Appendix D

September 2021

South West Wales Regional Economic Delivery Plan

Project Pipeline Supplement

Draft

SQW

Contents

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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.

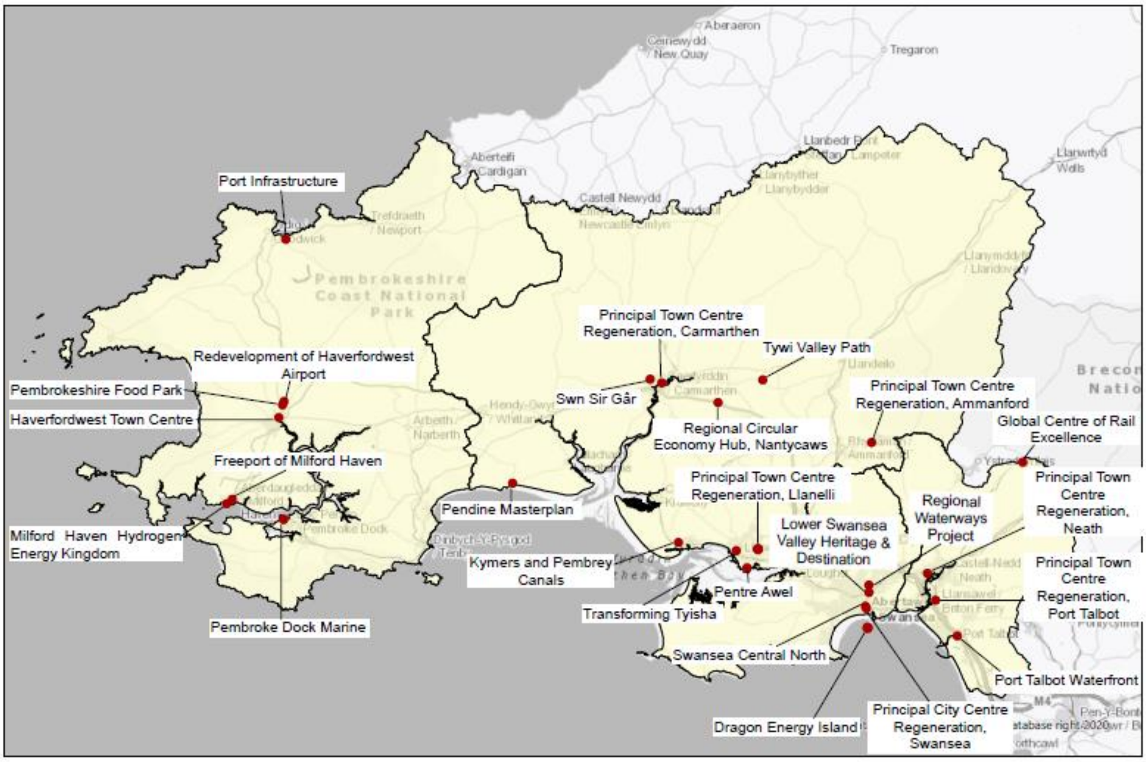
Indicator	Description
Firm creation and survival	New business starts as a result of REDP-backed activity and survival rates over time
Jobs	Jobs created and safeguarded as a result of investment. The REDP emphasises the quality of jobs (in line with the Economic Contract) and this should be reflected 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



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

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.
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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

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	Port Talbot Waterfront, linked with the decarbonisation of the industrial base and attracting investment into key sites.
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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
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	routes, re-routing existing routes and developing new tourism infrastructure and access to the historic environment.
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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:

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[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

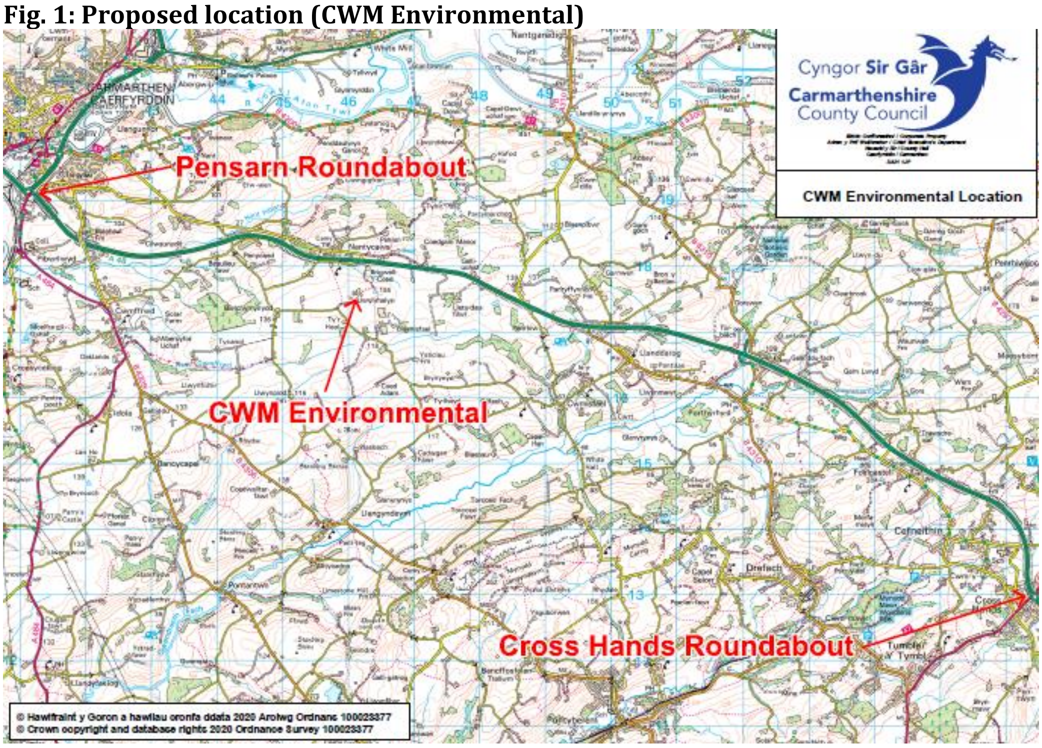
Contact details		
Organisation	Carmarthenshire County Council	
Key contact	Name	Stuart Walters
	Email	swalters@carmarthenshire.gov.uk
	Tel	07919592709

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.

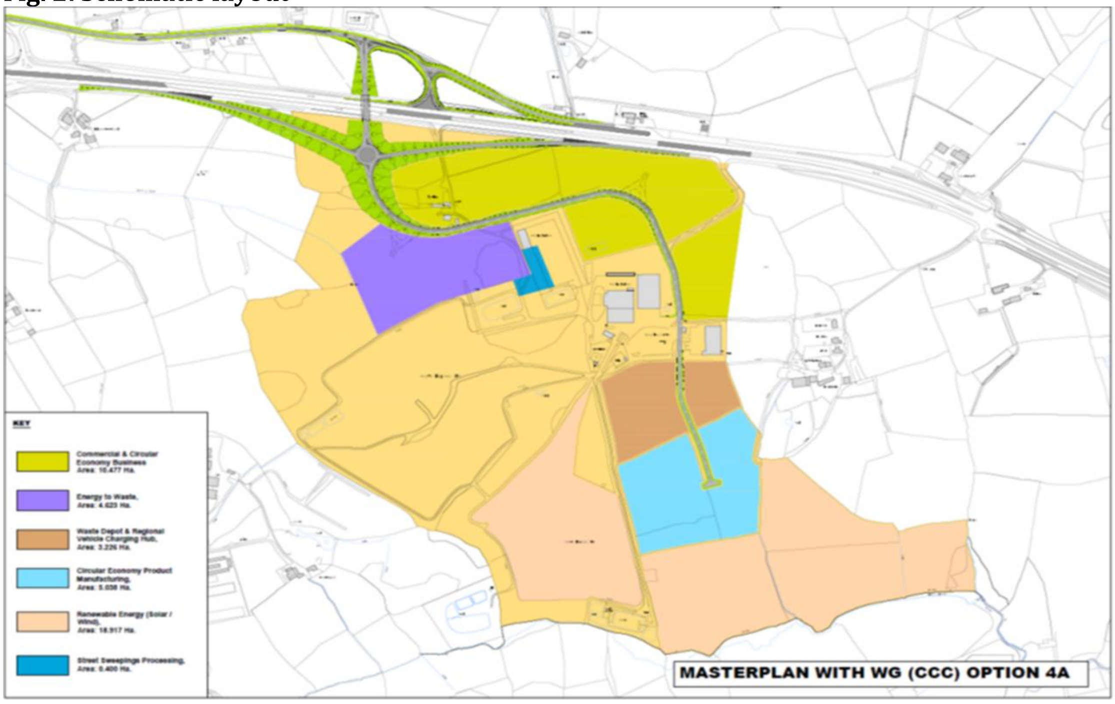
Energy production and distribution: solar, wind and waste combustion processes could be used to generate electricity. The electricity would be used to feed power to the site facilities and proposed industrial units as well as providing a source for charging electric commercial/private vehicles. Surplus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

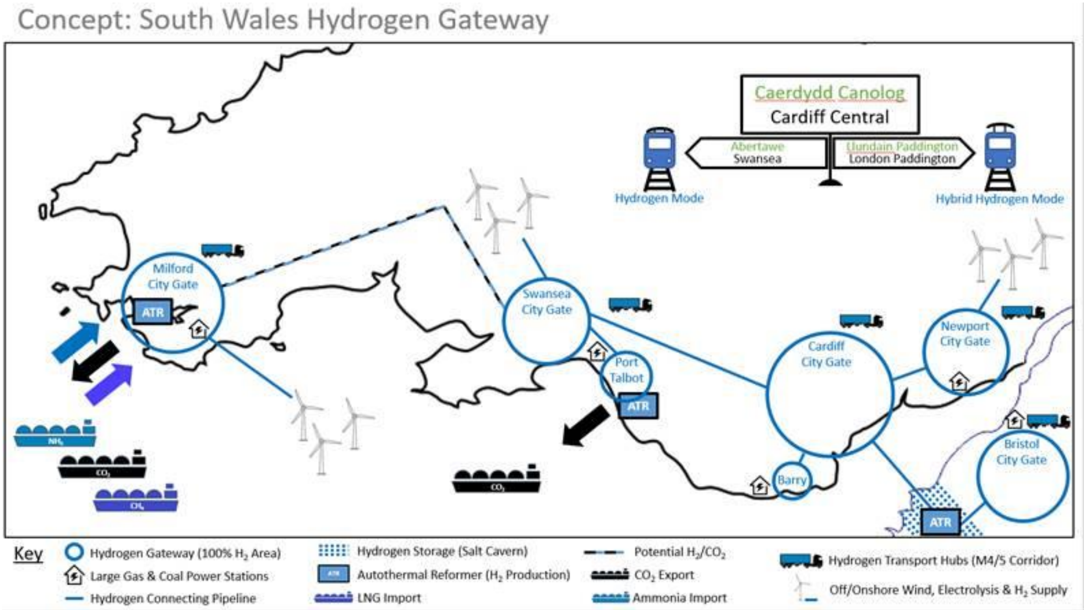
Source: SQW

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

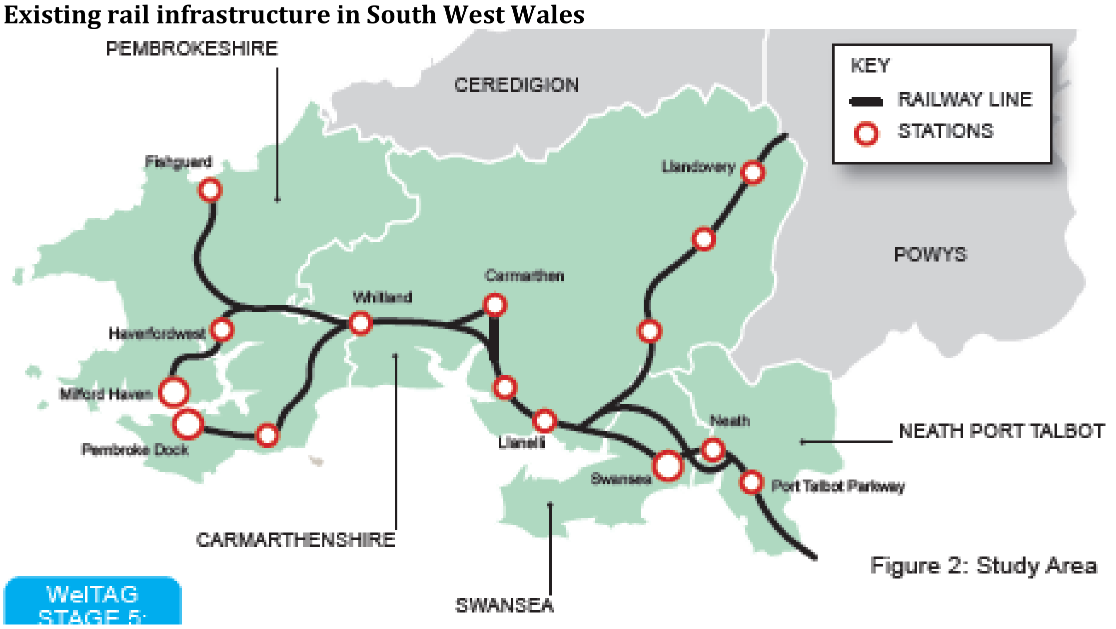
Contact details		
Organisation	Welsh Government/ Transport for Wales	
Key contact	Name	
	Email	
	Tel	

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
	Email	garethjones@carmarthenshire.gov.uk
	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.

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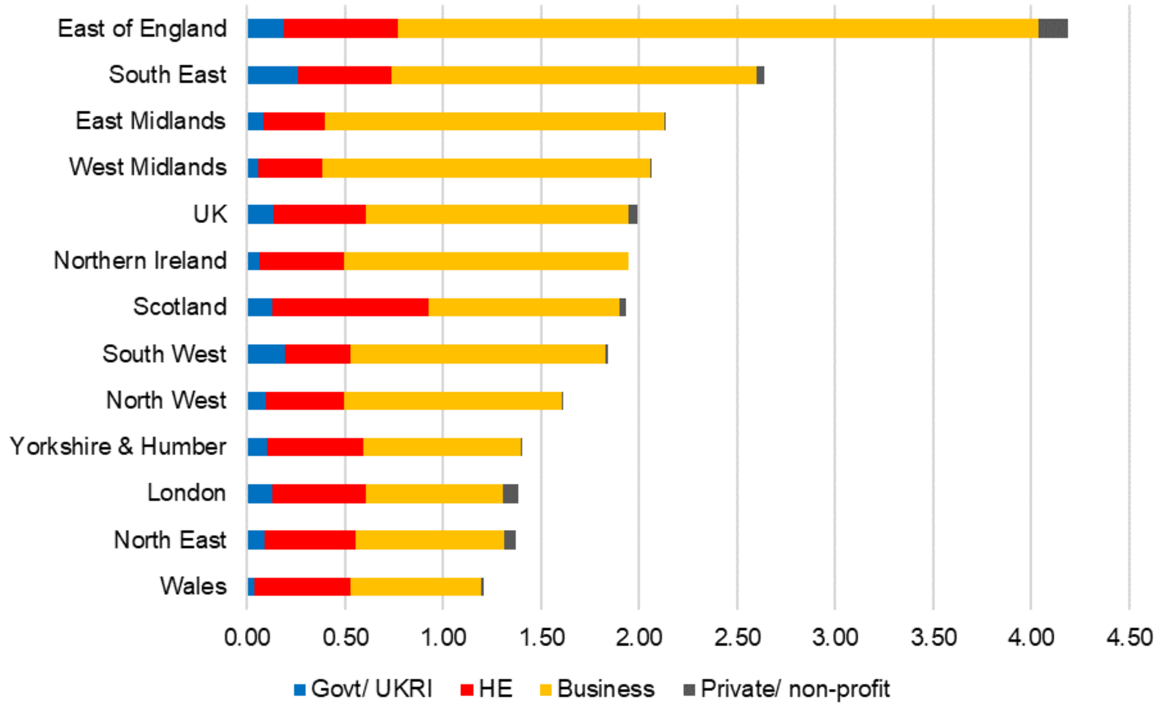
[7] Rick Delbridge, Dylan Henderson and Kevin Morgan (May 2021), [Scoping the Future of Innovation Policy in Wales]

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.

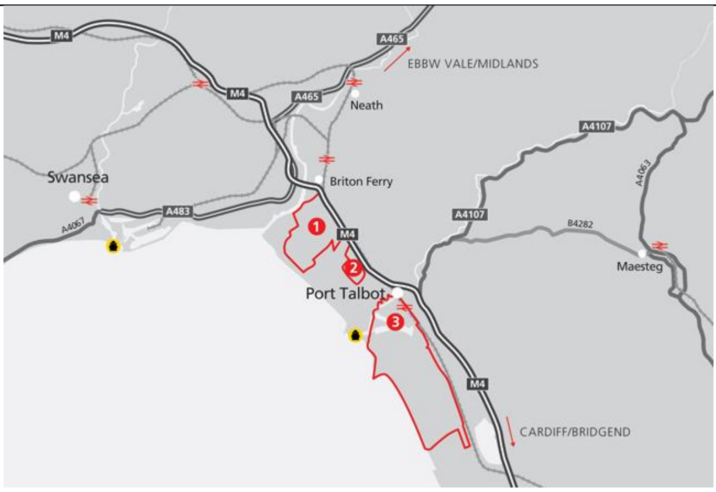
Overview

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
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	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

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About us

SQW Group

SQW and Oxford Innovation are part of SQW Group.
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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.
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