contribution to the Well-being Goals

B.1 The Wellbeing of Future Generations (Wales) Act 2015 (WFGA) identifies seven Well-being Goals: a Prosperous Wales; a Resilient Wales; a Healthier Wales; a More Equal Wales; a Wales of Cohesive Communities; a Wales of vibrant culture and thriving Welsh language; and a Globally Responsible Wales. Guidance on the application of the WFGA states that policy should seek to contribute to all seven Well-being Goals, not just the one that most closely approximates to the central purpose of the initiative.

B.2 The table below summaries how this Plan contributes to the Well-being Goals:

Table B-1: Contribution of the REDP to the Well-being Goals

Goal	Contribution
A Prosperous Wales	**Direct contribution** The Plan contributes to increasing productivity and economic growth, to support the creation and safeguarding of more, better paid jobs, opportunities for business starts and growth, and further links between the knowledge base and industry.
A Resilient Wales	**Direct contribution** The Plan places an increased emphasis on economic sustainability through focus on the need to decarbonise the economy; resilience to future technology change through emphasis on responding to and harnessing digitalisation
A Healthier Wales	**Indirect contribution** The Plan is not directly concerned with health matters. However, greater prosperity (especially where more equally distributed) leads to better health outcomes. The Plan also notes the importance of the health and care sector and the opportunity to link it with economic growth.
A More Equal Wales	**Direct contribution** The Plan recognises the need to build an 'inclusive growth' model into the strategy, via efforts to support skills outcomes, resilience to automation, or mechanisms to support greater wealth retention within the community
A Wales of Cohesive Communities	**Indirect contribution** Better economic inclusion outcomes should improve cohesion, where linked with programmes and mechanisms that focus on local community involvement and engagement.
A Wales of Vibrant Culture and Thriving Welsh Language	**Indirect contribution** Measures to support the growth of the creative economy (including associated with the Welsh language) should directly support, and could be an important part of the SW Wales investment proposition. More

Goal	Contribution
	broadly, the Plan seeks to support the economic vibrancy of the region, including principally Welsh-speaking communities.
A Globally Responsible Wales	**Indirect contribution** Achieving over time a decarbonised growth model will contribute to this The Plan also highlights openness to new ideas (and investment) from elsewhere

Delivering against the National Well-being Indicators

B.3 The Welsh Government has adopted 46 **National Indicators**, against which progress against the goals of the Well-being of Future Generations Act can be measured. As set out in the core of the REDP, while increasing productivity (gross value added per filled job, or hour worked) is an important measure, success will be measured against a number of other indicators as well. The key relevant indicators are listed below (with the number against each one corresponding to the indicator number published in the Welsh Government list), along with a description of how the Ambitions and Missions in the Plan are likely to contribute to their achievement:

Table B-2: Assessment of contribution to meeting the National Well-being Indicators

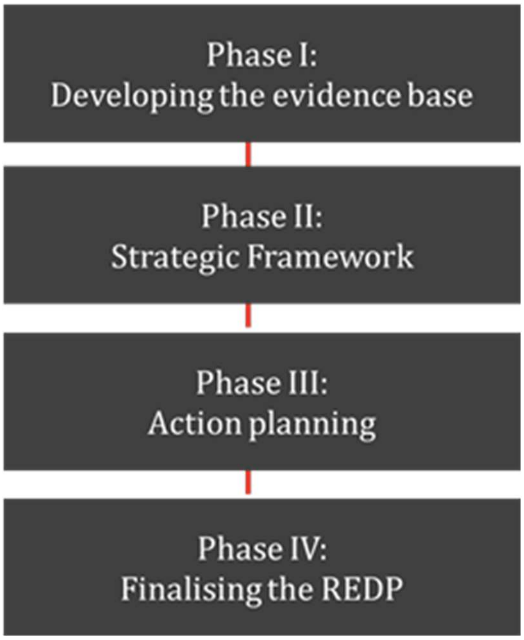
Indicator	Route to impact: Enabled through…
04. Levels of nitrogen dioxide pollution in the air	Large scale decarbonisation (Mission 1)
08. Percentage with adults with qualifications at different levels of the National Qualifications Framework	Measures to raise the supply of workforce skills, and improved engagement with employers, over time (across all Missions) Measures to raise demand for skills (across all Missions, but especially relevant to Missions 2 and 1)
09. Gross value added per hour worked relative to UK average	All Missions. This is a measure of productivity, which the Plan overall seeks to address. Note however that 'success' in achieving a relative measure in respect of the rest of the UK depends on the pace of growth elsewhere in the UK (hence the challenges in 'closing the gap' without very large-scale investment)
10. Gross disposable household income per head	All Missions. Note however that this data is not available at the South West Wales geography (it is published at ITL 1 and 2)
11. Percentage of businesses which are innovation active	Measures to increase interaction between business and the knowledge base, and to strengthen the innovation ecosystem (principally Mission 2)
12. Capacity (MW) of renewable energy equipment installed	Developing our renewable energy potential (Mission 1)
16. Percentage of people in employment who are on permanent	Measures to increase economic activity and the supply of higher paid employment. Delivered across all Missions.

Indicator	Route to impact: Enabled through…
contracts (or on temporary contracts and not seeking permanent employment) and who earn more than 2/3 of the UK median wage)	
18. Percentage of people living in households in income poverty relative to the UK median	Measures to increase access to employment, especially at higher rates of pay. Across all Missions
21. Percentage of people in employment	Key measure of economic success; relevant to all Missions
22. Percentage of people in education, employment or training measured for different age groups	Measures to improve access to, and demand for, education and training (across all Measures)
26. Percentage of people satisfied with their area as a place to live	Consequential measure arising from the success of measures to improve 'quality of place' (especially relevant to Measure 3)
33. Percentage of properties with adequate energy performance.	Measures to achieve a 'net zero' economy and to improve the energy efficiency of the housing stock as part of that (Mission 1)
42. Emissions of greenhouse gases within Wales	Measures to support decarbonisation (Measure 1)

Annex C: Developing the Plan: The process

C.1 The Regional Economic Delivery Plan was developed in 2021 with the support of SQW, through a sequential process that worked from a fresh analysis of the economic evidence to identify the key opportunities and challenges facing the region, and based on that, the Ambitions and Missions reflected in the Plan:

Figure C-1: Developing the Plan: Phases



- **Phase I** resulted in the development of a detailed **Evidence and Strategic Landscape Review**. This provides an overview of the region's economy and the policy context, informing an overall SWOT analysis. The Evidence and Strategic Landscape Review has been produced as a separate supporting document and informed the analysis in Chapter 2 of this Plan.
- Based on the outcomes of Phase I, **Phase II** involved the preparation of a **'strategic framework'** for the Plan, which identified the set of Ambitions and Missions that we have set out. As part of this, we analysed the outcomes of the SWOT analysis to consider the region's distinctive challenges, and we developed a series of future scenarios.
- In **Phase III**, we developed an initial pipeline of projects to meet the goals of the Ambitions and Missions. This involved a 'call for proposals' with the South West Wales local authorities and other stakeholders, and the development of a **Project Pipeline Supplement**, which will be kept 'live', as set out in Chapter 7.
- Based on the outcomes of the preceding phases, **Phase IV** involved the finalisation of the Plan, which was produced in draft in August 2021.

Consultation and engagement

C.2 The development of the Plan was led by the South West Wales local authorities, and regular dialogue took place with a steering group involving the four authorities and the Welsh Government, and with the Regional Directors. The strategic framework and contents of the Plan was also considered by South West Wales Leaders and Chief Executives.

In developing the Plan, consultation took place with over 50 stakeholders from business, local and Welsh national government, leaders within the region's Enterprise Zones and local business partnerships, and the third sector. This included bilateral consultations throughout the process; discussions at county-level economic partnership boards, the Regional Learning and Skills Partnership, and the Economic Strategy Group of the Swansea Bay City Deal; and a stakeholder consultation workshop which took place in June 2021.

Appendix D

September 2021

South West Wales Regional Economic Delivery Plan

Project Pipeline Supplement

Draft

SQW

Contents

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Approved by:

Luke Delahunty

Director

Date: 22/09/2021

Project pipeline summary

Table 1-1: Project pipeline summary

Project and section number	Description
Mission 1: Establishing SWW as a UK leader in renewable energy and a net zero economy	
2. Building capacity and expertise to maximise SWW's renewable energy and net zero potential	• Proposals to establish a better coordinated regional approach to realising South West Wales' decarbonisation opportunities and to raise its profile with industry, Welsh and UK Government and investors, with strategic options for consideration by the CJC and regional partners.
3. Dragon Energy Island	*Swansea Bay* • Major renewable energy infrastructure project, harnessing the power of the world's second highest tidal range at Swansea.
4. Neath Port Talbot Strategic Decarbonisation Projects	*Neath Port Talbot* • Package of measures to support decarbonisation, especially focused on the Port Talbot industrial district
5. Housing Stock Decarbonisation	*Carmarthenshire, with scope for wider regional application* • Retrofitting existing homes, using data to better assess energy performance and investing in tenant engagement and skills for delivery.
6. Carmarthenshire Renewable Energy Projects	*Carmarthenshire, with scope for wider regional application* • Onshore renewable energy schemes, making use of Council-owned land
7. Regional Circular Economy Hub	*Nantycaws, Carmarthenshire* • Centre for the re-use of materials and energy production
8. Freeport of Milford Haven	*Pembrokeshire* • Opportunities associated with Freeport designation at Milford Haven and surrounding sites.
9. Milford Haven Energy Kingdom (MH:EK)	*Milford Haven* • Detailed design programme to demonstrate what a decarbonised hydrogen and renewable energy based Smart Local Energy System could look like for Milford Haven.
10. Pembroke Dock Marine	*Pembroke Dock and wider region*

Project and section number	Description
	• Development of a 'world class' centre for marine energy development, including test areas, offshore demonstrator zone and innovation and business support activity.
11. STEP	*Pembrokeshire* • Proposed prototype nuclear fusion energy plant. Currently subject to national competition and UK Atomic Energy Authority decision.
12. Global Centre of Rail Excellence (GCRE)	*Onllwyn, Neath Port Talbot* • New testing centre for rail infrastructure and rolling stock together with training and research facilities.
13. Swansea Bay and SW Wales Metro	• Improvements to the South Wales Main Line and the creation of an integrated rail/ tram-train/ bus network linked with sustainable travel connections
14. Pembrokeshire Public Transport Interchanges	*Pembrokeshire* • New transport interchanges at Haverfordwest, Milford Haven and Pembroke Dock.
15. Rail Service Improvements to Pembrokeshire/ SWW	*Pembrokeshire* • Rail improvements to Pembrokeshire linked with Swansea Bay and South West Wales Metro
16. Regional Digital Connectivity	• Building on investment in digital connectivity via the current City Deal to ensure that regional infrastructure keeps pace with changing technology and demand.
Mission 2: Building a strong, resilient and embedded business base	
17. South West Wales 'virtual innovation agency'	• Consortium approach to: ➢ Brokering relationships between businesses, programmes and the knowledge base ➢ Developing a place-based innovation partnership ➢ Articulating and galvanising innovation responses to societal need ➢ Demonstrating and promoting regional opportunities
18. SW Wales Enterprise and Entrepreneurship Programme	• Programme to coordinate the local support offer across the region, drive demand for digital skills and adoption and promote integration of business support

Project and section number	Description
	with public sector procurement opportunities.
19. Promoting the SW Wales investment offer	• Coordinated support to actively promote the region's investment potential, linked with the wider capacity development interventions.
20. Regional Commercial Property Investment Fund	• Development grant scheme to close the viability gap on commercial schemes on regionally-important strategic sites and key local sites, to meet growing demand from local businesses and external investors.
21. Baglan Bay and Port Talbot Waterfront Industrial Cluster	*Port Talbot* • Developing a cluster of advanced manufacturing and engineering activity at Port Talbot Waterfront, linked with the decarbonisation of the industrial base and attracting investment into key sites.
22. Freeport of Port Talbot	*Port Talbot* • Opportunity of Freeport designation at Port Talbot
23. Swansea Central North	*Swansea* • Delivery of an office hub as the next phase of a comprehensive programme to regenerate Swansea city centre (building on the completion of the first phase at Copr Bay).
24. Swn Sir Gâr	*Carmarthen* • Sound stage adjacent to S4C's headquarters at Yr Egin, supporting the expansion of the creative economy.
25. Pentre Awel Phase 2	*Llanelli, with scope for wider regional application* • Scaling up the activities proposed at the Pentre Awel health, wellbeing and business development to support satellite research and innovation sites and an enhanced health technology and clinical engineering hub.
26. Haverfordwest Airport Redevelopment	*Haverfordwest* • Targeted investment at Haverfordwest airport, with a focus on light air freight and local connectivity to support offshore wind sector.
27. Pembrokeshire Food Park	*Haverfordwest* • New facility to support Pembrokeshire's food and drink industry, with likely need

Project and section number	Description
	for grow-on space beyond the current funding.
28. Skills and Talent Programme	• Delivering the Skills and Talent Programme supported through the Swansea Bay City Deal, and building on it to retain and develop the skills and employer relationships needed to drive the Missions of the REDP.
29. Local supplier development	*Swansea* • Increase in use of local suppliers through procurement based action
30. Supporting SMEs through Procurement	*Neath Port Talbot* • Increase in use of local suppliers through procurement based action
31. Supporting Business Growth and Innovation	*Neath Port Talbot* • Support for businesses in adoption of digital technology and support for innovation in the engineering/ manufacturing sector
32. Supporting New Business Start-ups	*Neath Port Talbot* • Start-up support, especially focused on businesses in Valley communities and firms with growth potential
Mission 3: Growing and sustaining the 'experience' offer	
33. Town Centre Regeneration	*Regional* • Overall coordinated approach to town centre development, linked with the Welsh Government's Transforming Towns initiative
34. Neath Port Talbot Town Centre Regeneration	*Neath Port Talbot* • Investment in main town centres at Port Talbot, Neath and Pontardawe and in smaller centres
35. Carmarthenshire Primary Town Centre Recovery Plan	*Carmarthen, Llanelli and Ammanford* • Package of investments in Carmarthenshire's principal towns, linked with future sustainability post-Covid and in the changed retail environment.
36. Carmarthenshire Rural Initiatives	*Carmarthenshire* • Targeted interventions building on Carmarthenshire's Ten Towns programme.
37. Pembrokeshire Town Centres	*Haverfordwest, Pembroke, Pembroke Dock, Milford Haven* • Delivery of the regeneration masterplan for Haverfordwest town centre and

Project and section number	Description
	strategic projects in Pembrokeshire's main town centres
38. Smaller Towns and Coastal Zones	*Swansea* • Targeted investment to support the leisure, visitor and town centre offer in smaller centres in the county of Swansea
38. Discover Pembrokeshire	*Pembrokeshire* • Package of projects to enhance and promote the visitor experience and offer in Pembrokeshire
39. Regional Waterways Project	*Swansea, with scope for wider regional application* • Measures to open up the waterways across Swansea's River Tawe, adding new routes, re-routing existing routes and developing new tourism infrastructure and access to the historic environment.
40. Lower Swansea Valley Heritage and Destination	*Swansea* • Series of investments opening up the heritage offer at the Hafod Morfa works, improving access along the Tawe and enhancing the museum and heritage assets in Swansea City Centre.
41. Carmarthenshire Visitor Experience Projects	*Carmarthenshire* • Investment in visitor infrastructure, environmental improvements and active travel at Pendine, Tywi Valley Path and the Kymers & Pembrey Canal.
42. Pembrokeshire Port Infrastructure	*Pembroke Dock/ Fishguard* • Investment in port infrastructure to support tourism activity (cruise ship potential) and resilience following Brexit.
43. Transforming Tyisha	*Llanelli* • Regeneration of the Tyisha neighbourhood between Pentre Awel and Llanelli town centre.
44. Affordable Housing Delivery	*Carmarthenshire, with scope for wider regional application* • Linking housing investment with economic development and decarbonisation objectives.

1. Introduction

The Regional Economic Delivery Plan

1.1 In 2021, the local authorities in South West Wales adopted the **Regional Economic Delivery Plan** (REDP). This looks ahead to the next ten years, setting out a 'route map' for the development of the region's economy, identifying priorities for intervention and setting out how business, government, education and other partners should work together to bring them forward. The REDP supplements the regeneration strategies and plans within each authority and provides the basis for the Regional Economic Framework currently being developed by the Welsh Government with local partners.

1.2 The REDP sets out three overall **objectives**, to which all economic growth activity should contribute, and three more specific **missions** which partners in the region aim to achieve over the coming decade:

Figure 1-1: Regional Economic Delivery Plan: Strategic framework

Source: SQW

Identifying potential interventions

1.3 The REDP itself takes a long-term view, with priorities described at relatively high level. To convert these into practical interventions, this **Supplementary Project Pipeline** document sets out a schedule of projects, describing how they contribute to the strategic framework and missions, their current development status and the actions that need to be taken to bring them forward.

1.4 It is envisaged that the project pipeline will be kept 'live' and will be regularly reviewed by partners. This will enable new interventions to come forward where opportunities arise (for example, commercial proposals may lead to propositions that have not yet been identified), and for project information to be updated as business cases are progressed.

Defining interventions

1.5 For the purposes of the project pipeline, we have defined an 'intervention' as a programme or a major project which is over and above 'business as usual'; is likely to require some form of new public investment to enable it to be brought forward; and is directly relevant to the delivery of one or more of the missions identified in the REDP. This excludes projects that are entirely commercial; those that are core public service delivery: and schemes that are already fully funded via City Deal or other sources: the focus here is on additional economic development to deliver the long-term strategy. Most interventions arise from consultation on the REDP itself and from specific proposals put forward by the local authorities (and other partners) in response to a call for projects in May-July 2021. While some projects are 'location-specific', several apply across the region and will require shared resources across all four local authority areas.

Business case status

1.6 The projects set out in the pipeline are at different stages of development. To give an indication of the extent to which projects have been developed and can come forward for delivery, we have adopted a common definition of business case status, based on the business case stages used in the 'Green Book' appraisal guide used by HM Treasury and Welsh Government. Other terminology may be used by individual project promoters and in line with specialist business case guidance (e.g., the project development stages defined in WelTAG), but the approximate headings below provides a way of comparing each project's status in a consistent manner:

Table 1-1: Business case status definition

Status	Definition
Concept/ feasibility	Early stage project idea. On the face of it, the proposition is plausible; and it would (in principle) align with wider strategy; and there is a description of the overall concept and objectives. But no work has yet been carried out to assess feasibility or to develop a business case.
Strategic Outline Case (SOC)	Project concept clearly articulated, with a preliminary assessment of strategic fit, options, value for money, affordability and achievability (usually at relatively high level and sufficient to determine whether it is worth committing resources to further business case development.
Outline Business Case (OBC)	Comprehensive analysis of strategic fit, options appraisal and economic case (generally quantified and monetised at this stage), with a preferred option identified; substantive consideration given to

Status	Definition
	delivery mechanisms and affordability, with a clear indication of likely funding sources.
Full Business Case (FBC)	All the information is in place to support a funding decision. Typically, funders will have been engaged for some time leading up to this point.

Source: SQW

Prioritisation

1.7 Within this document, we have not 'prioritised' the list of interventions. This is because the timescales for each intervention and their business case status and likely funding mix are all different, so a 'rank order' prioritisation would not be meaningful at this stage. However, in deciding whether to bring projects forward for investment (either by the participating local authorities or other funding sources), considerations should include the following, all of which are linked with the information required in a standard business case:

Table 1-2: Prioritisation considerations

Consideration	Description
Strategic fit	• How strong is the evidence of economic demand or need? • Does the project add 'net regional value' (i.e., is it additional t activity already taking place in the region, and if there is any duplication, is this mitigated?) • Does the project contribute to the overall strategic framework (i.e., will it support delivery of an economy that is *"resilient and sustainable; balanced and inclusive; and enterprising and ambitious"*?
Options appraisal	• Have a range of options been considered, and is there a clear case for the preferred option?
Value for money	• Does the project represent good value, in terms of the outputs and outcomes it will achieve, relative to anticipated public costs?
Affordability	• Does funding for the project exist, and/ or is there a clear route to funding? • Is the funding model compliant with Subsidy Control and other regulations?
Deliverability	• Have procurement options been considered and is there a clear route to successful procurement? • Are governance and management arrangements in place, and is there sufficient delivery capacity?

Source: SQW

Governance and delivery

1.8 The Regional Economic Delivery Plan will be 'owned' and overseen by the **South West Wales Corporate Joint Committee** (CJC). This will be one of four CJCs established in Wales under new legislation, enabling the constituent local authorities to exercise joint functions relating to strategic planning, transport and measures that will improve the economic wellbeing of their regions.

1.9 Supporting the CJC, the Regional Regeneration Directors will keep track of progress and will be responsible for developing business cases, securing investment and ensuring delivery on the CJC's behalf. It will be important to secure sufficient capacity – within individual partner authorities and jointly – to do this, given the scale of the opportunities and challenges. The CJC will also establish mechanisms for a strong non-government voice (e.g., from business and the third sector) in influencing priorities and maintaining oversight.

Funding – and the case for an Investment Fund

1.10 Funding to deliver the projects set out in the pipeline will come from multiple sources, and some individual funding packages are likely to be complex. There is still some uncertainty regarding future funding, as European sources draw to a close and clarity around new schemes (such as the UK Shared Prosperity Fund) has yet to materialise. However, the *current* total cost of the schemes on the project pipeline totals around £3 billion, giving an indication of the scale of the challenge and opportunity ahead.

1.11 Recognising this, the REDP makes the case for a devolved **Regional Investment Fund**, which would offer the region the ability to lever in additional funding, bring projects forward on a flexible basis and build on the success of the existing Swansea Bay City Deal. Such a fund could also be structured to give a partial financial return on investment, as well as an economic and social return, depending on the nature of the project. This would require investment expertise and capacity, but could lead to the development of a regional portfolio of projects. Options for the development and structuring of the Fund will be considered as the CJC becomes established and the pipeline is developed.

Monitoring progress

1.12 As the projects are all at different stages of development, a combined set of anticipated outputs has not yet been identified. However, through the business case process, it will be important to set out a series of performance indicators against which progress can be monitored. These are likely to include[1]:

Table 1-3: Indicative performance measures

Indicator	Description
Private investment	Additional private investment secured in the region as a result of public support through the REDP
Gross value added	Estimated additional GVA generated as a result of investment

[1] Note that these are essentially outcome measures. We have not included output measures (e.g., x sq m of new commercial floorspace, or x km of cycle track), although these would obviously be used in the project monitoring process.

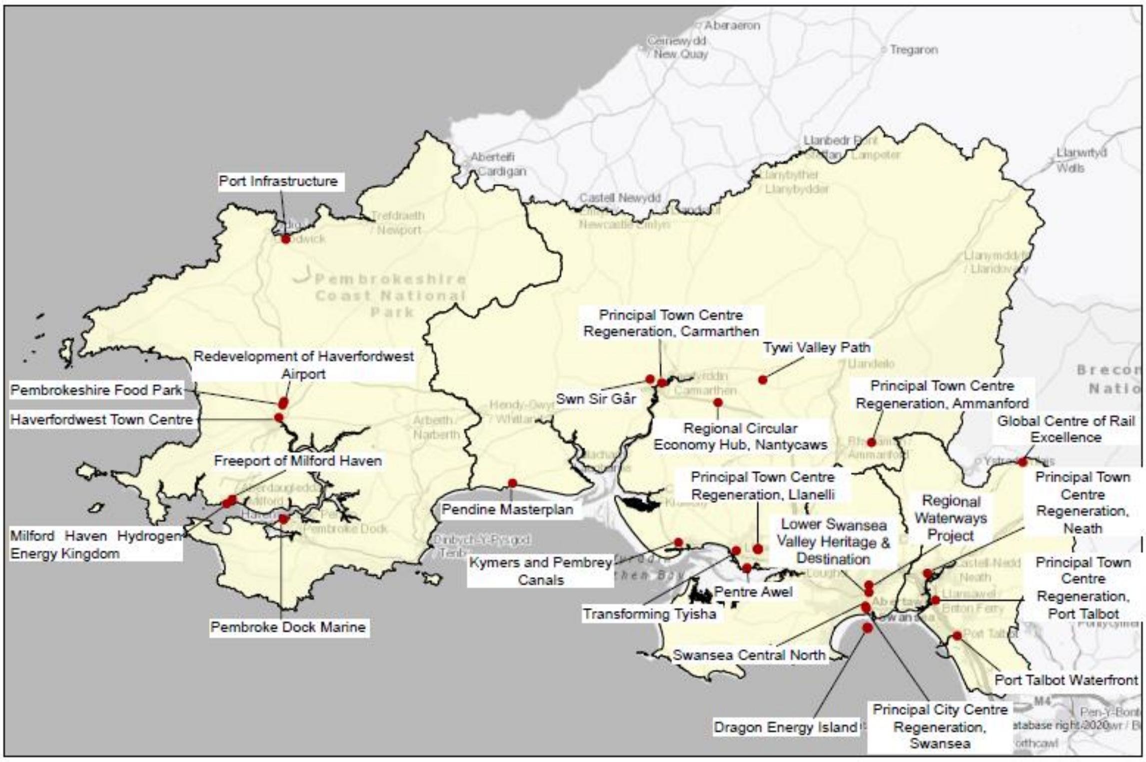
Indicator	Description
Firm creation and survival	New business starts as a result of REDP-backed activity and survival rates over time
Jobs	Jobs created and safeguarded as a result of investment. The REDP emphasises the quality of jobs (in line with the Economic Contract) and this should be reflected in the performance measure (e.g., employment at or above Real Living Wage and sustained over time).
Access to employment	People entering employment (or increasing hours) as a result of intervention
Innovation	Research and development into new products and services as a result of intervention. Adoption of 'new to the firm' products or processes as a result of intervention
Carbon reductions	CO2 savings as a result of investment
Modal shift	Increased journeys on public transport/ increased use of active travel as a result of investment.
Visitor spend	Increased visitor spend as a result of investment

Source: SQW

Projects summary

1.13 Figure 1-2 shows the distribution of 'fixed-location' projects across the region (although note that several are programmes covering the region as a whole):

Figure 1-2: Project pipeline: Physical project locations



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1.14 The list of project interventions is extensive, and in some cases, several projects align and add value to each other – for example, the wide range of energy-related schemes all support the delivery of 'Mission 1' and reflect the scale of the opportunity, within which the 'whole should be greater than the sum of the parts'.

1.15 For ease of reading, we have grouped the pipeline projects by the Missions to which they principally relate. However, all are cross-cutting to a certain extent, and some contribute equally to all three. This is acknowledged within each project entry, but for convenience, we have:

- **Included transport and digital connectivity projects within Mission 1** (Establishing South West Wales as a UK leader in renewable energy and the development of a net zero economy). This reflects the fact that all our transport proposals are for sustainable or active travel and seek to achieve modal shift. It also recognises the Welsh Government's decision to include transport within the Climate Change ministerial portfolio, the priorities set out in *Llwybr Newydd* and the contribution that transport currently makes to our overall carbon emissions.
- **Included skills and employment projects within Mission 2** (Building a strong, resilient and embedded business base). This recognises the importance of links between skills supply and employer demand and the role played by the Regional Learning and Skills Partnership and its strategy.
- **Included town centre regeneration projects within Mission 3** (Growing and sustaining the experience offer), recognising the centrality of our town centres to the overall quality of the South West Wales 'offer', to residents, visitors and investors.
- **Included community and neighbourhood renewal projects within Mission 3**, again recognising that quality of offer and experience relates to the 'whole place' and the quality of life of all who live within the region, as well as those visiting or investing in it.

1.16 Table 1-4 summarises the overall pipeline list:

Table 1-4: Project pipeline summary

Project and section number	Description
Mission 1: Establishing SWW as a UK leader in renewable energy and a net zero economy	
2. Building capacity and expertise to maximise SWW's renewable energy and net zero potential	• Proposals to establish a better coordinated regional approach to realising South West Wales' decarbonisation opportunities and to raise its profile with industry, Welsh and UK Government and investors, with strategic options for consideration by the CJC and regional partners.
3. Dragon Energy Island	*Swansea Bay*

Project and section number	Description
	• Major renewable energy infrastructure project, harnessing the power of the world's second highest tidal range at Swansea.
4. Neath Port Talbot Strategic Decarbonisation Projects	*Neath Port Talbot* • Package of measures to support decarbonisation, especially focused on the Port Talbot industrial district
5. Housing Stock Decarbonisation	*Carmarthenshire, with scope for wider regional application* • Retrofitting existing homes, using data to better assess energy performance and investing in tenant engagement and skills for delivery.
6. Carmarthenshire Renewable Energy Projects	*Carmarthenshire, with scope for wider regional application* • Onshore renewable energy schemes, making use of Council-owned land
7. Regional Circular Economy Hub	*Nantycaws, Carmarthenshire* • Centre for the re-use of materials and energy production
8. Freeport of Milford Haven	*Pembrokeshire* • Opportunities associated with Freeport designation at Milford Haven and surrounding sites.
9. Milford Haven Energy Kingdom (MH:EK)	*Milford Haven* • Detailed design programme to demonstrate what a decarbonised hydrogen and renewable energy based Smart Local Energy System could look like for Milford Haven.
10. Pembroke Dock Marine	*Pembroke Dock and wider region* • Development of a 'world class' centre for marine energy development, including test areas, offshore demonstrator zone and innovation and business support activity.
11. STEP	*Pembrokeshire* • Proposed prototype nuclear fusion energy plant. Currently subject to national competition and UK Atomic Energy Authority decision.
12. Global Centre of Rail Excellence (GCRE)	*Onllwyn, Neath Port Talbot* • New testing centre for rail infrastructure and rolling stock together with training and research facilities.

Project and section number	Description
13. Swansea Bay and SW Wales Metro	• Improvements to the South Wales Main Line and the creation of an integrated rail/ tram-train/ bus network linked with sustainable travel connections
14. Pembrokeshire Public Transport Interchanges	*Pembrokeshire* • New transport interchanges at Haverfordwest, Milford Haven and Pembroke Dock.
15. Rail Service Improvements to Pembrokeshire/ SWW	*Pembrokeshire* • Rail improvements to Pembrokeshire linked with Swansea Bay and South West Wales Metro
16. Regional Digital Connectivity	• Building on investment in digital connectivity via the current City Deal to ensure that regional infrastructure keeps pace with changing technology and demand.
Mission 2: Building a strong, resilient and embedded business base	
17. South West Wales 'virtual innovation agency'	• Consortium approach to: ➢ Brokering relationships between businesses, programmes and the knowledge base ➢ Developing a place-based innovation partnership ➢ Articulating and galvanising innovation responses to societal need ➢ Demonstrating and promoting regional opportunities
18. SW Wales Enterprise and Entrepreneurship Programme	• Programme to coordinate the local support offer across the region, drive demand for digital skills and adoption and promote integration of business support with public sector procurement opportunities.
19. Promoting the SW Wales investment offer	• Coordinated support to actively promote the region's investment potential, linked with the wider capacity development interventions.
20. Regional Commercial Property Investment Fund	• Development grant scheme to close the viability gap on commercial schemes on regionally-important strategic sites and key local sites, to meet growing demand from local businesses and external investors.
21. Baglan Bay and Port Talbot Waterfront Industrial Cluster	*Port Talbot* • Developing a cluster of advanced manufacturing and engineering activity at

Project and section number	Description
	Port Talbot Waterfront, linked with the decarbonisation of the industrial base and attracting investment into key sites.
22. Freeport of Port Talbot	*Port Talbot* • Opportunity of Freeport designation at Port Talbot
23. Swansea Central North	*Swansea* • Delivery of an office hub as the next phase of a comprehensive programme to regenerate Swansea city centre (building on the completion of the first phase at Copr Bay).
24. Swn Sir Gâr	*Carmarthen* • Sound stage adjacent to S4C's headquarters at Yr Egin, supporting the expansion of the creative economy.
25. Pentre Awel Phase 2	*Llanelli, with scope for wider regional application* • Scaling up the activities proposed at the Pentre Awel health, wellbeing and business development to support satellite research and innovation sites and an enhanced health technology and clinical engineering hub.
26. Haverfordwest Airport Redevelopment	*Haverfordwest* • Targeted investment at Haverfordwest airport, with a focus on light air freight and local connectivity to support offshore wind sector.
27. Pembrokeshire Food Park	*Haverfordwest* • New facility to support Pembrokeshire's food and drink industry, with likely need for grow-on space beyond the current funding.
28. Skills and Talent Programme	• Delivering the Skills and Talent Programme supported through the Swansea Bay City Deal, and building on it to retain and develop the skills and employer relationships needed to drive the Missions of the REDP.
29. Local supplier development	*Swansea* • Increase in use of local suppliers through procurement based action
30. Supporting SMEs through Procurement	*Neath Port Talbot* • Increase in use of local suppliers through procurement based action

Project and section number	Description
31. Supporting Business Growth and Innovation	*Neath Port Talbot* • Support for businesses in adoption of digital technology and support for innovation in the engineering/ manufacturing sector
32. Supporting New Business Start-ups	*Neath Port Talbot* • Start-up support, especially focused on businesses in Valley communities and firms with growth potential
Mission 3: Growing and sustaining the 'experience' offer	
33. Town Centre Regeneration	*Regional* • Overall coordinated approach to town centre development, linked with the Welsh Government's Transforming Towns initiative
34. Neath Port Talbot Town Centre Regeneration	*Neath Port Talbot* • Investment in main town centres at Port Talbot, Neath and Pontardawe and in smaller centres
35. Carmarthenshire Primary Town Centre Recovery Plan	*Carmarthen, Llanelli and Ammanford* • Package of investments in Carmarthenshire's principal towns, linked with future sustainability post-Covid and in the changed retail environment.
36. Carmarthenshire Rural Initiatives	*Carmarthenshire* • Targeted interventions building on Carmarthenshire's Ten Towns programme.
37. Pembrokeshire Town Centres	*Haverfordwest, Pembroke, Pembroke Dock, Milford Haven* • Delivery of the regeneration masterplan for Haverfordwest town centre and strategic projects in Pembrokeshire's main town centres
38. Smaller Towns and Coastal Zones	*Swansea* • Targeted investment to support the leisure, visitor and town centre offer in smaller centres in the county of Swansea
38. Discover Pembrokeshire	*Pembrokeshire* • Package of projects to enhance and promote the visitor experience and offer in Pembrokeshire
39. Regional Waterways Project	*Swansea, with scope for wider regional application* • Measures to open up the waterways across Swansea's River Tawe, adding new

Project and section number	Description
	routes, re-routing existing routes and developing new tourism infrastructure and access to the historic environment.
40. Lower Swansea Valley Heritage and Destination	*Swansea* • Series of investments opening up the heritage offer at the Hafod Morfa works, improving access along the Tawe and enhancing the museum and heritage assets in Swansea City Centre.
41. Carmarthenshire Visitor Experience Projects	*Carmarthenshire* • Investment in visitor infrastructure, environmental improvements and active travel at Pendine, Tywi Valley Path and the Kymers & Pembrey Canal.
42. Pembrokeshire Port Infrastructure	*Pembroke Dock/ Fishguard* • Investment in port infrastructure to support tourism activity (cruise ship potential) and resilience following Brexit.
43. Transforming Tyisha	*Llanelli* • Regeneration of the Tyisha neighbourhood between Pentre Awel and Llanelli town centre.
44. Affordable Housing Delivery	*Carmarthenshire, with scope for wider regional application* • Linking housing investment with economic development and decarbonisation objectives.

Mission 1:
Establishing South West Wales as a UK leader in renewable energy and the development of a net zero economy

2. Building capacity and expertise to maximise South West Wales' renewable energy and net zero potential

Introduction

2.1 South West Wales has a substantial opportunity in the renewable and low carbon energy sector. This opportunity is **cross-regional** (with major projects in Pembrokeshire and Swansea Bay as well as a range of smaller-scale schemes across the region), aligns with the region's **historic engineering strengths** (especially in the gas and petrochemicals sectors), and offers scope for integration with wider processes of **industrial decarbonisation.**

2.2 However, while there are several major projects in delivery or proposed – many of which are set out in Part C of this Project Pipeline – the agenda is complex and is developing rapidly. Currently, there is limited coordination at regional level, either between the major projects that are coming forward or between proposals for capital investment and the opportunities to capture the benefits locally, through (for example) skills development, business growth and the potential of local ownership models.

2.3 The REDP notes that there is a '**window of opportunity'** for South West Wales to take advantage of its distinctive regional potential. But it also notes that renewable energy is seen as a source of growth in many other regions as well – and the opportunities and challenges associated with the broader decarbonisation agenda are essentially ubiquitous. So there ought to be potential to 'scale up' activity at regional level, and to invest in greater shared capacity to drive the agenda forward. This is at the heart of the first mission within the REDP, which seeks to *"establish South West Wales as a UK leader in renewable energy and the development of a net zero economy".*

The current context

2.4 Any new regional coordination mechanism or strategy should be developed in the context of the existing approach at UK, national and local level.

The policy context

2.5 The new **UK Innovation Strategy: Leading the future by creating it** was published in July, and highlights Energy and Environment Technologies as one of seven priorities identified where the UK has globally competitive R&D and industrial strength. It recognises the need for a diverse ecosystem of initiatives and capabilities, and proposes four pillars of activity to deliver the strategy: Unleashing business; People; Institutions and places; and Missions and technologies.

2.6 The **Welsh Government**'s approach to regional and local action for a decarbonised energy system was summarised in its June 2021 response to the **Climate Change Committee's 2020 Progress Report: Reducing Emissions in Wales**. It emphasises a partnership approach (e.g., in relation to the complex challenge of decarbonising heat) and highlights the development of four **Regional Energy Strategies** which are intended to model future demand for power, heat and transport, identify the scale of change needed to reach a low carbon energy system, establish priorities for each region and set out the socio-economic impacts of delivering the ambitions. In South West Wales, the development of the **Regional Energy Strategy** has been taken forward in parallel with the development of the REDP, and it is expected to be published in summer 2021.

2.7 The Progress Report also sets out how **local energy planning** could be taken forward to provide much greater detail, identifying the specific actions needed for each community. Currently, two **Local Energy Planning** pilots are underway in Wales (in Conwy and Newport), and more areas are expected to start this work during 2021-22. This work is intended to identify the 'low regret' actions for decarbonising the local energy system and to influence the network providers' investment decisions in new grid infrastructure.

Major projects and programmes

2.8 Existing regional and local programmes that contribute to South West Wales' capacity for renewable energy and net zero include:

- **Pembroke Dock Marine**, set out in greater detail in Part C of the Pipeline. This is a £60 million programme part-funded by Swansea Bay City Deal, consisting of the Marine Energy Test Area (META), Marine Energy Engineering Centre of Excellence (MEECE), investment in Pembroke Port and the Pembrokeshire Demonstration Zone.
- **Dragon Energy Island**, also set out in Part C. This is a potentially £1.3 billion investment in tidal and wind power (and potentially solar) energy in Swansea Bay, enabling private sale to industry and supporting commercial development.
- The **Homes as Power Stations** project supported through the City Deal, which is bringing new energy efficiency technologies to existing and new homes across the region.
- A range of **onshore wind and energy from waste projects** across the region, as well as a potential **nuclear fusion** prototype scheme in Pembrokeshire.

2.9 In 2021, the **South Wales Industrial Cluster (SWIC)** was awarded £1.5 million from UKRI's Industrial Decarbonisation Programme to map the actions needed to support South Wales in becoming a net zero carbon region by 2050. SWIC is a partnership between Welsh industry, energy suppliers, infrastructure providers, academia, legal sector, service providers and public sector organisations, with partners including energy suppliers and the ORE and Energy Systems Catapults, as well as intensive energy users such as Tata Steel. The SWIC project extends to the South East Wales as well as the South West region, highlighting the common issues and close links the two areas share.

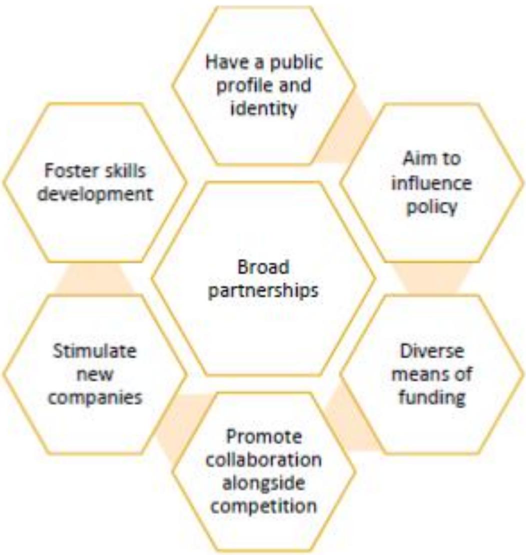
Options for the future

2.10 The specific needs associated with the scale and pace of change required to meet a net zero transition are still emerging: the SWIC project, for example, seeks to explore these further. However, efforts to build capacity in renewable energy and aspects of decarbonisation at a local to regional scale have been launched, and in some cases have delivered significant impact already.

Examples from elsewhere: Energy Capital

2.11 A review of examples from elsewhere[2] suggests that a regional decarbonisation 'system' ought to have a number of goals, set out in Fig. 1. These include addressing long term skills and business development, as having a clear 'identity' to help galvanise and coordinate investment, as well as influence policy, and extending beyond the delivery of specific initiatives or sectoral actions.

Figure 1: Key features of thriving climate innovation clusters



Source: Accelar, adapted from University of Birmingham/ Climate-KIC

2.12 An example that may be relevant to South West Wales is **Energy Capital**, the 'smart energy innovation partnership' established in the West Midlands[3]. Energy Capital is hosted by the West Midlands Combined Authority and partly developed from a **Regional Energy Policy Commission** convened in 2017 and which sought to focus on the economic opportunities associated with energy transition[4]. Consistent with this economic orientation, Energy Capital aspires to *"make the West Midlands one of the most attractive locations to build innovative clean energy technology companies in the world"*. It is governed by a Board consisting of local authority, investment agency, business and energy provider representatives. Energy Capital's role includes:

[2] University of Birmingham/ Climate-KIC (2018), *Connected Clusters Landscaping Study*
[3] See www.energycapital.org.uk
[4] Energy Capital, Regional Energy Policy Commission

- 'Owning' and driving forward the West Midlands Regional Energy Strategy
- Providing a single point of contact for investors, project funders and potential partners across the region
- Working with community organisations, local public bodies and the UK Government to create an "attractive and creative environment" for companies that want to be part of the low carbon and smart energy transition.
- Supporting innovative small business growth through the Energy Capital-Climate KIC 'start-up' and 'greenhouse' accelerator programmes.

2.13 One of the activities managed by Energy Capital is the definition of **Energy Innovation Zones** (EIZs), linking opportunities to expand manufacturing capabilities with sustainable energy capacity: especially relevant, given the West Midlands' historic manufacturing strengths and extensive stock of industrial land. This could also be relevant in South West Wales.

Lessons from the Connected Clusters project

2.14 Energy Capital is also a participant in Climate-KIC's **'Connected Clusters'** project, which includes five European cities and regions (as well as the West Midlands, these are London, Edinburgh, Valencia and Frankfurt). For South West Wales, three issues emerging from a review of the 'clusters' are relevant:

- **Local strengths as drivers of the proposition:** This is evident in the West Midlands, which derives much of its focus from its manufacturing heritage and from the presence of substantial brownfield industrial sites, which form the rationale for the Energy Innovation Zones programme. In Valencia, the AVAESEN cluster developed from local strengths in renewable energy (principally solar) and acts as an industry-led body supporting SME development in the renewables supply chain. In Frankfurt (where the 'cluster' is relatively young) the focus is on the decarbonisation of the city's major chemicals park and the opportunities that are associated with that.
- **Some form of central 'driving force' is important.** Although the nature of these vary between the examples (with university leadership in Edinburgh and Frankfurt, business leadership in Valencia, and regional government leadership in the West Midlands), *"in all the climate innovation clusters, one common factor is the presence of a central driving force, steering organisation or coordinating body that champions and stimulates new innovation in an area"*[5]. This can also be helpful in raising the profile of the cluster and maintaining momentum.
- **'Collecting' existing interests acts as a platform for future development.** This was especially the case in the West Midlands where (as in South West Wales) there were

[5] University of Birmingham/ Climate-KIC (2018), *Connected Clusters Landscaping Study, p.45*

already several key assets (e.g., the university knowledge base and the location of the Energy Systems Catapult).

Next steps

2.15 There is an opportunity to improve coordination of the region's decarbonisation potential and to raise its profile with industry, Welsh and UK Government and with investors. The examples above give some suggestions of the structures that could be put in place to support this, although it may be useful to carry out a broader study to consider options in more detail.

Issues to consider in moving forward include:

- Where could a coordinating body best add value to existing institutions (such as Marine Energy Wales, the local authorities, universities and new programmes such as SWIC)?
- What should the primary focus of a regional approach be?
- How could a regional approach deliver additional capacity (and where might funding come from)?

2.16 Thinking through these considerations could help to provide the basis for a business case.

3. Dragon Energy Island

Business case status	Strategic Outline Case

Contact details		
Organisation	Swansea Council	
Key contact	Name	Martin Nicholls
	Email	Martin.nicholls@swansea.gov.uk
	Tel	

Strategic rationale
Please describe the proposed intervention? What is it seeking to achieve?

The Dragon Energy Island Project will harness the power of the world's second highest tidal range to create an innovative and multi-faceted infrastructure project.

Background

The prospect of harnessing tidal power in Swansea Bay has been subject to investigation for several years. In 2014, the UK National Infrastructure Plan set out a long-term ambition to increase energy production from wave and tidal power, and committed to *"establish whether a potential tidal lagoon project in Swansea Bay is affordable and value for money for consumers"*.

In response, proposals were advanced for a Swansea Bay Tidal Lagoon (SBTL), which was granted a Development Consent Order in 2015. However, the financing of the project relied on a 35 year contract-for-difference, which the UK Government determined did not represent value for money.

Following the UK Government's decision not to proceed with the SBTL, Swansea Bay City Region partners established a **Tidal Lagoon Task Force** to consider options for an alternative tidal energy project. This sought to develop an option that would not be reliant on contract-for-difference funding.

The Dragon Energy Island proposition

Following the work of the Task Force, in 2019, a report by Holistic Capital on behalf of City Region partners set out the alternative **Dragon Energy Island** proposition. This envisages an "integrated infrastructure" project, rather than a sole-purpose power generation scheme, which would include:

- Tidal and wind power generation (and potentially solar power generation)
- Potential private supply to large data centre operations
- Potential use of electricity generated to produce hydrogen and oxygen for onward sale
- Residential and commercial development as an integral part of the development itself (e.g., 'floating' modular homes within the Dragon Energy Island)
- Energy supply to the local residential market, integration with the 'Homes as Power Stations' City Deal project and potential to aggregate the public energy demand across the City Region.

• Potential for use of battery storage technology to improve revenues and efficiency of the power plant, and link with battery development & manufacturing opportunities
What work has been done already (e.g., feasibility, project development, previous project activity)? *Please include links to relevant documents as appropriate.*
Extensive analysis was carried out as part of the SBTL proposition. Since then, a Strategic Options Review was undertaken March 2019 by Holistic Capital, and discussions have continued with Welsh and UK Government on potential funding to develop the scheme. Consideration has been given to the development of an Economic Impact Assessment to inform the business case, and this is likely to be taken forward in 2021.
What are the main barriers or challenges in bringing this intervention forward?
Securing the capital to fund the development. This is itself dependent on the business case for the scheme, and ongoing dialogue with the UK and Welsh Governments.
What benefits will the intervention should generate? *(if these are indicatively quantified at this stage, please state, but otherwise please describe in general terms)*
These will be considered within the forthcoming economic impact assessment. Potential benefits are likely to include: • O&M and equipment manufacturing and supply jobs associated with the operation of the energy facility • Increased land value associated with the residential element of the development • Additional jobs, business turnover and R&D investment linked with associated industrial development (e.g., data centre operation and the potential development of a hydrogen cluster) • Additional GVA • Benefits in the supply of clean energy

Funding	
Estimated total intervention cost	£1.16bn current estimate. Note that the project requires an estimated £22 million in pre-procurement and pre-construction assistance to support detailed designs, permissions, etc.
How will this cost be met? What sources of investment are…	
Secured?	£300,000 committed by Swansea Council and WG to develop project to this stage
Being considered?	Discussions ongoing with WG and UK Government to secure further development funding. Community Renewal Fund bid being prepared to support some short-term development costs
If you have an indicative annual funding profile, please state below, or attach as appropriate	
This has not yet been prepared.	

Delivery
Which organisations do you envisage will need to be involved in delivery? Is there a lead delivery organisation?
Swansea Council is currently leading on the scheme. Delivery mechanisms will need to be considered as part of business case development.
Beyond funding availability, what needs to happen to enable delivery? *(e.g., permissions, detailed business case development, key delivery challenges to overcome etc.)*
Outline Business Case/ Full Business Case to be developed.
What are the indicative timescales and milestones associated with the intervention?
To be determined through business case process.

Links to Missions	
Establish South West Wales as a UK leader in renewable energy and net zero	Strong link – the project directly delivers SW Wales' renewable energy potential and contributes to the wider opportunities associated with industrial decarbonisation.
Create a strong, resilient and embedded SW Wales business base	Strong link through supply chain development, the potential for new technology development and R&D associated with the scheme and potential additional investment.
Grow and sustain the SW Wales experience offer	Strong link through the 'UK first' aspects of the project and its potential to make a unique contribution to Swansea's offer.

4. Neath Port Talbot Strategic Decarbonisation Projects

Business case status	Outline Business Case

Contact details		
Organisation	Neath Port Talbot CBC	
Key contact	Name	Simon Brennan
	Email	s.brennan@npt.gov.uk
	Tel	

Strategic rationale
Please describe the proposed intervention? What is it seeking to achieve?

In May 2020, Neath Port Talbot Council launched its Decarbonisation and Renewable Energy (DARE) Strategy. This sets out how the Council will act to counter climate change, both by reducing its own carbon footprint and by working with others to bring forward key investments in renewable energy and low carbon technologies. The strategy is set within the context of the regional 'Re-energising Wales' project (which itself has informed the emerging Regional Energy Strategy) and the commitment within the Swansea Bay City Deal to investment in renewable energy and energy systems technologies.

Key projects for future investment and development within the DARE Strategy include:

FLEXIS (Flexible Integrated Energy Systems)

FLEXIS is a partnership between Cardiff University, Swansea University, the University of South Wales, Neath Port Talbot CBC and Tata Steel UK which seeks to develop and create an energy systems research capability in Wales. The project includes a **demonstration area** in focused on Port Talbot and with projects across the county. This aims to de-risk decarbonisation by running near-commercial demonstration projects. Port Talbot was identified as a suitable location given the combination of renewable energy capacity and a range of industries (including those with very high energy demand) alongside residential areas. Specific projects include:

- Port Talbot Smart Low Carbon Town, promoting smart local energy systems through use of digital technology
- Feasibility of energy from mine water, with the aim of using heat recovery from former mine workings to power the Cefn Coed colliery museum site at Crynant
- Development of a low emission vehicles and electrical charging strategy across the authority
- Smart metering opportunities within NPT Council's buildings
- The Swansea Bay Technology Centre (now in development and referred to in the Port Talbot Waterfront Industrial Cluster pipeline project entry) and the University of South Wales' Hydrogen Centre.

Building on FLEXIS, the **Reducing Industrial Carbon Emissions (RICE)** project is also investing in a hydrogen demonstrator project at Hanson UK's cement plant in Port Talbot.

FLEXIS is now nearing the end of its funding period (and the remaining WEFO-funded schemes will come to an end in the next couple of years). A key challenge (and opportunity) is to build on the investment in demonstration schemes and Neath Port Talbot's infrastructure to attract further investment (including commercial investment) in decarbonisation, especially where this relates to the county's industrial base. The future development of the South Wales Industrial Cluster will be an important part of this, as will the additional capacity to take advantage of the region's renewable energy and net zero opportunities outlined elsewhere in the project pipeline.

Other projects

Other significant projects promoted via the DARE Strategy include:

- Renewable and low carbon energy schemes (e.g., proposed tidal energy opportunities at Brunel Dock and solar PV and hydroelectric potential)
- Energy from waste management
- The ongoing delivery of the Homes from Power Stations project, building on the pathfinder scheme being taken forward in Neath
- Biofiuel production using waste gases from industrial processes
- Development of integrated transport hubs (building on the delivery of the integrated hub at Port Talbot)

Neath Port Talbot is also likely to be impacted by the development of the proposed Dragon Energy Island scheme in Swansea Bay.

What work has been done already (e.g., feasibility, project development, previous project activity)? *Please include links to relevant documents as appropriate.*

- As the overview above demonstrates, there has been substantial investment in demonstrating the viability of new technologies, via a range of programmes.
- In addition, there is already extensive renewable energy generation capacity in Neath Port Talbot: Pen y Cymoedd is currently the largest onshore wind farm in England and Wales, with the county accounting for Wales' largest installed renewable energy capacity (mainly through onshore wind and the Margam green energy plant).

What are the main barriers or challenges in bringing this intervention forward?

- Commercial interest, building on the publicly-financed demonstrator schemes
- Continued public investment. Strategically, projects to drive decarbonisation are a high priority within Welsh and UK Government strategy. However, European funding sources have been important in recent years, and there is still substantial uncertainty regarding the future of these.

What benefits do you think that the intervention should generate? *(if these are indicatively quantified at this stage, please state, but otherwise please describe in general terms)*

- Increased energy efficiency and lower carbon emissions
- Additional jobs within firms developing and commercialising low carbon technologies

• Jobs safeguarded within high energy-using businesses, through increased business resilience • Reduced energy costs to businesses and households

Funding	
Estimated total intervention cost	TBC
How will this cost be met? What sources of investment are	
Secured?	• Welsh and UK Government and commercial investment
Being considered?	
If you have an indicative annual funding profile, please state below, or attach as appropriate	
[To be added]	

Delivery
Which organisations do you envisage will need to be involved in delivery? Is there a lead delivery organisation?
Welsh Government, Neath Port Talbot CBC, universities, commercial organisations, community organisations
Beyond funding availability, what needs to happen to enable delivery? *(e.g., permissions, detailed business case development, key delivery challenges to overcome etc.)*
• Effective marketing and promotion of investment opportunities following initial public investment • Business case development for specific projects where appropriate.
What are the indicative timescales and milestones associated with the intervention?
• **TBD**

Links to Missions	
Establish South West Wales as a UK leader in renewable energy and net zero	Neath Port Talbot's energy opportunity is central to that of the region as a whole, given the scale of the county's current renewable energy capacity. The county also makes the largest contribution to regional carbon use via its industrial base. The NPT renewable energy and decarbonisation strategy therefore makes a key contribution to the Mission.
Create a strong, resilient and embedded SW Wales business base	Strong link through opportunities for business resilience and the development of new business growth associated with renewable energy.
Grow and sustain the SW Wales experience offer	A coordinated approach to realising NPT's low carbon and renewable energy opportunities should help to attract commercial investment and change perceptions of the area.

5. Housing Stock Decarbonisation

Business case status	Strategic Outline Case

Contact details		
Organisation	Carmarthenshire County Council	
Key contact	Name	Gareth Williams Nathan Hartley
	Email	GaJWilliams@carmarthenshire.gov.uk NJHartley@carmarthenshire.gov.uk
	Tel	07944 778329

Strategic rationale

Please describe the proposed intervention? What is it seeking to achieve?

The Decarbonisation of Councils Housing stock is the next step on our journey to improving the condition of or housing stock and generate a new Carmarthenshire Homes Standard (CHS) for our tenants. There are several key drivers that are currently being considered as part of the Councils decarbonisation strategy that will impact both the Councils existing housing stock and future new build development. The key drivers for this proposal include:

- Responding to the climate emergency and lowering carbon emissions produced by our homes,
- Taking a fabric first approach and using innovative technologies to enhance the energy performance our existing homes and our new build homes,
- Stimulating the economy, creating jobs for local people and growing the green economy,
- Stimulating the local construction industry and supply chain and developing local skills and talents,
- Setting up a new asset management system that will allow the Council to model energy improvements for our homes and producing housing passports clearly identifying the works required,
- Working with our tenants to enable them to maximise the energy saving measures in their homes, to reduce the carbon footprint and promote affordable warmth.

What work has been done already (e.g., feasibility, project development, previous project activity)? *Please include links to relevant documents as appropriate.*

The Council is involved in several projects that focus on different aspects of decarbonising our homes. Projects to date have focused on retrofitting existing homes, improving the performance of our new builds and understanding what/how we currently record data for our housing and the potential gaps in our dataset.

- Retrofitting existing Council Homes – to help us understand the challenge of delivering a retrofit programme, we have carried out several small scale retrofit projects that focus on different archetypes using different solutions. We are currently in the process of completing 7 whole house retrofits to void properties within the Councils housing stock. The houses represent 26% of the Councils housing stock and include an off-gas solution. The homes are also part of Welsh Governments 'Optimised Retrofit Programme'. All homes have been installed with Intelligent Energy Systems that will allow us to monitor the homes to gather data on how the homes are

performing when compared with the modelling data and also enable us to ensure our tenants are using the equipment effectively. • We also have other projects that focus on providing a low carbon solution for flats and retrofitting tenanted homes to help us understand the level of disruption caused as part of our learning. • New Build Standard – As part of our commitment to build over 900 new homes, we have looked at ways to improve the performance of our homes above the current standard set out by Building Regulations. Our new housing specification focuses on a fabric first approach with innovative technology. We want the innovative technologies within a home to be as non intrusive as possible and by taking a fabric first approach, we will aim to reduce the need for additional technologies to provide a low cost, low carbon and comfortable environment for our tenants. We have 8 developments currently on site and will be monitoring how our new homes perform once the homes are completed occupied. • We have produced a housing matrix that will allow us to build homes at different levels of energy efficiency depending on the scheme. The matrix ranges from building regulations standard to Passivhaus principles. • New Asset Management System – The Council was a successful candidate for Welsh Governments 'Collaborative Research & Innovation Support Programme' that has allowed us to procure the services of Cardiff University to review the data we currently hold for our housing stock and challenge ourselves to understand what is missing and how can we obtain it. The new asset management system will also provide us with the ability to model our own energy performance solutions for housing that is currently done by external parties. • Tenant engagement – We recognise that delivering carbon neutral housing will be difficult without the buy-in from our tenants. As part of the of our retrofit and newbuild programme, we will be looking to build a relationship with our tenants and asking for feedback about their home at different intervals (changes in season etc). we will also use the IES systems installed in the properties to monitor the energy consumption/carbon footprint of the homes and will be proactive in contacting tenants if we feel there may be a potential problem. Our CHS+ programme was delivered in partnership with our tenants and delivering net zero carbon housing will take the same approach. • Local trades & Skills – the retrofit and new build programmes we are currently running has allowed us to identify the current gaps within our local economy. • Tree planting – To offset our carbon footprint, we are currently planting over 1000 trees in our new build developments and estates.
What do you think are the main barriers or challenges in bringing this intervention forward?
The main barriers to decarbonisation are the following: • Tenant engagement – It is crucial that in order for us to successfully deliver decarbonisation on a wider scale that we have the buy-in from our tenants. This includes allowing us access to properties in order to carry out works and tenants using the equipment effectively. • Cost to deliver retrofit and the increased cost to build homes at a higher specification that is currently required for DQR. • Limited trades capacity to deliver retrofit at scale and pace • Staffing resources within the Councils Housing department to deliver a large scale decarbonisation programme.

What benefits do you think that the intervention should generate? *(if these are indicatively quantified at this stage, please state, but otherwise please describe in general terms)*
• Stimulate the local economy by providing long term programmes that can provide work for local trades. This includes providing additional training to local people and upskilling local businesses. • Provide affordable, low carbon and healthy living environment for our tenants. • Creating jobs for local people and growing the green economy.

Funding	
Estimated total intervention cost	Circa £200m
How will this cost be met? What sources of investment are…	
Secured?	Housing Revenue Account (HRA) Capital Funding
Being considered?	Various Grants that will become available to accelerate this programme.
If you have an indicative annual funding profile, please state below, or attach as appropriate	
The funding will be identified as the programme is developed and rolled out.	

Delivery
Which organisations do you envisage will need to be involved in delivery? Is there a lead delivery organisation?
These decarbonisation plans are Carmarthenshire based and led, but other LA's in the region will also need to carry out similar upgrading programmes to their housing stock.
Beyond funding availability, what needs to happen to enable delivery? *(e.g., permissions, detailed business case development, key delivery challenges to overcome etc.)*
• Clear direction for Welsh Government on what is expected of Local Authorities. • Funding to be made available to deliver the additional work required to meet net zero carbon for housing. • Additional resources within the Council to be able to deliver and manage large scale decarbonisation of our housing stock and be able to effectively monitor homes for early intervention.
What are the indicative timescales and milestones associated with the intervention?
We aim to have a high level decarbonisation strategy produced by Autumn 2021. We also have a public consultation live on our website asking the public what they feel we need to deliver as part of our 10 year Housing and Regeneration master plan.

Contribution to Missions	
Establish South West Wales as a UK leader in renewable energy and net zero	Strong link, through the core purpose of the project in decarbonising the housing stock
Create a strong, resilient and embedded SW Wales business base	Opportunities through the supply chain and through local skills development
Grow and sustain the SW Wales experience offer	Supports the attractiveness of South West Wales as a place to live and invest, within the context of wider regeneration plans.

6. Carmarthenshire Renewable Energy Projects

Business case status	Strategic Outline Case

Contact details		
Organisation	Carmarthenshire County Council	
Key contact	Name	Stephen Morgan
	Email	SMMorgan@carmarthenshire.gov.uk
	Tel	

Strategic rationale

Please describe the proposed intervention? What is it seeking to achieve?

In February 2019, Carmarthenshire County Council declared a climate emergency, and made the commitment to become a net zero carbon local authority by 2030. Whilst the Council is committed to significantly further reduce its carbon footprint, the 'net' in net zero carbon acknowledges that the Council will have a residual carbon footprint to be compensated for, via renewable energy generation or carbon offsetting (such as tree planting).

For context, we would require ~67 MW of solar PV or ~31MW of wind power to offset our 2019/20 carbon footprint. We currently have ~1.2MW of solar PV installed.

Example of what would be required to compensate / offset the entirety of our 2019/20 carbon footprint with renewable energy:

Carbon Footprint 2019/20		- Renewable Energy Generation =			Net Zero Carbon
Non-Domestic Buildings		Wind Turbines	or	Solar PV panels	
Carbon emissions (tCO_2e)	14,443	44	or	189,398	= 0 tCO_2e
Street Lighting					
Carbon emissions (tCO_2e)	1,088	3	or	14,267	= 0 tCO_2e
Fleet Mileage					
Carbon emissions (tCO_2e)	3,814	11	or	50,015	= 0 tCO_2e
Business Mileage					
Carbon emissions (tCO_2e)	1,132	3	or	14,844	= 0 tCO_2e
TOTAL					
Carbon emissions (tCO_2e)	**20,477**	**62 ≡ 31.0 MW**	or	**268,524 ≡ 67.1 MW**	= 0 tCO_2e

Even with a reduction in our carbon footprint, we will need a significant increase in our renewable energy generation by 2030 if we are to achieve our net zero ambitions.

Parallel to this, Welsh Government has a commitment that 70% of electricity consumption in Wales should be from renewables by 2030. In 2017 electricity equivalent to 48% of Wales' consumption was generated, however, with the increase in the use of electric vehicles and the decarbonisation of heating, demand for electricity is only going to increase to 2030.

Welsh Government has set out its ambition for the public sector to be carbon neutral by 2030, and this is reflected in Carmarthenshire's commitment to also become Net Zero by 2030.

Carmarthenshire County Council has a number of sites in its ownership that have been identified to date as having potential for solar and wind developments. In total, these identified sites have the potential to deliver ~220 MW, which would more than offset our Council carbon footprint and would provide green electricity to the grid.

What work has been done already (e.g., feasibility, project development, previous project activity)? *Please include links to relevant documents as appropriate.*

In 2013, Building Research Establishment (BRE) surveyed the potential for solar PV across 27 Councils and identified 7 which were considered viable.

In 2014, Parsons Brinckerhoff were then appointed to provide specialist support in order to progress these sites. They reviewed the BRE report and submitted grid connection applications to WPD on our behalf, together with grid connection applications for solar PV on our land in Pembrey, and for a second 500 kW wind turbine at our Nantycaws waste facility.

We initially secured favourable grid connection offers for 2 sites. For Site 1, the grid connection cost was considered to be very reasonable when compared to earlier budget estimates received from WPD for this and our other locations. Accordingly, an initial payment was made to secure the grid connection offer. However, escalating budget estimates (associated with securing a connection some 18 kilometres away to the nearest sub-station) plus planning concerns resulted in us instructing WPD on 5th March 2018 to terminate the connection agreement following advice from Welsh Government Energy Service.

For Site 2, WPD agreed that they would be carrying-out all necessary grid reinforcement works at no charge to us, however we were advised this could take a number of years to complete. Parsons Brinckerhoff concluded that "whilst Site 2 is feasible financially, environmentally and technically, the programme / revenue risk from the 132kV reinforcement means we should probably leave this one be for now, and maybe have discussions again with WPD in the next year to see whether they can be more committal on the timeframes for the reinforcement works".

From 2015 onwards we have received support to develop and deliver renewable energy projects from Local Partnerships / Welsh Government Energy Service (WGES) under Welsh Government's Green Growth Wales programme. WGES have recently submitted grid connection applications to WPD on our behalf for a number of other sites, however due to reduced grid capacity in Carmarthenshire, the majority of these estimates have rendered projects to be financially unviable. This is a major concern as enhancements to the capacity of the local electricity distribution network are beyond our direct control as require a combination of major infrastructure works plus balancing local consumption, generation, and storage.
This challenge was recognised by the E&PP Scrutiny Committee and Executive Board in March 2021 with both agreeing to write a letter to Welsh Government to convey their concern regarding the limited capacity of the local electricity distribution network and to request that Welsh Government work with Local Authorities, and others, to develop a clear plan to address this issue.

What do you think are the main barriers or challenges in bringing this intervention forward?

• Grid Capacity and costs/uncertainty associated with grid reinforcements • Gaining relevant planning permissions • Financial viability of projects • Land acquisitions/negotiations
What benefits do you think that the intervention should generate? *(if these are indicatively quantified at this stage, please state, but otherwise please describe in general terms)*
• Will contribute to Carmarthenshire's Net Zero Carbon commitment and to WG's commitment to a net zero carbon sector by 2030. • Contribute to wider climate change/climate emergency • Potential to establish green supply chain and associated job creation • Potential for diversification of rural economy

Funding	
Estimated total intervention cost	Unknown but recent (2021) high-level screening of 4 sites suggests between £3m and £20m (excl grid connection) depending on size of site. Grid connection budget estimates for these sites ranged from £30.8m to £32.6m.
How will this cost be met? What sources of investment are…	
Secured?	N/A
Being considered?	To date, many of our energy programmes have been financed using interest-free funding secured from Salix / Wales Funding Programme and supplement by other financing where required. Possible pension funds.
If you have an indicative annual funding profile, please state below, or attach as appropriate	
No Indicative funding profile currently	

Delivery
Which organisations do you envisage will need to be involved in delivery? Is there a lead delivery organisation?
Carmarthenshire County Council (lead) Potentially public sector partners such as: • Hywel Dda Health Board • University of Wales Trinity Saint David • Neighbouring local authorities/Swansea Bay city region LAs • Welsh Government
Beyond funding availability, what needs to happen to enable delivery? *(e.g., permissions, detailed business case development, key delivery challenges to overcome etc.)*
• Planning permissions, • Public consultations / Stakeholder engagement

• Discussions with land holders • Utility / Environmental surveys • Staff resource • Project design feasibilities • Detailed business case development
What are the indicative timescales and milestones associated with the intervention?
• Shortlisting of CCC priority sites for development following discussions with CCC property and planning departments and WGES – next 12 months • Developing detailed business case for priority sites – 24 months • Pre-app and planning consents – 3 years • Consented projects ready for delivery – 5 years • Developed portfolio of Council renewable energy sites – by 2030

Contribution to Missions	
Establish South West Wales as a UK leader in renewable energy and net zero	Strong link through expansion of renewable energy generating capacity on Council land (also links to the strategic Nantycaws proposal, set out separately.
Create a strong, resilient and embedded SW Wales business base	Opportunities through the supply chain and through the wider development of a concentration of renewable energy business activity.
Grow and sustain the SW Wales experience offer	Contributes to the recognition of South West Wales as a location for low-carbon investment and opportunity.

7. Regional Circular Economy Hub, Nantycaws

Business case status	Strategic Outline Case

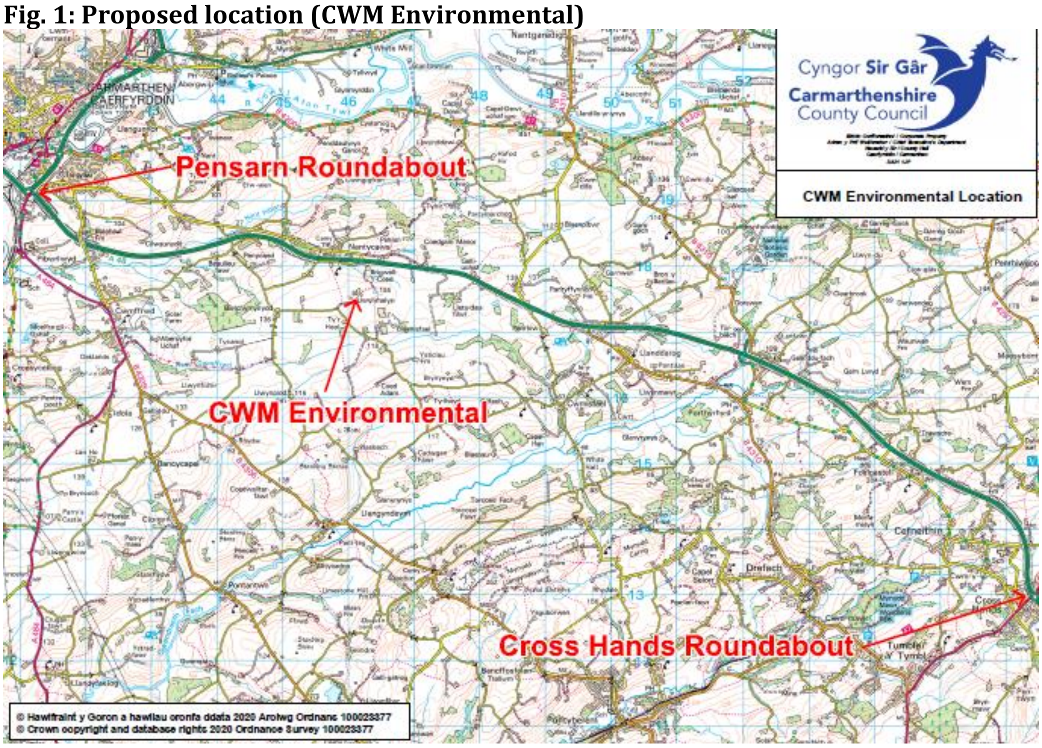
Contact details		
Organisation	Carmarthenshire County Council	
Key contact	Name	Stuart Walters
	Email	swalters@carmarthenshire.gov.uk
	Tel	07919592709

Strategic rationale

Please describe the proposed intervention? What is it seeking to achieve?

The aim is to create a **circular economy hub** to service the South West Wales region. The site is located approximately halfway between Cross Hands and Carmarthen (see plan below), with direct access to the A48 dual carriageway, and lends itself well to a strategic development opportunity.

Fig. 1: Proposed location (CWM Environmental)



Source: Carmarthenshire County Council

Figure 2 provides a schematic layout demonstrating this potential. The proposed uses identified on this plan can be summarised as:

Waste management, processing and recycling for the County and the South West Wales region, including circular economy processing and associated projects.

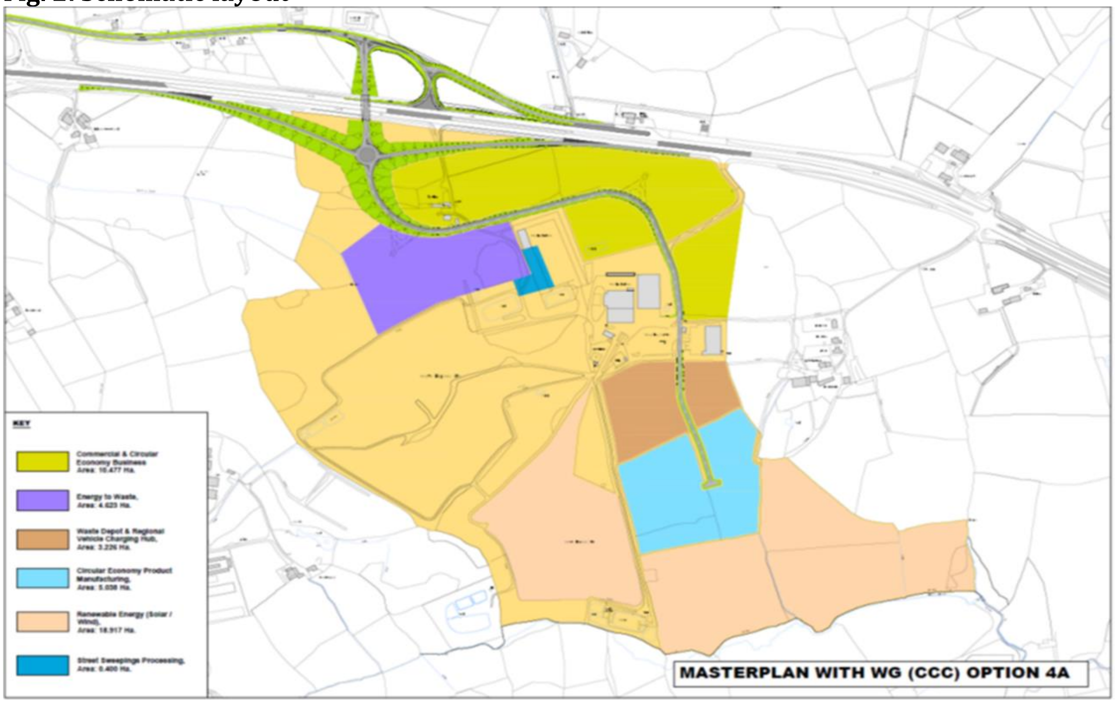
Energy production and distribution: solar, wind and waste combustion processes could be used to generate electricity. The electricity would be used to feed power to the site facilities and proposed industrial units as well as providing a source for charging electric commercial/private vehicles. Surplus energy could be supplied directly into the local grid network.

Commercial units for general industrial use: This would take the form of infrastructure enabled site for the sale of serviced industrial plots or a combination of plots and completed industrial units for sale or letting. A circular economy manufacturing base could be promoted as part of the marketing aspect.

Commercial fleet facility: Centralised depot facility for Carmarthenshire's waste operation at the facility. This aspect could be expanded to undertake fleet maintenance for the wider council fleet and potentially for other partner agencies in this respect that operate their fleets of vehicles.

ULEV Vehicle recharging/refuelling infrastructure: Regional recharging/refuelling infrastructure for the local authority fleet in addition to commercial organisations and partner agencies.

Fig. 2: Schematic layout



Source: Carmarthenshire County Council

What work has been done already (e.g., feasibility, project development, previous project activity)? *Please include links to relevant documents as appropriate.*
Carmarthenshire County Council (CCC) will be the lead authority in bringing the project forward. CCC is the single shareholder owner of three Teckal companies, one of which is **CWM Environmental Ltd (CWM)**. CWM owns the Nantycaws waste treatment facility, located near Carmarthen. The site is the centre of CWM's waste operation and serves as its head office. Initial masterplan layouts have been prepared by CWM and CCC. Discussions have also taken place with Welsh Government over the access improvements needed from the trunk road, further details are contained in the next section.

What are the main barriers or challenges in bringing this intervention forward?
One significant hurdle that we need to overcome, if this development potential is to be maximised, is the **current site access** – the site is currently served by a direct conventional junction off the A48 trunk road, having no deceleration or acceleration lanes that would be a requirement of current highway design standards. The A48 at this location is an unrestricted dual carriageway that forms the main artery for all traffic connecting with western Carmarthenshire and Pembrokeshire. As such the road serves as a major link to the commercial ports in Pembrokeshire and therefore freight transport relies heavily on the network and provides a good opportunity for a regional ULEV charging destination. There is a history of accidents along this stretch of carriageway. As a result, Welsh Government (SWTRA) has reopened a study into how these junctions can be made safer. Part of the solution may be to close off the current cross-over points and construct a strategically located junction designed to reflect current standards and traffic flows at a key location to avoid the need to make turning movements that necessitate crossing two lanes of traffic on the dual carriageway. You will note on the layout plan that we have indicated such an arrangement as an improved access to the CWM site. Atkins, SWTRA's appointed consultant, is currently considering the potential of this proposed junction. The cost of the proposed new junction arrangement is significant - £5m plus, but the economic benefits of unlocking this site are also significant. Without an improved access none of our regeneration proposals, including the significant energy from waste proposals, can be delivered.
What benefits will the intervention generate? *(if these are indicatively quantified at this stage, please state, but otherwise please describe in general terms)*
Initial estimates anticipate that the facility will provide the following benefits: • 350 construction jobs for 5 year period. • 45 jobs linked to waste to energy facility • Serviced employment industrial site to support business growth, linked to circular economy (additional jobs) • Significant private sector investment • Public sector investment • A regional circular economy hub including waste management, processing, and recycling. • A regional energy generation hub to feed power to the site facilities and proposed industrial units as well as providing a source for charging electric commercial/private vehicles. • Centralised commercial depot facility for Carmarthenshire's waste operation at the facility. This aspect could be expanded to undertake fleet maintenance for the wider council fleet and potentially for other partner agencies in this respect that operate their fleets of vehicles. • ULEV Vehicle recharging/refuelling infrastructure – regional recharging/refuelling infrastructure for the local authority fleet in addition to commercial organisations and partner agencies.

Funding		
Estimated total intervention cost	£175m	
How will this cost be met? What sources of investment are…		
Secured?	None	
Being considered?	Private Investment - £150m TBC Public Sector - £25m LA/ CWM/WG	
If you have an indicative annual funding profile, please state below, or attach as appropriate		
Indicative profile as follows: 2022/23 - £1m -Further feasibility and scheme development 2023/24 – £1m -Secure investment, Planning 2024/25 – £25m - Tender, appoint contractor, commence delivery 2025/26 onwards – £148m complete delivery of project		

Delivery
Which organisations do you envisage will need to be involved in delivery? Is there a lead delivery organisation?
As set out above, Carmarthenshire County Council will be the lead organisation, with the involvement of CWM Environmental Ltd.
Beyond funding availability, what needs to happen to enable delivery? *(e.g., permissions, detailed business case development, key delivery challenges to overcome etc.)*
Planning consent.
What are the indicative timescales and milestones associated with the intervention?
2022/23 - Further feasibility and scheme development 2023/24 – Secure investment, Planning 2024/25 – tender, appoint contractor, commence delivery 2025/26 – complete delivery of project

Contribution to Missions	
Establish South West Wales as a UK leader in renewable energy and net zero	Strong link. The project directly supports sustainable energy generation, the use of low emissions vehicles and the development of an energy cluster
Create a strong, resilient and embedded SW Wales business base	Strong link, through the development of new commercial space on site and business uses
Grow and sustain the SW Wales experience offer	No direct link.

8. Freeport of Milford Haven

Business case status	Concept/ feasibility

Contact details		
Organisation	Milford Haven Port Authority	
Key contact	Name	Steve Edwards
	Email	steven.edwards@mhpa.co.uk
	Tel	

Strategic rationale

Please describe the proposed intervention? What is it seeking to achieve?

The Freeports concept

The UK Government launched a consultation on a 'next generation' of Freeports in November 2020, followed by a Freeports Prospectus in November. In summary, the UK Government sees Freeports as delivering against three **outcomes**, via a mixture of **tax and customs incentives**, within **defined geographical zones:**

Fig. 1: Summary of criteria for Freeports (in England)

Objectives:

1. Establish Freeports as global hubs for trade and investment across the UK
2. Promote regeneration and job creation
3. Create 'hotbeds of innovation'

Incentive mix:

Customs: Duty deferral while goods remain on site and duty inversion if finished goods exiting the freeport attract a lower tariff than their component parts.

Tax: Range of measures, including Stamp Duty Land Tax relief; Enhanced Structures and Buildings Allowance; Enhanced Capital Allowances; Employers' NIC Rates Relief; Business Rates Relief

Planning: Simplified planning and use of Local Development Orders

Spatial boundaries:

Outer boundary of 45km diameter, containing all proposed customs sites and tax sites.

Must include at least one port and at least one customs site

Either single tax site (up to 600ha, or up to 3 tax sites of 20-200ha each)

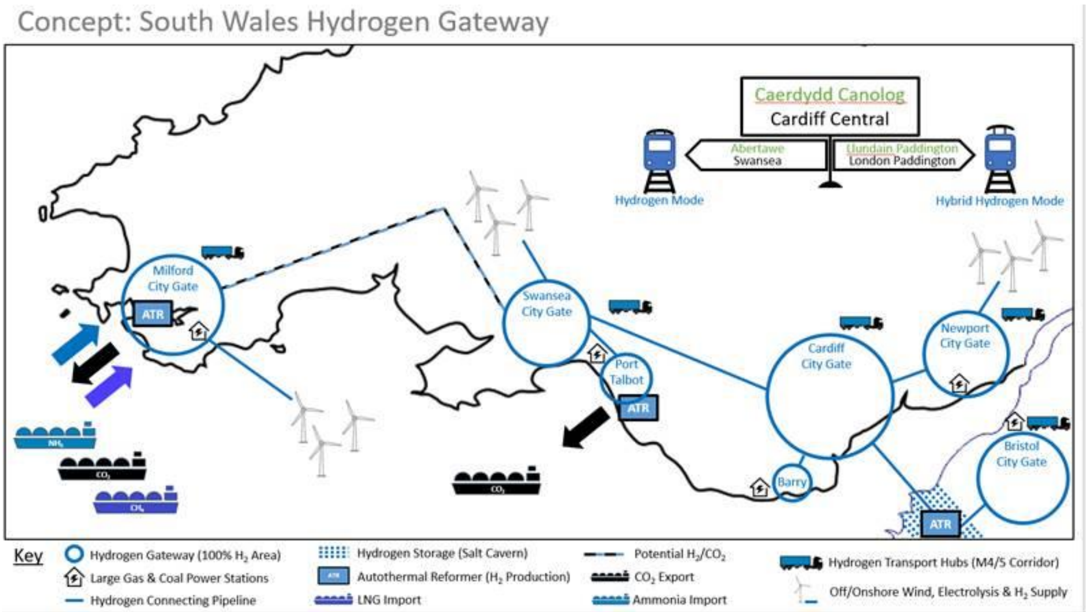
Source: SQW

The Freeports Prospectus only applied to England, and some of the incentives are specific to the English tax regime (such as Stamp Duty Land Tax). However, the Prospectus provides a guide to the objectives and scope that the UK Government expects to see. Following a competitive process, eight Freeports were designated in England in 2021.

The UK Government has said that there will be at least one Freeport in Wales. Potentially, there could be interest from more than one location in South West Wales (see the accompanying project entry for Port Talbot), although it should be noted that some of the approved English Freeports have quite complex geographies.

Opportunities associated with a potential Freeport at Milford Haven
Potentially, Freeport designation could align closely with the Mission set out in the REDP to make South West Wales a "UK leader in renewable energy and the net zero economy". Specifically:

- Freeport designation could support the development of an import/ export industry for CO2, hydrogen and ammonia, linked with a wider strategy for the production, storage and use of hydrogen across South Wales. This could form a key component of wider regional decarbonisation strategy set out elsewhere in this document, and supports the emerging 'South Wales Hydrogen Gateway' concept:



Source: SWIC, MH:EK

- More broadly, for Milford Haven (and the wider Haven Waterway), Freeport designation could support the further development of the renewable energy sector by incentivising manufacturing and other onshore value added activity, It would also build on and develop further the existing Enterprise Zone.

What work has been done already (e.g., feasibility, project development, previous project activity)? *Please include links to relevant documents as appropriate.*

Consideration has been given to an initial application, based on a review of the approach taken to date in England and the potential benefits for Pembrokeshire.

What do you think are the main barriers or challenges in bringing this intervention forward?

There is currently no open competition. The case for a Freeport will depend on the criteria published by Government and the nature of the competitive process.

What benefits do you think that the intervention should generate? *(if these are indicatively quantified at this stage, please state, but otherwise please describe in general terms)*
• Additional manufacturing and R&D activity (leading to higher-value job creation and GVA) • Increased investment in port-related infrastructure, supporting long-term sustainability beyond the duration of financial incentives • Increased competitiveness for the South West Wales renewable energy offer

Funding	
Estimated total intervention cost	£50m
How will this cost be met? What sources of investment are…	
Secured?	None
Being considered?	£50m. Were Freeport designation to be granted, some costs will be directly sequential to the Freeport status (for example, in relation to enhanced capital allowances and business rate discounts). The requirement for capital investment is to be determined.
If you have an indicative annual funding profile, please state below, or attach as appropriate	
Not yet prepared.	

Delivery
Which organisations do you envisage will need to be involved in delivery? Is there a lead delivery organisation?
Port of Milford Haven (likely to be the promoting body), Pembrokeshire County Council, Welsh Government. Many English Freeports also have a 'regional' dimension, and this may be an important part of any proposal.
Beyond funding availability, what needs to happen to enable delivery? *(e.g., permissions, detailed business case development, key delivery challenges to overcome etc.)*
Development of a detailed proposal, linked with the Government's criteria and bidding process.
What are the indicative timescales and milestones associated with the intervention?
Unclear at this stage, although we assume an application process starting in 2021/22.

Contribution to Missions

Establish South West Wales as a UK leader in renewable energy and net zero	Strong link given role of Freeport designation in supporting the development of the offshore renewables industry.
Create a strong, resilient and embedded SW Wales business base	Strong link, since Freeport designation should be an important part of the mix in marketing SW Wales to investors
Grow and sustain the SW Wales experience offer	Limited relevance, although designation would highlight (and help develop) investment opportunities in the area.

9. Milford Haven Energy Kingdom (MH:EK)

Business case status	Full Business Case (for 'detailed design' project, informing future business case development)

Contact details		
Organisation	Pembrokeshire County Council	
Key contact	Name	Steve Keating
	Email	Steve.keating@pembrokeshire.gov.uk
	Tel	

Strategic rationale
Please describe the proposed intervention? What is it seeking to achieve?

Overview

Milford Haven Energy Kingdom (MH:EK) is a 'detailed design' project within the Prospering from the Energy Revolution programme funded by Innovate UK as part of its Industrial Strategy Challenge Fund.

Worth £4.5 million over two years and completing in 2022, MH:EK explores what a decarbonised hydrogen and renewable energy based Smart Local Energy System could look like for the Milford Haven Waterway. The ambition is to gather detailed insight into the whole energy system around the Waterway, and to identify and design a future Smart Local Energy System. This will involve exploration of how to make using and distributing hydrogen financially viable within the different energy sectors of buildings, industry, power and transport all backed by comprehensive energy systems architecture.

The team will investigate the potential of local renewable energy, including solar, onshore wind, future offshore wind and biomass for decarbonised gas transition. The project also involves consumer trials of hydrogen fuel cell electric vehicles and hydrogen-ready hybrid heating systems.

Key outputs

The MH:EK project aims to deliver:

- A design for a **flexibility trading platform**: a design for the underlying system architecture for the trading platform integrating national to local networks, including a detailed whole energy system.
- **Infrastructure outline drawings, generation model and hydrogen production model** incorporating major energy infrastructure in the project area, including existing and planned solar, wind and offshore renewables, and major natural gas infrastructure, and current and potential hydrogen infrastructure.
- **Detailed designs and local pilot study for hydrogen-ready hybrid heating applications** that are appropriate for residential and commercial heating applications and provide valuable demand-side flexibility for optimising with today's and tomorrow's energy system.
- **Outline drawings of transport solutions**, to include hydrogen fuel cell vehicles for public transport, public and private fleets, including Port vehicles.
- **Budget for the complete local energy system**, sizing calculations and schedule

The detailed design project includes a **Hydrogen Fuel Cell Electric Vehicle (HFCEV)** trial to demonstrate the viability of hydrogen refuelling at local scale, demonstrate demand and engage with the community. It also involves the installation of a hydrogen-ready hybrid heating system in an operational building belonging to Port of Milford Haven, trialling the use of hydrogen as a clean heating fuel. **Beyond the detailed design project** MH:EK is fully funded and the detailed design project is already underway. However, the project will lead to the development of a series of **investable propositions** later in 2021, to be taken forward beyond the lifetime of the project itself.
What work has been done already (e.g., feasibility, project development, previous project activity)? *Please include links to relevant documents as appropriate.*
MH:EK builds on a previous Welsh Government-funded project to explore the development of a Zero Carbon Area in Milford Haven Waterfront. As set out above the current project is fully funded and approved.
What do you think are the main barriers or challenges in bringing this intervention forward?
There are no barriers to the current project, although the project itself seeks to overcome some of the barriers to the development and adoption of hydrogen technologies, in particular the absence of demonstrated demand in a community setting, public awareness and the development of practical solutions that can engage investor confidence. Maintaining momentum beyond the conclusion of the detailed design project will be key.
What benefits do you think that the intervention should generate? *(if these are indicatively quantified at this stage, please state, but otherwise please describe in general terms)*
• Identification of investment opportunities, including renewable energy/ green hydrogen opportunities around Haven Waterway, including at Haverfordwest Airport, Pembrokeshire Food Park, Milford Haven Waterfront and in Pembroke/ Pembroke Dock. • Greater public and investor awareness of the potential of hydrogen technology • Stronger business case for future Government investment and informing public policy • Opportunities to safeguard energy sector jobs in an area with a high dependency on the gas sector • Development of projects capable of securing investment

Funding	
Estimated total intervention cost	£4.5 M
How will this cost be met? What sources of investment are…	
Secured?	£4.5M

Being considered?	The detailed design project is fully funded. Future funding will depend on specific proposals and will likely require a combination of public and private investment.
If you have an indicative annual funding profile, please state below, or attach as appropriate	
To be determined subject to future phases.	

Delivery
Which organisations do you envisage will need to be involved in delivery? Is there a lead delivery organisation?

Detailed design project

Partners are Pembrokeshire County Council (Project Lead); Offshore Renewable Energy (ORE) Catapult (Project Manager); Arup; Energy Systems Catapult; Port of Milford Haven; Riversimple; Wales & West Utilities; and the Welsh Government.

Partner roles in relation to each project workstream are set out below:

WP number	WP	Leading organisation
1	System architecture development	CATAPULT
2	Flexibility trading platform development	ARUP
3	Major energy facilities design development	ARUP, CATAPULT
4	Households and building loads design development	ARUP, CATAPULT
5	Hydrogen vehicle demo and design	riversimple
6	Hydrogen-ready residential equipment demo	
7	Commercial models	ARUP
8	Design integration	ARUP
9	Finance and Investment	
10	Stakeholder engagement	CATAPULT
11	Project management	CATAPULT

Future work

This is to be determined, based on emerging propositions.

Beyond funding availability, what needs to happen to enable delivery? *(e.g., permissions, detailed business case development, key delivery challenges to overcome etc.)*
Future work is sequential to the current detailed design. More broadly, from a regional perspective (especially in relation to the aim of securing an 'embedded' business base), consideration should be given to capturing longer term local benefit, linked with the local skills offer and potentially the local investor base.
What are the indicative timescales and milestones associated with the intervention?
Project completion in 2022, with future development sequential. Future timescales to be determined.

Contribution to Missions	
Establish South West Wales as a UK leader in renewable energy and net zero	Key contribution to the development of the region's renewable energy potential. The project also helps to put the region on the 'front foot' in demonstrating the viability of new technology, and in translating this into investment propositions.
Create a strong, resilient and embedded SW Wales business base	Increases the attractiveness of the region as an investment location.
Grow and sustain the SW Wales experience offer	Contributes to positive perceptions of the region as a place to live, visit and invest.

10. Pembroke Dock Marine

Business case status	Full Business Case

Contact details		
Organisation	Pembrokeshire County Council; Milford Haven Port Authority; Marine Energy Wales; Offshore Renewable Energy (ORE) Catapult; WaveHub Ltd.	
Key contact	Name	Rachel Moxey
	Email	rachel.moxey@pembrokeshire.gov.uk
	Tel	07557 191254

Strategic rationale

Please describe the proposed intervention? What is it seeking to achieve?

Overview

Pembroke Dock Marine seeks to develop a 'world class' centre for marine energy development, by delivering the facilities, services and spaces needed to support marine engineering. The immediate focus is on low carbon energy, with wider application across the 'blue' economic sectors (e.g., shipbuilding, aquaculture, oil and gas and nuclear), increasing resilience and supporting economic growth.

The proposition is that the Pembrokeshire coast offers an ideal base for marine energy developers, given the combination of natural assets (strong tidal currents and wave resources), as well as its existing port facilities, relevant and experienced supply chain (linked with the area's extensive experience in the oil and gas sector) and grid connections. There is an opportunity to build on these to create a concentration of facilities to support growth in low carbon energy and ensure that South West Wales is at the forefront of the UK's decarbonisation agenda.

Project components

The project is led by the private sector and supported by Pembrokeshire County Council. It consists of four elements:

- **META (Marine Energy Test Area)**
  META offers eight pre-consented quayside and deep water sites suitable for testing devices, sub-assemblies and components, with the aim of reducing the time, costs and risks faced by marine energy developers, helping to accelerate growth in the sector. The META sites are accessible, although representative of 'real sea' environments, and are seen as suitable for early stage developers.
  The project is managed by Marine Energy Wales and administered by Pembrokeshire Coastal Forum.

- **Marine Energy Engineering Centre of Excellence (MEECE)**
  The MEECE collaboration seeks to support firms in West Wales and the Valleys to develop new products, processes and services for the offshore renewables sector, supporting SMEs in moving technologies and concepts towards commercialisation. Delivered as a collaboration

between the Offshore Renewable Energy Catapult and Welsh universities, MEECE delivers desk-based research projects to establish feasibility and impact; design and construction of prototypes and scale models; and testing and demonstration of prototypes, products and subassemblies at the META test centres and at other testing facilities elsewhere in the UK. • **Pembroke Port Developments** Pembroke Port is a cargo port at Pembroke Dock, owned and operated by the Port of Milford Haven. As part of the Pembroke Dock Marine project, a range of spaces will be developed at the Port to enable industry to fabricate, launch and maintain devices. • **Pembrokeshire Demonstration Zone** The Pembrokeshire Demonstration Zone (PDZ) is an area of 90,000 sq m of sea off the south coast of Pembrokeshire, leased from the Crown Estate. The PDZ benefits from water depths of 50-62 metres, a 10 m/s wind resource and excellent potential to connect to the electricity grid. It offers the potential to deploy current and future energy generating technologies, linked with the other Pembroke Dock Marine projects. **Project status** The Pembroke Dock Marine programme is fully funded by Swansea Bay City Deal, European funding and private sources – so the existing programme is assured and delivery is underway. However, the programme is focused on a range of technologies which remain (in some cases) novel, and where there is a continued need for investment to bring emerging concepts to commercialisation. Beyond the current funding period (and linked with the capacity-building project identified elsewhere in the South West Wales REDP projects pipeline), there will be a need to consider future investment, building on the outcomes of the initial Pembroke Dock Marine programme and associated renewable energy projects and opportunities.
What work has been done already (e.g., feasibility, project development, previous project activity)? *Please include links to relevant documents as appropriate.*
• The current programme is approved and projects are in delivery • Legal agreements have been signed between partners • Planning application for Pembroke Port developments approved by PCC, and is currently referred to Welsh Government
What do you think are the main barriers or challenges in bringing this intervention forward?
There are no barriers to delivery, although challenges in the current programme include: • Planning • Licensing • Crown estate • Construction (demand in the sector and pricing)
What benefits do you think that the intervention should generate? *(if these are indicatively quantified at this stage, please state, but otherwise please describe in general terms)*

- Significant capital investment (direct from the project, and sequential private sector investment)
- Renewable energy generation, contributing to the UK's decarbonisation targets
- Energy security (both from a national UK perspective, and in terms of access to cheap and reliable energy supplies for industry)
- Development of new products, processes and services linked with the growth of the offshore market, with the aim of supporting Wales-based SMEs and attracting further commercial investment
- Securing the region as major renewable energy producer and a location for direct economic activity (e.g., O&M) and the development and production of added-value goods and services to support the market
- Higher Education partnership, delivery and engagement locally.

Funding	
Estimated total intervention cost	£160m
How will this cost be met? What sources of investment are…	
Secured?	Current sources of investment are: • City Deal • WEFO • Private sector See profile at end of project entry
Being considered?	Future sources of funding beyond the current programme are to be determined, although will be linked with the development of the wider regional strategy for low carbon energy and decarbonisation.
If you have an indicative annual funding profile, please state below, or attach as appropriate	
See end of document	

Delivery
Which organisations do you envisage will need to be involved in delivery? Is there a lead delivery organisation?
Currently: Pembrokeshire County Council; Milford Haven Port Authority; Offshore Renewable Energy Catapult; Marine Energy Wales; WaveHub Ltd; Swansea Bay City Deal. Future partners to be determined.
Beyond funding availability, what needs to happen to enable delivery? *(e.g., permissions, detailed business case development, key delivery challenges to overcome etc.)*
Planning and other permissions; for future investments beyond the current programme, development of business cases sequential to the outcomes of the current stage.
What are the indicative timescales and milestones associated with the intervention?

Completion of the current programme by 2023/24. A financial profile is set out below.

PDI / META / MEECE / PDZ TOTALS								
Costs	**2017/18**	**2018/19**	**2019/20**	**2020/21**	**2021/22**	**2022/23**	**2023/24**	**Totals**
Capital	£39,823	£726,198	£3,284,779	£5,194,689	£9,354,858	£17,146,629	£7,935,469	£43,682,444
Revenue	£556,460	£702,076	£2,264,146	£5,464,607	£4,114,552	£2,643,790	£1,042,832	£16,788,462
Total	**£596,283**	**£1,428,274**	**£5,548,924**	**£10,659,296**	**£13,469,409**	**£19,790,419**	**£8,978,300**	**£60,470,906**
Funded by:								
Catapult	£0	£23,691	£22,184	£394,587	£392,333	£167,114	£43,035	£1,042,944
CCF	£75,000	£150,000	£75,000	£0	£0	£0	£0	£300,000
City Deal	£0	£0	£2,157,877	£3,585,934	£5,374,082	£9,778,341	£7,103,766	£28,000,000
PoMH	£0	£632,346	£410,000	£1,536,000	£3,177,090	£6,160,110	£1,130,572	£13,046,118
Private Sector	£0	£0	£0	£0	£0	£0	£400,000	£400,000
WEFO	£418,178	£453,623	£2,543,609	£4,799,938	£4,331,027	£3,539,177	£265,901	£16,351,453
Other (Inc WHL)	£103,105	£168,614	£340,254	£342,837	£194,877	£145,677	£35,026	£1,330,391
Total	£596,283	£1,428,274	£5,548,924	£10,659,296	£13,469,409	£19,790,419	£8,978,300	£60,470,906

Contribution to Missions	
Establish South West Wales as a UK leader in renewable energy and net zero	Direct and substantial contribution to the region's renewable energy potential, through the provision of sites and premises, offshore demonstrator areas and measures to support innovation and commercialisation.
Create a strong, resilient and embedded SW Wales business base	Contributes to the development of innovation capacity within the local SME base and will support in attracting further investment.
Grow and sustain the SW Wales experience offer	Contributes to positive perceptions of the region as a place to live, visit and invest, and as a leading UK location for the development of a low carbon economy.

11. STEP (Spherical Tokomak for Energy Production)

Business case status	Concept/ feasibility

Contact details		
Organisation	UKAEA/Pembrokeshire County Council	
Key contact	Name	Rachel Moxey
	Email	Rache.moxey@pembrokeshire.gov.uk
	Tel	07557 191254

Strategic rationale
Please describe the proposed intervention? What is it seeking to achieve?

The prototype proposition

The UK Atomic Energy Authority (UKAEA) has launched a programme to design and construct a prototype fusion energy plant (referred to as STEP – a Speherical Tokomak for Energy Production). The first phase of the work is to produce a 'concept design' by 2024 (i.e., an outline of the power plant and how it will work). The second phase involves detailed engineering design and permissions for the plant; with the third phase envisaging construction of the prototype plant by 2040.

The proposition builds on fusion research and development over many years, leading the UKAEA to conclude that *"there is increasing confidence that a clear path to commercial development can be planned"*, with the prospect of low-carbon energy generation without the risks associated with 'traditional' nuclear power plants. The prototype plant is expected to have many of the features normally associated with an operational power plant, and is likely to be similar in scale and value to a conventional power station. The prototype plant would be connected to the national grid and producing net energy, although it is not expected to be a commercially operating plant at this stage.

Opportunities in Pembrokeshire

The UKAEA has requested expressions of interest from communities to host the STEP prototype, with a focus on those locations that can offer practical benefits (e.g., good grid connections and flexibility to accommodate facilities at scale), as well as a vision for how the project can align with wider strategy and deliver economic and social gain.

In May, Pembrokeshire County Council endorsed a proposal to nominate a site on the south side of the Haven Waterway for the STEP prototype. This seeks to build on the area's existing capabilities in the energy sector and the wider existing and emerging low carbon energy offer.

What work has been done already (e.g., feasibility, project development, previous project activity)? *Please include links to relevant documents as appropriate.*

The Pembrokeshire site has been nominated, with the proposal submitted to the UKAEA. It has now been placed on the long list for the next stage in the submission process.

What do you think are the main barriers or challenges in bringing this intervention forward?
At this stage, the main barrier is competition from other bidders in the UK: the project is dependent on the decision of the UKAEA to proceed.
What benefits do you think that the intervention should generate? *(if these are indicatively quantified at this stage, please state, but otherwise please describe in general terms)*
In addition to the national benefits of demonstrating the use of low carbon energy-generating technology (with the associated environmental benefits and contribution to the UK's net zero targets), benefits specifically to South West Wales include: • Securing the region's status as a major energy producer, with opportunities associated with the growth of the skills base and supply chain across the area's range of energy opportunities • Direct and supply chain jobs • Opportunities to secure investment in R&D linked with the project (and the expansion of the energy cluster more broadly) • Significant immediate regional investment (£220 M) • £2B investment over the development period

Funding	
Estimated total intervention cost	£220M, for Phase 1 to 2024
How will this cost be met? What sources of investment are…	
Secured?	£220M (for successful bidder), via the UKAEA
Being considered?	-
If you have an indicative annual funding profile, please state below, or attach as appropriate	
To be determined.	

Delivery
Which organisations do you envisage will need to be involved in delivery? Is there a lead delivery organisation?
• UKAEA as lead • Pembrokeshire CC • Welsh Government • Haven Waterway Enterprise Zone • Cambridge University • Swansea University

• Pembrokeshire College
Beyond funding availability, what needs to happen to enable delivery? *(e.g., permissions, detailed business case development, key delivery challenges to overcome etc.)*
• Planning permission • NRW licensing and permissions • Detailed business case development (UKAEA will lead with successful bidder)
What are the indicative timescales and milestones associated with the intervention?
• Further shortlisting Autumn 2021 • SOS announcement on successful bidder Autumn 2022 • Concept design 2024 • 20 year development programme, leading to the completion of the prototype power station by 2040.

Contribution to Missions	
Establish South West Wales as a UK leader in renewable energy and net zero	Direct and substantial contribution to the region's low carbon energy potential, adding value and diversity to the existing and emerging energy generation mix
Create a strong, resilient and embedded SW Wales business base	Potentially contributes to the development of innovation capacity within the local SME base and will support in attracting further investment (although this will depend on alignment with a wider range of support actions)
Grow and sustain the SW Wales experience offer	Contributes to positive perceptions of the region as a place to live, visit and invest, and as a leading UK location for the development of a low carbon economy.

12. Global Centre of Rail Excellence

Business case status	Outline Business Case

Contact details		
Organisation	Welsh Government/ Neath Port Talbot CBC	
Key contact	Name	Simon Brennan
	Email	s.brennan@npt.gov.uk
	Tel	

Strategic rationale

Please describe the proposed intervention? What is it seeking to achieve?

The **Global Centre of Rail Excellence** will be a **testing centre for rail infrastructure and rolling stock**, located on a 1,000 ha site which incorporates the Onllwyn coal washery site (in Neath Port Talbot) and the adjacent Nant Helen opencast coal mine (just inside Powys).

The project will include electrified testing tracks, overhead line equipment and station infrastructure and space for R&D, education and training., It will also offer capacity for testing new rail technologies, such as hydrogen powered rolling stock, as these are developed. It will have capacity to operate 24 hours a day, with the ability to test high-speed trains at up to 110mph.

It is anticipated that the project will be delivered in three phases (although this may vary depending on market demand):

- Phase 1: Infrastructure testing (operational 2023)
- Phase 2: Rolling stock testing (operational 2024)
- Phase 3: R&D/education facility, stationary testing facility and associated laboratories and rolling stock maintenance/decommissioning facility (operational 2025)

The rationale for the project is:

- **There is currently a shortage of rail testing capacity.** The UK's main testing facility (in Leicestershire) is oversubscribed, resulting in a need for many UK manufactured trains having to go to Europe for testing (although there is also limited capacity in the EU), and in some cases, the US. The UK Rail Sector Deal (2018) recognised this and committed to joint work between Government and the industry to support further capacity. Discussions on the need for a new facility also took place between the Welsh Government and the rail industry as part of the negotiation of the new TfW franchise.
- **There are few sites with scope to accommodate a facility of this scale** – essentially a flat, 1,000 hectare site with the ability to operate continuously.
- **The Nant Helen/ Onllwyn site is well served by infrastructure**, with a direct freight line connecting to the South Wales Main Line, and access to the Heads of the Valleys Road.

The project is expected to generate long-term, skilled employment (see benefits below), as well as attracting R&D-intensive activity to the region in a nationally-significant facility.

What work has been done already (e.g., feasibility, project development, previous project activity)? *Please include links to relevant documents as appropriate.*
• The Welsh Government has carried out 'soft market testing' with industry stakeholders: "This demonstrates that there is a strong strategic case for a new rail test centre that combines infrastructure and rolling stock testing with facilities for storage and maintenance of stock, together with training and research and development facilities." • This has supported the development of an **Outline Business Case**, which was submitted to the UK Government, and which subsequently resulted in securing £50 million in the March 2021 budget. • The Welsh Government has entered into a Joint Venture Agreement with Powys County Council and Neath Port Talbot CBC to develop a masterplan for the site. • Planning consent was granted to Celtic Energy (the owners of the site) for earthworks in summer 2020, and an outline application for the track and infrastructure has been submitted to the two planning authorities. See Consultation Document and summary description.
What are the main barriers or challenges in bringing this intervention forward?
• Commercial interest, although the promoters are confident of this, based on earlier market testing and the Outline Business Case. • Planning consent (expected later in 2021)
What benefits do you think that the intervention should generate? *(if these are indicatively quantified at this stage, please state, but otherwise please describe in general terms)*
• Additional UK rail testing capacity, providing benefits to the rail infrastructure and manufacturing sector. • Creation of a rail technology hub in Wales, supporting long-term investment in R&D and higher-value employment and the development of training facilities • Around 180 jobs once fully operational (assuming all elements come forward), in addition to project-based jobs temporarily located on site; plus around 240 construction job years. • Additional £90 million annual GVA to the Welsh economy.

Funding	
Estimated total intervention cost	£150 million (based on an estimated cost of £50 million for each phase)
How will this cost be met? What sources of investment are	
Secured?	• Welsh Government: £30 million • UK Government: £50 million
Being considered?	• Commercial investment
If you have an indicative annual funding profile, please state below, or attach as appropriate	
[To be added]	

Delivery
Which organisations do you envisage will need to be involved in delivery? Is there a lead delivery organisation?
Welsh Government, Powys County Council, Neath Port Talbot CBC and Celtic Energy (the owners of the site, plus private sector investors. It is anticipated that a company will be established to take the project forward.
Beyond funding availability, what needs to happen to enable delivery? *(e.g., permissions, detailed business case development, key delivery challenges to overcome etc.)*
• FBC and determination of phasing, subject to market demand • Full planning consent • Development of plans to capture wider benefits. This may include supply chain development and actions to create a local skills base (discussions have taken place between Welsh Government, Neath Port Talbot College Group and Coleg y Cymoedd).
What are the indicative timescales and milestones associated with the intervention?
• Public consultation: summer 2019 and autumn 2020 • Planning application submission: spring 2021 • Planning approval: summer 2021 • Site preparation / construction: 2021 to 2023 • Accreditation / validation: 2021 to 2023 • Phase 1 operational: 2023 • Fully operational: 2025

Links to Missions	
Establish South West Wales as a UK leader in renewable energy and net zero	Strong link through replacement of existing coal site with sustainable activity; investment in sustainable transport infrastructure; reduction in transport costs for industrial testing; creation of high-value engineering jobs.
Create a strong, resilient and embedded SW Wales business base	Strong link through opportunities for supply chain and skills development.
Grow and sustain the SW Wales experience offer	No direct link

13. Swansea Bay and South West Wales Metro

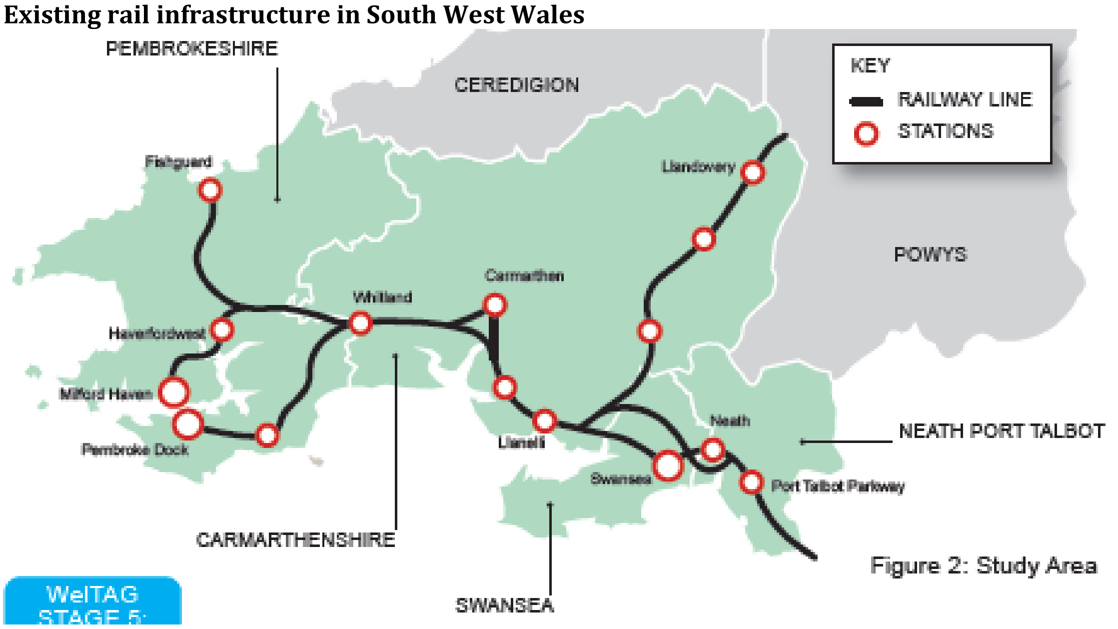
Contact details		
Organisation	Welsh Government/ Transport for Wales	
Key contact	Name	
	Email	
	Tel	

Strategic rationale

Please describe the proposed intervention? What is it seeking to achieve?

To meet its objectives of achieving a more sustainable transport system, the Welsh Government's transport strategy, *Llwybr Newydd*, seeks to deliver *"public transport Metro systems in all parts of Wales"*. The aim of the Metro approach is to provide an integrated public transport network using a variety of modes, including heavy rail, tram-train, light rail and bus, all of which will be connected by cycling and walking routes.

Existing rail infrastructure in South West Wales



Source: Welsh Government

In South West Wales, the **Swansea Bay and West Wales Metro programme** seeks to achieve a series of improvements to long-distance services and infrastructure on the South Wales Main Line and improvements to the local network. Improvements that the programme is working towards were set out in a consultation earlier in 2021, and are summarised in the table below:

Proposed Metro improvements

South Wales Main Line	Swansea Bay & West Wales Metro Network
• Reduce rail times between SWW and London (30 mins Swansea-Cardiff; 90 mins Cardiff-London)	• Reduce journey times between key population centres

• Increase service frequencies between SWW and Cardiff and London • Increase capacity and improve network resilience • Enhance rail connectivity to Enterprise Zones and international gateways • Improve P&R provision for accessing the SWML and reduce reliance on the M4 • Improve integration between mainline rail and the wider transport network • Maximise potential for stations to accelerate urban regeneration and major site delivery • Increase trips made by public transport (esp. commuter trips) • Reduce environmental impact of transport • Improve rail network efficiency	• Increase service frequencies for local stations on the SWML between Carmarthen and Port Talbot; on the Heart of Wales Line; and across SWW • Improve regional transport accessibility • Improve P&R provision for access to Swansea Bay region • Provide a viable public transport alternative to the M4/A48 corridor • Contribute to developing a Swansea Bay Urban Metro • Increase trips made by public transport (esp. commuter trips) • Reduce environmental impact of transport • Improve rail network efficiency

What work has been done already (e.g., feasibility, project development, previous project activity)? *Please include links to relevant documents as appropriate.*

Some improvements to the existing network are already committed by Transport for Wales. These include new trains and an additional daily service on the Heart of Wales Line. Funding for a new station at St Clears has also been secured from the Department for Transport New Stations Fund.

Currently, the Swansea Bay and South West Wales Metro programme is at WelTAG Stage 1 (i.e. the development of the Outline Case)[6]. A series of infrastructure and service options has been drawn up and was published in a consultation document earlier in 2021. Consultation closed on 8 June, and responses are currently being reviewed.

What do you think are the main barriers or challenges in bringing this intervention forward?

- These will be determined through the business case development process and the investigation of detailed options. But generically, funding availability and phasing and the availability of sufficient resources to enable supporting infrastructure (e.g. active travel infrastructure) to come forward to enable the full benefits of the Metro to be captured.

What benefits do you think that the intervention should generate? *(if these are indicatively quantified at this stage, please state, but otherwise please describe in general terms)*

- Modal shift and increased use of sustainable travel options
- Environmental improvements (inc. improved air quality, reduced emissions, reduced congestion)
- Improved access to work, study and leisure and greater community integration
- Improved network resilience
- New economic opportunities (e.g., key sites) unlocked

[6] Welsh Government, Swansea Bay and South West Wales Metro Consultation

• Better strategic connectivity beyond the region (Cardiff and London and via Heart of Wales Line).

Funding	
Estimated total intervention cost	To be determined, depending on review of options
How will this cost be met? What sources of investment are	
Secured?	
Being considered?	
If you have an indicative annual funding profile, please state below, or attach as appropriate	
To be determined, depending on review of options	

Delivery
Which organisations do you envisage will need to be involved in delivery? Is there a lead delivery organisation?
• Transport for Wales/ Welsh Government • Network Rail • Transport providers • Local authorities
Beyond funding availability, what needs to happen to enable delivery? *(e.g., permissions, detailed business case development, key delivery challenges to overcome etc.)*
• Business case development through the WelTAG process
What are the indicative timescales and milestones associated with the intervention?
• New trains introduced in 2022 • Improved service on Heart of Wales Line to Manchester from 2024 • Further timescales for new services to be set out as business case proceeds.

Links to Missions	
Establish South West Wales as a UK leader in renewable energy and net zero	Direct contribution. *Llwybr Newydd* and the Metro programmes specially seek to decarbonise the transport system and to support Wales' transition to net zero.
Create a strong, resilient and embedded SW Wales business base	Direct link through improved and more resilient connectivity and through the opening up of additional sites and employment locations
Grow and sustain the SW Wales experience offer	Direct contribution by improving access to SW Wales' offer (and reducing the road congestion associated with peak visitor traffic), delivering environmental improvements and improving perceptions of accessibility and sustainability.

14. Pembrokeshire Public Transport Interchanges

Business case status	Outline Business Case

Contact details		
Organisation	Pembrokeshire County Council	
Key contact	Name	Darren Thomas
	Email	Darren.Thomas@pembrokeshire.gov.uk
	Tel	01437 775892

Strategic rationale

Please describe the proposed intervention? What is it seeking to achieve?

The Public Transport Interchanges project forms part of the South West Wales Metro concept and will provide modern and innovative transport hubs, integrating all transport modes, serving the towns of Haverfordwest, Milford Haven and Pembroke Dock, the surrounding communities and the western part of the South West region..

The new transport interchange at **Haverfordwest** will incorporate:

- A new bus station
- A new multi-storey car park
- Access improvements and extension to the rail station car park
- Active travel hub and route improvements

The new transport interchange at **Milford Haven** will incorporate:

- A new rail station
- A new bus focal point
- A new rail station car park
- Active travel connectivity improvements

The new transport interchange at **Pembroke Dock** will incorporate:

- A new highway link between the bus focal point and nearby retail park
- Bus focal point and car park improvements
- Active travel connectivity improvements

These will complement wider investment in the county's transport infrastructure, including facilities to support the visitor economy (such as seasonal park and ride).

Investment in new transport interchanges could also accommodate renewable energy generation and infrastructure (e.g., solar photovoltaic canopies, electric vehicle charging, battery storage, etc.).

What work has been done already (e.g., feasibility, project development, previous project activity)? *Please include links to relevant documents as appropriate.*

The Public Transport Interchanges project has been developed up to and including WelTAG Stage 2 (Welsh Transport Appraisal Guidance, Outline Business Case).

WG Transport Grant funding has been secured for 2021-22 to complete WelTAG Stage 3 (Full Business Case including detailed design).
What do you think are the main barriers or challenges in bringing this intervention forward?
The WG Transport Grant scheme is a competitive process where funding has to be applied for on an annual basis. Even though funding has been secured for 2021-22 to fund WelTAG Stage 3, further funding will have to be secured in future years to ensure the project can be delivered.
What benefits do you think that the intervention should generate? *(if these are indicatively quantified at this stage, please state, but otherwise please describe in general terms)*
• To increase modal shift onto more sustainable forms of transport and reduce reliance on the motor car. • To improve public transport journey time reliability and a reduction in journey times. • To increase the ease of transfer onto more sustainable transport modes at Haverfordwest, Milford Haven and Pembroke Dock transport interchanges. • To improve the travel experience of public transport passengers on local and cross boundary bus and train services. • To improve the long-term viability of public transport in the area by encouraging more people to choose sustainable transport options. • To support town centre regeneration in terms of the Haverfordwest Riverside Quay Development Project and the Milford Waterfront Strategic Masterplan.

Funding	
Estimated total intervention cost	£16 million
How will this cost be met? What sources of investment are…	
Secured?	£2.32 million of WG Transport Grant for 2021-22 plus £258k match funding
Being considered?	• WG Transport Grant for future years • UK LUF for future years
If you have an indicative annual funding profile, please state below, or attach as appropriate	
• 2022-23 £8.50 million • 2023-24 £5.50 million	

Delivery
Which organisations do you envisage will need to be involved in delivery? Is there a lead delivery organisation?
PCC is the lead delivery organisation, working in partnership with TfW, Network Rail and WG.

Beyond funding availability, what needs to happen to enable delivery? *(e.g., permissions, detailed business case development, key delivery challenges to overcome etc.)*
Completion of WelTAG Stage 3 (Full Business Case) including detailed design, Network Rail GRIP stages and to acquire the necessary statutory permissions.
What are the indicative timescales and milestones associated with the intervention?
• Haverfordwest Public Transport Interchange – to be completed in 2022-23 • Milford Haven Public Transport Interchange – to be completed in 2023-24 • Pembroke Dock Public Transport Interchange – to be completed in 2022-23

Contribution to Missions	
Establish South West Wales as a UK leader in renewable energy and net zero	Links to decarbonisation of the transport system by encouraging greater public transport use and simplifying journeys
Create a strong, resilient and embedded SW Wales business base	Improves transport reliability and accessibility, increasing the attractiveness of the area to investors and existing businesses.
Grow and sustain the SW Wales experience offer	Directly improves access (and the range of access options) to visitors. Also improves perceptions of accessibility and legibility of the transport network, with better transport interchanges making a positive contribution to the public realm and quality of the town centre environment.

15. Rail Service Improvements to Pembrokeshire and South West Wales

Business case status	Outline Business Case

Contact details		
Organisation	Pembrokeshire County Council	
Key contact	Name	Darren Thomas
	Email	Darren.Thomas@pembrokeshire.gov.uk
	Tel	01437 775892

Strategic rationale

Please describe the proposed intervention? What is it seeking to achieve?

The Metro approach being applied across Wales aims to provide a series of regional integrated public transport systems; it is different from a traditional urban metro which may often be associated with an underground system. The concept is to provide an accessible, integrated and comprehensive network using a variety of modes such as heavy rail, tram-train, light rail and bus as appropriate to individual routes. Integrated ticketing and active travel (walking and cycling) links into the transport network are also important components.

As part of the development of the Metro concept for South West Wales, the four local authorities in the region have commissioned Transport for Wales to undertake feasibility design and operational assessments together with WelTAG appraisal of various proposals to improve rail services and facilities in South West Wales building on work that has already been undertaken.

The current commission is focusing on local measures on the existing rail network and a new urban area metro approach to the east of the region. The outputs of the commission will support and complement a Strategic South Wales Mainline (SWML) study, to be commissioned by Transport for Wales later this year.

The strategic SWML study will consider a number of longer distance rail service improvements including the extension of a current GWR Taunton – Bristol service to potentially provide an hourly express service to Milford Haven. The Metro project also contains options for electrification west of Cardiff, and consideration is being given to alternative traction technology in the event that electrification does not proceed.

The key aims are to reduce rail journey times between key population centres not only in Pembrokeshire but across the region, to increase service frequencies and to increase the number of trips made by public transport, focusing particularly on commuter trips.

What work has been done already (e.g., feasibility, project development, previous project activity)? *Please include links to relevant documents as appropriate.*

The regional rail study is being taken forward as part of the Swansea Bay and West Wales Metro concept and has been developed up to and including WelTAG Stage 2 (Welsh Transport Appraisal

Guidance, Outline Business Case). WG Transport Grant funding has been secured by the region for 2021-22 to support the development of transport hubs and rail business cases as part of the Metro approach. TfW is in the process of securing funding to complete WelTAG Stage 3 (Full Business Case) for local improvements on the existing rail network and for a new urban area metro approach to the east of the region.
What do you think are the main barriers or challenges in bringing this intervention forward?
The WG Transport Grant scheme is a competitive process where capital funding has to be applied for on an annual basis. Even though funding has been secured for 2021-22 to support the development of transport hubs and rail business cases as part of the Metro approach, further funding will have to be secured in future years to ensure the improvements can be delivered. Furthermore, rail service improvements will be reliant on significant revenue support from Welsh Government to fund the operation of services.
What benefits do you think that the intervention should generate? *(if these are indicatively quantified at this stage, please state, but otherwise please describe in general terms)*
• Reduce journey times between key population centres including Swansea, Neath, Port Talbot, Llanelli, Carmarthen, Pembroke Dock and Milford Haven. • Increase service frequencies • To improve the suitably of rail services for daily commuting • Improve regional transport accessibility through widening the spatial reach of the rail network and services • Provide a viable public transport alternative to the congested M4/A48 corridor • Contribute to developing a Swansea Bay Urban Area Metro including improvements to multi-modal interchanges. • Maximise the potential for stations to accelerate urban regeneration and major development site delivery • Increase the number of trips made by public transport, focusing particularly on commuter trips. • Reduce the environmental impact of transport, especially carbon emission and air quality • Improve rail network efficient to allow a lower future subsidy requirement per passenger.

Funding	
Estimated total intervention cost	To be determined, depending on which options are taken forward
How will this cost be met? What sources of investment are…	
Secured?	£677,000 of WG Transport Grant allocated to the SW Region for Metro development in 2021-22 (with £90,000 allocated for the development of transport hubs and rail business cases).
Being considered?	• WG Transport Grant for future years • WG Revenue funding for future years

If you have an indicative annual funding profile, please state below, or attach as appropriate
To be determined, depending on which options are taken forward.

Delivery
Which organisations do you envisage will need to be involved in delivery? Is there a lead delivery organisation?
Lead organisation to be determined, depending on which options are taken forward. The improvements will be delivered in partnership with TfW, Network Rail and WG.
Beyond funding availability, what needs to happen to enable delivery? *(e.g., permissions, detailed business case development, key delivery challenges to overcome etc.)*
Completion of WelTAG Stage 3 (Full Business Case) for the following: • Local rail network service improvements • Strategic South Wales Mainline (SWML) study
What are the indicative timescales and milestones associated with the intervention?
• WelTAG Stage 3 Local rail network service improvements – to be completed in 2021-22 • WelTAG Stage 3 Strategic South Wales Mainline (SWML) study - to be completed in 2021-22

Contribution to Missions	
Establish South West Wales as a UK leader in renewable energy and net zero	Links to decarbonisation of the transport system by encouraging greater public transport use and simplifying journeys
Create a strong, resilient and embedded SW Wales business base	Improves transport reliability and accessibility, increasing the attractiveness of the area to investors and existing businesses.
Grow and sustain the SW Wales experience offer	Directly improves access (and the range of access options) to visitors. Also improves perceptions of accessibility and legibility of the transport network.

16. Regional Digital Connectivity

Contact details		
Organisation	Carmarthenshire County Council	
Key contact	Name	Gareth Jones
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	Tel	07854 304 740

Strategic rationale
Please describe the proposed intervention? What is it seeking to achieve?
The challenge The breadth and quality of digital infrastructure (Broadband & Mobile Connectivity) available in South West Wales has fallen behind that found in many other parts of the UK. The reasons for this do not only rest with the topography of the region and the fact that it is heavily rural, it is a deeper issue related to digital awareness, affordability and commercial appetite for investment by the communications service providers (CSPs). There is broad and proven recognition that the provision of digital services drives economic growth and enables social inclusion and cohesion. There is also a growing recognition that the availability of world class digital connectivity stimulates innovation and the creation of new business streams. The clear conclusion is that we must address any shortfall in the availability of digital connectivity in the region. We must invest in digital connectivity to obtain a competitive advantage and it must also drive the uptake and quality of those services that are already available. Improving the Digital Infrastructure of the region is critical as it has suffered from a lack of commercial investment that has consequently resulted in an underlying gap in delivery capability. These gaps need to be closed in order for the Region to achieve its goals. Responding to the challenge: the Swansea Bay City Deal Digital Infrastructure Programme The existing Digital Infrastructure Programme of the Swansea Bay City Deal is a £55 million investment in the Digital Connectivity and associated Telecommunications Infrastructure of the region which is intended to help address Digital Connectivity needs across the Region. This includes but is not limited to full fibre fixed connectivity and associated infrastructure, 4G Advanced, 5G and Internet of Things wireless networks and use cases. It is in essence the deployment of enabling technology that will allow quality digital services to be delivered and accessed over fixed line networks or wireless networks. The Programme is helping to deliver the essential underlying Infrastructure required to support and underpin the regions broader Digital Strategy. It will help to ensure that the region is equipped with future-proofed Digital Infrastructure that will provide the transformative foundations for City Deal interventions and wider regional growth. The Programme will also help to ensure social inclusion and cohesion in a post Covid19 world. This gigabit capable ultra-reliable connectivity will help to ensure that the region capitalises on opportunities to accelerate economic growth and establish itself as a centre of excellence in the

key sectors of; energy, life science and well-being and smart manufacturing. Future proofed Digital Infrastructure will help create a paradigm shift in the design, development, and application of technology within these key sectors across the region.

The proposed Programme of work will lead to:

- An increase in local productivity and employment
- An uplift in the region's attractiveness for both the telecommunications industry and subsequent inward investment by highly skilled digitally intensive industries
- An enhanced ability to deliver local services, notably education, health, and transport
- Environmental benefits through the facilitation of teleworking and enhanced traffic management
- A reduced gap in access to digital services across the region, notably to isolated communities
- Enabling digital transformation across the public and private sector
- Ensuring the cities and development zones of the region obtain a competitive advantage against other parts of the UK.

The region is not homogenous in its requirements and challenges and the investment priorities need to reflect this. To give a focus on the region's needs, and the manner in which they can be met, three intervention areas have been identified to be delivered through the Digital Infrastructure Programme. These are:

Intervention	Description
Connected Places	This is regional support that will increase the availability of fibre to the premise in key urban areas. Mainly targeted at existing industrial areas and economic growth zones to provide competitive world class connectivity
Rural Connectivity	Intervention where there is shortfall in existing or planned investment to ensure as many rural premises as possible in the region has access to a minimum broadband service, currently considered to be 30Mbps, via gigabit capable infrastructure.
Next Generation Wireless	This is focussed on the provision of next generation wireless connectivity in the form of 4GAdv, 5G and IoT networks. The use cases and business models for these technologies is still to emerge, but supporting early adoption and stimulating innovation within the regions SMEs will ensure that the region stays at the forefront of deploying this technology

Moving forward

As with the Skills and Talent Programme (described elsewhere in this pack), delivery of the Digital Infrastructure Programme is at an early stage and is, in itself, a transformational investment in regional connectivity.

Delivery of the Programme will be a priority over the coming years. However, the pace of technology change means a need to maintain a focus on the Programme's future evolution, especially given that commercial investment will tend to go to urban areas in the first instance. More broadly, the need to 'mainstream digital' within the wider economy (including the foundational economy) is widely recognised. The Digital Infrastructure Programme will have a key role in contributing to the business support actions identified elsewhere in this pack (and proposals for business support will be important in driving demand for additional infrastructure capabilities that the Programme will deliver). Linked with this, there is a case for a wider **Digital**

Exploitation Programme to ensure that the benefits of improved connectivity are taken up and embedded.
What work has been done already (e.g., feasibility, project development, previous project activity)? *Please include links to relevant documents as appropriate.*
Over the past 12 months a significant amount of work has been done on the Digital Infrastructure Programme to ensure robust regional governance, Programme business case (Green Book) and Programme resources are in place to successfully deliver the Digital Infrastructure Programme. The Programme has now received all necessary local, regional and national sign off and is ready to proceed to procurement and delivery of individual Projects over the next 4 years. The Programme team is already working with Government and Industry and having a significant impact on attracting public and private sector funding to improve connectivity across South West Wales. The Region's Public Sector is also becoming more and more active in this space ensuring all of its services and levers which impact on this agenda are utilised to improve the situation.
What do you think are the main barriers or challenges in bringing this intervention forward?
There are several specific barriers, challenges, risks and issues which have the potential to hinder the successful delivery of the Digital Infrastructure Programme. All of them are being managed by the Digital Programme Board of the Region which has representation from all key partners and stakeholders. Risk registers, issues logs, mitigation actions and governance are in place and active. One of the biggest risks to achieving the desired outcomes and objectives of the Digital Infrastructure Programme is ensuring the Region's residents and businesses have the necessary awareness, understanding, knowledge, skills and confidence to truly exploit the connectivity and infrastructure deployed by the Digital Infrastructure Programme. It is that usage and exploitation of connectivity that drives social equality and economic prosperity rather than the connectivity itself. There is therefore a need to significantly invest in supporting residents and businesses to exploit Digital technologies and connectivity.
What benefits do you think that the intervention should generate? *(if these are indicatively quantified at this stage, please state, but otherwise please describe in general terms)*
Investment objectives have been defined for each of the three Project areas within the Digital Infrastructure Programme as follows. Any additional funding contributing to exploitation of connectivity and infrastructure will further enhance the below: • Connected Places; Ensures towns, cities and development zones have access to competitive world class full fibre infrastructure. This will deliver the following spending objectives: ➢ improve the quality of public service delivery by ensuring all public buildings are served with gigabit capable infrastructure, facilitating improved efficiency and public access to services. This will be measured by the number and frequency of Digital customer contacts and costs per transaction.

- cost savings to the public sector for digital connectivity. This will be achieved through the aggregation of demand and the consolidation of the purchasing process. Savings will be measured by year on year expenditure and cost per unit of capacity used.
- stimulation of competition in digital services. The number of services providers in the region will be measured and tariffs benchmarked.
- stimulate inward investment in the region by telecommunications industry and hence improve access to services for residents and businesses. Experience elsewhere has shown that expenditure by the public sector on digital infrastructure typically leverages additional private sector investment. This will be reported on and measured as part of procurements and economic development programmes, including wider coverage and additional services being offered.
- deliver economic benefits through the usage of digital infrastructure, notably increased efficiency, and enhanced productivity. A range of studies are available that benchmark economic impacts on a region. These are highlighted in this report. The benefits modelling used in these reports can be utilised or a bespoke set can be developed. It should be noted that the benefit modelling has a diverse range of measures including impacts on environmental and social benefits.

- Rural: Facilitate equality of access to broadband services across the region. This will deliver the following spending objectives;

    - improve the quality of public service delivery by ensuring communities in remote areas have access to services. This will be measured by tracking the availability of services across the region along with take up and usage of the public service.
    - social cohesion and inclusion across the region to sustain communities.
    - stimulate economic growth by enhancing opportunities for employment. Employment, number of business start-ups and investment levels will all be measured with an initial baseline established.

- Next Generation Wireless: Ensure that the region is at the forefront of 4G Adv, 5G and Internet of Things (IoT) investment and subsequent innovation. This will deliver;

    - Inward investment. Accelerated deployment of 5G will be considered as inward investment and measured accordingly. The attraction of businesses to areas that has 5G coverage will be measured by movement into these zones.
    - Innovation and ensuring the region is at the forefront of new service roll out and delivery. The availability of services such as 5G and other IoT wireless networks will be tracked and availability and penetration benchmarked against other parts of the UK
    - Economic growth. The uptake of 5G and IoT services will be measured with the assumption that early adoption is driven by gains to productivity or service offering and therefore economic growth. As this is likely to be a narrow area to monitor, direct input from companies utilising 5G and IoT will be gained to measure growth.

Funding	
Estimated total intervention cost	• Digital Infrastructure Programme - £55m • Additional funding for Digital exploitation – Unknown
How will this cost be met? What sources of investment are…	
Secured?	• £25m City Deal funding - secured,

	• £13.5m additional public sector funding - secured, • £16.5m additional private sector investment – unsecured (to be leveraged in via various planned procurement activity) • Additional funding for Digital exploitation – Unsecured
Being considered?	

If you have an indicative annual funding profile, please state below, or attach as appropriate
• Indicative funding profile for Digital Infrastructure Programme is £55m over 5 years (currently in year 2) as outlined in the Programme Business Case. • Indicative funding profile for any future Digital exploitation Programme is currently unknown.

Delivery
Which organisations do you envisage will need to be involved in delivery? Is there a lead delivery organisation?
All partners and stakeholders of the South West Region and Swansea Bay City Deal.
Beyond funding availability, what needs to happen to enable delivery? *(e.g., permissions, detailed business case development, key delivery challenges to overcome etc.)*
• Detailed business case development for a Regional Digital exploitation programme • Production of a Regional Digital Strategy to inform future investment.
What are the indicative timescales and milestones associated with the intervention?
To be discussed and confirmed.

Links to Missions	
Establish South West Wales as a UK leader in renewable energy and net zero	Key link in relation to the role that digital technology can play in supporting decarbonisation.
Create a strong, resilient and embedded SW Wales business base	Key link. 'World standard' digital connectivity is essential infrastructure to support business growth and is a key part of the business development package. However, while connectivity is *essential,* it is not *sufficient:* raising demand will be important, and future phases of the programme to support digital exploitation recognise this.
Grow and sustain the SW Wales experience offer	Key link, given the importance of digital connectivity to SW Wales' attractiveness as a place to work and invest – and in overcoming the barriers historically presented by peripherality.

Mission 2:
Building a strong, resilient and embedded business base

17. South West Wales 'virtual innovation agency'

Introduction

17.1 South West Wales has some impressive innovation assets. The Regional Economic Delivery Plan identifies the universities' research capabilities (especially Swansea, and especially in relation to data science) as key strengths, and highlights the success of translational research programmes (such as ASTUTE and RICE) in recent years. There are also some private sector-driven initiatives, such as TWI's Technology Centre Wales at Baglan.

17.2 In consultation, stakeholders emphasised the importance of continued and sustained investment in translational research, although observed the potential for wider engagement beyond the manufacturing sector. Development of the REDP also highlighted:

- The risk associated with the substantial investment made through European funding over the past couple of decades, and the lack of clarity on what will replace current programmes (including schemes such as ASTUTE highlighted above and the national SMART suite of innovation programmes delivered via the Welsh Government.
- The complexity of the landscape and the range of institutions and programmes with an interest in driving forward innovation support. While this reflects a breadth of expertise, it also potentially contributes to complexity in terms of business engagement.
- Strong links between 'innovation' (the development and commercialisation of new products, goods and processes) and wider policy objectives, especially in relation to climate change and decarbonisation; digitalisation and the exploitation of data; and the pressures and opportunities associated with an ageing population.

17.3 In that context, the REDP states that: ***"we will explore a better-integrated regional innovation offer, in the form of a 'virtual Research and Technology Organisation' for South West Wales"***, with the aim of achieving a better integrated offer, in which there is "no wrong front door" to innovation activity and support.

The current context

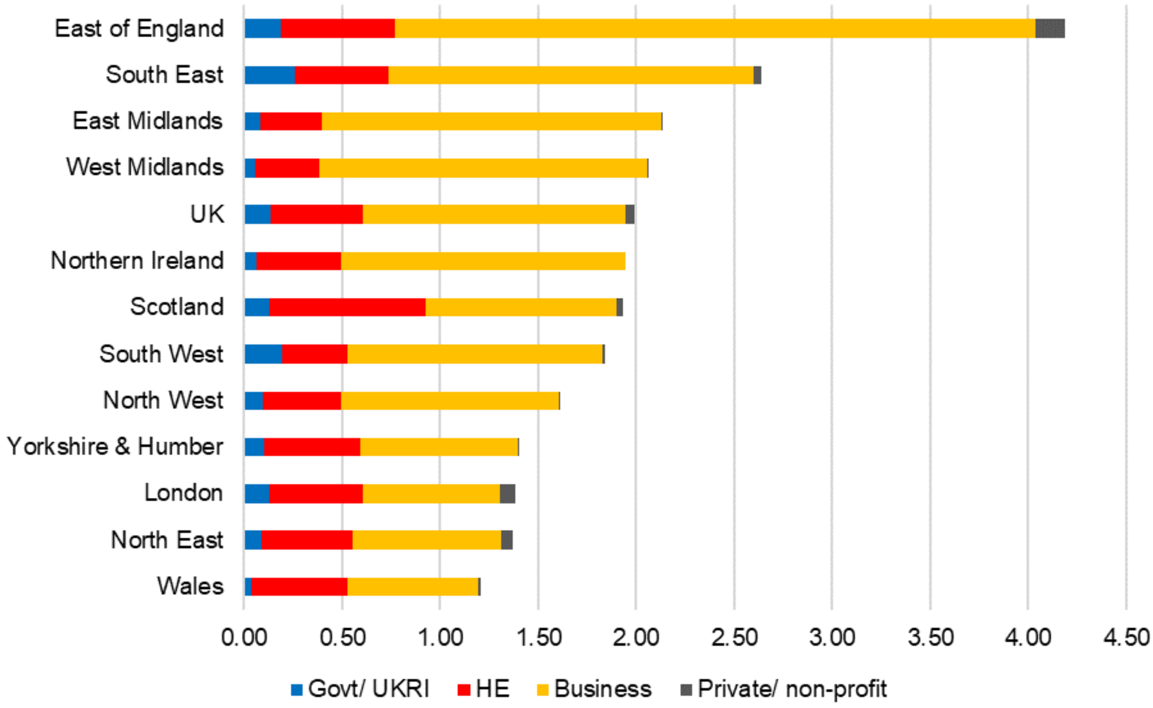
17.4 In 2021, the Innovation Advisory Council for Wales commissioned the Centre for Innovation Policy Research at Cardiff University to prepare a report on *Scoping Future Innovation Policy in Wales*[7]. This is a substantial report, which provides a review of the current innovation policy landscape (and its evolution since the last formal national innovation strategy – *Innovation Wales* - was published in 2015), and sets out recommendations for the future. The following paragraphs draw on this report, as they are relevant to South West Wales.

[7] Rick Delbridge, Dylan Henderson and Kevin Morgan (May 2021), [Scoping the Future of Innovation Policy in Wales]()

Current R&D expenditure

17.5 While not a 'perfect' measure of innovation, R&D expenditure provides a rough indication of regional innovation propensity. Compared with other parts of the UK, Wales performs relatively poorly: total R&D expenditure accounted for around 1.2% of total Welsh GVA in 2019, compared to about 2% across the UK as a whole. While the UK average is somewhat skewed by very high levels of expenditure in the Greater South East, Wales also lags behind the North of England and Northern Ireland:

Figure 17-1: Expenditure on R&D as a proportion of total GVA, 2019



Source: ONS, UK gross domestic expenditure on research and development

17.6 Looking at the *type* of expenditure, the gap in Wales is principally driven by business R&D (and to a lesser extent Government and UKRI-generated expenditure): university spend is comparable with the rest of the UK. The *Scoping Future Innovation Policy* report also observes that a general absence of business demand has led to the universities playing an important role in the absorption of ERDF-funded innovation spend.

17.7 While R&D expenditure data does not exist at a geographical level smaller than Wales, it is likely that the picture would be similar in South West Wales, given similar challenges and issues across the country.

The innovation support landscape

17.8 Currently, public sector innovation support is made available through a number of channels, summarised in the table below:

Table 17-1: Sources of public sector innovation support

Intervention	Description
SMART	• Series of innovation programmes (SMART Cymru, SMART Innovation and SMART Expertise) operated by the Welsh Government • Funded with £64.7 million ERDF support, with programmes ending in 2021-23 • Forms the core of the Welsh Government offer. The *Scoping Future Innovation Policy* report notes that its support for smaller scale projects aligns well with the Welsh SME business base, and highlights a wide regional distribution of funding.
Challenge schemes	• Programmes aimed at bringing public bodies and businesses together to develop new solutions to address societal challenges or to increase public sector efficiencies. These include: ➢ The Small Business Research Initiative (SBRI), funded by Innovate UK and managed within Welsh Government. SBRI is a well-established scheme that procurement of solutions that do not yet exist or which have not yet been proved commercially viable ➢ GovTech Catalyst is a UK Government scheme to support technology solutions for public service challenges (e.g., Mid and West Wales Fire and Rescue Service secured £1.2 million to enable businesses to develop real-time tracking solutions for the Service).
Knowledge Transfer Partnerships	• Knowledge Transfer Partnerships (KTPs) link businesses and not-for-profit organisations with an innovation idea or challenge with university expertise and recent graduate or postgraduate talent. • The Welsh Government supplements the UK-wide KTP offer, introducing a three-year 'Enhanced KTP' programme.
ERDF-funded projects	• The core of the Welsh ERDF-funded innovation offer is the SMART suite of products, referred to above. However, ERDF funding has enabled a range of other initiatives to come forward, especially with university leadership. • Within the 2014-20 Structural Fund programme, ERDF innovation funding sought to *"increase research funding attracted to Wales' research institutes [and] increase commercialisation of R&D&I within the programme area"*. In West Wales and the Valleys, some £259 million was allocated to the innovation priority (or £391 million with anticipated match funding). • In South West Wales, projects supported include some of the region's key innovation assets and opportunities. These include[8]: ➢ Advanced Engineering and Materials Research Institute (AEMRI) based at TWI in Port Talbot

[8] For a full list, see Welsh Government/ WEFO (2017), [Approved projects 2014-20]

Intervention	Description
	➢ ASTUTE 2020, linking university research capabilities with manufacturing SMEs ➢ Sustainable Product Engineering Centre for Innovation in Functional Coatings (SPECIFIC) at Swansea University developing technology to enable buildings to produce and store their own energy. ➢ Swansea University Computational Foundry ➢ Flexible Integrated Systems (FLEXIS) to create enhanced energy systems research capability (and including a major demonstrator project at Port Talbot). ➢ AgorIP, creating a new open access framework to support the commercialisation of existing research • In addition, several other ERDF funded R&D&I projects benefit businesses and academic partners in South West Wales, although the lead agency is based outside the region (for example at Cardiff, Bangor or Aberystwyth universities).
Innovate UK	• Innovate UK funds research and innovation activity on a UK-wide basis, mainly through competitions. • Cardiff University's analysis indicates that take-up of Innovate UK funding is relatively low in Wales – and within Wales, is quite strongly geared to Cardiff and the South East.
Strength in Places	• The Strength in Places Fund (SiPF) is managed by UK Research and Innovation (UKRI). It is intended to help areas of the UK to build on existing strengths in research and innovation to deliver benefits for their local economy. • So far, no projects have been approved in South West Wales.
Horizon 2020	• Horizon 2020 is an EU-funded programme for research and innovation. Since 2014, this has attracted about £110 million to Wales, especially in projects related to advanced manufacturing, food, the environment, energy and ICT.
Regional initiatives	• In South West Wales, capital investment through the City Deal has complemented these sources of funding (e.g., in relation to projects with a substantial innovation component, such as Pentre Awel and Pembroke Dock Marine.

Source: Based on Cardiff University (2021), Scoping the Future of Innovation Policy in Wales; supplemented with SQW analysis

Issues for the future

17.9 It is clear from the programmes highlighted in Table 3-1 that much of Wales' innovation support agenda has been closely associated with a European funding landscape that is now coming to an end. In cash terms, this has been beneficial to South West Wales and has delivered several major programmes directly supporting business, as well as infrastructure to reinforce the research base. It remains unclear what will replace the European funding settlement, with -still – little detail on the content and purpose of the proposed UK Shared Prosperity Fund. Aside from this uncertainty, three key issues for the future of innovation policy and support are worth highlighting:

Ensuring business access and 'absorptive capacity' as programmes change

17.10 Analysis as part of the Cardiff University review highlights relatively low take-up of competitive Innovate UK funds in Wales, and within Wales, especially low take-up outside the South East. This is consistent with the low levels of business R&D that currently prevail. Part of the policy response has been to design national programmes (such as the SMART suite) geared to SME involvement and with the aim of investing across the country, and to encourage local university leadership in relation to SME-focused support programmes.

17.11 Looking to the future, there may be a greater role for the UK Government in the Welsh innovation landscape, following the provisions of the Internal Market Act. This potentially presents a challenge to Wales if the core funding model is 'competitive' along the lines of that used by Innovate UK: as the Cardiff University review notes, *"businesses in Wales [have] considerably lower levels of absorptive capacity for such funds, and there will be a considerable challenge ahead if funding models move towards top-down UK competitive funding allocations for research and innovation"*[9].

Responding to 'systemic challenges'

17.12 The REDP highlights climate change and decarbonisation; digitalisation; and demographic change as systemic challenges to which all policy will need to respond over the coming decade:

- We have already highlighted in ***'Building capacity and expertise to maximise South West Wales' renewable energy and net zero potential'*** the opportunity that decarbonisation presents, and several of the pipeline projects in this pack will help to deliver against this ambition.
- In relation to **digitalisation**, the 2019 review of digital innovation by Professor Philip Brown recognised the all-encompassing nature of digital transformation on the economy. Of relevance to innovation strategy, the Brown Review noted the need to raise *demand* for digital skills and infrastructure, pointing to a focus on industry adoption as well as building on regional strengths (notably the concentration of data science assets at Swansea University).
- In relation to **demographic change**, the *Evidence and Landscape Review* highlights the long-term decline in the region's 'working age' population, and the challenges of an ageing population. The recent focus on innovation in relation to health and wellbeing (c.f. Pentre Awel) responds to this, but there ought to be opportunities for publicly-backed initiatives on the SBRI model to develop new solutions to support sustained quality of life.

[9] Delbridge, Henderson and Morgan (May 2021), p.20

Recognising the breadth of innovation

17.13 Finally, the Cardiff University review notes how the concept of 'innovation' has broadened in policy in recent years, away from a narrow focus on 'technology' (usually industrially-based and essentially focused on business and university interaction) to a broader view of the role of innovation in meeting 'societal challenges', especially in relation to the systemic issues highlighted above. For the innovation landscape in South West Wales, this emphasises the role of (for example) NHS Wales and the local authorities as purchasers and commissioners of services and the opportunity to capture some of the benefits of demand for innovation locally.

Opportunities for action at the regional level: A 'virtual innovation agency'

17.14 Activity to support and encourage innovation in South West Wales will need to take place in the context of future Welsh Government and UK Government policy. However, there are opportunities for greater coordination within South West Wales, which could form the basis for what we have termed a **'virtual innovation agency'**. This starts from the premise that:

- **There is a need (as set out above) to raise absorptive capacity and demand for investment in research, development and innovation**. Given the starting point, this is likely to demand additional intervention over and above competitive programmes delivered at UK (and perhaps Wales) level.
- **The region is relatively compact and 'navigable'**, with a limited number of key institutions (including those in the NHS and other parts of the public sector, as well as business and academia). On the one hand, limited scale could be seen as a weakness; on the other, it presents opportunities for 'getting things done' and for local leadership.
- **There is a good track record**, especially in translational research, presenting a core of existing activity on which to build.

17.15 The scope of a 'virtual innovation agency' will need to be developed further. But at its core, the assumption is that it could provide a consortium of partners in the public and private sectors, bringing together the universities, business and others alongside the Corporate Joint Committee to:

- **Broker relationships between businesses, programmes and the knowledge base**, ensuring that there is 'no wrong front door'.
- **Develop a place-based innovation partnership** that is in a strong position to access competitive programmes such as the Strength in Places Fund. Feedback from previous rounds is that success depends on a strong regional consortium which can demonstrate a clear route into local business impact: linked with the region's energy potential (and wider strengths), there should be a significant opportunity here.

- **Articulate and galvanise responses to social need**, recognising the combined value of the public sector regionally, the common challenges that it faces and the shared interest in capturing spend and benefit locally. This might include developing a **'challenge fund'** proposition to drive public demand for local innovation[10].
- **Demonstrate and promote regional opportunities**, linked with better coordinated investment marketing and promotional activity, to attract further investment and drive local demand.

Next steps

17.16 This overview sets out in headline terms the case for a 'virtual innovation agency', as highlighted in the REDP: essentially, the starting point for a strategic outline case. In further developing the business case, issues to consider include:

- Potential routes to investment post-ERDF (including opportunities for increased private sector co-financing)
- Institutional options (which could range from a partnership to provide leadership and strategic focus, through to a more formally constituted delivery vehicle
- Links with initiatives and policy development at Welsh and UK Government (especially the Welsh Government's future approach following the Innovation Advisory Council review).

[10] See for example the Challenge Fund recently established by Cardiff Capital Region. CCR (2020), Outline Business Case for a Challenge Programme

18. South West Wales Entrepreneurship and Enterprise Programme

Introduction

18.1 The analysis of productivity growth within the REDP notes the gains that can be made in *all* sectors (including those within the foundational economy as well as within 'export-like' industries) through investment in management capacity, technology adoption, supply chain capabilities, skills development and so on). This is likely to be especially important in South West Wales: the REDP notes that in a region with relatively few large firms, *"a broad-based approach that supports SME growth and entrepreneurship across the board and increases the local 'stickiness' of investment is likely to be important".*

18.2 The proposition is that while investment in the region's R&D&I capacity (as set out in the previous project pipeline entry) is important, incremental improvement across the wider business stock will be fundamental. This will partly be addressed through the property, connectivity and skills interventions articulated elsewhere in this pack, but the REDP also sets out the case for a *"better coordinated support package for business"*, to drive up business density, start-ups and entrepreneurship and to support adaptability and resilience.

The current landscape

18.3 Across the wider business stock, there have been changes in the support landscape since the last Regeneration Strategy was produced. Nationally, Business Wales provides a central gateway to a range of support products, and since 2017, the Development Bank of Wales has consolidated publicly-backed loan and equity support. In addition, the Welsh Government provides some direct investment (generally in relation to larger, often manufacturing firms), and all the South West Wales local authorities offer support services.

18.4 A recent review of the Welsh business support landscape[11] highlighted three challenges

- First, **Wales' relative vulnerability to economic shocks:** a function of the continuing process of restructuring highlighted in the evidence base. This has contributed to the more recent policy focus on indigenous business growth. However, while economic 'shocks' are often seen through large 'one-off' events (plant closures, redundancy programmes, and so on), economy-wide technology-driven transformation is larger in its overall impact, and the ability to adapt and respond will be important across firm sizes and sectors.

[11] Jack Watkin (February 2021), A Better Balance: Business support policy for the foundational economy (CREW/ Institute of Welsh Affairs)

- Second, **the scale of the support offer**, and the relatively small number of firms that it reaches (the inference being that there is a much wider range of SMEs that could benefit from interaction with the support system, were the reach to be greater).
- Third, **dissemination of benefits**, in particular the extent to which gains in business performance are captured in wages and tax and in which benefits to the supply chain accrue regionally. The Welsh Government has placed a greater emphasis on this in recent years, through the development of the 'economic contract'.

Options for the future

18.5 The challenge is ensuring a system which offers consistency over time, scale to ensure widespread business access, and integration with the wider support offer. This might involve:

- **Coordination of the local support offer across the region**, perhaps around a consistent product offer. This might include a 'single service', but might equally allow for a range of local public, private and third sector provision within an overall regional framework.
- **Driving demand for digital skills and adoption**, building on the recommendations in the *Wales 4.0* Brown Review of digitalisation. The recent Made Smarter Pilot programme in North West England potentially provides a model focused on increasing SMEs' resilience by supporting manufacturing firms in adopting digital technology (including through staff capabilities and capacity as well as technology itself)[12].
- **Integration with public sector procurement opportunities.** There has been significant interest in recent years in the role of the local public sector in driving business opportunities through procurement, with the Welsh Government specifically linking procurement to wider social and economic policy objectives[13]. At local level, public authorities can be important sources of custom for local goods and services: by specifying contracts at a scale accessible for local SMEs and by linking procurement strategy with wider business support actions to ensure local capacity, the 'local pound' can be more effectively deployed to support SME growth, especially within the foundational economy, and especially in locations (for example in the upper Valleys and parts of rural South West Wales) where access to markets is otherwise relatively limited locally.

18.6 Several proposals have already been put forward at local level (see for example the *Supporting Business Growth and Innovation* project in Neath Port Talbot). Next steps in developing a business case will include identifying the case for 'scaling up' to regional level, scope for coordination with the Welsh Government/ DBW offer and potential funding options (either through the pooling of existing resources or via funding schemes such as Community Renewal Fund).

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[12] *Made Smarter: Technology Adoption Pilot Report* (2020)
[13] Welsh Government (March 2020), *Progress towards the development of a new procurement landscape in Wales*

19. Promoting the South West Wales investment offer

Introduction

19.1 As the REDP sets out, South West Wales has a distinctive set of economic assets, especially in terms of its university capabilities, industrial stock and opportunities (especially in energy and engineering) and its excellent 'quality of life'. However, in consultation on the REDP, stakeholders highlighted a concern that the region's strengths and opportunities are less well-known than they ought to be, with the consequence that it is seen as more peripheral than it really is, and that the extent of the major investment opportunities (some of which are of UK or international scale) are not fully recognised. There is also a recognition across the local authorities that there should be greater impact and economies of scale in working together to promote the region.

Towards a more coordinated approach

19.2 It is proposed that South West Wales partners adopt a shared approach to promoting the region. This should link with the proposals to provide stronger strategic lead in coordinating the region's energy and low carbon potential, the actions set out above in relation to innovation and wider business support, and the proposal for a regional investment fund. Rather than a conventional 'marketing' approach, a shared resource should use this strengthened regional function to attract commercial investment alongside the public sector and to demonstrate the region's shared ambition.

Developing a business case

19.3 This proposal is at an early stage. Developing it further should take place in conjunction with the other region-wide capacity projects proposed in this pipeline. It would be helpful in building the business case to consider:

- The interaction between a regionally-based approach and the Welsh Government's investment promotion activities
- The parameters and limitations of an investment promotion operation, and whether it should extend to other forms of place marketing (for example, in relation to the visitor economy and the food and drink offer)
- Experiences from elsewhere. Examples include **MIDAS**, the inward investment agency for Greater Manchester. MIDAS is a long-established vehicle, which pre-dates the Greater Manchester Combined Authority, and has a role in providing and linking with business support, recruitment advice, market intelligence and so on, as part of a coordinated offer.

20. Regional Commercial Property Investment Fund

Contact details		
Organisation	Carmarthenshire County Council	
Key contact	Name	Mike Bull
	Email	MABull@carmarthenshire.gov.uk
	Tel	01267 242393

Strategic rationale

Please describe the proposed intervention? What is it seeking to achieve?

The Welsh Government's recent commercial property study has identified an overall shortfall of close to a million sq ft of employment space across Wales. This shortfall is exacerbated in the western and rural areas of South West Wales by weak viability. Whilst demand is high across South West Wales for grow on and start up employment units, developers are unable to bring forward developments (especially in rural areas) in market conditions (and are sometimes unable to even with grant funding due to the scale of the cost/ value gap).

This project involves a **£25.55 million Commercial Property Development Grant scheme (£11.5m fund)** that will be specifically targeted at the regional strategic employment sites and centres (tier 1 and tier 2) some of which are in private ownership. The scheme will deliver the substantial employment and investment opportunities that stand to be gained from the successful continued development of our strategic employment sites, as locations for large scale and high value business investment from international, national, and regional occupiers, including a real focus on knowledge-based and innovation-driven business activity.

Grants will be available to developers and will bridge the gap between the cost of construction and the end value of the building up to a maximum of 45% of the total project cost (based on assumed Subsidy Control limits). The maximum funding grant award is £1.5m and priority will be given to those applicants who are developing or building new office / industrial space to service potential use by high value growth sectors.

Strategic sites are designated as:

- Tier 1 - regionally important Strategic Employment Sites designated are: Haven Enterprise Zone; Cross Hands Growth Zone; Felindre; Fabian Way Corridor and NPT Water-Front
- Tier 2 - regionally important Strategic Employment Sites /centres designated are: Withybush; Fishguard / Goodwick / Trecwn; Carmarthen, Ammanford; Llanelli Gate / Llanelli Coast; Swansea West Business Park; Baglan Energy Park; Coed Darcy Village; Carmarthenshire Rural Ten Towns Initiative.

Projects outside of these areas could also be considered in exceptional circumstances.

What work has been done already (e.g., feasibility, project development, previous project activity)? *Please include links to relevant documents as appropriate.*

A concept scheme has been designed and signed off by Regional Directors. Talks are ongoing between the Welsh Government and local authority partners on proposed delivery structures and detail (including potential variations to the scheme design described above). This proposed programme follows on from: • The successful ERDF Funded (2009 – 2015) South West Wales Commercial Property Development Fund • The ongoing £4.5m Carmarthenshire Transformational Commercial Property Development Fund and £300k Ammanford Regeneration Development Fund, as well as funding schemes within the other local authorities.
What do you think are the main barriers or challenges in bringing this intervention forward?
• Getting all parties signed up to a collaboration agreement • Resources to deliver Grant Scheme (revenue, capital and staff) • The potential for the cost/ value gap to increase as environmental and sustainability standards rise.
What benefits do you think that the intervention should generate? *(if these are indicatively quantified at this stage, please state, but otherwise please describe in general terms)*
Summary of Potential Projected Outputs

Output	**Regional Target**
Jobs Accommodated	570
SMEs Accommodated	60
Premises Created – Sq ft	210,000 sq ft
PSI Secured	£14,055,555

Funding	
Estimated total intervention cost	£26,055,555
How will this cost be met? What sources of investment are…	
Secured?	• £1.5m CCC £6m WG
Being considered?	• To be discussed further but notionally minimum contribution of £1.5m per local authority partner over duration of collaboration
If you have an indicative annual funding profile, please state below, or attach as appropriate	

- 21/22 WG £1m PCC £250k, CCC £250k, CCS £250K, NPT £250k
- 22/23 WG £1m PCC £250k, CCC £250k, CCS £250k, NPT £250k
- 23/24 WG £2m, PCC £500k, CCC £500k, CCS £500k, NPT £500k
- 24/25 WG £2m, PCC £500k, CCC £500k, CCS £500k, NPT £500k

- Note above does not include £14,055m PSI but likely to be heavily based on year 3 and 4

Delivery
Which organisations do you envisage will need to be involved in delivery? Is there a lead delivery organisation?
• Carmarthenshire County Council Lead • Partners: Welsh Government, City and County of Swansea, Neath Port Talbot CBC, Pembrokeshire CC
Beyond funding availability, what needs to happen to enable delivery? *(e.g., permissions, detailed business case development, key delivery challenges to overcome etc.)*
• Collaboration Agreement • Staff Resource • Delivery Processes and Proformas agreed • Project Launch • EOI's • Detailed Applications • Construction • Tenancies / Occupation
What are the indicative timescales and milestones associated with the intervention?
• Collaboration Agreement – July 2021 • Staff Resource – Sept 2021 • Delivery Processes and Proformas agreed – October 21 • Project Launch – October 21 • EOI's – Jan 2022 • Detailed Applications - March 2022 to April 2023 • Construction – April 23 to March 25 • Tenancies / Occupation -April 24 Onwards

Links to Missions	
Establish South West Wales as a UK leader in renewable energy and net zero	Modern commercial stock is likely to deliver greater energy efficiency than older premises. The commercial property study for the Welsh Government noted that ageing stock and the rising costs and poor resilience associated with it presents a disinvestment risk.
Create a strong, resilient and embedded SW Wales business base	Strong direct link. Increasing the supply of commercial property is a key part of the region's offer to local businesses and new investors.
Grow and sustain the SW Wales experience offer	Secondary link, but contributes to positive perceptions of South West Wales as a business investment location.

21. Baglan Bay and Port Talbot Waterfront Industrial Cluster

Business case status	Outline Business Case

Contact details		
Organisation	Neath Port Talbot CBC	
Key contact	Name	Simon Brennan
	Email	s.brennan@npt.gov.uk
	Tel	

Strategic rationale
Please describe the proposed intervention? What is it seeking to achieve?

This project seeks to develop the **cluster of advanced manufacturing and engineering** activity at Port Talbot Waterfront, linked with the decarbonisation of the industrial base, developing capacity and attracting new investment into the Waterfront's key sites and developing the potential of the regionally-significant Baglan Bay site.

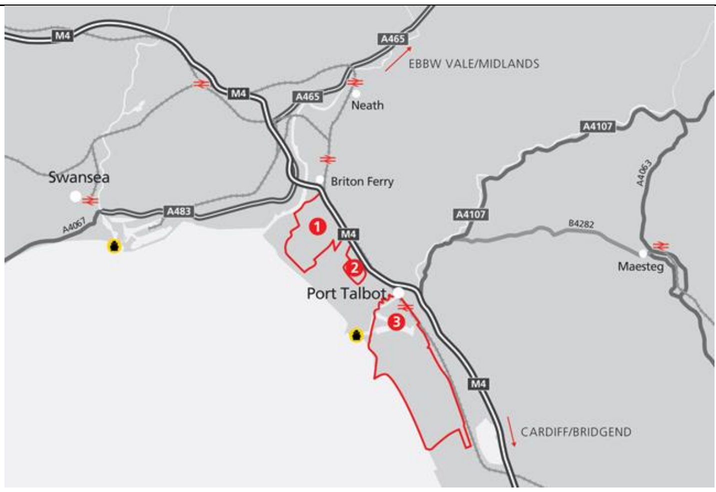
Overview

Port Talbot Waterfront was designated as an Enterprise Zone in 2016. It covers one of Wales' principal industrial districts, with substantial activity in advanced materials and manufacturing; energy; construction; and environmental technologies. The area benefits from extensive land availability, good road and rail links and access to a deep-water harbour.

The Council's overall strategic approach is set out in the **Waterfront Regeneration Strategy**, which presents an integrated approach to the development of major ex-industrial sites, town centre renewal in Port Talbot and neighbourhood regeneration more widely, and the development of an improved visitor and leisure offer, linked with Margam Park, Aberafan Seafront and the regeneration of Brunel Dock.

Major sites

Within this context, the Enterprise Zone encompasses three strategic development areas, illustrated on the map below:



Major sites

1. Baglan Energy Park
2. Baglan Industrial Park
3. Harbourside and Port Talbot Docks

Source: Welsh Government

Baglan Bay

Neath Port Talbot once hosted one of Europe's largest concentrations of petrochemicals activity. Since the closure of the industry from the 1990s, this has left a legacy of extensive strategic regeneration sites, some of which have been transformed into regionally-significant investments, including Swansea University's Bay Campus and the Coed Darcy housing development.

BP Baglan Bay closed in 2004, with the site acquired by St Modwen through a joint venture with the Welsh Government. Since then, much has been delivered at Baglan Energy Park, although there is scope for long-term development on the rest of the site.

Baglan Bay Energy Park

Baglan Energy Park is the first stage in the regeneration of the former petrochemicals site at Baglan Bay. The Park itself covers around 180 hectares and includes:

- The **Baglan Bay Innovation Centre**, operated by Neath Port Talbot Council
- The University of South Wales' **Hydrogen Research and Demonstration Centre**, which provides a platform for the experimental development of renewable hydrogen production and novel hydrogen energy storage, with application for the development of hydrogen vehicles, fuel cell applications and overall hydrogen energy systems
- The **Swansea Bay Technology Centre**, a new facility offering space to new and growing companies, with a continued focus on renewable energy. Currently under construction, the Centre will be one of a few 'net energy positive' buildings in Wales, generating more energy than it consumes, functionally linked with the Hydrogen Centre.
- Several **manufacturing** businesses, including Ecolab and Intertissue.

Wider Baglan Bay development

Beyond Baglan Energy Park, the remainder of the site offers opportunities for development on a regional and national scale, supporting the continued development of the Waterfront industrial cluster. Long-term public investment and sustained coordination will be needed to bring these forward.

Baglan Industrial Park

Baglan Industrial Park is an existing business park, offering good transport links and with capacity for expanding manufacturing businesses.

Harbourside and Port Talbot Docks

Harbourside is a encompasses the former docks quarter, close to the town centre. Designated as a Strategic Regeneration Area in the Local Development Plan and a part of the **Port Talbot Waterfront Enterprise Zone**, the Harbourside redevelopment project includes:

- Improved road access, via the completion of Harbour Way, providing a direct link to M4 Junction 38
- The redevelopment of Port Talbot Parkway rail station
- New residential development
- Construction of **Harbourside Park**, which includes a new **Research and Development Village**. Including office and lab space. A key occupier at Harbourside Park is **TWI Technology Centre (Wales)**, which specialises in 'non-destructive testing' methods to support testing and inspection in a range of energy, transport, healthcare and manufacturing industries. TWI hosts an **Advanced Engineering and Materials Research Institute** at its Port Talbot facility.

Earlier this year, work began on site remediation and access to support future phases of development, building on the core of existing activity at the R&D Village. NPTC Group also has plans to develop its new Port Talbot campus at Harbourside.

Port Talbot Docks is a deep-water port, capable of handling vessels of up to 180,000 dwt, and benefiting from excellent road and rail access.

Future investment

Port Talbot Waterfront has already seen substantial investment (through European and Welsh Government funding, as well as via the private sector), as the headlines above demonstrate. The Waterfront also presents a strategic development opportunity which is - in terms of its combination of land availability, port capacity, energy potential and existing manufacturing capabilities – of UK significance. However, the regeneration of the Waterfront is a long-term endeavour, and despite major successes in bringing forward development, there have been some setbacks (e.g., job losses at Hi-Lex on Baglan Energy Park, and the collapse of the Baglan power station operator).

There is therefore a need for a continued investment focus in:

- Bringing forward new sites and premises and marketing the area to investors , linked with the regional programmes of commercial property intervention (and scope for Freeport designation) outlined elsewhere in the project pipeline.
- Developing a cluster of business activity linked with the new innovation facilities and business stock at Baglan and Harbourside.

What work has been done already (e.g., feasibility, project development, previous project activity)? *Please include links to relevant documents as appropriate.*

- As outlined above, significant investment has been made already. This includes the completion of the Innovation Centre and the development of the Technology Centre at Baglan Energy Park,

and delivery of the Research and Development Village at Harbourside, as well as investment in strategic infrastructure • The Enterprise Zone has played an important role in promoting opportunities on the Waterfront. However, *direct* resources have been relatively limited, given the scale of the opportunity. • The **Supporting Innovation and Low Carbon Growth** programme (focused on Port Talbot) has been approved for City Deal investment and will focus £58.7 million on: ➢ Developing the Technology Centre building at Baglan Energy Park (underway) ➢ A specialist innovation facility focused on the steel and metals industry and promoting decarbonisation ➢ A series of decarbonisation projects (see also the Strategic Decarbonisation projects cited elsewhere) ➢ Hybrid units to bridge the commercial property supply and demand gap. • South Wales Industrial Cluster initiative established and underway to support regional industrial decarbonisation.
What are the main barriers or challenges in bringing this intervention forward?
• Viability challenges in bringing forward some forms of commercial development • Public sector funding availability
What benefits do you think that the intervention should generate? *(if these are indicatively quantified at this stage, please state, but otherwise please describe in general terms)*
• Additional business investment (direct and supply chain) • Jobs created (and jobs safeguarded in existing businesses through clustering effects) • Increased demand for higher-level skills • Productivity and resource efficiency gains through direct operation of new facilities and 'demonstration' effect.

Funding	
Estimated total intervention cost	£TBD
How will this cost be met? What sources of investment are	
Secured?	• TBD
Being considered?	• Commercial investment
If you have an indicative annual funding profile, please state below, or attach as appropriate	
[To be added]	

Delivery
Which organisations do you envisage will need to be involved in delivery? Is there a lead delivery organisation?
Welsh Government, Neath Port Talbot CBC, UK Government and commercial partners.

Beyond funding availability, what needs to happen to enable delivery? *(e.g., permissions, detailed business case development, key delivery challenges to overcome etc.)*
• TBD.
What are the indicative timescales and milestones associated with the intervention?
• **T**BD

Links to Missions	
Establish South West Wales as a UK leader in renewable energy and net zero	Strong link through the focus on providing demonstrator centres for the development of new energy solutions and promotion of industrial decarbonisation.
Create a strong, resilient and embedded SW Wales business base	Strong link through direct opportunities for business expansion and supply chain development.
Grow and sustain the SW Wales experience offer	Port Talbot Waterfront will be an important part of SW Wales' offer to inward investors, with the focus on advanced manufacturing and cleaner energy changing perceptions of a well-established industrial district.

22. Freeport of Port Talbot

Business case status	Concept/ feasibility

Contact details		
Organisation	Neath Port Talbot CBC	
Key contact	Name	Simon Brennan
	Email	s.brennan@npt.gov.uk
	Tel	

Strategic rationale

Please describe the proposed intervention? What is it seeking to achieve?

The UK Government launched a consultation on a 'next generation' of Freeports in November 2020, followed by a Freeports Prospectus in November. In summary, the UK Government sees Freeports as delivering against three **outcomes**, via a mixture of **tax and customs incentives**, within **defined geographical zones:**

Fig. 1: Summary of criteria for Freeports (in England)

Objectives:

1. Establish Freeports as global hubs for trade and investment across the UK
2. Promote regeneration and job creation
3. Create 'hotbeds of innovation'

Incentive mix:

Customs: Duty deferral while goods remain on site and duty inversion if finished goods exiting the freeport attract a lower tariff than their component parts.

Tax: Range of measures, including Stamp Duty Land Tax relief; Enhanced Structures and Buildings Allowance; Enhanced Capital Allowances; Employers' NIC Rates Relief; Business Rates Relief

Planning: Simplified planning and use of Local Development Orders

Spatial boundaries:

Outer boundary of 45km diameter, containing all proposed customs sites and tax sites.

Must include at least one port and at least one customs site

Either single tax site (up to 600ha, or up to 3 tax sites of 20-200ha each)

Source: SQW

The Freeports Prospectus only applied to England, and some of the incentives are specific to the English tax regime (such as Stamp Duty Land Tax). However, the Prospectus provides a guide to the objectives and scope that the UK Government expects to see. Following a competitive process, eight Freeports were designated in England in 2021.

The UK Government has said that there will be at least one Freeport in Wales. Potentially, there could be interest from more than one location in South West Wales (see the accompanying project entry for Milford Haven), although it should be noted that some of the approved English Freeports have quite complex geographies. Port Talbot could have a strong case for Freeport designation. There is an extensive existing industrial base, with new and longer-established institutions to support innovation and business growth. The area also enjoys a combination of extensive land availability, excellent road and rail access and deep water port facilities. The existence of the Port Talbot Waterfront Enterprise Zone could also be helpful in making the case.
What work has been done already (e.g., feasibility, project development, previous project activity)? *Please include links to relevant documents as appropriate.*
Initial consideration has been given to the potential for an application.
What do you think are the main barriers or challenges in bringing this intervention forward?
There is currently no open competition. The case for a Freeport will depend on the criteria published by Government and the nature of the competitive process.
What benefits do you think that the intervention should generate? *(if these are indicatively quantified at this stage, please state, but otherwise please describe in general terms)*
• Additional manufacturing and R&D activity (leading to higher-value job creation and GVA) • Increased investment in infrastructure, supporting long-term sustainability beyond the duration of financial incentives • Increased competitiveness and attractiveness to inward investors • Potential benefits arising from collaboration between university, industrial and commercial partners

Funding	
Estimated total intervention cost	TBC
How will this cost be met? What sources of investment are…	
Secured?	None
Being considered?	TBC. Were Freeport designation to be granted, some costs will be directly sequential to the Freeport status (for example, in relation to enhanced capital allowances and business rate discounts). The requirement for capital investment is to be determined.
If you have an indicative annual funding profile, please state below, or attach as appropriate	
Not yet prepared.	

Delivery
Which organisations do you envisage will need to be involved in delivery? Is there a lead delivery organisation?
ABP, Neath Port Talbot CBC, Welsh Government; potentially neighbouring authorities depending on the geographical scope of the proposition. Many English Freeports also have a 'regional' dimension, and this may be an important part of any proposal.
Beyond funding availability, what needs to happen to enable delivery? *(e.g., permissions, detailed business case development, key delivery challenges to overcome etc.)*
Development of a detailed proposal, linked with the Government's criteria and bidding process.
What are the indicative timescales and milestones associated with the intervention?
Unclear at this stage, although we assume an application process starting in 2021/22.

Contribution to Missions	
Establish South West Wales as a UK leader in renewable energy and net zero	Strong link given role of Freeport designation in supporting the development of the offshore renewables industry.
Create a strong, resilient and embedded SW Wales business base	Strong link, since Freeport designation should be an important part of the mix in marketing SW Wales to investors
Grow and sustain the SW Wales experience offer	Limited relevance, although designation would highlight (and help develop) investment opportunities in the area.

23. Swansea Central North

Business case status	Strategic Outline Case

Contact details		
Organisation	Swansea Council	
Key contact	Name	Huw Mowbray/ Emma Dakin
	Email	Huw.mowbray@swansea.gov.uk Emma.dakin@swansea.gov.uk
	Tel	

Strategic rationale
Please describe the proposed intervention? What is it seeking to achieve?

This project will deliver a **public sector office hub** within **Swansea Central** mixed use development, a transformative a comprehensive programme to regenerate the Swansea' central area.

The first phase of Swansea Central, now known as Copr Bay (https://coprbayswansea.com/), will deliver a 3,500-capacity indoor arena with digital facade, a 'digital square', car parking, a coastal parkland, commercial units, residential units, and a pedestrian bridge connecting the development from the north to the south of Oystermouth Road. Phase 1 is currently on site, with completion expected in Q4 2021.

The next phase is the office hub. This is expected to accommodate circa 3,500 FTEs from Swansea Council, and other government offices and departments, with negotiations are currently ongoing. The hub will be comprised of either one or two buildings depending on final requirements from occupiers (circa 14,500 sqm/ 156,500 sqf GIA).

The office hub will bring professional employment to the city centre, a key policy objective identified in the Local Development Plan, and supporting the Swansea Central Area Regeneration Framework. This will help to counter the current lack of significant numbers of people working and living in the city centre. This influx of daytime activity will bring much needed life and vitality to the city centre, supporting the improved retail and leisure offer developed through the Copr Bay regeneration scheme.

The concentration of employment and links to wider city centre regeneration will increase footfall and spend in the city centre. It will also have a substantial catalytic effect, increasing investor and business confidence, stimulating further economic growth and generating additional GVA.

Swansea Central North also supports the implementation of the 'One Public Estate' programme launched by UK Government. The programme focuses upon the consolidation of public service assets and services into shared estates within the city centre to bring cost, efficiency, and productivity benefits, plus providing a single point of contact.

What work has been done already (e.g., feasibility, project development, previous project activity)? *Please include links to relevant documents as appropriate.*

• 2017 - Outline planning permission for the Swansea Central scheme (2017/0648/OUT)
• 2019 - Swansea Central North Masterplan updated to reflect sectoral shifts in city centre to provide an employment and leisure focused scheme
• 2020 - Feasibility study for the office hub, including RIBA stage 1 designs and development appraisals
• 2021
  ➢ Appointment of a private sector development partner under the Shaping Swansea initiative https://shapingswansea.com/index.html
  ➢ Site clearance and preparatory works completed under the Copr Bay scheme
  ➢ Continue occupier negotiation on heads of terms

What are the main barriers or challenges in bringing this intervention forward?
• **Viability and the requirement for gap funding** – initial appraisals for the office hub show a development deficit. The deficit is not unexpected, as the core uses proposed currently have a 'market failure' position in Swansea. Existing headline rents (c.£14sqf) are not sufficient to create viable office development in current conditions. This is a vicious circle which only public sector investment can currently unlock. • **Organisations understanding their accommodation strategy in a post Covid world** – Covid has significant impacted ways of working, so organisations are reviewing their accommodation strategies. Whilst these reviews are impacting timescales, it is expected that organisations will shift towards flexible workspaces in central locations which provide the latest video conferencing meeting facilities to enable seamless hybrid working. Swansea currently suffers from a lack of quality office space, therefore the office hub will be crucial in the provision of fit for purpose office accommodation.
What benefits will the intervention generate? *(if these are indicatively quantified at this stage, please state, but otherwise please describe in general terms)*
• **Improved rental values and vitality for office development** - Being the first significant city centre office development since the 1990s (excluding SA1), the investment in the Public Sector Hub is expected to increase investor confidence and occupier interest in the later development phases, thus increasing potential land and rental values. This should lead to a decrease in the viability gap, improving the deliverability and market interest in Swansea Central North. A precedent for the expected uplift in rental values is Cardiff's Central Square development. Since 2016, Cardiff's gateway site has witnessed the construction of three major office developments (135, 0000 sq ft, 148, 000 sq ft, and 180, 000sq ft). The Central Square scheme has had a transformative impact, with Cardiff witnessing an average c. 40% increase in office rents since the completion of the latest phase of the Central Square masterplan. • **Increased footfall and dwell time** – The scheme will draw more footfall into the city centre via residents accessing public services and staff working in city centre. This will help drive demand for existing and new businesses, including in F&B, and leisure. • **Uplift in GVA** - An economic impact assessment, produced by Amion (Feb 2020) outlined the economic benefits of the Swansea Central North masterplan in its entirety:

- Over 5,000 workers will be accommodated in the proposed development including office, retail and leisure. After allowing for the displacement, deadweight and multiplier effects, the scheme will create an estimated 1,583 additional full-time equivalent jobs in Swansea. This will support net additional GVA of over £80m per annum.
- The construction project of Swansea Central North will have significant (albeit temporary) effects. The £117m of construction expenditure will support 1,199 job years in Swansea, generating one-off net additional GVA of £69.6m.

Funding

Estimated total intervention cost	Indicative total development cost: circa £52m

How will this cost be met? What sources of investment are…

Secured?	• Swansea Council – Stage 2 work up costs
Being considered?	• Private Sector Partner investment • Occupier contribution under hub scheme • Public sector gap funding • Borrowing

If you have an indicative annual funding profile, please state below, or attach as appropriate

To be determined.

Delivery

Which organisations do you envisage will need to be involved in delivery? Is there a lead delivery organisation?

- Lead – Swansea Council
- Shaping Swansea Private Sector development partner (subject to selected delivery method)
- Public sector occupiers

Beyond funding availability, what needs to happen to enable delivery? *(e.g., permissions, detailed business case development, key delivery challenges to overcome etc.)*

- Detailed business case development
- Heads of Term with occupiers
- Section 73 planning application under existing outline planning

What are the indicative timescales and milestones associated with the intervention?

	Start	**End**
Appointment of Shaping Swansea Partner	August 2021	
Stage 2 Concept design	Sept 2021	Q1 22
Stage 3 Developed design	Q1 2022	Q3 2022

	Stage 4 Technical design - PCSA period	Q4 2022	Q2 2023	
	Stage 5 / 6 / 7 Construction	Q2/3 2023	Q4 2024	

Contribution to Missions	
Establish South West Wales as a UK leader in renewable energy and net zero	Secondary link through greater energy efficiency of new building stock and contribution to concentration of employment and economic activity in a sustainable, city centre location.
Create a strong, resilient and embedded SW Wales business base	Strong link through catalytic effects on city centre growth and business opportunities, and potential for supply chain development.
Grow and sustain the SW Wales experience offer	Strong link through contribution to vibrancy and vitality of the city centre and its role as a key driver of the region's cultural, leisure and knowledge economy.

24. Swn Sir Gâr: Carmarthenshire Sound Stage

Business case status	Strategic Outline Case

Contact details		
Organisation	Carmarthenshire County Council	
Key contact	Name	Jason Jones
	Email	jajones@carmarthenshire.gov.uk
	Tel	

Strategic rationale

Please describe the proposed intervention? What is it seeking to achieve?

The intervention involves the construction of a 15,000 sqft single story building for use as a Sound Stage on a site adjacent to S4C's headquarters at Yr Egin, on the University Wales Trinty St David (UWTSD) campus, Carmarthen. An additional 750sqft space is required for costume area , makeup, offices, green room and storage.

The project offers a cultural, creative and linguistic platform for rural Carmarthenshire and the South West region. There will be strong links to the provision of a new bilingual skills base centred around arts, theatre and film.

Swn Sir Gar will build on the success of Yr Egin and a creative hub and will extend the benefits of what the creative sector is beginning to achieve in the county. A subsidiary of Sky has already shown interest in the development and initial talks have been had.

Evidence of demand

There is significant demand for a Sound Stage facility in the region, with similar facilities in Swansea and Cardiff already been booked up by the likes of Netflix and Amazon Prime for the next 5 years.

UWTSD commissioned BOP Consulting in early 2021 to undertake a Creative Industries Need Analysis for the region. The analysis of ONS data on business counts reveals the performance of the creative business base in the region, all of which demonstrate the need to develop the creative industry sector within the region:

- 56% increase in the number of businesses in the Film, TV, Video, Radio and Photography sector in the region between 2015 and 2020. This sector is responsible for more creative businesses in Carmarthenshire (40 businesses) and Neath Port Talbot (20 businesses) than any other creative sector.
- Despite a 13% fall in the number of businesses in the Music, Performing and Visual Arts sector in the region between 2015 and 2020, this sector is responsible for more creative businesses in the region than any other creative sector (135 businesses). It is also responsible for more creative businesses in Swansea (50 businesses) and Pembrokeshire (40 businesses) than any other creative sector.
- 17% of Welsh creative industries businesses are in South West Wales. The creative sector with the strongest performance in the region on this metric is Crafts, with 33% of Welsh

creative businesses in this sector being in the region – albeit sector sustains relatively very few businesses. • IT, Software and Computer Services and Film, TV, Video, Radio and Photography are the two most important sector contributors to the region's creative workforce. The former is responsible for 47% of creative jobs in the region (1930 jobs) and the largest jobs contributor in 3 of the 4 counties. The exception being Carmarthenshire, where Film, TV, Video, Radio and • Photography is most important. This sector sustains 20% of creative jobs across the region (850 jobs). • These two sectors increased their employment contribution to the region between 2015 and 2019 – but the most rapid increase in this period came from Advertising and Marketing: a 350% increase across the region driven by large increases in Carmarthenshire and Swansea. All other creative sectors declined in their employment contributions to the region.
What work has been done already (e.g., feasibility, project development, previous project activity)? *Please include links to relevant documents as appropriate.*
• Order of Estimates – Mott Macdonald • Sound Stage Options Plan • Savills Initial Viability Plan
What do you think are the main barriers or challenges in bringing this intervention forward?
The provision of external funding is the main challenge. The lack of skills for the jobs that will be available is also currently an issue. The RLSP through the City Deal Skills and Talent project will address this, as will the provision of tailored courses by UWTSD. The land is already owned by Trinity St David and obtaining planning permission should not be an issue.
What benefits do you think that the intervention should generate? *(if these are indicatively quantified at this stage, please state, but otherwise please describe in general terms)*
The facility would generate 60 new and direct jobs and 120 indirect jobs. Swn Sir Gar will allow UWTSD the opportunity to run 51 interrelated courses, e.g. • BA Theatre/ Design • BA Vocal Studies • MA Theatr Perfformio/ Cyfarwyddo (Performance/ Directing) • PhD Film and Digital Media. A total of 713 students will participate on these 51 courses.

Funding		
Estimated total intervention cost		£5.5m
How will this cost be met? What sources of investment are…		
Secured?	None	
Being considered?	Future funding application to the UK Government's Shared Prosperity Fund; Welsh Government funding.	
If you have an indicative annual funding profile, please state below, or attach as appropriate		
An Order of Estimate by Mott Macdonald estimated that the cost would be £8m. UWTSD are of the opinion that it could be built for £5.5m.		

Delivery
Which organisations do you envisage will need to be involved in delivery? Is there a lead delivery organisation?
Carmarthenshire County Council will lead on the delivery. Trinity St David will be the key partners.
Beyond funding availability, what needs to happen to enable delivery? *(e.g., permissions, detailed business case development, key delivery challenges to overcome etc.)*
• Business Case planning. • Design process • Planning permission
What are the indicative timescales and milestones associated with the intervention?
April 2022 - December 2023, subject to funding.

Contribution to Missions	
Establish South West Wales as a UK leader in renewable energy and net zero	No direct link, although the new facility will be built to high environmental standards, and co-location with existing activities at Yr Egin will reduce travel times
Create a strong, resilient and embedded SW Wales business base	Strong link, by supporting the growth of the creative sector and developing a concentration of film, TV and theatre production in Carmarthenshire.
Grow and sustain the SW Wales experience offer	Strong link, through the contribution of the cultural and creative industries to South West Wales' overall offer to visitors, residents and investors.

25. Pentre Awel Phase 2

Business case status	Strategic Outline Case

Contact details		
Organisation	Carmarthenshire County Council	
Key contact	Name	Sharon Burford
	Email	SBurford@carmarthenshire.gov.uk
	Tel	

Strategic rationale

Please describe the proposed intervention? What is it seeking to achieve?

Pentre Awel is a multi-million pound development to be located across 83 acres of Joint Venture land in South Llanelli. It will be the first development of its kind in Wales, creating a unique ecosystem that co-locates business, research, academia, health and leisure within landmark infrastructure.

Funding for **Zone 1** has been secured through City Deal and CCC's Capital Programme. However, there are opportunities to upscale the proposed services and activities at Pentre Awel and linked sites to further extend the socio-economic and health impact regionally and nationally by creating a hub and spoke network. In **Phase 2**, these could include:

- **Research and Innovation Hub** at Pentre Awel linked to satellite sites across Hywel Dda to expand the opportunities and provide an enhanced critical mass for med-tech development and rural entrepreneurship with enhanced 'Living – Lab' /testbed opportunities. The enhanced capacity would enable an incremental approach to market adoption to be developed which would be advantageous to the private sector and innovation networks including Life Sciences Hub Wales and Accelerate.
- An enhanced **Health Technology Hub** to:
    - promote equitable access to health and care services, for example virtual consultations and health promotion sessions to groups/classes in satellite sites. This could include remote diagnostics – an area of increasing importance
    - deliver telepharmacy – offering improved access to pharmacists across the county, including rural, to relieve pressures on secondary care (e.g. services such as chronic condition management, health and wellbeing)
    - empower self-management of own health and wellbeing (e.g. remote diagnostics)
    - anchor a dispersed 'living laboratory' to test digital services and products with residents across the region and recruit people into low-level clinical trials
    - link to Health and Wellbeing Centres (e.g. at Cross Hands) to deliver education, skills and training programmes and community out-reach activities. For example, livestreaming classes from the simulation and training suites at Pentre Awel.
- **Biobank/Clinical Engineering** – to strengthen health research capabilities, increase population catchment areas for trials and potential for a national biobank network
- **Expansion business centre** for companies to 'spin out' from incubation facilities in Zone 1 to dedicated premises

What work has been done already (e.g., feasibility, project development, previous project activity)? *Please include links to relevant documents as appropriate.*

• Health Impact Assessment undertaken and evidences how Pentre Awel would improve population health and wellbeing by addressing the wider determinants of health. • 5 Case Business Plan approved by UKG and WG • Working strategies by thematic area produced by multi-agency working groups, including Clinical Delivery Strategy, Education Strategy • Outline planning for Pentre Awel • Identification of health and care skills need linked to training. • Development of research space, linked to Hywel Dda Research and Innovation strategy. • Capacity and affordability modelling for assisted living. • Agreements in place with Health/Social Care and education skills and training providers. • Links with digital and skills Swansea Bay City Deal projects to enable shared planning to maximise benefits. There is potential to explore how new digital infrastructure could be utilised to empower remote patient monitoring, better data-driven decisions in health. • Planning with Delta Wellbeing for monitoring, development of tech and response service
What do you think are the main barriers or challenges in bringing this intervention forward?
Capital and revenue funding for the wider schemes and extending regional partner buy-in. Strategic and operational integration of the hub and spoke model across the health board region
What benefits do you think that the intervention should generate? *(if these are indicatively quantified at this stage, please state, but otherwise please describe in general terms)*
• **Economy -** create economic regeneration and impact on GVA / NPV across the region • **Business -** improve business, research & development excellence/capacity within the region by harnessing the strengths of the South West Wales life science crucible • **Skills -** To address retention and recruitment challenges by focusing on skills shortages, particularly in health and care, digital skills, apprenticeships, NEETS and return to work • **Health -** Reduce health and social inequalities and improve the overarching wellbeing indices for the region. Enhance availability of services • **Engagement –** Foster partnership between the public, private and third sectors for joint delivery of business, research, education/training and health ambitions

Funding	
Estimated total intervention cost	Pentre Awel £200m (total investment) Proposed additionality and creation of a hub and spoke model TBC
How will this cost be met? What sources of investment are…	
Secured?	City Deal, CCC Capital Programme (for Zone 1)
Being considered?	Institutional investment (funding appraisals undertaken)
If you have an indicative annual funding profile, please state below, or attach as appropriate	
TBC	

Delivery
Which organisations do you envisage will need to be involved in delivery? Is there a lead delivery organisation?
We anticipate that CCC would remain the lead organisation, building on the strong, collaborative working relationships already in place to deliver Zone 1 of Pentre Awel. These include health, FE and HE, research, social care, leisure, third sector and local community stakeholders.
Beyond funding availability, what needs to happen to enable delivery? *(e.g., permissions, detailed business case development, key delivery challenges to overcome etc.)*
Feasibility study to identify suitable Research and Innovation and Health Technology Hub satellite sites, consider their infrastructure/fit-out requirements (e.g. IT) and service planning. Expansion Business Centre may require a separate business case. The links with the digital project could be used to ensure connectivity opportunities are maximised in each community health facility to facilities access to services closer to home and enable research innovation and training.
What are the indicative timescales and milestones associated with the intervention?
We anticipate that the proposed intervention would run in parallel with the delivery programme of Zone 1, which has the following milestones: • Contractor appointment – September 2021 • Design and Build – c. 2 years • Operationalisation – January 2024

Contribution to Missions	
Establish South West Wales as a UK leader in renewable energy and net zero	The although the new facility will be built to high environmental standards and the hub and spoke model should help to support better access to services closer to home.
Create a strong, resilient and embedded SW Wales business base	Strong link, by supporting the growth of R&D and business opportunities in the health economy – a rapidly growing sector in South West Wales.
Grow and sustain the SW Wales experience offer	Pentre Awel is a flagship scheme and has an important relationship with the region’s health economy and life science offer. Potentially important in contributing to the wider investment case.

26. Haverfordwest Airport Redevelopment

Business case status	Concept/ feasibility

Contact details		
Organisation	Pembrokeshire County Council	
Key contact	Name	Rachel Moxey
	Email	rachel.moxey@pembrokeshire.gov.uk
	Tel	07557 191254

Strategic rationale
Please describe the proposed intervention? What is it seeking to achieve?

Haverfordwest Airport (also known as Withybush Airport) is a small airport in Pembrokeshire, owned by Pembrokeshire County Council and primarily used for pleasure flights, flying school and some medical uses. While the airport is an important regional asset and has some good quality infrastructure, it has struggled commercially for some years.

In 2020, the Welsh Government and Pembrokeshire County Council commissioned a review of the operating status, operational activities and facilities at Haverfordwest Airport, taking account of an earlier options study prepared by Arup. The review made a series of recommendations for operational improvements to improve profitability. However, the review also noted opportunities for increasing the use of the airport, in relation to:

- **Offshore wind**, including the potential for helicopter transfer to the proposed Erebus floating offshore wind turbine
- **Air freight**, especially where relevant to high-quality perishable goods produced by the South West Wales food sector, and transfer of just-in-time equipment and personnel for the oil and gas and offshore renewables sector.

Consequently, the review recommended that, in addition to business improvements and preparation of a Haverfordwest Airport Development Plan, *"targeted and limited investment [should] be made in a package of operational upgrades to increase the attractiveness of the airport to new and existing users"*, with a focus on sub-regional connectivity and light air freight. This may include an increase in the runway length to accommodate some freight activities. The report notes that *"the airport is significantly under-valued and under-exploited"*, in the context of its road and rail links and proximity to the Haven Waterway Enterprise Zone and associated energy sector investments.

What work has been done already (e.g., feasibility, project development, previous project activity)? *Please include links to relevant documents as appropriate.*

An Options Review was completed by Arup in 2015. This considered a series of options, from closure to substantial reinvestment. Subsequently, a further review (Osprey, 2020) identified a preferred way forward (improvements to business processes and strategy and modest investment, as outlined above), in the context of the existing market and potential new sources of demand.

What do you think are the main barriers or challenges in bringing this intervention forward?
• **Policy approaches to aviation:** *Llwybr Newydd* maintains Welsh Government support for a viable aviation sector in Wales (albeit principally focused on Cardiff Airport). However, it acknowledges the challenges that air travel presents to meeting net zero targets. This may present a challenge in making the case for future government investment, although the potential use of the airport in supporting the renewable energy sector ought to be strong. • **Funding** for infrastructure improvements, given the airport's marginal viability (although the Osprey report is optimistic that sustained profitability can be reached through stronger business planning and processes). • **Demonstrating demand** and the business case for further improvements (such as runway extension). • In the short term, greater current **operational losses** caused by Covid-19.
What benefits do you think that the intervention should generate? *(if these are indicatively quantified at this stage, please state, but otherwise please describe in general terms)*
• Investment in and attractiveness of the renewable energy industry, through the provision of essential infrastructure • Benefits to local producers in gaining fast access to markets (and therefore increasing profitability and productivity), potentially adding value to the new Pembrokeshire Food Park • Long-term sustainability of the airport as a regional asset. There is an opportunity at Haverfordwest Airport to build a solar PV farm that could power the airport, offer battery storage for grid balancing, provide private wire power to the adjacent Pembrokeshire Food Park (referenced in separate project entry) and offer electric vehicle charging. In the longer term, there could also be potential for electric plane charging and the production of green hydrogen to service fuel cells for buildings at Pembrokeshire Food Park and Withybush Hospital and for electric road and rail vehicles. • Increased tourism and business connectivity (depending on the use mix – note that the Osprey report makes a presumption against expansion for executive travel, for which the negative environmental consequences are likely to be higher).

Funding	
Estimated total intervention cost	£5m (estimates included in the Osprey report, although this is considered a high-level assessment only)
How will this cost be met? What sources of investment are…	
Secured?	None at this stage
Being considered?	Pembrokeshire County Council (potentially via borrowing); Welsh Government; potentially commercial investment.
If you have an indicative annual funding profile, please state below, or attach as appropriate	
Not yet developed	

Delivery
Which organisations do you envisage will need to be involved in delivery? Is there a lead delivery organisation?
• Pembrokeshire County Council • Welsh Government Aviation Department
Beyond funding availability, what needs to happen to enable delivery? *(e.g., permissions, detailed business case development, key delivery challenges to overcome etc.)*
• Implementation of operational improvements to secure the future of the airport • Demand analysis and business case development
What are the indicative timescales and milestones associated with the intervention?
• Business case development 2021/22; potential implementation 2022/23

Contribution to Missions	
Establish South West Wales as a UK leader in renewable energy and net zero	Strong link if the redevelopment of the airport can be associated with access to Pembrokeshire's offshore renewables offer and could potentially drive the development of the industry.
Create a strong, resilient and embedded SW Wales business base	Strong link, if there is a rationale linked with the use of the airport for perishable freight transport, supporting the food sector
Grow and sustain the SW Wales experience offer	The airport could provide improved visitor, resident and investor access, although note the potential environmental concerns associated with this, especially if at scale.

27. Pembrokeshire Food Park

Business case status	Phase 1: FBC and underway Phase 2: Strategic Outline Case

Contact details		
Organisation	Pembrokeshire County Council	
Key contact	Name	Rachel Moxey
	Email	Rache.moxey@pembrokeshire.gov.uk
	Tel	07557 191254

Strategic rationale
Please describe the proposed intervention? What is it seeking to achieve?
Pembrokeshire Food Park is a new facility to support and strengthen Pembrokeshire's food and drink industry. It occupies a 23 acre site on the Withybush Business Park north of Haverfordwest and offers a series of serviced sites geared to SMEs as well as larger food processors, plus a food grade incubator for start-ups and small enterprises. The site is adjacent to a development being taken forward commercially by a food producer and is located within the Haven Waterway Enterprise Zone. Work is underway to complete estate roads and utilities supply, with incubator units being delivered in the next phase. Beyond the current funding, there is an identified need for further 'grow-on' space, which is likely to require further public support to come forward (and which should form part of the regional commercial property proposals for which there is a separate entry within the Project Pipeline).
What work has been done already (e.g., feasibility, project development, previous project activity)? *Please include links to relevant documents as appropriate.*
The project has secured Welsh Government and ERDF funding and the first phase is underway.
What do you think are the main barriers or challenges in bringing this intervention forward?
Commercial viability of grow-on space and provision for larger units. This is a widely recognised issue across the region, resulting in an overall shortfall in commercial property provision. The likelihood is that demand (both current demand and new demand generated from the incubator offer) will be unmet without intervention to bridge the gap between development costs and anticipated rents.
What benefits do you think that the intervention should generate? *(if these are indicatively quantified at this stage, please state, but otherwise please describe in general terms)*

• Growth of smaller enterprises in the food sector (building on growing demand for artisan/ specialist produce and facilitating expansion beyond farm and home-based businesses) • Expansion of existing food sector enterprises through provision of grow-on space • New job creation • Opportunities to invest in local businesses (and an expansion of the locally owned business base) • Contribution to food security • Opportunity to link the Food Park with the solar energy generation potential at Haverfordwest Airport (see separate project entry).

Funding	
Estimated total intervention cost	£6 million
How will this cost be met? What sources of investment are…	
Secured?	£4.5 million, ERDF and Welsh Government
Being considered?	Commercial investment and public funding via proposed commercial property fund
If you have an indicative annual funding profile, please state below, or attach as appropriate	
To be determined beyond completion of Phase 1 in 2022.	

Delivery
Which organisations do you envisage will need to be involved in delivery? Is there a lead delivery organisation?
• Pembrokeshire CC • Welsh Government • Haven Waterway Enterprise Zone
Beyond funding availability, what needs to happen to enable delivery? *(e.g., permissions, detailed business case development, key delivery challenges to overcome etc.)*
• Further evidence of demand for grow on space/ larger units within the industry
What are the indicative timescales and milestones associated with the intervention?
• First phase of incubator units completed in 2022; further development to follow.

Contribution to Missions	
Establish South West Wales as a UK leader in renewable energy and net zero	Site offers capacity for energy generation. New facilities will offer higher sustainability standards than existing stock.
Create a strong, resilient and embedded SW Wales business base	Strong link in contributing to the development of growth opportunities in the food sector, a recognised

	area of strength in South West Wales, with high levels of local ownership and employment.
Grow and sustain the SW Wales experience offer	Contributes to positive perceptions of the region as a place to live, visit and invest, including through the growth of the local food and drink offer.

28. Skills and Talent Programme

Contact details		
Organisation	Regional Learning and Skills Partnership (RLSP)	
Key contact	Name	Jane Lewis
	Email	jelewis@carmarthenshire.gov.uk
	Tel	07789371211

Strategic rationale
Please describe the proposed intervention? What is it seeking to achieve?
This project seeks to build on the Skills and Talent Programme currently developed as part of the Swansea Bay City Deal and the work of the Regional Learning and Skills Partnership to develop a skilled workforce in South West Wales linked with current and anticipated employer demand. It aims to reduce the number of individuals with no, or below level 2 qualifications; reduce economic inactivity; enhance apprenticeship opportunities and increase the number of pupils leaving school to follow a STEM qualification in further or higher education.
What work has been done already (e.g., feasibility, project development, previous project activity)? *Please include links to relevant documents as appropriate.*

The Regional Learning and Skills Partnership
The RLSP is a partnership of employers, providers and strategic partners, and has an ongoing role in engaging with business to understand skills gaps in the region. It also prepares an annual Employment and Skills Plan to support the funding of apprenticeship and further education courses in the region. In recent years, the role of the RLSP has expanded: for example, during the Covid -19 pandemic the RLSP has been preparing quarterly reports for Welsh Government on the impact of the pandemic on the businesses in the region and identifying new skills required coming out of the pandemic.

The Swansea Bay Skills and Talent Programme
Alongside the eight projects supported by the Swansea Bay City Deal, a **Skills and Talent Programme** has been designed to identify the employment opportunities and skills that will be created by the City Deal programme across the five identified themes of Construction, Digital, Energy, Health and Wellbeing and Smart Manufacturing. A business case has been completed and is currently in going through the review and approval process[14].

The Skills and Talent Programme envisages four phases of delivery:

- Phase1 - mapping of the City Deal skills gaps and analysis of the training needs for the City Deal projects and the wider regional benefits. The needs analysis will consider the business needs; gender and equality imbalances and the needs and availability of the existing and future workforce through re-training and increasing awareness of opportunities.
- Phase 2 - identify the skills gaps across the five key themes and work with stakeholders to develop pilot projects to deliver the skills training and upskilling identified. The Skills and Talent programme will not duplicate existing provision but will work with all training providers across the region to ensure that the courses delivered through the pilot projects will

[14] See summary of the business case

meet the future skills needs for the region and will provide a lasting legacy of skilled individuals across the Swansea Bay region.

- Phase 3 - will work with schools across the region to highlight opportunities that will be generated through the City Deal projects and develop clear pathways to help young people make the right choices in schools. The aim will be to increase the number of pupils following STEM subjects in Further and Higher Education.
- Phase 4 – identify opportunities to create Centres of Excellence in the region that will be the legacy of the programme and establish the region as being the best place to learn specific sector skills.

Future growth and investment in skills to support delivery of the REDP

The Skills and Talent Programme is a significant investment and will help to ensure that major capital schemes support the retention and growth of opportunities locally. While the Programme is in its 'early days', it should offer a platform for further development to support the wider agenda set out in the REDP, especially in providing employer-oriented solutions to the challenges of decarbonisation and digitalisation that the REDP articulates, and raising demand for (as well as responding to the supply of) skills progression.

The pandemic has also highlighted significant skills and labour challenges in a number of sectors, notably in transport and logistics. While to some extent these reflect turbulence in the labour market as production and demand return unevenly to normal, they also reflect long-standing issues in some industries associated with the ageing of the workforce and/ or reliance on international labour which may be more challenging following Brexit. Working with employers to provide better information on opportunities and progression to new entrants – and helping employers address some of the condition and pay related reasons for recruitment shortfalls will be an important part of the future approach.

Supporting access to employment

While significant progress has been made in recent years in reducing levels of economic inactivity in South West Wales, there is still a gap between the region and the rest of the UK – the REDP highlights that if economic inactivity could be reduced to the UK average, it would mean an additional 22,000 people entering the labour market. This is important in terms of increasing the workforce 'pool', but it is also crucial in creating the 'balanced and inclusive' economy that we want: access to work is still critical to health and prosperity.

In recent years, great progress has been made through specialist employability programmes, such as Workways+, in providing access to job brokerage, practical work experience and support in job readiness. The case for continued supplementary support remains, given the region's economic activity shortfall. As the European funding that sustained Workways+ and similar programmes comes to an end, it will be important that support remains in place and is enhanced, alongside the skills offer.

What do you think are the main barriers or challenges in bringing this intervention forward?

- **Absorptive capacity:** Funding is one of the main issues for business and time to allow staff time off to study. The Welsh Government has made funding available for free courses, but businesses are facing difficulty currently in recruiting staff and are unable to give them time off for study.
- **Sequencing the programme:** Securing funding from the City Deal and delivering the current business case (and demonstrating success), as a platform for future expansion.

What benefits do you think that the intervention should generate? *(if these are indicatively quantified at this stage, please state, but otherwise please describe in general terms)*
• Increased number of people with the skills required to meet the needs of industry. • Upskilled workforce to meet the skills needs of the future. • Increased opportunity to get economically inactive people into work. • Improved business activity and job creation • Greater opportunities for people, job creation and business growth

Funding	
Estimated total intervention cost	£30,000,000 (existing Skills and Talent Programme)
How will this cost be met? What sources of investment are…	
Secured?	Awaiting ratification of funding which will be secured through the Swansea Bay City Deal
Being considered?	To be secured via a mix of public and private investment
If you have an indicative annual funding profile, please state below, or attach as appropriate	

Delivery
Which organisations do you envisage will need to be involved in delivery? Is there a lead delivery organisation?
• Regional Learning and Skills Partnership • FE Colleges – Gower, Coleg Sir Gar, Neath and Port Talbot and Pembrokeshire • Universities – Swansea and Trinity Saint David • Private Training Providers • Businesses • DWP • Careers Wales
Beyond funding availability, what needs to happen to enable delivery? *(e.g., permissions, detailed business case development, key delivery challenges to overcome etc.)*
• Business Case development for Skills and Talent Programme- Complete • Project concepts developed • Cost planning and programming • Funding secured
What are the indicative timescales and milestones associated with the intervention?
• Business case development complete • Project concept, cost planning and programming 2022/23 • Implementation 2022 - 2026

Links to Missions	
Establish South West Wales as a UK leader in renewable energy and net zero	Key link in supporting the supply of talent (especially in relation to STEM/ technical skills) to meet the decarbonisation agenda.

Create a strong, resilient and embedded SW Wales business base	Key link, given the centrality of the availability of skills as part of the overall business environment and investment package. However, the evidence suggests that the challenge is not just about increasing 'supply' to meet business demand: it also relates to the need to drive up demand, especially among SMEs. The Programme should have an important role in enabling this.
Grow and sustain the SW Wales experience offer	Secondary link, but contributes to positive perceptions of South West Wales as a business investment location, and as a place that attracts and retains talent.

29. Local supplier development

Much attention has been paid recently to the role that the local public sector can have as an 'anchor institution' in the local economy, as a stable employer and purchaser of goods and services. As part of this, public procurement can be an important way of stimulating local supplier markets and supporting employment, and it has been a focus of policy both for the Welsh Government and for several authorities elsewhere in the UK (Preston is often cited as an example).

Essentially, there are two arguments for a locally-oriented procurement approach:

- First, in places where there is not already strong local demand, public contracts can be an important way of encouraging market and business development. This is not about 'local protectionism': rather, it is about linking the role of the authority as a purchaser with its role as a wider business support agency.
- Second, there are circumstances where locally-based provision might be more resilient and might provide a better community service (for example in some social care activities). But in rural/ more remote areas, there may be insufficient nearby demand to enable a viable and diverse local supplier mix. Considering different ownership and contracting models could be a way of securing better overall outcomes.

Several authorities are considering different approaches to procurement. The project entry below and the one that follows reflect two of these. Building on this, it may be possible to develop a shared regional approach to procurement.

Business case status	Concept/ feasibility
NB – This proposal contributes to/ could form part of the regional Entrepreneurship and Enterprise Programme (see above)	

Contact details		
Organisation	Swansea Council	
Key contact	Name	Chris Williams
	Email	Chris.williams4@swansea.gov.uk
	Tel	07471 145444

Strategic rationale
Please describe the proposed intervention? What is it seeking to achieve?

To increase the percentage of local government spend with companies in our region. This would act to strengthen the business community as well as develop skills.
What work has been done already (e.g., feasibility, project development, previous project activity)? *Please include links to relevant documents as appropriate.*
Swansea's WG funded project to look at local supplier development and barriers; this work would build on that project. The U.K.'s recent departure from the European Union does create opportunities for more use of local suppliers as the procurement rules are somewhat more flexible.
What do you think are the main barriers or challenges in bringing this intervention forward?
Resources/capacity
What benefits do you think that the intervention should generate? *(if these are indicatively quantified at this stage, please state, but otherwise please describe in general terms)*
Increase in use of local suppliers to deliver local authority contracts (this could be quantified following a suitable baseline assessment – there is for example no pan-Wales definition of what constitutes a local supplier)

Funding	
Estimated total intervention cost	£330,000 over 3 years
How will this cost be met? What sources of investment are…	
Secured?	Needs to be secured
Being considered?	
If you have an indicative annual funding profile, please state below, or attach as appropriate	
£110,000 per annum / 1 grade 10 and 1 grade 8 procurement professional	

Delivery
Which organisations do you envisage will need to be involved in delivery? Is there a lead delivery organisation?

Swansea Council could be lead body working with city deal region as well as existing groups such as the WLGA regional procurement network
Beyond funding availability, what needs to happen to enable delivery? *(e.g., permissions, detailed business case development, key delivery challenges to overcome etc.)*
Development of detailed plans / please see indicative timelines below.
What are the indicative timescales and milestones associated with the intervention?
Baseline data to be completed - 3 to 6 months (in terms of analysis of the supply chain) Review of forward pipeline of contracts - in parallel with the above lotting strategy achieved 6 -12 months / i.e. reconfiguration of procurement pipeline to facilitate increased local supply usage. 12 months + rolling implementation across the range of contracts identified

Contribution to Missions	
Establish South West Wales as a UK leader in renewable energy and net zero	Potential contribution through the development of local markets and shortened supply chains
Create a strong, resilient and embedded SW Wales business base	Direct contribution, and supports (and could form part of) the Enterprise and Entrepreneurship package set out in Project Proposal 4.
Grow and sustain the SW Wales experience offer	No direct link, although there could be wider benefits in generating 'sense of place' and community pride through local ownership and locally-based service provision.

30. Supporting SMEs through procurement

Business case status	Outline Business Case
NB – This proposal contributes to/ could form part of the regional Entrepreneurship and Enterprise Programme (Project Proposal 4)	

Contact details		
Organisation	Neath Port Talbot County Borough Council	
Key contact	Name	Julie Davies
	Email	j.davies1@npt.gov.uk
	Tel	07977 443861

Strategic rationale

Please describe the proposed intervention? What is it seeking to achieve?

The aim of the project will be to:

- Promote the development and expansion of the foundational economy, specifically within Valleys areas, removing barriers to growth and supporting business to develop in a supportive and managed environment.
- Trail new innovative ways to maximise procurement to support the development of local supply chains within the foundational economy of our valley communities and adopt a core business friendly approach to procuring.
- Intervention will be via 1-1 sessions, workshops, training seminars, etc.

What work has been done already (e.g., feasibility, project development, previous project activity)? *Please include links to relevant documents as appropriate.*

A bid was submitted (early 2020) and approved under the Welsh Government's Foundational Economy programme of support.
Unfortunately, was not able to recruit the staff to deliver the project due to Covid-19, so the project was put on hold, pending another round of Foundational Economy funds being released.

What do you think are the main barriers or challenges in bringing this intervention forward?

Costs (in particular, staff costs)

What benefits do you think that the intervention should generate? *(if these are indicatively quantified at this stage, please state, but otherwise please describe in general terms)*

Project aims include:

- Understand the needs of the businesses within the foundational economy.
- Provision of wraparound support service, in partnership Business Wales and NPT College, to encourage growth, development and the creation/ safeguarding of jobs. This will include help with skills development, employability support, procurement, finance, property, etc.
- Promote the engagement of small, local businesses in the securing public sector contracts.

The success of the project will be measured through specific outputs: • No of businesses engaged • No of local businesses supported to deliver contracts • No of local businesses supported with training • No of jobs created/safeguarded • No of contract opportunities (under £25k) identified by Council • No of Work Experience Placements • No of local businesses receiving recruitment support • No of Paid Work Experience opportunities • Sector specific training provided to potential applicants • Support with recruitment will be provided – 10 • Opportunities of Paid Work Experience – 5 • Sector specific training provided to potential applicants – 15 • No of businesses engaged - 50 • No of local businesses engaged with/advised/supported to deliver contracts - 20 • No of local businesses supported with training - 10 • No of jobs created/safeguarded – 10 – due to Covid19 this may be difficult to achieve • No of contract opportunities (under £25k) identified by Council - 15 Employability Projects (Workways+, Communities for Work) will be used to support businesses across the foundational economy with employment and job/work experience opportunities for will benefit local people. In addition, Cyfle Building Skills will also be used to identify deliver work experience opportunities and help with the up-skilling of the supply chain (within the construction-related sector). • Work Experience Placements created – 15

Funding	
Estimated total intervention cost	£100,000 (12months)
How will this cost be met? What sources of investment are…	
Secured?	Not secured/originally approved but project was put on hold due to Covid-19.
Being considered?	
If you have an indicative annual funding profile, please state below, or attach as appropriate	

Delivery
Which organisations do you envisage will need to be involved in delivery? Is there a lead delivery organisation?
• Business Wales • Neath Port Talbot College • Workways+ • Communities for Work • Cyfle

Beyond funding availability, what needs to happen to enable delivery? *(e.g., permissions, detailed business case development, key delivery challenges to overcome etc.)*
• Further business case development
What are the indicative timescales and milestones associated with the intervention?
Project was initially costed for a 12 month delivery period.

Contribution to Missions	
Establish South West Wales as a UK leader in renewable energy and net zero	Potential contribution through support to businesses in adaption and adoption
Create a strong, resilient and embedded SW Wales business base	Direct contribution, and supports (and could form part of) the Enterprise and Entrepreneurship package set out in Project Proposal 4.
Grow and sustain the SW Wales experience offer	Potential contribution through support for visitor economy and town centre businesses.

31. Supporting Business Growth and Innovation

Business case status	Outline Business Case
NB – This proposal contributes to/ could form part of the regional Entrepreneurship and Enterprise Programme (Project Proposal 4)	

Contact details		
Organisation	Neath Port Talbot County Borough Council	
Key contact	Name	Julie Davies
	Email	j.davies1@npt.gov.uk
	Tel	07977 443861

Strategic rationale
Please describe the proposed intervention? What is it seeking to achieve?

Delivery of the project will focus on 2 key themes:

Digital Technology ensuring businesses in all sectors have the right skills and technologies to capitalise on growth opportunities post-Covid and take advantage of an increasingly green, digital and flexible economy. Discussions have taken place with Superfast Business Wales and new 1-1 programmes have been discussed that complement existing interventions. Going forward, the focus will be on filling gaps in current provision and ensuring businesses have the skills and knowledge to exploit the potential of digital technology to innovate for growth and long-term sustainability.
The plan is share intelligence/evidence collated relating to digital infrastructure and/or connectivity with the Swansea Bay City Deal to support its digital agenda.

Supporting innovation and the Manufacturing/Engineering sectors to upskill diversify operations; identify issues and future growth opportunities to boost productivity and power economic growth. Delivery will focus on businesses who are looking to expand and grow. 1-1 diagnostic reviews will be used to tease out the impact of Covid-19 on the manufacturing/engineering sector, identify growth and diversification opportunities and tailor interventions to support the sector going forward. Financial planning, analytics and optimisation sessions will also take place along with a final review to track progress and revisit any new challenges. One to many sessions, are also planned the setting up of Manufacturing/Engineering Business Forum to gather business intelligence; encourage collaboration, provide opportunities for businesses to exchange ideas and link with trade/professional bodies and industry related organisations.
Going forward, intelligence will be used to develop tailored support packages to support future growth opportunities and will be shared with partner local authorities, City Deal projects and academia to support future innovative bids around low carbon, green, sustainable manufacturing.

Covid-19 Recovery Plan – a package of support to help businesses recover from the impact of the pandemic and to support the delivery of Neath Port Talbot's post-Covid19 recovery plan. Wide-ranging programme will include capital and revenue grant assistance for new start-ups and growth SMEs, to help make them more resilient; stimulate investment, encourage innovation, increase capacity, improve sales and/or to become more competitive as they adapt and evolve post Covid-19. The fund will not support working capital requirements or it not intended to help

businesses survive a difficult trading period - a longer term plan as to how they are to become more resilient and be able to deal with further restrictions will be required.
What work has been done already (e.g., feasibility, project development, previous project activity)? *Please include links to relevant documents as appropriate.*
CRF bids have been submitted to UK Government to cover the costs of delivering the Digital Technology & Supporting innovation and the Manufacturing/Engineering sectors sections above. Council approved additional funds to support the delivery of the Covid-19 Recovery Plan. In addition, discussions are taking place with Welsh Government regarding their Recovery Grant programme to be launched in September. Local authorities will be delivering an element of the programme – budget and further details yet to be finalised.
What do you think are the main barriers or challenges in bringing this intervention forward?
Funding if CRF bid is not successful. Not having enough funding in the Covid-19 Recovery Fund to support high value projects across all business sectors.
What benefits do you think that the intervention should generate? *(if these are indicatively quantified at this stage, please state, but otherwise please describe in general terms)*
The project will: • Inform the development of a robust post Covid local economic development strategy that aligns with relevant local, regional and national long-term strategic plans. • Equip local people with the skills to take advantage of new opportunities that meet the needs of businesses and an increasingly green and digital economy. • Support a prosperous local economy, post Covid and EU funding. • Address local need of local employers for digital up-skilling. • Encourage the development of innovative growth potential projects and links to trade bodies, academia, etc. • Help businesses understand their skills gaps, access finance to support innovative growth or diversification plans, safeguarding existing employment and create new jobs. • Encourage collaboration and knowledge sharing to create a local innovation culture. • Promote the advancement of digital skills and inclusion of under-represented groups, especially within our valley (rural) communities. • Investing in a pilot interventions to support micro and SMEs grow and prosper. • Support local and national decarbonisation measures by encouraging local businesses to reduce greenhouse gases by investing in new technology or energy efficiency measures to improve business productivity. • Support local businesses in their recovery from the impact of the pandemic. • Help build business resilience, stimulate capital investment, encourage innovation, increase capacity, improve sales, boost the local economy, stimulate business growth and make businesses more competitive as they adapt and evolve post Covid-19.

Funding	
Estimated total intervention cost	£620,000
How will this cost be met? What sources of investment are:	
Secured?	£200k (internal)

Being considered?	CRF WG Recovery Fund
If you have an indicative annual funding profile, please state below, or attach as appropriate	

Delivery
Which organisations do you envisage will need to be involved in delivery? Is there a lead delivery organisation?
Neath Port Talbot Council's Economic Development Unit will lead on the project and deliver in partnership with Superfast Business Wales, Welsh Government, private sector and support organisations such as Neath Port Talbot College.
Beyond funding availability, what needs to happen to enable delivery? *(e.g., permissions, detailed business case development, key delivery challenges to overcome etc.)*
What are the indicative timescales and milestones associated with the intervention?
• CRF Funding – project will cover a pilot 6 month period (Sept 2021 – March 2022). Evidence gathered will be shared with partner organisations, will help shape long term regional and local economic development priorities and will be able to inform larger scaled up bids in the future. • Covid-19 Recovery Plan – plans to launch in Sept (both Council & WG funding). Council will review outcomes at the end of March, WG timescales t.b.c.

Contribution to Missions	
Establish South West Wales as a UK leader in renewable energy and net zero	Potential contribution through support to businesses I adaption and adoption
Create a strong, resilient and embedded SW Wales business base	Direct contribution, and supports (and could form part of) the Enterprise and Entrepreneurship package set out in Project Proposal 4.
Grow and sustain the SW Wales experience offer	Potential contribution through support for visitor economy and town centre businesses.

32. Supporting New Business Start-ups

Business case status	Concept/ feasibility
NB – This proposal contributes to/ could form part of the regional Entrepreneurship and Enterprise Programme (Project Proposal 4)	

Contact details		
Organisation	Neath Port Talbot County Borough Council	
Key contact	Name	Julie Davies
	Email	j.davies1@npt.gov.uk
	Tel	07977 443861

Strategic rationale

Please describe the proposed intervention? What is it seeking to achieve?

To build on NPT Council's existing Innov8 programme of support for potential new business start-ups to provide additional interventions such as:

- Deliver a programme of support to businesses within the valley communities of Neath Port Talbot including Enterprise Clubs and Business Bootcamp events.
- Deliver a tailored programme of support to business starts with growth potential, e.g. sourcing specialist support to help businesses develop new and improved products, develop their innovation potential and prepare entrepreneurs to be investor ready.
- Promote collaboration and knowledge sharing, including small-scale knowledge transfer activity, links with academia and the commercialisation of products.

What work has been done already (e.g., feasibility, project development, previous project activity)? *Please include links to relevant documents as appropriate.*

- A bid was considered for submission to the CRF to build on the existing programme of support which delivers:
  - Monthly Enterprise Clubs that provide support and advice to local people considering self-employment.
  - Up to £1.5k grant to cover start-up costs.
- Due to the tight submission deadlines, there was not enough time to work up the bid.

What do you think are the main barriers or challenges in bringing this intervention forward?

Funding & staff resources

What benefits do you think that the intervention should generate? *(if these are indicatively quantified at this stage, please state, but otherwise please describe in general terms)*

- New job creation
- Jobs safeguarded
- Introduction of new products
- Development of innovation plans
- Encouraging knowledge transfer activity.

-

Funding	
Estimated total intervention cost	No cost developed
How will this cost be met? What sources of investment are…	
Secured?	
Being considered?	
If you have an indicative annual funding profile, please state below, or attach as appropriate	

Delivery
Which organisations do you envisage will need to be involved in delivery? Is there a lead delivery organisation?
• Business Wales • Neath Port Talbot College • Swansea University • University of Wales Trinity Saint David
Beyond funding availability, what needs to happen to enable delivery? *(e.g., permissions, detailed business case development, key delivery challenges to overcome etc.)*
Further business case development
What are the indicative timescales and milestones associated with the intervention?
The project proposal has not been worked up.

Contribution to Missions	
Establish South West Wales as a UK leader in renewable energy and net zero	Potential contribution through support to businesses in adaption and adoption
Create a strong, resilient and embedded SW Wales business base	Direct contribution, and supports (and could form part of) the Enterprise and Entrepreneurship package set out in Project Proposal 4.
Grow and sustain the SW Wales experience offer	Potential contribution through support for visitor economy and town centre businesses.

Mission 3:
Growing and sustaining the ‘experience’ offer

33. Town centre regeneration

Introduction

33.1 The REDP places a strong emphasis on town centre regeneration. Across the region, all four local authorities have ambitious plans for town centre renewal. The importance of these have been heightened by the consequences of the Covid-19 pandemic and structural changes in the retail market, although they are also underpinned by a focus on sustainable development and the role that the region's towns and cities play in supporting quality of life and the experience offer.

Transforming Towns

33.2 The Welsh Government's **Transforming Towns Programme** was launched in January 2020 to address the decline in town centres and the reduced demand for high street retail. The focus of the Programme is sustainable growth of our towns, through interventions that include improved biodiversity and green infrastructure; reuse of derelict buildings; increasing the variety of services on offer in towns with an emphasis on flexible working and living space; and access to services and leisure.

33.3 The work to transform towns collaborates across Government to enhance existing investments such as public transport improvements and enhanced active travel routes.

33.4 The Transforming Towns programme, which is underpinned by place making principles and robust master planning, recognises the new landscape of towns and actively encourages mixed use towns as places to live, work, visit and stay. One of the key elements of this 'placemaking' activity includes strong community involvement, well-being, enhancement of existing places and their unique identity.

33.5 Key to the delivery of Transforming Towns is the recognition of strong local leadership, principally Local Authority partners but also other active groups such as Town and Community Councils and groups such as Business Improvement Districts where they are active.

33.6 The Welsh Government's adoption of the Town Centre First Principle means that investment in infrastructure – including those that enable the delivery of key public services – should be prioritised in town centres, and made more accessible to those without cars. Whilst delivery of this will be driven by the spatial choices of investment in our transport, housing, health and education sectors, our regeneration investments play a key enabling role by ensuring that town centres become important focal points of communities and are increasingly becoming places to live, and centres of community and cultural activity.

33.7 In order to further this ambition support is available in the form of Town Centre Loans accessible by local authorities and third parties in order to support project delivery. In recognition that some projects, particularly in peripheral areas are not considered viable, grant support is also available for key strategic projects in town centres throughout South West region. Key to the utilisation of this support is the expectation that Local Authorities will utilise all available policy levers through Planning Enforcement to effect change prior to strategic investment.

33.8 This work is underpinned by a pan Wales Ministerial Town Centre Action Group MAG to help determine how best to use existing funds and prioritise further actions to bolster town centres in the short term, but also to identify and action opportunities that will secure their longer term. The Group is supported by multi-disciplinary Regional Action Groups.

Regional projects

33.9 The following project entries set out in more detail proposals across the region. While specific investments will obviously take place in specific locations and will be managed locally, in combination they present a coordinated programme.

34. Neath Port Talbot Town Centre Regeneration

Business case status	Concept/ feasibility

Contact details		
Organisation	Neath Port Talbot CBC	
Key contact	Name	Simon Brennan
	Email	s.brennan@npt.gov.uk
	Tel	

Strategic rationale
Please describe the proposed intervention? What is it seeking to achieve?

Across South West Wales, the region's principal towns and smaller communities play a central role as focal points for economic and social activity, and contribute (individually and in aggregate) to the 'experience economy' offer outlined in the emerging Regional Economic Delivery Plan. However, structural shifts in consumer retail demand have placed town centres' traditional functions under pressure. This has been reinforced by the Covid-19 pandemic, with the loss of some national multiples, a continued trend towards online retail and more people working remotely.

Before the start of the pandemic, the Welsh Government launched its Town Centre First initiative, which seeks to locate services within town centres wherever possible, both to support their vitality and viability and to encourage greater access to services via sustainable and active travel. More recently, the Welsh Government has set out an aspiration to increase the number of people working from home or closer to home, highlighting the potential for town centre premises to be repurposed as flexible work hubs and to achieve a better balance of town centre uses.

Within this economic and policy context, there will be a continued need to invest in Neath Port Talbot's main town centres at Neath, Port Talbot and Pontardawe, and in smaller district centres at Skewen, Briton Ferry, Glynneath and Taibach to:

- Attract a greater diversity of uses
- Enhance the town centre environment, public realm and heritage/' cultural offer, both for existing residents and for new investors and visitors
- Improve accessibility (for example, building on the experience of the new Port Talbot transport interchange)
- Secure alternative uses for redundant properties
- Attract commercial investment
- Develop opportunities for community ownership and leadership

Specific projects will come forward individually over time, within this overall framework.

What work has been done already (e.g., feasibility, project development, previous project activity)? *Please include links to relevant documents as appropriate.*

There has been substantial investment in the county's town centres in recent years (e.g., the Neath town centre redevelopment scheme currently underway; investment in Port Talbot's town centre and transport interchange; and the regeneration of Glynneath). Future investment proposals will build on this, through individual project-specific business cases.
What do you think are the main barriers or challenges in bringing this intervention forward?
• Market uncertainty and commercial appetite for investment • Complexity of strategic town centre investment schemes • Likely need for substantial public sector funding support
What benefits do you think that the intervention should generate? *(if these are indicatively quantified at this stage, please state, but otherwise please describe in general terms)*
• Reduced town centre vacancy rates and increased footfall • Greater diversity of town centre uses • Improved environmental outcomes (air quality, improved public realm, better transport accessibility, etc) • Increased private sector investment

Funding	
Estimated total intervention cost	TBC (although potential notional c.£50 m for consistency across the region)
How will this cost be met? What sources of investment are…	
Secured?	None
Being considered?	Welsh Government sources (e.g., Transforming Towns); potentially future rounds of Levelling Up Fund
If you have an indicative annual funding profile, please state below, or attach as appropriate	
Not yet prepared.	

Delivery
Which organisations do you envisage will need to be involved in delivery? Is there a lead delivery organisation?
Neath Port Talbot CBC,; private sector; Welsh Government.
Beyond funding availability, what needs to happen to enable delivery? *(e.g., permissions, detailed business case development, key delivery challenges to overcome etc.)*

Development of specific project business cases,
What are the indicative timescales and milestones associated with the intervention?
TBC

Contribution to Missions	
Establish South West Wales as a UK leader in renewable energy and net zero	Investment likely to facilitate low carbon transition through new closer-to-home working options, more local service delivery, building stock improvements and sustainable transport solutions.
Create a strong, resilient and embedded SW Wales business base	Helps to drive additional commercial investment, with potential to bring forward new business premises and opportunities
Grow and sustain the SW Wales experience offer	Strong contribution to the area as a place to live, visit and invest in – both within each town and collectively across the county.

35. Carmarthenshire Primary Town Centre Covid-19 Recovery Plan Delivery

Business case status	Range of development status for individual component schemes

Contact details		
Organisation	Carmarthenshire County Council	
Key contact	Name	Stuart Walters
	Email	SWalters@carmarthenshire.gov.uk
	Tel	01269 590241

Strategic rationale

Please describe the proposed intervention? What is it seeking to achieve?

Due to the impact of Covid 19 on the economy, Carmarthenshire County Council has reviewed its strategic actions and priorities with a view to developing an Economic Recovery Plan that will enable the authority and its key partners to co-ordinate and target available resources to contain the scale of the downturn and to stimulate demand and confidence, saving thousands of jobs and keeping large and small businesses at work while waiting for growth to return.

To this extent Carmarthenshire has further developed individual recovery plans for each of its three primary town centres (Ammanford, Carmarthen and Llanelli), with a view to help steer the immediate actions in support of town centre recovery and to provide the framework to help re-imagine longer term regeneration and growth.
The key interventions are as follows:

a) Carmarthen

- Place Projects
  - St Peter's Street car park entrance
  - King Street/Queen Street pedestrianisation
  - Cultural Quarter enhancement
  - Guildhall Square and Nott Square
  - Castle entrance
  - The Lanes
  - Jacksons Lane Gardens
  - Chapel Street, Cambrian Place, John Street
  - Red Street
  - Market precinct
  - Quay Street
  - Castle Wall
  - County Hall
  - River Towy connection
  - Riverside
- Property projects
  - Local Market Insight

- Local Development Order
- Funding Support
- Public Sector Land and Assets – Carmarthen Hwb Project
- Project 5: Reform of business rates
- Business projects
  - Entrepreneurship & Business Support
  - Digital Town Centre & Skills
- Place management projects
  - Culture and Entertainment
  - Transport and Movement
  - Town Centre Heritage Review

b) Llanelli

- Place Projects
  - Spring Gardens
  - Cowell Street & Western Section of Stepney Street
  - The Crown Building & Arcade
  - Park Congregational Chapel
  - Raffles Building
  - Central Square
  - Indoor & Outdoor Markets
  - Market Street / Mincing Lane
  - Market Street South/ Stepney Street/ Tinopolis Area
  - Eastgate connections
- Property projects
  - Local Market Insight
  - Local Development Order
  - Funding Support
  - Public Sector Land and Assets
  - Reform of business rates
- Business projects
  - Entrepreneurship and Business Support
  - Digital Town Centre & Skills
- Place management projects
  - Transport and Movement
  - Culture & entertainment
  - Building Cleansing & Maintenance

c) Ammanford

- Place projects
  - Railway Crossing
  - Quay Street & Market Square
  - Wind Street Junction Improvements
  - Margaret Street & College Street
- Property projects
  - Local Market Insight
  - Local Development Order
  - Funding Support
  - Public Sector Land and Assets
  - Reform of business rates
- Business projects
  - Entrepreneurship & Business Support

➢ Digital Town Centre & Skills • Place management project ➢ Place Management Organisation ➢ Culture & Entertainment ➢ Transport & Movement
What work has been done already (e.g., feasibility, project development, previous project activity)? *Please include links to relevant documents as appropriate.*
A number of projects and initiatives have been delivered over the last 10 years across the town centres with a view to delivering previous master-plan proposals: projects include ADREF, Opportunity St, TRI, Ammanford Hwb, Ammanford Town Centre Regeneration Public Realm, Margaret St Road Widening, Carmarthen BID, Llanelli BID. Draft Recovery Masterplans have been prepared for Ammanford, Carmarthen and Llanelli.
What do you think are the main barriers or challenges in bringing this intervention forward?
• Available resources • Town Centre Co-ordination • Planning legislation • Utility Companies • Decline in retail – vacant premises • Balance delivery with need to maintain footfall
What benefits do you think that the intervention should generate? *(if these are indicatively quantified at this stage, please state, but otherwise please describe in general terms)*
• Increased footfall • Sustainable towns both economically and environmentally • Reduction in vacant buildings • Vibrant town centres

Funding	
Estimated total intervention cost	Unknown but crude estimate of £50m
How will this cost be met? What sources of investment are…	
Secured?	N/A
Being considered?	• Levelling Up Fund Carmarthen Hwb £11m, • Community Renewal Fund £320,000 • CCC £2m • Welsh Government Transforming Towns £1.5m
If you have an indicative annual funding profile, please state below, or attach as appropriate	
No Indicative funding profile currently	

Delivery
Which organisations do you envisage will need to be involved in delivery? Is there a lead delivery organisation?
• Carmarthenshire County Council, • Hywel Dda Health Board • University of Wales Trinity Saint David • Carmarthen BID • Carmarthen Town Council, • Ammanford Town Council • Llanelli BID • Llanelli Town Council
Beyond funding availability, what needs to happen to enable delivery? *(e.g., permissions, detailed business case development, key delivery challenges to overcome etc.)*
• Planning permissions, • Public consultations / Stakeholder engagement • Utility / Environmental surveys • Staff resource • Project design feasibilities
What are the indicative timescales and milestones associated with the intervention?
Projects are grouped into three main categories: • **Immediate -** actioning of quick-win permanent or temporary schemes, to take advantage of potential opportunities arising after the end of lockdown and for the remainder of 2021 • **Short term -** delivery within the next 24 months **-** priority transformational projects that may require planning, funding, approvals and may cause some disruption during delivery • **Strategic -** Significant projects and strategies that will help guide the town centres direction to be resilient and to respond to long term changes

Contribution to Missions	
Establish South West Wales as a UK leader in renewable energy and net zero	Potential contribution through increased sustainability/ energy efficiency arising from individual schemes
Create a strong, resilient and embedded SW Wales business base	Opportunities through the supply chain and through the revitalisation of town centre economies through increased footfall diversification of uses, etc.
Grow and sustain the SW Wales experience offer	Strong link through the increased vibrancy of Carmarthenshire's town centres and their attractiveness as places to live, work and visit. .

36. Carmarthenshire Rural Initiatives

Business case status	Range of development status for individual component schemes

Contact details		
Organisation	Carmarthenshire County Council	
Key contact	Name	Rhian Phillips
	Email	mrphillips@carmarthenshire.gov.uk
	Tel	01267 242356

Strategic rationale
Please describe the proposed intervention? What is it seeking to achieve?
The **Ten Towns initiative** was developed as part of the work undertaken by the **Carmarthenshire Rural Task Force** which identified a need to increase the resilience and future growth of Carmarthenshire's rural market towns and their surrounding areas and to create further opportunities to create new employment opportunities locally. As part of the Ten Towns initiative, Carmarthenshire County Council has commissioned external consultants to work with the towns to help identify their priorities and to prepare individual recovery plans for each of its rural market towns with a view to help steer the immediate actions in support of town centre recovery and to provide the framework to support their longer term regeneration and growth. The plans are based on the principles of co-design and encouraging the continued involvement of local businesses, communities and stakeholders from an early stage in its development. Delivery will be focused around a shared vision for each town and its wider rural areas, supported by shared priorities and outcomes. Key interventions identified across the Ten Towns include: • Development of new business premises • SMART Towns initiative • Community energy projects • Re-use of vacant and under-utilised buildings for Meanwhile space/work hubs and shared spaces • Tourism initiatives Some of these interventions closely link with those proposed as part of other proposed projects (for example, business premises in relation to the regional commercial property proposition).
What work has been done already (e.g., feasibility, project development, previous project activity)? *Please include links to relevant documents as appropriate.*
Carmarthenshire County Council commissioned external consultants to develop economic plans to support the economic recovery and growth of its rural market towns. There are currently 8

plans that are in final draft with a further 2 to be completed by the end of May/early June. The plans present immediate, medium and longer terms action plans for the specific towns. Further, more detailed feasibility will be required to take forward specific actions within the plans. Copies of the plans can be made available. Funding has been secured and construction commenced on Llandeilo Market Hall – Rural Enterprise Hub Rural Employment Sites - Commercial Unit Sites identified and initial discussions taking place with WG over delivery Joint Venture agreement.
What do you think are the main barriers or challenges in bringing this intervention forward?
• Resources both time and financial • Continued commitment and engagement from town and key stakeholders • Planning
What benefits do you think that the intervention should generate? *(if these are indicatively quantified at this stage, please state, but otherwise please describe in general terms)*
• Increased footfall • Sustainable towns both economically and environmentally • Reduction in vacant buildings • Vibrant rural market town centres • Increased employment opportunities • Increased business premises for businesses to start and grow in rural areas

Funding	
Estimated total intervention cost	TBC estimated £15m
How will this cost be met? What sources of investment are…	
Secured?	• CCC - £1m • Leader funding £100k (£10k per town) • WG & CCC £3.95m (Llandeilo Market Hall) • Other revenues funding secured via Leader programme e.g. Smart Towns; Local Distinctiveness projects; community energy projects etc
Being considered?	Welsh Government £2m – rural sites and premises
If you have an indicative annual funding profile, please state below, or attach as appropriate	
To be determined	

Delivery
Which organisations do you envisage will need to be involved in delivery? Is there a lead delivery organisation?
• Carmarthenshire County Council • Respective Town Councils in the Ten Towns • Town based fora • 3rd sector • Private sector
Beyond funding availability, what needs to happen to enable delivery? *(e.g., permissions, detailed business case development, key delivery challenges to overcome etc.)*
• Planning permissions, • Utility / Environmental surveys • Staff resource • Project design feasibility studies
What are the indicative timescales and milestones associated with the intervention?
The plans have identified immediate, short and longer term aspirations to support the recovery and growth of the respective towns: • Immediate – actioning of quick win initiatives within the next 12 months • Short term - delivery within the next 24 months of priority projects that may require planning, funding, approvals etc • Longer term – projects that will require further feasibility before progressing further

Contribution to Missions	
Establish South West Wales as a UK leader in renewable energy and net zero	Potential contribution through increased sustainability/ energy efficiency arising from individual schemes
Create a strong, resilient and embedded SW Wales business base	Opportunities through the supply chain and through the revitalisation of town centre economies through increased footfall, diversification of uses, opportunities for local business creation and expansion, etc.
Grow and sustain the SW Wales experience offer	Strong link through the increased vibrancy of Carmarthenshire's rural town centres and communities and their attractiveness as places to live, work and visit. .

37. Pembrokeshire Town Centres

Business case status	Strategic Outline Case

Contact details		
Organisation	Pembrokeshire County Council	
Key contact	Name	Rachel Moxey
	Email	Rachel.moxey@pembrokeshire.gov.uk
	Tel	07557 191254

Strategic rationale
Please describe the proposed intervention? What is it seeking to achieve?

Background: Pembrokeshire's town centres
Pembrokeshire has a dispersed settlement pattern, with a sub-regional town centre at Haverfordwest and a network of local town centres in Pembroke Dock, Pembroke, Milford Haven, Fishguard and Narberth. The county's towns have an important role in the visitor economy as well as local service centres.

Haverfordwest
Haverfordwest has an important sub-regional role as Pembrokeshire's county town and its principal centre for retail and public and commercial service activity. It is also an important gateway for visitors to the county and, through the Castle and the town's historic assets, has a significant visitor economy role in its own right.
The regeneration masterplan adopted for the town centre envisages a range of investments, which include:

- On the eastern side of the Cleddau, reinvestment in the **Riverside shopping centre** (a 1980s open mall) and in a new **transport interchange** (described in greater detail on a separate entry in this Project Pipeline)
- On the western side of the Cleddau, improvements to the **riverside** (including the new library and cultural centre, which is now complete and open), investment in repurposing the former **Ocky Whites** department store as a multi-use food emporium, café and restaurant area; and investment in **Haverfordwest Castle and the former County Gaol** as a key historical asset and visitor attraction
- Improved linkages across the river, including a new pedestrian 'signature bridge'
- Potential for renewable energy (PV or green hydrogen) to power district heating.

This represents a significant regeneration agenda, which will be taken forward over the coming decade. As with the proposals for other town and city centre regeneration packages in the region, it is likely that elements of the package will come forward incrementally and will be subject to specific business cases associated with relevant funding streams and investment opportunities, within the context of the overall vision and masterplan for the town.

Other town centres
Within the county's other town centres, key projects include:

- The regeneration of South Quay in **Pembroke,** providing a new visitor centre and library and a centre for community and social care adjacent to the historic setting of Pembroke Castle.

• Developing **Milford Haven** as a vibrant, mixed-use waterfront destination, including plans for a new hotel, conference and events venue and leisure offer.
What work has been done already (e.g., feasibility, project development, previous project activity)? *Please include links to relevant documents as appropriate.*
In **Haverfordwest,** as set out above, the riverside library and cultural centre has been delivered, and since opening in 2018, has increased (pre-pandemic) footfall in the town centre by around 10%. Earlier in 2021, a £20 million proposal was submitted to the UK Government's Levelling Up Fund for a package of investment in the Castle and town centre, the outcome of which is expected to be announced in the autumn. In **Pembroke**, work is underway to deliver Phase 1 of the South Quay development, and a proposal for investment through the Levelling Up Fund has been made to progress Phase 2.
What do you think are the main barriers or challenges in bringing this intervention forward?
• **Availability of public funding.** While the regeneration of Haverfordwest town centre will unlock commercial opportunities, much of the need for investment is in facilities that are 'public goods' (e.g., the town's heritage assets and public realm), or which are unlikely to come forward without some form of public intervention. The proposition is that public investment will help to drive 'consequential' commercial activity, supported by increased footfall and visitor numbers – but this dependent on sufficient capital investment at the start. • **The pace and nature of recovery from the Covid-19 pandemic.** The pandemic has exacerbated the challenges facing town centre retail: at the time of writing, the outlook (in terms of the return of demand and likely easing of restrictions) is positive, although the extent to which patterns of consumer behaviour have changed permanently remains uncertain.
What benefits do you think that the intervention should generate? *(if these are indicatively quantified at this stage, please state, but otherwise please describe in general terms)*
• Increased attractiveness of the town centre, driving footfall and spend • Consolidation of Haverfordwest as the principal sub-regional centre for Pembrokeshire • Improvements in the attractiveness and legibility of the town as a visitor gateway and as an attraction in its own right – increasing visitor numbers and dwell time and helping to drive further investment in visitor facilities as a result • Consequential increase in business opportunities (in terms of additional retail and leisure activities, as well as in the potential for wider business uses in the town centre, building on increased propensity to work flexibly and demand for town centre work hubs, etc.) • Better public transport and active travel access, reducing reliance on car use and driving improvements in congestion and air quality.

Funding	
Estimated total intervention cost	£50 million (long-term overall package)
How will this cost be met? What sources of investment are…	
Secured?	c.£15 million

Being considered?	UK Levelling Up Fund; Welsh Government; potential investment opportunities; private investment
If you have an indicative annual funding profile, please state below, or attach as appropriate	
To be determined	

Delivery
Which organisations do you envisage will need to be involved in delivery? Is there a lead delivery organisation?
• Pembrokeshire CC • Welsh Government • Private and third sectors
Beyond funding availability, what needs to happen to enable delivery? *(e.g., permissions, detailed business case development, key delivery challenges to overcome etc.)*
• Securing commercial development partner (sequential to next stage of funding)
What are the indicative timescales and milestones associated with the intervention?
• Programme of development over next ten years

Contribution to Missions	
Establish South West Wales as a UK leader in renewable energy and net zero	Secondary link through improved active/ sustainable travel and increased opportunities and incentives to shop and work locally.
Create a strong, resilient and embedded SW Wales business base	Key link through the development of Haverfordwest as a commercial centre, and an increase in business and investment opportunities.
Grow and sustain the SW Wales experience offer	Key link through the development of Haverfordwest's visitor gateway role and improvements in visitor facilities and attractions in the town.

38. Small towns, coastal zones and regeneration

Business case status	Concept/ feasibility

Contact details		
Organisation	Swansea Council	
Key contact	Name	Paul Relf
	Email	Paul.relf@swansea.gov.uk
	Tel	

Strategic rationale

Please describe the proposed intervention? What is it seeking to achieve?

This programme is about ensuring that the region makes the most of the opportunities created by the outstanding natural environment and patchwork of market towns and coastal towns, villages and beach/aquatic destinations. These are the destinations you dream about when thinking about visiting a place or choosing a location for a holiday or a day out.

Areas of work could include wider destination and transport features including key community and business facilities, beach and related destination infrastructure, events facilities, waterways and other key transport requirements, binding the wider county as part of a whole-Swansea offer.

It is noticeable that despite some areas being 'honey pot' destinations at key points of the year, they are currently not able to sustain a sufficient level of accommodation offerings such as good quality hotels and restaurants. There are many reasons for this but it seems to be something that is normally excluded from funding opportunities so might require creation of small grant schemes for community and business capacity. There are potential links to a wide range of other business support and financing interventions, though these are largely focussed on town centres on the assumption that other areas don't need any support. Whilst that may be the case once they are established, securing commercial finance for hospitality, F&B etc is challenging and needs consideration.

The range of transport modes and ways of getting to places in the most environmentally friendly and convenient way cannot be overlooked – this could include deployment of hydrogen-powered vehicle fleets.

Places must be destinations in their own right, requiring their own unique selling points. The South West region is rich in these stories, from Dylan Thomas, to coal mining and copper and quality local independent businesses selling unique products. We need to do more to help define the historic linkages of our market towns more effectively to help them punch above their weight. This aligns well with post-Covid shop local interventions and heritage restoration and interpretation proposed in other strategic interventions.

What work has been done already (e.g., feasibility, project development, previous project activity)? *Please include links to relevant documents as appropriate.*

Various data exists from a range of sources including STEAM and various other surveys and dialogue with the tourism industry. Previous EU and WG programmes and have supported a

range of successful interventions for smaller levels of grant support, and Development Bank for Wales is supporting some larger interventions. The indoor and outdoor offer available is critical to the success of the region both for the visitor economy and regional investment – just because a scheme does not stack up short term does not mean that it won't fly with some initial intervention to get it off the ground. The post-Covid recovery is the ideal opportunity to take stock and generate more ways of enabling independent local entrepreneurs to thrive across all sectors.
What do you think are the main barriers or challenges in bringing this intervention forward?
Funding is tight and therefore prioritised tightly around higher end tech businesses and town centre regeneration. Whilst these are absolutely vital, peripheral regions will always face an up hill climb in securing the private or public investment necessary to help local economies thrive. The case needs to be made for more investment in this area of work which is generally going to a lower funding ask than large town or city investments, with potentially a greater economic impact. Thriving district and coastal centres will add to the economic vibrancy of places in mutually beneficial way.
What benefits do you think that the intervention should generate? *(if these are indicatively quantified at this stage, please state, but otherwise please describe in general terms)*

Funding	
Estimated total intervention cost	tbc
How will this cost be met? What sources of investment are…	
Secured?	• Various existing funding programmes via Visit Wales and Welsh Government generally • WG Transforming Towns Placemaking grant • Swansea Council Economic Recovery fund
Being considered?	• Levelling up and Shared Prosperity are potential avenues – DBW and WG options to be considered
If you have an indicative annual funding profile, please state below, or attach as appropriate	
To be confirmed	

Delivery
Which organisations do you envisage will need to be involved in delivery? Is there a lead delivery organisation?
UK Gov, WG, LAs, private sector.

Beyond funding availability, what needs to happen to enable delivery? *(e.g., permissions, detailed business case development, key delivery challenges to overcome etc.)*
Further development of interventions to complement WG Placemaking and Covid emergency response - successor programmes to European Maritime and Fisheries Fund and Coastal Communities Fund.
What are the indicative timescales and milestones associated with the intervention?
Range of delivery starting 2021/22 via Placemaking but this agenda could be far wider and requires a strategic view from funders.

Contribution to Missions	
Establish South West Wales as a UK leader in renewable energy and net zero	Promotes sustainable tourism opportunities and would encourage the use of sustainable/ active travel
Create a strong, resilient and embedded SW Wales business base	Direct support for SME development in the visitor economy sector (and more broadly through the wider town centre regeneration opportunities associated with the project).
Grow and sustain the SW Wales experience offer	Key link. The project directly contributes to the quality of the environment and the visitor offer.

39. Discover Pembrokeshire

Business case status	Concept/feasibility

Contact Details		
Organisation		
Key contact	Name	Mike Cavanagh
	Email	Michael.Cavanagh@pembrokeshire.gov.uk
	Telephone	07879 084639

Strategic rationale
Please describe the proposed intervention? What is it seeking to achieve?
A series of strategic interventions, linked through: Pembrokeshire's Destination Management Plan [DMP]; Renew and Regenerate Strategy, and regional work relating to waterways and coastal interventions[15] The DMP seeks to sustainably grow the value of the visitor economy in Pembrokeshire, and to reduce the impact of seasonality by generating more visits out of high season. Pembrokeshire's Renew and Regenerate 10 year strategy includes important tourism outcomes linked to the DMP and other interventions to assist the industry to recover from the pandemic and thrive. It is recognised in both strategies that tourism is the county's major employer, with a 2019 economic impact analysis showing that the industry supports 12,437 FTE jobs, some 21% of all employment in the county. The interventions proposed respond to that strategic context and include the following package of works: • Delivery of a major multi-year Destination Marketing campaign [helping to promote values and behaviours and sustainable growth] • Delivery of the emerging new Pembrokeshire Events strategy [which includes an objective to work regionally and nationally on some Major Events such as St. Davids Day] • Creation of a Centre of Excellence for Hospitality Skills, tackling the staffing crisis in the industry which existed before the pandemic and BREXIT, and is now more acute • Delivery of new and innovative wet weather product/attractions including a major international class visitor attraction and improved cruise ship infrastructure in Goodwick [see link to project 10 Pembrokeshire Port Infrastructure] and smaller scale wet weather improvements to existing attractions such as Scolton Manor • Exploration of tourism opportunities relating to the Forest Nation vision and growing importance of environmental sustainability • Sustaining and growing the "Brilliant Basics" [vital tourism infrastructure] to ensure wider strategic improvements are not undermined by cuts to core services such as toilets, coastal buses, beach management etc. Waterways/coastal improvement interventions [linked to footnote 1] including:

[15] See linked project proposal submitted by Swansea Council regarding regional waterways

- Sustainable transport interventions to reduce car use such as park-and-ride schemes at key coastal locations [Porthgain, Abereiddy and St Justinian's, and Stackpole Quay/Bosherston/St Govans] - Active Travel projects in key tourism locations [Saundersfoot, Stepaside, Lydestep, Wiseman's Bridge, Tenby] - Major indoor coastal-based attraction [links/refers to Goodwick project 10] - Modified wheelchairs for beach access [link to Brilliant Basics]
What work has been done already (e.g., feasibility, project development, previous project activity)? *Please include links to relevant documents as appropriate.*
In addition to the production of key strategies [DMP and Renew and Regenerate strategy]: - We have created Wales's 1st Destination Management Organisation by pooling resources between organisations in the public, private and 3rd sectors to create Visit Pembrokeshire, which is well-placed to deliver/support some of this activity - Visit Pembrokeshire have delivered grant funded and WG funded [through the hardship fund] Destination Marketing work this year in collaboration with partners including the Council. As part of that process they now have established delivery partners for PR and marketing activity, and have created a new brand identity for the county which will deliver a coordinated and therefore more effective approach to marketing the destination - At the time of writing [September 2021] the Pembrokeshire Major Events strategy was close to completion and due to be scheduled for Scrutiny and Cabinet consideration - Discussions have been held with partners, particularly Bluestone, relating to the centre of excellence concept which is underpinned by some initial options appraisal/feasibility work. Discussions have also taken place with PCC Social Care looking at the potential for work opportunities for clients with learning disabilities - An initial discussion has taken place with Stena and Seaport Development regarding visioning for improvements to cruise infrastructure and potential for an international quality climate-based visitor attraction in Goodwick - A number of grant funded projects have been delivered at Scolton Manor to improve the offer, infrastructure and marketing of the attraction. The site has some match funding to deliver an indoor wet weather attraction element, focused on environmental/sustainability issues particularly around trees/forests. - Partnership discussions have taken place with the National Park authority regarding funding of the "Brilliant Basics" but no solutions identified - PCC has been through a robust objective process of prioritisation with regional partners and local partners to reach a short list of waterways/coastal projects - Significant feasibility work and at the time of writing, consultation, regarding active travel projects more generally in the county - Some work done in terms of park-and-ride at key coastal locations, ranging from significant work [options appraisal, feasibility, community and SME engagement at Saint Justinian's], through to initial discussions at other locations such as Porthgain
What do you think are the main barriers or challenges in bringing this intervention forward?
- Revenue and capital funding - revenue required for elements such as destination marketing campaigns, supporting the brilliant basics, delivering major events, and capital funding required for infrastructure improvements/new facilities/attractions [centre of excellence, high-quality wet weather visitor attractions, park and ride infrastructure, active travel infrastructure]

- In terms of capital schemes, all the various challenges that come with such schemes such as permissions [planning, biodiversity, other regulatory approvals, potential CPO's with regard to active travel, etc.] and delivering to anticipated time/cost/quality triangle
- Finding the right operating partners to ensure new infrastructure is sustainable
- Finding a holistic approach to over-tourism hotspots which fully addresses issues for local people and visitors, taking into account the need to decarbonise and get people out of cars whilst recognising visitors want to see a relatively small number of popular small coastal destinations

What benefits do you think that the intervention should generate? *(if these are indicatively quantified at this stage, please state, but otherwise please describe in general terms)*

- Delivery of the objectives outlined in the DMP [e.g. sustainable [value not volume] growth, addressing seasonality]
- Delivery of the objectives outlined in the Renew and Regenerate strategy
- Reduced community tensions relating to tourism
- More sustainable and higher-quality hospitality workforce
- Regeneration/economic benefits in key areas e.g. Fishguard/Goodwick
- Alignment and contribution to key Welsh Government priorities in terms of sustainability/environment [e.g. Forest Nation, reduced car use etc.]
- Protection of vital "Brilliant Basics" tourism infrastructure
- Improved accessibility to key locations suffering from over-tourism
- Decarbonisation/modal shift reducing the impact on the landscape, environment and communities

Funding	
Estimated total intervention cost	Further work required due to number of schemes. Very high-level estimates subject to change: **Revenue** DM campaigns 150K per annum Major Events 200K per annum Brilliant Basics 200K per annum **Capital** Hospitality Skills Centre of Excellence £5m to £10m [assumption at this stage that the scheme would be revenue neutral] Major climate-based attraction and cruise infrastructure [see Pembrokeshire project 10 Pembrokeshire Port Infrastructure for this estimate] Scolton Manor 400K [no revenue required] Active Travel - TBD Park and Ride - TBD
How will the costs be met? What sources of investment are …?	
Secured?	150K capital [Scolton Manor] 1.45 million capital active travel [but for whole county, not specifically these schemes] Some existing revenue budgets but under continual pressure

Being considered?	Welsh Government, PCC, PCNPA, grant giving bodies, sponsorship/corporate/individual giving
If you have an indicative annual funding profile, please state below, or attach as appropriate	
Not yet developed beyond the above estimates	

Delivery
Which organisations do you envisage will need to be involved in delivery? Is there a lead delivery organisation?
Pembrokeshire County Council Destination Management Organisation: Visit Pembrokeshire Pembrokeshire Coast National Park Authority Private sector [tourism trade, event management industry, Stena] Mainly PCC as lead delivery organisation but in some cases would be a different organisation such as Visit Pembrokeshire for the multiyear Destination Marketing Campaign.
Beyond funding availability, what needs to happen to enable delivery? *(e.g., permissions, detailed business case development, key delivery challenges to overcome etc.)*
• Destination marketing campaign - funding is the only issue • Delivery of major events strategy - creation of dedicated team [enabled by funding] • Creation of hospitality centre of excellence - revisit and update existing options appraisal and feasibility, then undertake business case development, permissions • Creation of international quality climate-based attraction and cruise infrastructure improvements - options appraisal, feasibility, business case development, permissions • Wet weather offer improvements in Scolton Manor - funding is the only issue • Park and Ride - options appraisal, feasibility, business case development, permissions • Active Travel - as per Park and ride but also considerations relating to a more holistic approach going beyond specific active travel and looking at a range of strategic issues to do with how we get people out of cars, using public transport including visitors • Brilliant Basics - funding is the only issue
What are the indicative timescales and milestones associated with the intervention?
• Destination marketing campaign - delivery 2022/23/24 • Major events - appoint team and set up governance 2022 - delivery of strategy 2022 to 2027 • Hospitality centre of excellence - revisit and update options appraisal/feasibility and create business plan 2022 - RIBA construction phases 2023 to 2025 • International quality attraction and cruise infrastructure improvements - see project 10 Pembrokeshire Port infrastructure • Scolton - delivery 2022/23 • Park and Ride - 3 to 5 years from project commencement • Active Travel - 3 to 5 years from project commencement • Brilliant Basics - ongoing delivery subject to funding

Contribution to Missions	
Establish SW Wales as a UK leader in renewable energy	Destination marketing campaigns will feature the county's green credentials as a USP, providing a significant pull, with consumers increasingly valuing areas that position

	themselves as sustainable and environmentally friendly. The establishment of an international quality climate-based visitor attraction will significantly strengthen the county's identity as the home of renewable energy. On a smaller but no less important scale, the creation of an indoor attraction at Scolton Manor focused on biodiversity and environmental sustainability will further strengthen the county's focus on all things 'green'
Build a strong, resilient and 'embedded' SW Wales business base	The project which focuses on creating a centre of hospitality excellence is critical in building a stronger, more resilient hospitality business base in Pembrokeshire and the wider region. Addressing the skills shortage and increasing quality will provide significant economic outcomes. The other projects within this overall programme will also contribute to strengthening tourism businesses, making them more resilient, for example through work around addressing seasonality to create the conditions where a greater proportion of employment in the sector is year-round rather than seasonal.
Grow and sustain the SW Wales experience offer	All of the projects within this overall programme of tourism work contribute to enhancing the SW Wales experience offer. Enhancing the county's marketing to visitors; improving the basic infrastructure [brilliant basics, park-and-ride, active travel]; enhanced experiences [new climate-based attraction, Scolton Manor improvements, major events], and improving the quality of hospitality. Creating a real sea-change, turning a high-quality visitor destination into a world class visitor destination with sustainability as a USP, and thus achieving the DMP strategic aim of being a top-five UK destination choice

40. Regional Waterways Project

Business case status	Strategic Outline Case

Contact details		
Organisation	Swansea Council	
Key contact	Name	Paul Relf
	Email	Paul.relf@swansea.gov.uk
	Tel	

Strategic rationale

Please describe the proposed intervention? What is it seeking to achieve?

The **Regional Waterways** project proposes to open up the waterways across Swansea's River Tawe, adding new routes and re-routing existing routes to the Swansea Canal at Clydach, and from the Tawe to the Tennant Canal at Crymlin Bog near Jersey Marine up the Swansea Valley and towards Neath. There are also various other canal structures across the region that could contribute to Mission 3 of the REDP, several of which are set out in other project entries in this pack.

It is envisaged that by opening up the waterways and with the new Pontoon to be located on the River Tawe, the project will open up new tourist destinations and job opportunities with water access to Hafod Copper Works, Penderyn Whisky Factory, Liberty Stadium, Morfa Stadium, as well as providing an opportunity to establish a sustainable transport link into Swansea City Centre from the Landore Park and Ride – which all links with Council's £1bn regeneration programme and the development of the Hafod-Morfa Copperworks Powerhouse, with the world-class Welsh distiller Penderyn set to have a base there. There is also an opportunity to consider further sea-based connections between destinations around the South West Wales coastline (building on successful operations such as Tenby to Caldey island and other more local operations.

What work has been done already (e.g., feasibility, project development, previous project activity)? *Please include links to relevant documents as appropriate.*

In 2020, a feasibility study commissioned by Swansea Community Boat Trust, a charity that operates the Copper Jack community boat on the Tawe, promoting the heritage, use and environment of the area's inland waterways was published and received an extremely positive response from Swansea residents via the Council's Facebook page

The report entitled Copper Jack: New Destinations' https://www.swansea.gov.uk/SBFLAGprojects) looked at facilitating and extending navigation of the River Tawe, Swansea. The outcome of the report stated that '*it is feasible, with significant funding and other support, to create navigable waterways as far as Clydach and Jersey Marine, with these linking up with existing canals'.* The report covered the provision of landing stages on the river and the benefits of encouraging navigation, covering extending navigation from the Tawe to the Swansea Canal at Clydach, and from the Tawe to the Tennant Canal at Crymlin Bog near Jersey Marine.

As a result of the feasibility study, the Council successfully secured funding from the Swansea Bay Fisheries Local Action Group (SBFLAG) and the WG Transforming Towns Programme, to install a

Pontoon on the River Tawe. This project is currently being implemented with delivery anticipated early 2021.

The new Pontoon will provide a pick-up and drop-off point near the Liberty Stadium for customers of the Copper Jack running boat trips for the public from Swansea Marina to exciting new destinations planned for this area, namely the Hafod-Morfa Copperworks Powerhouse and the Penderyn Whisky distillery. Furthermore, the Council's Regeneration plan includes other regeneration opportunities both sides of the River Tawe, making way for pathways and cycle tracks both sides of the river. There are also wider plans to develop the riverside site of the former St Thomas station and the area alongside the SA1 Sailbridge.

Furthermore, Swansea Council has been actively engaging across the region with other authorities i.e. Carmarthenshire, Pembrokeshire and Neath Port Talbot to discuss opportunities to open up our waterways and improvements to our coasts with a view to perhaps submitting a collaborative bid for funding. We have also been exploring the length of the River Tawe to identify the stakeholders, have ongoing dialogue with the Copper Jack regarding how to open up the waterways, with the possibility of using volunteers when able. Further work is required but with a massive opportunity to exploit further inter-regional connections.

What do you think are the main barriers or challenges in bringing this intervention forward?

- Unable to obtain the necessary resources to fund the project
- Planning permissions
- Failure to fully engage with stakeholders
- Failure to set up the Project, confirm the scope, unclear goals and objectives, communication gaps, insufficient resources and unrealistic timelines.
- Project managers who lack experience and training.
- No use of formal methods and strategies.
- Lack of effective communication at all levels.

What benefits do you think that the intervention should generate? *(if these are indicatively quantified at this stage, please state, but otherwise please describe in general terms)*

Benefits to opening up our waterways include:
- Improved access to the waterways encouraging more people to take to the river to undertake rowing and other activities on the Tawe. If numbers were to increase there would be an economic benefit not only to local clubs but businesses in the marina that support this activity, it could also allow other activities and potential new businesses to set up including Kayak and SUP tours for example.
- Opening up the waterways and the new pontoon will open up new destinations with water access to Hafod Copper Works, Penderyn Whisky Factory, Liberty Stadium, Morfa Stadium, as well as offer an opportunity to establish a sustainable transport link into Swansea City Centre from the Landore Park and Ride.
- Will allow people to reach destinations by water, and safely embark and disembark at locations previously unobtainable on the River Tawe
- Provide access to future builds up the river including White Rock.
- Provide support for businesses to identify and diversification opportunities and re-skill within or outside the sector i.e. fishermen moving to water taxis.

- Provide opportunities to develop the tourism sector linked to eco-tourism and tourism
- The boating club, who frequent the river with their canoes, will be able to travel much further up the river.
- It will strengthen the links between the River Tawe and the Swansea Marina.
- Will provide opportunities to develop high quality hospitality provision along the river, offering local produce i.e. cockles, muscles etc. including seafood as part of a memorable experience.
- Local fishermen will be able to diversify into tourism, offering fishing trips, water taxis up and down the river between the Marina and the River Tawe.
- It will make a significant contribution to the development of Swansea Waterfront as a visitor destination in line with the National Development Framework
- Provide benefits to schools, community groups, the public and visitors to the Swansea Bay area, providing additional access routes, offering schools /visitor historical trips up and down the river.
- There will be a reduction in the need to use cars/buses to the Copperworks and other historical sites.
- Vessels will have full disabled accessible at moorings;
- The location for the proposed "Skyline" to make land at the lower end, and would thus be a hub for two related sightseeing attractions if trip boats were also to have a landing here;
- Boats and party boats form a valuable part of the water based offer in many river towns and the Tawe is easily a big enough navigation for such vessels to have appeal. The boats could be bespoke build or more likely be converted commercial boats such as Keels, Peniche or Luxemotor that have reached the end of their working days.

Funding	
Estimated total intervention cost	£30m+
How will this cost be met? What sources of investment are	
Secured?	For pontoon on River Tawe: • Swansea Bay FLAG funding to = £138k secured • WG Transforming Towns Programme funding = £100k secured
Being considered?	• Further funding from Welsh Government is being considered for the surrounding area of the Pontoon. • Potential for Levelling up funding
If you have an indicative annual funding profile, please state below, or attach as appropriate	
Major infrastructure costs could exceed £30m but could be phased and delivered in tandem with linked infrastructure projects e.g. roads and rail.	

Delivery
Which organisations do you envisage will need to be involved in delivery? Is there a lead delivery organisation?
Swansea Council have been in discussions with other local authorities i.e. Carmarthenshire, Pembrokeshire and Neath Port Talbot to discuss the future development and improvements to our waterways and coasts. A long list of potential interventions has been prepared.

Beyond funding availability, what needs to happen to enable delivery? *(e.g., permissions, detailed business case development, key delivery challenges to overcome etc.)*
• Structural Report required for proposed re-routing and changes to the river within scope • Agree project team supporting the application from Swansea Council's Economic Development and External Funding Team (ED&EFT) • Completion of a full business plan and application identifying location of changes and costings; • Completion of project management tools in place including i.e. Stakeholder and Communication plan, project plan, risk and issue tracker and Governance arrangements. • Identify any legal constraints i.e. ownership of the river bed Somerset Trust, establish a caveat for proposed works, NRW: flood survey, FRAPS, /Planning with Swansea • Investigations into all regulations and legal constraints around the river bed i.e. ownership by the Duke of Beaufort (Somerset Trust) – obtain lease if anything planned touches the river bed. • Ecology reports – liaise with ecologist to determine requirements (NRW) • CADW – liaise with CADW re any consents necessary. • Swansea Council – Planning consent and consultation
What are the indicative timescales and milestones associated with the intervention?
After exploration and a detailed business plan is established, the project tasks and timelines will be identified and included in a Project Plan, communicated to all members of the project and a budget set against the project. Further regional meetings required to consider wider scope.

Contribution to Missions	
Establish South West Wales as a UK leader in renewable energy and net zero	Promotes active travel and active leisure opportunities and directly supports environmental improvements.
Create a strong, resilient and embedded SW Wales business base	Potential opportunities associated with the growth of the visitor economy and the leisure offer.
Grow and sustain the SW Wales experience offer	Key link: the proposed project could make an important contribution to SWW's visitor economy, providing additional leisure and environmental infrastructure and supporting the development of the 'experience' brand and offer. This will be augmented if the project can be developed across the region.

41. Lower Swansea Valley Heritage and Destination

Business case status	Outline Business Case

Contact details		
Organisation	Swansea Council and partners	
Key contact	Name	Paul Relf
	Email	Paul.relf@swansea.gov.uk
	Tel	

Strategic rationale

Please describe the proposed intervention? What is it seeking to achieve?

The Vivian family redefined Swansea in the 19th Century, creating a world-class copper enterprise that left many legacies, not least significant cultural and heritage which underpin the modern City and the Lower Swansea valley.

This ambitious project consolidates a strategic path of investments bringing people closer to the iconic heritage and culture of Swansea, relying on strong working relationships across public, private and community to consider the best placement and usage of key heritage and cultural assets and facilities to drive and encourage strong social, employment and regeneration outcomes. The project will mix new income generation opportunities with struggling assets to give them a new lease of life and sustainable long-term futures. As darker memories of the industrial age fade, there is a new opportunity to consider the contrasting legacy impacts, positive and negative, as we level up our county.

Lower Swansea Valley heritage assets and proposals: Context map

Key investment points are:

- **Hafod Morfa Copperworks**, including key buildings and structures at risk of loss without intervention (to complement existing NLHF, Welsh Government, Swansea Council and private sector investments):
  - Sensitive **expansion and updating of Swansea Museum** (oldest in Wales) to increase gallery space to enable greater portion of extensive collection to be displayed, learning areas, functionality, café space, expansion including use of historic lecture theatre, basement former storage area used by the Royal Institution founders (£3m) –largest collection outside the National Museum. This will include relocation and upgrade of the Dylan Thomas Exhibition and learning provision currently located in the Dylan Thomas Centre to release space for commercial opportunities.
  - Transfer of museum collection to purpose built store built and equipped to appropriate British Standards, at an appropriate location (£1m) to release remaining 75% of space in former Hafod Rolling Mill for sustainable commercial re-use (£2m)
  - **Morfa Works Laboratory building** – shovel ready scheme ready to move immediately into RIBA Stage 5 (£2m) with potential restaurant/leisure end use scoped.
  - **Morfa Works V&S Locomotive shed** reconstructed with relaying of a suitable length of railway track following historic footprint as working steam railway exhibit to include refurbishment of an appropriate saddle tank steam locomotive (£2.5m)
  - **Consolidate and extend Morfa Engine Houses** to include cover and interpretation of Musgrave Engine external components and community/social spaces, e.g. Swansea Rowing club (£2m)
  - **White Rock heritage park consolidation and regeneration of Smith's Canal** as a working attraction to include reintroduction of water, opportunity for lighting, sound, moving barges, operational lock system and lighting of key structures and interpretation. (£2m)
  - **Major programme of heritage skills** building on current successes through existing investments and increasing numbers able to participate and apprenticeship and employment outcomes (£0.5m) CRP

- **Swansea City Centre:**
  - [Possibly] Mixed use **redevelopment of derelict former Pilkington Glass factory** as gateway landmark scheme to include museum store, office, residential and leisure uses
  - Enhancement of **Dylan Thomas Centre** as flexible venue (£0.5m)
  - Creation of **Museum Quarter** public space, integrating the above with neighbouring quality conservation area and destination inc Morgans Hotel (historic former docks office), on the city centre core/SA1 Sailbridge arterial route. (£0.5m)
  - Add a **New Cut Road Pontoon access point** to complement installation at Hafod Morfa Copperworks to facilitate ease of river transfer.

The project will both consolidate and achieve a step change in Swansea's heritage and cultural offer, binding existing and new investments into a coherent whole. This will have a major impact on the accessibility and visibility of heritage through landmark facilities that integrate with mixed use opportunities creating footfall at key
destinations, realising a range of opportunities to enjoy the different aspects of heritage and culture day and night.

The project will complement Active Travel works to improve footpath connectivity along the River Tawe and creation of new bridge crossing points linking former industrial communities on both sides of the Tawe to the City Centre through the attractive setting of the Tawe corridor.

The project will crown the best of Swansea for both the local population, civic pride and attracting regional, national and international visitors with a broad and exciting all weather offer. The project will work across sectors including Swansea University, a range of active friends groups and private sector partners to achieve an innovative and comprehensive sustainable funding package that will put Swansea on the map as a place that is transforming heritage at risk into a major asset that blends sensitively with the future of the City.
What work has been done already (e.g., feasibility, project development, previous project activity)? *Please include links to relevant documents as appropriate.*
A range of feasibility work, studies and surveys have been undertaken for a wide section of the above proposed activities both capital and revenue. Further design and development is needed for some, whilst others would proceed at pace. 2 years development time required and a year 3 implementation phase. These are prominent, high profile sites that are seen by all who drive into and through the City and will add to the energy and enthusiasm City Deal and other investments are creating.
What do you think are the main barriers or challenges in bringing this intervention forward?
Whilst good progress has been made in stabilising and turning around the fortunes of several key buildings and structures in the Valley, there is considerably more to be done to safeguard what remains and fully enable the corridor to achieve its full potential, not least the scope to unlock private investment via the Reshaping Swansea development partner, and making the best of current investments to begin to build the destination and work with the range of quality local independent businesses already locating in the vicinity and expressing interest in doing so. There is a sense of urgency to ensure that listed historic structures are not lost due to increasing rates of decay so timescales are a challenge, and securing funding to support the scale of investment to achieve a real step change has been a barrier to date. The UK Levelling up fund provides the current best fit to hit the ground with a broad inter-linked package to bring sufficient schemes on line to achieve this step change.
What benefits do you think that the intervention should generate? (if these are indicatively quantified at this stage, please state, but otherwise please describe in general terms)
Along with the considerable community and social benefits, the project will create employment, particularly in commercial elements but also extensive opportunities for high quality community engagement and volunteering work, particularly in light of the increasing student population in walking distance of all these facilities. The creation of new commercial space will also create affordable space for new micro-enterprises across a range of sectors. The combination of investments will significantly enhance opportunities for all ages to engage with heritage, increasing viability and sustainability of key assets for future generations and a much stronger appreciation and understanding amongst the wider population At one stage the population of Swansea was around 15,000 people, with 11,000 in employment in the copper and associated industries. This package will reintegrate this extensive heritage with the modern-day population generating endless positive opportunities to live, work, learn and play, carrying the Vivian legacy from the past into the present and the future. Swansea's population alone

now exceeds 350,000. The programme is consistent with the potential of the wider South West region and the ambitions of Missions 2 and 3 in particular.

Funding	
Estimated total intervention cost	£20m+
How will this cost be met? What sources of investment are…	
Secured?	• NLHF, private sector and Welsh Government for existing ongoing phases of work • Section 106
Being considered?	• Swansea Council • National Lottery Heritage Fund • UK Government Levelling up and Community Renewal Programmes (leading into Shared Prosperity Fund) • Welsh Government Transforming Towns • Welsh Government Active Travel • Cadw • Private sector
If you have an indicative annual funding profile, please state below, or attach as appropriate	
£7m+ per year subject to success of funding bids	

Delivery
Which organisations do you envisage will need to be involved in delivery? Is there a lead delivery organisation?
The Council will lead but will work across sectors including Swansea University, a range of active friends groups and private sector partners to achieve an innovative and comprehensive sustainable funding package that will put Swansea on the map as a place that is transforming heritage at risk into a major asset that blends sensitively with the future of the City.
Beyond funding availability, what needs to happen to enable delivery? *(e.g., permissions, detailed business case development, key delivery challenges to overcome etc.)*
Some elements of the programme are shovel ready, in particular Tawe walkway which is designed, and the Hafod Laboratory building with RIBA 4 met and consents in place. Other elements are being worked up at risk in anticipation of Levelling up so would need to progress quickly from RIBA 2 to full consents, RIBA 4 and procurement of works contracts.
What are the indicative timescales and milestones associated with the intervention?
Subject to funding elements of the programme are ready to start on site in 2021/22 with other elements able to progress rapidly if the major funding sought via levelling up is secured. The potential is for a fully linked suite of interventions linked by the Vivian legacy narrative that will fuel national interest in the Lower Swansea Valley and give the boost needed to enable the City Centre and district centres up the valley fully energised and contributing to Missions 2 and 3.

Contribution to Missions	
Establish South West Wales as a UK leader in renewable energy and net zero	Promotes active travel opportunities and directly supports environmental improvements.
Create a strong, resilient and embedded SW Wales business base	Potential opportunities associated with the growth of the visitor economy, the regeneration of the Hafod Morfa site and the leisure offer, as well as supply chain opportunities during the development phase. The scheme also directly contributes to the wider strategy for Swansea City Centre.
Grow and sustain the SW Wales experience offer	Key link: the project will make a direct contribution to the enhancement of Swansea's heritage as a core part of the city's wider development and regeneration, and will complement the city's major leisure offer (which has expanded in recent years and is the subject of substantial investment).

42. Carmarthenshire Visitor Experience Projects

Business case status	Pendine: FBC Tywi Valley Path: FBC Kymers and Pembrey Canal: SOC

Contact details		
Organisation	Carmarthenshire County Council	
Key contact	Name	Mike Bull
	Email	MABull@carmarthenshire.gov.uk
	Tel	01267 242393

Strategic rationale

Please describe the proposed intervention? What is it seeking to achieve?

In line with Carmarthenshire County Council's destination management plan the authority is aiming to enhance its visitor offer and experience through the delivery of three strategic visitor experience projects:

1. Pendine Masterplan

This project is a series of sub-projects aimed at transforming the resort of Pendine Sands into a year-round 'day and stay event destination'. Key projects include:

- Completion of Pendine Attractor Project – An £8 million project to provide 42 bed eco-hostel, sands of speed museum, enhanced parking, adventure playground, beach sports area, events area, exhibition esplanade and Overnight Motorhome site
- Delivery of Sustainable and Accessible Pendine Project which aims to provide beach wheelchairs and additional overflow parking
- Redevelopment of Pendine Outdoor Education Centre to improve educational and economic benefit.

2. Tywi Valley Path

This project involves the creation of a 20km off road shared use path for pedestrians and cyclists stretching from Abergwili to Llandeilo.

The path will connect seven small rural communities with Carmarthen (the main administrative centre for the county) and Llandeilo (a smaller rural market town). The route would become a key active travel route connecting settlements along the route with key employment sites, hospitals, educational establishments and leisure/ retail outlets. The route would be ideally located to directly link into and enhance the SUSTRANS National Cycle Network Route 47 (NCN 47) East of Llanarthne and also to trip attractors / employment sites/ tourist attractions such as the National Botanic Gardens of Wales, Aberglasney Gardens, Dinefwr Park, Dryslwyn Park, Brechfa Mountain Biking Centre and Gelli Aur Agricultural College, West Wales General Hospital, Mid and West Wales Ambulance Service as well as employment sites in Carmarthen and Llandeilo that would benefit from improved accessibility through the scheme.

The route from Carmarthen would also encourage access to the Heart of Wales rail line at Ffairfach and Llandeilo. There are also close links to Carmarthen Museum at Abergwili with further connections to Carmarthen Leisure Centre, the new Gwili Railway station adjacent to West Wales General Hospital at Glangwili also being investigated. Connections can also be generated to the local hospitality trade including hotels, B&Bs, restaurants and public houses increasing trade in the area.

3. Restoration of Kymers and Pembrey Canals

This project involves the restoration and development of Kymers Canal (3 mile stretch of canal from Carway (ffos las) to Kidwelly Quay; and the restoration of the Kidwelly – Llanelly canal and Pembrey canal. It includes the creation of four mooring centres in Carway, Kidwelly, Pembrey and Burry Port with Eco Canal side pub/hotel (http://www.waterscape.com/in-your-area/lowlands/places-to-go/608/auchinstarry-marina); Electric Points for Mooring, Showers and Toilets, Launderette, Car Parking / Motor home parking, Boat Lifting, Hard Standing & Boat Storage Workshop, Hydrogen Fuel cell station.

There is a strong case that restoration of the Canal network will act as a catalyst for economic regeneration in the following ways:

- The project to restore the Llanelli and Gwendraeth canals will create short term construction employment and stimulate the local economy as the canal is restored.
- Restoration of canals in Britain and Ireland has proven to bring economic benefits from visitor expenditure. Restored waterways can also stimulate inward investment and increases in property values as waterside locations are attractive for investors and add value to land and property. Changes in external perceptions often lead to greater developer confidence and increased inward investment.
- The projects will promote imaginative schemes for commercial and domestic building on sites adjacent to the navigation. Economic regeneration can also be realised with the development of commercial and social enterprises in the vicinity of the navigation serving visitors' needs. It will create significant sustainable employment both directly on the canal and in the wider local economy and help the leisure and tourism economy to grow, especially in those areas which are not traditional tourist destinations

What work has been done already (e.g., feasibility, project development, previous project activity)? *Please include links to relevant documents as appropriate.*

Pendine

- Masterplan developed and phased projects delivered or being delivered including:
- Pendine Gateway Scheme, Pendine Promenade and Lighting, Parry Thomas Commercial Centre, Commercial Premises Improvement Grants; Pendine Attractor Project; TAIS Beach Sports Project; Coastal Communities Overnight Motorhome site.
- Options appraisal undertaken of outdoor Education centre redevelopment and draft plans and potential funding for sustainable and accessible Pendine project.

Towy Valley Path:

Planning approval granted for western section 6th April 2017, please see link below. Approval included 12 planning conditions, 2 conditions outstanding awaiting approval imminently. Planning Application: W/34225 (force.com).

Planning for the eastern section is in development and it is hoped that all necessary survey information will be in place to conduct the PAC by the end of the summer/ early Autumn with a view to submitting the planning application by the end of Autumn 2021.

- **Phase 1** of the scheme represents the link from Carmarthen Museum at Abergwili to Nantgaredig which has been divided into 4 elements. Approximately 2 kilometers of the path have been completed to date which included works within highway limits by utilising the Council's permitted development powers. Planning consent has now been secured for phase 1, detailed designs are complete and scheme development works and land negotiations are ongoing. User counters on open sections of path are in place and are showing healthy user figures of over 15000 movements past the counter from January-March 2021. These figures are approximately 200% up on 2019 and 2020 figures.
- **Phase 2** will continue the link from Nantgaredig to Ffairfach and Llandeilo and will involve three river crossings. Two of the river crossings are spanning locations of previous bridges and one crossing is in a new location. A planning application is required for this phase. Works and ecological surveys are ongoing, the EIA has been submitted to the planning department and the response has been received. The Environmental Statement is being prepared in advance of the PAC process. We are in consultation with NRW on the scheme at to date we have no concerns over the deliverability of the project and are confident it can be completed subject to funding being secured.

Restoration of Kymers and Pembrey Canals

Funding currently secured to undertake high level feasibility

What do you think are the main barriers or challenges in bringing this intervention forward?

- Securing capital funding
- Securing remaining consents
- Land acquisitions

What benefits do you think that the intervention should generate? *(if these are indicatively quantified at this stage, please state, but otherwise please describe in general terms)*

Pendine Attractor:

- 123 jobs created
- 30 jobs safeguarded
- 41 Jobs accommodated
- 1765m2 premises created
- 1.97ha land developed
- £3.3m annual economic impact
- 40,000+ additional day visitors p/a
- 6500+ additional overnight stays p/a

Tywi Valley Path

The feasibility studies undertaken to date reference economic, social benefits, tourism and leisure benefits associated with the scheme. Economic benefits have been calculated at between £800,000 - £2,400,000 per annum spend. These figures based on 70,000 users per annum and attracting overnight stays etc. It's estimated that 14-46 jobs created as a result of additional visitor spend in the local area along with local jobs being safeguarded through spend on construction and scheme development.

Other examples of similar schemes of this nature in Ireland and England have proved to be very popular and a big attraction for tourists. The Irish government has seen the benefit of schemes of this nature and have been proactively expanding their Greenway and Blueway offer by investing £53 million Euro between 2019 & 2021 plus a further £63 million Euro in 2021 for their development. Examples of similar schemes include

- Camel Trail, Cornwall – 400,000 users per annum generating £3 million per annum
- Tarka Trail, Devon
- Waterford Greenway, Ireland – 250,000 users in first year
- Great Western Greenway, Ireland, 250,000 users per annum, 200 jobs created
- Great Southern Trail Ireland, Ireland

Kymers and Pembrey Canals

Whilst it is too early to identify the potential economic impacts to Carmarthenshire below is an economic Impact Case Study from the Kennett and Avon Canal (in Berkshire and Wiltshire) as a potential comparator.

Kennet & Avon Canal

£32m full restoration cost £25m HLF grant Direct visitor spend	£42,113,000
Direct, indirect & induced spend	£54,747,000
Visits p.a.	11,216,000

Funding

Estimated total intervention cost	£40m
How will this cost be met? What sources of investment are…	
Secured?	• Pendine Attractor £8.2 million (ERDF, WG TMF, WG regional Funding, Coastal Communities, TAIS, CCC Capital Funds) • Canal Project - £30k feasibility WG Valleys Task Force • Towy Valley Path £2,000,000 CCC Capital Funding
Being considered?	Towy Valley Path £11,750,694 – UK Govt Levelling Up
If you have an indicative annual funding profile, please state below, or attach as appropriate	
No Indicative funding profile currently	

Delivery

Which organisations do you envisage will need to be involved in delivery? Is there a lead delivery organisation?

- Carmarthenshire County Council Lead
- Welsh Government (Visit Wales and Transport Teams)
- Pendine Community Council
- Kidwelly Growth Plan Team
- Kidwelly Town Council / Burry Port & Pembrey Town Council / Trimsaran Community Council
- Canal Trust

Beyond funding availability, what needs to happen to enable delivery? *(e.g., permissions, detailed business case development, key delivery challenges to overcome etc.)*
• Planning permissions, • Public consultations / Stakeholder engagement • Utility / Environmental surveys • Land acquisitions • Staff resource • Project design feasibilities

What are the indicative timescales and milestones associated with the intervention?
Pendine: Attractor / Sustainable & Accessible Pendine - Completed March 23 Pendine Outdoor Education centre – 2022 – 25 **Towy Valley Path: 2021 -2025** 2021/2022 Secure Planning Start CPO process Secure parcels of land which don't require CPO Undertake ground investigations Complete detailed designs of Eastern Section 2022/2023 Secure CPO and land required to deliver the scheme Secure relevant licenses e.g. Badger / Otter Initial site clearances, land management and pre-construction activities Commence Construction activities 2023/2024 Continue construction activities 2024/2025 Complete construction activities **Canal project:** Feasibility completed September 2021: Project delivery 2023 - 2030

Contribution to Missions	
Establish South West Wales as a UK leader in renewable energy and net zero	Increased opportunities for active travel, in relation to Tywi Valley Path Sustainability/ energy efficiency of new facilities
Create a strong, resilient and embedded SW Wales business base	Opportunities through the development of visitor economy business and growth in visitor numbers
Grow and sustain the SW Wales experience offer	Direct contribution in promoting SW Wales as a sustainable and high quality visitor destination.

43. Pembrokeshire Port Infrastructure

Business case status	Concept/ feasibility

Contact details		
Organisation	Pembrokeshire County Council	
Key contact	Name	Rachel Moxey
	Email	Rachel.moxey@pembrokeshire.gov.uk
	Tel	07557 191254

Strategic rationale
Please describe the proposed intervention? What is it seeking to achieve?
The two ports at Pembroke Dock and Fishguard provide the main sea link between South Wales, southern England and Ireland. Both are important as passenger ports and as gateways for roll-on-roll-off freight traffic to Rosslare. Both ports also have potential for expansion, in relation to: • Existing passenger and freight opportunities. To support this, there is a need to maintain investment in the infrastructure at both ports to accommodate this growth, including adequate border control facilities at the ports themselves • Opportunities for green/ renewable energy linked with the ports' function. This could include green hydrogen production, distribution and refuelling to support the freight sector and with potential for wider application. There may be opportunities for a joint venture with Rosslare and hydrogen refuelling providers (perhaps building on the proposed Hydrogen Hub at Holyhead). • The potential to accommodate cruise ships through improved infrastructure at Goodwick and investment in a key visitor attraction.
What work has been done already (e.g., feasibility, project development, previous project activity)? *Please include links to relevant documents as appropriate.*
• In relation to **border infrastructure,** discussions have taken place with the port operators and with the Welsh Government, although an infrastructure investment package has not yet been prepared. • In relation to **visitor infrastructure,** an initial discussion has taken place with Stena and Seaport Development regarding visioning for improvements to cruise infrastructure and potential for an international quality climate-based visitor attraction in Goodwick.
What do you think are the main barriers or challenges in bringing this intervention forward?
This proposal is pre-business case. A definition of need and potential options need to be developed in the first instance, which will determine feasibility and potential barriers that will need to be overcome.

What benefits do you think that the intervention should generate? *(if these are indicatively quantified at this stage, please state, but otherwise please describe in general terms)*
• Increased fluidity of movement at the ports (potentially leading to greater attractiveness and higher passenger/ freight volumes) • Increased port resilience and security • Increased capacity to support expansion in relation to major opportunities (e.g., offshore renewable energy investment) • Increased visitor numbers and revenue

Funding	
Estimated total intervention cost	Potentially up to £50m, although to be determined
How will this cost be met? What sources of investment are…	
Secured?	None
Being considered?	UK and Welsh Governments; port and transit operators
If you have an indicative annual funding profile, please state below, or attach as appropriate	
To be determined	

Delivery
Which organisations do you envisage will need to be involved in delivery? Is there a lead delivery organisation?
• Port operators; UK and Welsh Governments; Pembrokeshire County Council
Beyond funding availability, what needs to happen to enable delivery? *(e.g., permissions, detailed business case development, key delivery challenges to overcome etc.)*
• To be determined through business case process
What are the indicative timescales and milestones associated with the intervention?
• To be determined through business case process

Contribution to Missions	
Establish South West Wales as a UK leader in renewable energy and net zero	Supports the future expansion of the renewable energy sector by securing port capacity
Create a strong, resilient and embedded SW Wales business base	Supports resilience of port-related businesses and the attractiveness of the region as an investment location
Grow and sustain the SW Wales experience offer	Potentially opens up future visitor economy opportunities (e.g., in relation to cruise sector).

44. Transforming Tyisha, Llanelli

Business case status	Strategic Outline Case

Contact details		
Organisation	Carmarthenshire County Council	
Key contact	Name	Jonathan Morgan
	Email	JMorgan@carmarthenshire.gov.uk
	Tel	01267 234567

Strategic rationale

Please describe the proposed intervention? What is it seeking to achieve?

The Tyisha project will deliver a bold and transformational plan to create vibrancy, cohesion, and sustainability for a currently disadvantaged community in Llanelli. In turn this will provide the residents and future generation with ambition, aspirations and investment for their future. Delivering this project is crucial to the wider development and strategic goals which encompass the core principals of the wellbeing and future generations act. The project also aims to improve transport connections from the railway station to the town centre and new £40million life science project, Pentre Awel at Delta Lakes. The project will benefit the socio-economic issues in the area and provide incentive for further development, making the area more vibrant and attractive.

The Tyisha ward sits between the new Pentre Awel Life Science Village, Llanelli Town Centre and Llanelli Railway Station. The area is one of the highest ranked under the Welsh Deprivation Index with high levels of unemployment, lack of opportunities as well as having a high transient community which gives a lack of social and community cohesion. Carmarthenshire County Council are addressing the issues through a multi partnership approach with strong links with the following:

- **Police** to improve crime, antisocial behaviour and community engagement to make the area safe.
- **Housing and registered social landlords** who will improve the availability of family homes and stock condition for the area making residents feel happier in their local environment.
- **Education** and development opportunities for children and young people to thrive in the area.
- **Environment and waste** division to aesthetically improve the area and street scene.
- **Regeneration and Highway** division which will create prosperous and stronger opportunities for businesses and tourism and cycle routes between Pentre Awel, the Town Centre and Llanelli Railway Station.

What work has been done already (e.g., feasibility, project development, previous project activity)? *Please include links to relevant documents as appropriate.*

- Community and Business engagement through the Planning for Real process which provided the key themes for change. The community wanted more family housing, a better environment, tackle crime and more opportunities for younger people to thrive and protect the future generations that live there.
- Our Strategy for the project - *The Way Forward* which outlines the strategic development and ambitions for the area.

• Project initiation with governance, risk register, targets, and action plans. • Dedicated Team consisting of Team Leads, Project Development Officer, Housing Officers, Environmental Health Officer and Community Wardens who are all dedicated to transforming Tyisha. • A dedicated community steering group with a number of partners and agencies who work or are involved in the area and want to champion the change with us. • 4 dedicated and ambitious workstreams to tackle and alleviate the main social, environmental and economical issues for the area. These workstreams include; crime and disorder, Housing and Regeneration, Environment waste and Highways and Children, Families and Community workstream.
What do you think are the main barriers or challenges in bringing this intervention forward?
• Public perception of living in Tyisha are low, although there is a demand for family accommodation and adapted homes in the area. Changing the tenure mix to include more affordable homes to buy may be challenging due to perceptions of the area • Housing Market valuations have increased which will impact on the availability and purchase price of temporary accommodation. • Construction and delivery challenges, including availability of contractors (especially with Pentre Awel, town centre regeneration and Llanelli railway station projects due to come forward in the next few years) and rising materials costs.
What benefits do you think that the intervention should generate? *(if these are indicatively quantified at this stage, please state, but otherwise please describe in general terms)*
Improving Tyisha will have a number of benefits on the Community, Partners and Carmarthenshire County Council. We want to ensure that we are delivering on the key themes of what the community want to see in the area but also how we can protect the future generations and deliver this under the 7 key goals of the Well-being of Future Generations (Wales) Act 2015. We believe that we can: • Create long term investment in the area which will benefit the socioeconomic factors and improve links between Pentre Awel and the Town Centre. This will give us a more prosperous area to live and work in. • Early Intervention and prevention are proven as successful and can provide less impact on critical services ensuring that we allocate resources to the right areas at the right time. • Ensuring that Tyisha has an equal, integrated, and sustainable community that will in turn create trust, respect and protection for the area. • Delivering the project through collaboration will mean that we will be stronger together and can tackle the issues at the core and as one. • Ensuring that we involve the community and our residents as they are the key to this project and will need to ensure they look after their community for the future.

Funding	
Estimated total intervention cost	£9 million (initially)
How will this cost be met? What sources of investment are…	
Secured?	Housing Revenue Grant

Being considered?	Other funding opportunities maybe available in the future for smaller projects within Transforming Tyisha. For example, we look to use: • Potential partnership with developer (Early Market Engagement currently being undertaken) • Levelling up funding for environmental and street scene improvements especially on Station Road and Clos Sant Paul. • National Lottery Funding for a new hub for the area. • OPCC funding for employment of the Community Wardens and delivery of security and target hardening measures (CCTV) to make the area safer. • Other small funding streams to help with community engagement especially with young people and give them new opportunities and skills while helping improve the area.

If you have an indicative annual funding profile, please state below, or attach as appropriate
To be determined.

Contribution to Missions	
Establish South West Wales as a UK leader in renewable energy and net zero	Supports this Mission through the introduction of more energy-efficient homes within the context of an integrated regeneration programme.
Create a strong, resilient and embedded SW Wales business base	Potential links to supply chain opportunities and local community economic development.
Grow and sustain the SW Wales experience offer	Contributes to the attractiveness of the region as a place to live and work and complements the major investment at Pentre Awel and in Llanelli town centre and railway station.

45. Affordable Housing Delivery

Business case status	Full Business Case

Contact details		
Organisation	Carmarthenshire County Council	
Key contact	Name	Rachel Davies
	Email	Ramdavies@carmarthenshire.gov.uk
	Tel	07884 235714

Strategic rationale

Please describe the proposed intervention? What is it seeking to achieve?

The Council developed ambitious plans to increase the supply of affordable housing a number of years ago, to ensure that:

- The level of supply of social housing in the county meets the demand for both general and specialist housing need
- Options are developed to help people who cannot afford to buy homes at open market values are given options to help them access home ownership and remain in their communities.

Our plans to increase the supply of affordable homes will:

- Deliver homes in the areas of greatest housing need, with housing solutions based on the needs of the particular area e.g. more low cost home ownership in rural areas
- Deliver more homes for general needs households as well as specialist housing meeting specific housing need e.g. assisted living schemes for learning disabilities, mental health and older people
- Develop homes to support wider strategic regeneration priorities throughout the county, including town centres and rural areas
- Create jobs for local people and stimulate the local economy
- Stimulate the local constriction industry and supply chain, grow the green economy and develop local skills and talents
- provide affordable homes for young and working aged people to help them remain in the county and benefit from the additional jobs created;
- help maintain our culture and identity especially in rural towns and villages, where we must help ensure that local people are able to afford quality affordable homes and remain in their communities;
- help to maintain and develop our town centres by increasing the residential offer, increasing footfall and helping businesses thrive;
- increase demand for excellent digital connectivity across all communities
- help build strong sustainable communities – places were people want to live and work.

Due to the strong links between housing-based investment and development and economic regeneration our plans for affordable housing will be captured in the new 10 Year Housing and Regeneration Master Plan which will be ready by the autumn.

What work has been done already (e.g., feasibility, project development, previous project activity)? *Please include links to relevant documents as appropriate.*

Providing more affordable homes has been a key a strategic priority for the Council for a number of years. We published our five year vision[16] for increasing the supply of affordable homes in 2015. In 2016, we set out our first ambitious programme to deliver over 1000 additional affordable homes across the County[17] and, in September 2019, we published our exciting plans to build over 900 new Council homes[18]. Our initial plan to deliver over 1000 additional affordable homes was achieved nearly a year ahead of schedule. To date we have delivered over 1100 additional affordable homes through a range of solutions including: • bringing empty homes back into use; • making more affordable homes available for letting through our in -house Simple Lettings Agency; • increasing the Councils housing stock buy buying private sector homes; • building new affordable homes; and • securing affordable homes for low-cost home ownership on private developments through the planning system (Section 106 contributions). Our focus over the next 10 years will be to build new affordable homes at scale at pace. We currently have 8 affordable housing developments on site that will create 135 new affordable homes by January 2022. We also have development plans for a further 23 sites that will deliver over 750 homes in the next 4 years. In addition to the Councils new build proposal, we also work closely with our Housing Association partners to ensure that their new build programmes (supported by Social Housing Grant) are delivered to meet the Councils strategic priorities, including: • meeting housing need throughout the county • providing more affordable homes for sale and rent in rural areas • developing our town centres and increasing the residential offer • delivering the Tyisha regeneration master plan The current 3 year Social Housing Grant allocation for Carmarthenshire is £39m. This will generate a total investment of circa £68m and will deliver over 500 new homes.
What do you think are the main barriers or challenges in bringing this intervention forward?
Capacity of the construction industry may impact on our plans for delivery. If the current shortage of building materials continues, this will cause significant delays to our programme.
What benefits do you think that the intervention should generate? *(if these are indicatively quantified at this stage, please state, but otherwise please describe in general terms)*
This intervention will: • provide more homes across the county meeting specialist and general housing need • stimulate the economy and create strong sustainable communities – places were people want to live and work. • create jobs for local people and helping to replace the 3,000 jobs that have already been lost; • provide affordable homes for young and working aged people to help them remain in the county and benefit from the additional jobs created;

[16] Our Commitment to Affordable Homes – Agreed by Council in October 2015
[17] Affordable Homes Delivery Plan – Agreed by Council in March 2016
[18] Building More Council Homes – Our Ambition and Plan of Action – Agreed by Council in September 2019

• help maintain our culture and identity especially in rural towns and villages, where we must help ensure that local people are able to afford quality affordable homes and remain in their communities; • help to maintain and develop our town centres by increasing the residential offer, increasing footfall and helping businesses thrive; • help grow the green economy, the local construction industry and our supply chains; and • increase demand for excellent digital connectivity across all communities

Funding	
Estimated total intervention cost	Over the next 10 year the investment from this programme will exceed £200m
How will this cost be met? What sources of investment are…	
Secured?	Housing Revenue Account (HRA) Capital Funding and various sources of WG grant finding including : • Affordable Housing Grant • Social Housing Grant (SHG) • Innovative Housing Programme Funding • Integrated Care Funding • Land Release Fund Grant
Being considered?	Private finance and funding from private sector development partners
If you have an indicative annual funding profile, please state below, or attach as appropriate	
HRA capital funding is approximately £20m per annum for the next 3 years. SHG allocation is £13m per annum for the next 3 years.	

Delivery
Which organisations do you envisage will need to be involved in delivery? Is there a lead delivery organisation?
These affordable housing plans are Carmarthenshire based and led, but other LA's in the region will also be committed to increasing the supply of affordable housing. Their plans and capacity will, however, differ.
Beyond funding availability, what needs to happen to enable delivery? *(e.g., permissions, detailed business case development, key delivery challenges to overcome etc.)*
The strategic direction and commitment is already agreed. The delivery of each development will be subject to planning and the appropriate procurement route etc.
What are the indicative timescales and milestones associated with the intervention?
This is currently a 10 year programme which will be monitored as part of the delivery of the Housing and Regeneration Master Plan.

Contribution to Missions	
Establish South West Wales as a UK leader in renewable energy and net zero	Supports this Mission through the introduction of more energy-efficient homes within the context of an integrated regeneration programme.
Create a strong, resilient and embedded SW Wales business base	Potential links to supply chain opportunities and local community economic development.
Grow and sustain the SW Wales experience offer	Contributes to the attractiveness of the region as a place to live and work

SQW

Contact

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About us

SQW Group

SQW and Oxford Innovation are part of SQW Group.
www.sqwgroup.com

SQW

SQW is a leading provider of research, analysis and advice on sustainable economic and social development for public, private and voluntary sector organisations across the UK and internationally. Core services include appraisal, economic impact assessment, and evaluation; demand assessment, feasibility and business planning; economic, social and environmental research and analysis; organisation and partnership development; policy development, strategy, and action planning. In 2019, BBP Regeneration became part of SQW, bringing to the business a RICS-accredited land and property team.
www.sqw.co.uk

Oxford Innovation

Oxford Innovation is a leading operator of business and innovation centres that provide office and laboratory space to companies throughout the UK. The company also provides innovation services to entrepreneurs, including business planning advice, coaching and mentoring. Oxford Innovation also manages investment networks that link investors with entrepreneurs seeking funding from £20,000 to £2m.
www.oxin.co.uk

Appendix E - Integrated Impact Assessment Screening Form

Please ensure that you refer to the Screening Form Guidance while completing this form.

Which service area and directorate are you from?

Service Area: Property Services
Directorate: Place

Q1 (a) What are you screening for relevance?

☐ New and revised policies, practices or procedures
☐ Service review, re-organisation or service changes/reductions, which affect the wider community, service users and/or staff
☐ Efficiency or saving proposals
☐ Setting budget allocations for new financial year and strategic financial planning
☐ New project proposals affecting staff, communities or accessibility to the built environment, e.g., new construction work or adaptations to existing buildings, moving to on-line services, changing location
☐ Large Scale Public Events
☐ Local implementation of National Strategy/Plans/Legislation
☐ Strategic directive and intent, including those developed at Regional Partnership Boards and Public Services Board, which impact on a public bodies functions
☒ Medium to long term plans (for example, corporate plans, development plans, service delivery and improvement plans)
☐ Setting objectives (for example, well-being objectives, equality objectives, Welsh language strategy)
☐ Major procurement and commissioning decisions
☐ Decisions that affect the ability (including external partners) to offer Welsh language opportunities and services

(b) Please name and fully describe initiative here:

The Swansea Bay Delivery Plan will be developed in accordance with the South West Wales Regional Economic Delivery Plan (REDP), that has replaced the Swansea Bay City Region Economic Regeneration Strategy as the strategic framework for economic regeneration at a local and regional level.

An analysis of the region's economy, labour market and infrastructure determined strengths, weaknesses, opportunities and threats to inform the REDP. The development of the plan also included consideration of national, regional and local policy context including the Well-being of Future Generations (Wales) Act 2015, decarbonisation and the achievement of net zero by 2050, technological and demographic change and Brexit.

Q2 What is the potential impact on the following: the impacts below could be positive (+) or negative (-)

	High Impact +	High Impact -	Medium Impact +	Medium Impact -	Low Impact +	Low Impact -	Needs further investigation
Children/young people (0-18)	☐	☐	☒	☐	☐	☐	☐
Older people (50+)	☐	☐	☒	☐	☐	☐	☐
Any other age group	☐	☐	☒	☐	☐	☐	☐
Future Generations (yet to be born)	☐	☐	☐	☐	☒	☐	☐
Disability	☐	☐	☐	☐	☒	☐	☐

Appendix E - Integrated Impact Assessment Screening Form

Race (including refugees)	☐	☐	☐	☐	☒	☐	☐
Asylum seekers	☐	☐	☐	☐	☒	☐	☐
Gypsies & travellers	☐	☐	☐	☐	☒	☐	☐
Religion or (non-)belief	☐	☐	☐	☐	☒	☐	☐
Sex	☐	☐	☐	☐	☒	☐	☐
Sexual Orientation	☐	☐	☐	☐	☒	☐	☐
Gender reassignment	☐	☐	☐	☐	☒	☐	☐
Welsh Language	☐	☐	☐	☐	☒	☐	☐
Poverty/social exclusion	☐	☐	☒	☐	☐	☐	☐
Carers (inc. young carers)	☐	☐	☐	☐	☒	☐	☐
Community cohesion	☐	☐	☐	☐	☒	☐	☐
Marriage & civil partnership	☐	☐	☐	☐	☒	☐	☐
Pregnancy and maternity	☐	☐	☐	☐	☒	☐	☐

Q3 What involvement has taken place/will you undertake e.g. engagement/consultation/co-productive approaches?
Please provide details below – either of your activities or your reasons for not undertaking involvement

The REDP was prepared in collaboration with the four local authorities in South West Wales in partnership with Welsh Government. In preparing the REDP, consultation has taken place with over fifty stakeholders to include Welsh Government, businesses, local authorities, universities, further education colleges, leaders with the enterprise zones and third sector.

Consultation has included one to one sessions throughout the process. Discussions have been held at county level economic partnership boards to include; Regeneration Swansea, the Regional Learning and Skills Partnership, together with the Economic Strategy Group of the Swansea Bay City Deal and stakeholder consultation that was undertaken during June 2021.

Q4 Have you considered the Well-being of Future Generations Act (Wales) 2015 in the development of this initiative:

a) Overall does the initiative support our Corporate Plan's Well-being Objectives when considered together?
Yes ☒ **No** ☐

b) Does the initiative consider maximising contribution to each of the seven national well-being goals?
Yes ☒ **No** ☐

c) Does the initiative apply each of the five ways of working?
Yes ☒ **No** ☐

d) Does the initiative meet the needs of the present without compromising the ability of future generations to meet their own needs?
Yes ☒ **No** ☐

Q5 What is the potential risk of the initiative? ***(Consider the following impacts – equality, socio-economic, environmental, cultural, legal, financial, political, media, public perception etc…)***

High risk	Medium risk	Low risk
☐	☐	☒

Q6 Will this initiative have an impact (however minor) on any other Council service?

☒ Yes ☐ No **If yes, please provide details below**

The REDP will provide strategic direction for economic regeneration activities undertaken by the Council.

Q7 What is the cumulative impact of this proposal on people and/or communities when considering all the impacts identified within the screening and any other key decisions affecting similar groups/ service users made by the organisation?
(You may need to discuss this with your Service Head or Cabinet Member to consider more widely if this proposal will affect certain groups/ communities more adversely because of other decisions the organisation is making. For example, financial impact/poverty, withdrawal of multiple services and whether this is disadvantaging the same groups, e.g., disabled people, older people, single parents (who are mainly women), etc.)

The REDP sets the strategic direction for economic regeneration both locally and regionally for the next ten years, whilst informing the Swansea Bay Delivery Plan. The REDP aims to create an economy that is resilient and sustainable, enterprising and ambitious, be inclusive. It is envisaged that the REDP will have a positive impact for the people and communities of Swansea, by improving economic performance, whilst creating sustainable employment opportunities. In accordance with the Equality Act 2010 and Public Sector Equality Duty, due regard will be given to protected groups when developing and during the delivery of all actions from the REDP. All actions will be screened and full IIA's will be undertaken (if applicable).

Appendix E - Integrated Impact Assessment Screening Form

Outcome of Screening

Q8 Please describe the outcome of your screening below:

- **Summary of impacts identified and mitigation needed (Q2)**
  The impacts of the Swansea Bay Delivery Plan derived from the REDP is expected to be positive and are low – medium in nature.

- **Summary of involvement (Q3)**
  Consultation with the public, private and voluntary sector partners both locally and regionally, together with the Regeneration Swansea Partnership, which has helped to shape ambitions and missions of the REDP.

- **WFG considerations (Q4)**
  The Well-being of Future Generations (Wales) Act 2015 has been considered throughout the developed and approval of the REDP.

- **Any risks identified (Q5)**
  The Swansea Bay Delivery Plan derived from the REDP is expected to low risk. Risk Registers will be utilised as part of the project initiation, to be considered, agreed and monitored as part of the governance in place for the Regeneration Programme Board.

- **Cumulative impact (Q7)**
  The REDP sets the strategic direction for economic regeneration both locally and regionally for the next ten years, whilst informing the Swansea Bay Delivery Plan. The REDP aims to create an economy that is resilient and sustainable, enterprising and ambitious, be inclusive. It is envisaged that the REDP will have a positive impact for the people and communities of Swansea, by improving economic performance, whilst creating sustainable employment opportunities. In accordance with the Equality Act 2010 and Public Sector Equality Duty, due regard will be given to protected groups when developing and during the delivery of all actions from the REDP. All actions will be screened and full IIA's will be undertaken (if applicable).

(NB: This summary paragraph should be used in the relevant section of corporate report)

☐ **Full IIA to be completed**

☒ **Do not complete IIA – please ensure you have provided the relevant information above to support this outcome**

NB: Please email this completed form to the Access to Services Team for agreement before obtaining approval from your Head of Service. Head of Service approval is only required via email.

Screening completed by:
Name: Kristy Tillman
Job title: Project Manager
Date: 10.11.2022

Approval by Head of Service:
Name: Geoff Bacon
Job title: Head of Property Services
Date: 10.11.2022

Please return the completed form to accesstoservices@swansea.gov.uk

Agenda Item 5

Cyngor Abertawe Swansea Council

Report of the Chair

Economy & Infrastructure Corporate Delivery Committee – 23 March 2023

Work Plan 2022-2023

Date of meeting	Agenda items and Format
23 June 2022	• Work Plan Discussion.
28 July 2022	• Work Programme 2022-2023.
22 September 2022	• Meeting Cancelled.
27 October 2022	• Resident's Rewards App (SL).
24 November 2022	• Meeting Cancelled.
22 December 2022	• Introduction to Tawe Riverside Corridor Strategy (GE)
26 January 2023	• Local Economic Delivery Plan.
23 February 2023	• Tawe Riverside & Levelling Up.(GE & PR).
2 March 2023 (Special)	• Update – Swansea Resident's Rewards App (SL) includes representatives from BID.
23 March 2023	• Introduction to Swansea Bay Strategy (GB).
27 April 2023	• Draft Economic Development Strategy Framework.
To be scheduled	