

## **Executive Summary**

Welcome to the 2023-24 Swansea Bay City Deal (SBCD) Annual Report. Much progress continues to be made across the region to deliver our ambitious Portfolio, which is reflected throughout the report. Progress is detailed through key information, activity, achievements, and in focus pieces.

The City Deal provides South West Wales a unique opportunity through a £1.3 billion Portfolio investment across nine headline programmes and projects, throughout the counties of Carmarthenshire, Neath Port Talbot, Pembrokeshire and Swansea.

The ambition is to deliver key benefits to the region over a 15-year period including:

- Creating over **9,000** jobs in areas including energy, manufacturing, digital, health and well-being, R&D, education, leisure and tourism.
- Contributing **£1.8-2.4 billion** of economic impact.
- Upskilling **14,000** people through **2,200** training opportunities and over **3,000** new apprenticeships.

Achieving these ambitions will help transform South West Wales into a place of opportunity, where people can live and work, and where businesses can thrive through the creation of well-paid jobs, new skills and a first-class business environment.

MAP & PARTNER LOGOS  
FUNDING INFOGRAPHICS

The projects and programmes within the City Deal Portfolio are aligned to three themes - Economic Acceleration, Energy and Smart Manufacturing, and Life Science and Well-being.

**Economic acceleration** - Providing the space, skills and connectivity to drive forward the regional economy to provide new opportunities for our businesses and communities to thrive.

**Life science and well-being** - Providing developments that will combine cutting edge innovation, research and learning facilities with new business and within areas of life sciences, health, well-being and sport.

**Energy and smart manufacturing** - Placing the region at the forefront of energy and manufacturing innovation as part of the drive towards a low carbon economy and the strengthening of the existing manufacturing base.

**Foreword:**

**Cllr Rob Stewart Swansea Council Leader and Swansea Bay City Deal Joint Committee Chairman**

“We have seen yet another year of significant progress across the Portfolio, welcoming new companies into South West Wales, building new facilities, taking on apprentices, creating jobs and growing our regional economy. Many of our projects are maturing and excelling in delivery, and the collaborative working between all our partners is strengthening as we reach important milestones. Complimentary initiatives within the region including several successful Levelling-up bids and the Celtic Freeport bid are also progressing which are also having a positive impact on the City Deal. I’m looking forward to the next 12 months with excitement as further projects come to fruition.”

## **Benefits**

The portfolio has again made significant progress during 2023/24 towards its benefit targets as its projects are delivered. It is expected that this progress will continue to accelerate in future years as more projects enter their delivery and operational phase. Some headline achievements to date include:

- **£354m** of total investment to date  
**£125m** investment in 2023-24
- **£71m** Private Sector investment contribution secured to date.
- At least **600+** Full Time Equivalent (FTE) jobs created\*
- **160 FTE** apprenticeship opportunities created or continued
- **13,464** construction related training weeks across Portfolio training weeks provided across Portfolio construction activity to date with at least **4,264** weeks delivered in 2023-24.
- **75,701m<sup>2</sup>** of completed floor space across the Portfolio
- Skills and Talent Programme delivered **22,215** Additional Skills and **42** new course frameworks to date.
- **£34m** private sector funding levered through the Digital Infrastructure programme 2022-23.
- **308** Homes as Power Stations homes delivered leveraging **£48.6m** of investment, in addition to another **£17.4m** of public and private sector investment.
- **250+** contracts awarded to Welsh based companies.
- **3 of 36** projects completed with a total investment of **£123m**.
- **19 of 36** projects in delivery, delivering **£438m** total investment once completed.
- **14 of 36** projects approved and working through pre-commencement activity. Once complete, these projects will deliver the remaining **£721m** of SBCD forecasted investment.
- Construction contracts in the region of **£141m** are in the immediate pipeline including major procurements for HAPS, Digital Infrastructure and Campuses projects.

\*Further jobs have been created, and will be confirmed with a 12-24 months' time lag post completion

**Wendy Walters, Carmarthenshire County Council Chief Executive and SBCD Senior Responsible Owner**

“We are on track to deliver significant regional change through the delivery of the SBCD Portfolio. To date, over £354m of investment has been spent to help support the South West Wales economy. Further key infrastructure has become visible across the region over the past 12 months, including Pentre Awel, Pembroke Dock Infrastructure, 71-72 Kingsway and the Innovation Matrix. With many more developments in the pipeline and will be delivered over the next 2-3 years.

The most exciting thing about portfolio delivery is the networks and collaborations that these initiatives bring to the region that support the growth of key sectors and businesses. This activity will, in turn, create employment opportunities for our existing workforce and future generations in sectors including health and well-being, energy, digital and manufacturing.

As the operations of completed projects becomes embedded, including Yr Egin, Swansea Arena and the Bay Technology Centre, we will look towards their success through economic impact evaluations. Coupled with the delivery of the three regional SBCD projects, Homes as Power Stations, Digital Infrastructure and Skills and Talent, the Portfolio will put South West Wales on the map for being a place that people want to invest, work, learn and live.”

**Quote from UK Government TBC**

## **Skills & Talent**

Focussing on high growth industry sectors in the digital, construction, energy, smart manufacturing and health and well-being sectors, the programme will deliver 2,200 additional skills and development opportunities, 14,000 higher skilled individuals and 3,000 new apprenticeships - which will support businesses by allowing them to grow and future proof through developing a talented regional workforce.

Working alongside partners from the private sector, higher and further education, schools and the third sector, the programme team are periodically identifying gaps in current provision and establishing the changes needed to develop new courses and frameworks to meet these skills gaps. Pilot projects are being developed and deployed which align to the needs of industry and the key SBCD themes.

### **Key milestones and achievements:**

- 10 further skills pilot projects approved by the Regional Learning and Skills Partnership (RLSP) board. Taking the total number of approved pilots to 21 since launching the scheme. There was a strong focus on priority sectors specifically energy and engineering. Other pilot activity also included upskilling current workforce in the hydrogen sector.
- Exceeding targets for 'Additional Skills' with 22,215 created to date against a target of 2,200. Also exceeding target for 'New Course Frameworks' with 42 created against a target of 20.
- Skills Barometer reviewed and updated with sector skills gap analysis and reports undertaken.
- Development of website [www.rlp.org.uk](http://www.rlp.org.uk) – with information about the RLSP and SBCD Skills and Talent programme, latest news section, and a summary of approved pilot projects.
- Teacher Encounters pilot complete and evaluation report prepared for Welsh Government. This was to support teaching staff at Dwr Y Felin Secondary School in Neath with the implementation of the new curriculum for Wales, allowing them to transfer their subjects into relevant industry requirements.
- Attendance at Parent Evenings in two schools per local authority to raise awareness of the SBCD, the Skill and Talent Programme and upcoming local career options. Engagement with parents and teachers was very well received and has provided further opportunities to work collaboratively.
- Marketing material produced showing career pathways roadmaps, highlighting post 16 training opportunities available in colleges and universities across the region.
- Work Experience pilot planned for Ysgol Dyffryn Aman school which will include real life industry experience and classroom project work. This will be rolled out in the next academic year.
- Workshop held with pilot project leads and City Deal project managers to share best practice and what activities have been undertaken. The workshop was successful and is planned to be repeated.

### **Key activity for 2024-25:**

- Supporting the TATA Steel Transition Board to upskill and reskill workers to retain them within the region.
- Review the skills barometer and skills data to evaluate impact and target necessary skills interventions.
- Engage with stakeholders and partners to ensure the needs of employers direct any skills developments.
- School engagement to raise awareness of City Deal and what that means for young people.

### **Infographics for anticipated benefits:**

2,200	Additional Skills
14,000	Upskilling Opportunities
3,000	Apprenticeships Opportunities
20	New Course Framework
2+	Centres of Excellence Developed

### **In Focus: Exceeding Targets**

To ensure the success of the programme, key activities with school pupils and staff were undertaken to drive additional skills and create new course. This is demonstrated by the programme surpassing its targets for both 'additional skills' and 'new course frameworks' over the last 12 months.

22,215 individuals have benefited from additional skills against a target of 2,220.

In conjunction new courses have been developed, across a range of levels and sectors. The RLSP are working in collaboration with training providers and industry partners to create pilot projects in sectors with a future high demand for workers and current lack of training provision to meet the future skills needs of the region. To date, 42 new course frameworks have been created against a target of 20, in sectors including Digital, Green Construction, and manufacturing.

**Quote from Welsh Government TBC**

## **In Focus: Skills & Talent pilot projects**

Over the last 12 months the Skills & Talent programme have approved 10 new pilot projects which will prepare young people for upcoming jobs across the region.

### **Investment to date**

Public Sector Match Funding of £1,229,985

Private Sector Match Funding of £1,362,810

Private Apprenticeships Investment of £1,060,800

### **Future Skills for Land & Sea**



COLEG Sir Benfro  
Pembroke COLLEGE



Port of  
Milford Haven



REARDON SMITH  
NAUTICAL TRUST

Directly addresses skills need in the region's growing maritime sector. A 2-year programme of pre-cadetship in maritime studies for students, delivering courses in maritime specific qualifications and visits to industry. On completion, the learners will be offered direct entry onto a fully funded officer cadetship. The project will also develop pathways in schools to engage learners with the STEM aspects of marine renewable energy including renewable energy technologies and project development processes for wave, tidal, onshore wind, solar and offshore wind.

294 Higher skilled individuals gaining a qualification.

### **Construct Net Zero**



Canolfan Artesol Adnoddau Cymru  
Construction Wales Innovation Centre

Provides a range of innovative courses for learners in energy-saving building techniques, delivered by industry experts with a combination of practical and theoretical work education at various levels. Based on 'fabric first' design, the project will work closely with partners in industry, higher and further education, schools and the third sector to establish the training need and build a unified Net-Zero construction curriculum across the whole spectrum from Level 1 to Level 7.

450 Higher skilled individuals gaining a qualification.

### **The Young Dragons - Futurescape**



To introduce pupils to the construction industry using a combination of Virtual Reality and hands-on experience. Using realistic workplace scenarios, the project will help develop key employability skills such as

problem solving and creative thinking, as well as enabling the application of maths, science and enterprise skills.

800 Individuals benefitting from increased learning.

#### **VR/AR Technologies Training Project**



Promote the use of VR (virtual reality) and AR (augmented reality), and the benefits it can bring to the region's business community. Working closely with industry, this project will design a VR training centre to provide a platform to deliver an exciting learning experience to the region through blended learning, on-line or face to face learning environments. Training will also be available to school leavers, the unemployed, as well as students and career changers.

500 Higher skilled individuals gaining a qualification.

#### **AGOR skills – Sport Health and Wellbeing**



Addresses the skills gap in the rapidly growing sector of Sport, Health and Wellbeing. It will take advantage of the wealth of opportunities arising around the City Deal Campuses and the Pentre Awel developments. Working closely with businesses, this exciting project offers a collaborative environment for online and in-person learning, hosting innovative courses and events for a range of market led, sector focused skills.

50 Higher skilled individuals gaining a qualification.

#### **Advanced industrial Drone Course**



Provides advanced accredited training for drone pilots to be able to undertake inspection flights required for regular inspection and identification of plant and equipment in industrial settings.

12 Higher skilled individuals gaining a qualification.

#### **Sustainable Power Renewables and Construction (SPARC)**



To encourage females into careers in underrepresented industries across Pembrokeshire including sustainable power, renewables, engineering and construction. Working closely with schools and industry, the project will work to empower and inspire young women to consider and pursue careers in these industries and create a more diverse and inclusive workforce for the future.

40 Higher skilled individuals gaining a qualification.

#### **Energy Transition Hub**



**Shell**  
**ENERGY**



This UK first will see the establishment of a control room operator facility based in Pembrokeshire College. With a room capable of training groups of 24 learners, including students and existing workforce, the facility will accurately emulate the environment seen in all major energy plants in the region. This will include both current facilities such as oil refinery, LNG plants, power station and food and drink facilities, as well as future plants such as offshore floating wind and hydrogen plants.

450 Higher skilled individuals gaining a qualification.

#### **Fit For Offshore Renewables Wales**



To help prepare the region's supply chain for the offshore renewable energy sector. It will support a wide range of the region's businesses to develop into the sector both locally and globally, offering tailored advice and the opportunity to grow a network of supply chain contacts. Once the company is F4OR 'granted', it will be promoted to industry contacts who would be potential future customers.

80 Higher skilled individuals gaining a qualification.

#### **Immersive Learning for the Hydrogen Industry in Wales**



Develop and deliver innovative training courses for the region's rapidly growing hydrogen industry using cutting-edge 360-degree immersive filming techniques. It addresses the skills gap in the region's hydrogen industry and will help develop a skilled workforce, better able to compete on the global stage.

100 Higher skilled individuals gaining a qualification.



## **Homes As Power Stations**

This project will facilitate the adoption of energy efficient design and renewable technologies into homes across the region – helping to tackle fuel poverty, cut carbon emissions and support regional economic growth.

Supporting development of both new build schemes and retrofitting of existing homes, it will enable a programme of comprehensive monitoring and data collection. Financial support is available to incorporate renewables technologies in homes and to develop renewable technology supply chains across the region.

### **Key milestones and achievements:**

- Launch of the Financial Incentives Fund (FIF) where 16 applications were approved utilising £3.7m of City Deal Funding and leveraging an additional £37.6m of public and private sector funding. This supports 8 organisations to progress their housing decarbonisation plans with the support of Cardiff University's Welsh School of Architecture.
- Swansea based supply chain and procurement consultant OPUS BS completed a supply chain mapping exercise, identifying current suppliers and potential future opportunities across the region.
- Continued to work with UK Government & Welsh Government to ensure the scope of the FIF is aligned to the Optimised Retrofit Programme and ECO 4 Flex to maximise the funding opportunities.
- Communications and Marketing Plan created by Urban Foundry.
- Technical Monitoring and Evaluation planning meetings held with Cardiff University Welsh School of Architecture to ensure collaboration with existing work and current opportunities.
- Subsidy Scheme in development to award Financial Assistance in line with subsidy control regulations.
- £75k of funding secured from MCS (Microgeneration Certification Scheme) to enable foundational work to be undertaken with schools and colleges.
- £250k Shared Prosperity Funding secured to create a HAPS Demo House.
- Co-ordinated events to support supply chain activity and skills across the region:
  - SO Modular event held, highlighting Modern Methods of Construction, using Welsh Wood.
  - Launch of Duracell's Home Battery to increase awareness of the product and increase the number of accredited installers.
- Supported the application of:
  - UK Research & Innovation, part of UK Government to secure £5m for a Place Based Impact Accelerator Account Switch to Net Zero buildings led by Swansea University.
  - Innovate UK, to secure £7.5m funding from Launchpad. This is a partnership between NPT Council, Pembrokeshire Council and Net Zero Industry Wales for business-led innovation projects and wrap around support.
  - Arts & Humanities Council to secure £4.6m for a collaborative project Transforming Housing and Homes for Future Generations. This project will run until September 2025 across 50+ consortium members including Cardiff, Bath, Bristol and Exeter Universities, Swansea Council and So Modular, it aims to create a new multi-partner, transdisciplinary, design ecosystem to transform housing for future generations using bio-based and non-extractive materials, together with renewable energy supply and storage.

### **Key activity for 2024-25:**

- Launch the £7m Supply Chain Development Fund which will leverage the regional demand to attract manufacturers, suppliers and installers to the region and to stimulate existing companies to manufacture, train and invest in response to the region's needs.
- Create content for sharing progress (including lessons learned) of schemes funded through the FIF.
- Continue to seek opportunities to leverage additional funding that support the project objectives.
- Support opportunities for businesses to increase skills within their workforce to install and maintain the technologies associated with the project.

### **Infographics for anticipated benefits:**

£251m Contribution to Regional GVA

1,804 Jobs created.

10,300 New and existing homes fitted with Renewable Technologies

10,417+ KWh Energy savings  
19,000+ Tonnes of CO2 Reductions per year

### **In Focus: The Duracell Battery Launch**

The project supported a successful event held in the National Botanical Garden of Wales, Carmarthenshire on 30<sup>th</sup> November to launch Duracell battery storage for homes. There were over 85 attendees and the event facilitated more than 15 installation companies becoming 'platinum partners' with Duracell. The first Duracell battery has already been installed by a company within the region and the more installers of batteries there are, the more competitive the pricing will become.

#### **Gareth Bevan, Solar Centric (awaiting approval from Solar Centric)**

"We were invited to a Duracell Launch event that was hosted by the HAPS Team at the Botanical Gardens. Following this event, we were able to become platinum installers for Duracell, which enables home owners and developers to use us as a local business to install and maintain a quality product and a trusted brand that is known to us all. We have already seen a great interest in the battery, which is considerably more affordable than other brands, we carried out our first installation several months ago now and have received orders for many more across the region. It's fantastic to see how HAPS is supporting change and ensuring the impact of developing supply chains will have a positive effect on those who live in fuel poverty."

## **Digital Infrastructure**

Providing full fibre connectivity to strategic public sector sites, addressing areas of poor connectivity in rural settings and supporting the rollout of 4G & 5G to drive adoption of emerging technologies.

The programme's three workstreams – Rural, Connected Places and Next Generation Wireless are all in delivery and continuing to support the programme's aspirations:

- Better broadband for everyone... leaving nobody behind
- A smart region, ready and able to innovate and adopt emerging technology.
- An inclusive digital landscape that meets everyone's needs.

The delivery team includes Digital Champions within each Local Authority to provide support to residents across the region and be a central point for suppliers and government.

### **Key milestones and achievements:**

- Full Fibre infrastructure Build (FFIB) has connected 68 public sector assets with an additional 401 residential/business premises benefitting from full fibre connectivity as a result.
- Connected 35 key strategic public sector sites with dedicated Dark Fibre. The contract was awarded to VMO2.
- Continued to work on the Better Broadband Infill project with detailed analysis of connectivity needs for every premise cross referencing multiple dataset to define the intervention area.
- Launched the 5G Innovation Fund to support the use of 5G / advanced wireless networks to drive adoption, commercialisation, and scalability of emerging technology across key sectors. Swansea University's Campuses project was awarded £1.55m to fund the infrastructure required to support their use of 5G technology to further advancements in life-sciences and sports.
- Open Access Agreement signed between Swansea Council and Freshwave to deploy small cell technology to improve the mobile capabilities in congested areas of the city. Confirmed investment from VMO2.
- Support delivery of the £1bn Shared Rural Network programme, which is UK Government and Mobile Network Operator led, to improve 4G mobile coverage in the most challenging parts of the UK. Carmarthenshire and Pembrokeshire were the primary beneficiaries of this programme. On completion this will significantly improve 4G connectivity for most rural communities with the region.
- Programme has funded two Digital Champions in each Local Authority; they are the first points of contact for both residents and suppliers.
- Marketing and Communications Plan approved and in place, outlining key activities and milestones.
- Completed a Gateway Review, receiving a Green/Amber rating.
- Farrpoint conducted an independent impact assessment for 2022–23 which estimated £36.7m inward investment from the public and private sector to improve connectivity across the region.

### **Key activity for 2024-25:**

- Hold a Digital Innovations and 5G Technology event - Shaping our future. The event will highlight key topics relating to digital connectivity as well as innovations happening across the region.
- Define intervention area and viability of the Better Broadband Infill project. Conduct procurement.
- Scope Dark Fibre in Carmarthen and the East of the region with partners and conduct procurement.
- Build is in delivery for the Public Sector Broadband Aggregate which is supporting the transformation of public sector service delivery by upgrading several public sector assets across the region to full fibre.
- All four Local Authorities to adopt Lessons Learned from Swansea to ensure a consistent approach is used across the region.
- Continue to support delivery of mobile infrastructure through the Shared Rural Network programme.
- Continue the 5G Investment Fund to support the development and use of 5G and advanced wireless technology

- Support delivery of the £5bn Project Gigabit at a local level by reviewing data to inform voucher scheme areas. Continue to review data to inform voucher scheme areas and monitor progress.

### **In Focus: Educational Animations**

A series of educational animations have been created and produced to inform the public of the benefits of better connectivity, what financial support is available to assist with improving their broadband, as well as information on technology changes in their area. The series is now being used by each local authority's Broadband Engagement Officers, as part of their community outreach work.

This forms part of the wider barrier-busting work, which is taking place across the programme's workstreams, to focus on the deployment of Digital Infrastructure, to ensure efficient processes are in place internally when reviewing/approving Digital Infrastructure deployment, and to increase knowledge/awareness of Digital Infrastructure and Internet of Things (IoT).

[EDUCATIONAL ANIMATIONS on Vimeo](#)

## **Campuses**

Delivering two complementary initiatives on the Singleton Campus at Swansea University and Morriston Hospital, as well as an industry-leading network of expertise, this project will add value to the regional life science, health and sport sectors.

Advanced research and development facilities will be created. Collaboration between academic research, industry and the NHS will place Campuses at the forefront of new technologies to improve healthcare, while creating opportunities for new life science and sport-tech companies and creating highly skilled jobs for people in the region.

### **Key Milestones and Achievements:**

- All Funding Agreement signed between partners - Carmarthenshire County Council, Swansea Council, Swansea University and Swansea Bay University Health Board.
- Singleton project actively engaged with stakeholder groups, including councilors, Swansea University staff groups, and members of the public through comprehensive public consultations to inform on the design and gather feedback.
- Singleton Phase 1 tender process commenced through the Southeast & Mid Wales Collaborative Construction Framework to secure the build's main contractor. Seven contractors expressed an interest, initiating early discussions. The Statutory Planning Application also went live with no objections raised to date.
- Working in collaboration with Vodafone, Swansea University successfully secured £1.5m Digital Infrastructure 5G funds. The project will fully fund 3 PhDs to work on research opportunities and use cases.
- Successful allocation of £150k from the Skills and Talent programme to support the Agor Skills Sport Health and Well-being pilot project.
- A regional Health Needs Assessment was co-ordinated by ARCH, involving the Local Public Health Teams in Hywel Dda University Health Board and Swansea Bay University Health Board. Campuses will use the HNA to inform activity to benefit the health and well-being of the regional population <https://nniish.uk/en/2024/02/13/health-needs-assessment/>.
- Sports Showcase event saw over 100 people participate in discussions on the Campuses Project and University Sporting activity. Academics, industry, and sport's governing bodies helped identify and progress in discussions to enhance existing partnerships and establish new collaboration by providing exemplars of good practice and showcasing ambition for sport.
- Phase 2 Singleton master planning progressed and Phase 2 Morriston development control plan written.

### **Key Milestones for 2024-25:**

- Site work preparation and main contractors appointed for the Sketty Lane, ILS Singleton.
- Submission of planning for access route to the 55-acre site at Morriston Hospital, which is proposed as part of the project's Phase 2.
- Design and tender the Management Centre at Morriston Hospital

### **Infographics for anticipated benefits:**

£150m contribution to Regional GVA

1,120 Jobs created.

2,000m<sup>2</sup> Sports Tech and Med Tech Research and Innovation Space

700 m<sup>2</sup> Centre for Commercial and Academic Collaboration

300+ Cluster companies

100+ Innovation and Commercial Opportunities

## **In Focus: Collaborative working**

Campuses has worked collaboratively with two of the regional SBCD programmes to successfully secure and leverage additional private sector funding and collaborations to help deliver the project.

£1.5m of the Digital Infrastructure programme's 5G Innovation Fund has been awarded to Swansea University to transform health, well-being and sports-science capabilities across sites in Swansea. This groundbreaking research will support key device developments for health that will enable real-time monitoring of physical and mental well-being, helping improve the overall standard of care in the area.

Further info <https://nniish.uk/en/2023/11/21/swansea-university-to-develop-world-first-research-and-innovation-living-lab/>

£155,860 of Skills and Talent funding was also secured by Swansea University that will assist the Campuses project to bridge the skills gap in the sports, health and well-being sector. Working closely with businesses, a pilot project will be set up creating a collaborative environment for online and in-person learning, with innovative course and events for a range of sector led focused skills.

### **Quote from Vodafone**

"We're immensely impressed by Swansea University's ambition to push the boundaries of research and innovation while enriching the lives of communities in South West Wales. The collaboration between Swansea University and Vodafone provides an environment to test and develop ground-breaking products and solutions across multiple industries, particularly healthcare and engineering, with potential impacts across the UK and beyond. We've already made progress with multiple workshops, site-visits and engagements. We're excited for what's to come as we continue merging academic and industry expertise to bring innovation and co-creation to life."

## **Yr Egin**

Canolfan S4C Yr Egin is a digital and creative cluster, led by University of Wales Trinity Saint David (UWTSD), based in Carmarthen. The iconic building boasts an auditorium, superfast connectivity, state-of-the-art office spaces and post-production facilities for professional and community activities. Welsh language broadcaster S4C is the anchor tenant and many leading creative and digital businesses co-locate within the centre. Yr Egin is a catalyst for a creative cluster to inspire collaboration, develop talent, and enhance the status of the Welsh language.

The delivery model for the 2<sup>nd</sup> phase of Yr Egin project is currently being considered by the University and its advisors.

### **Key milestones and achievements:**

- Phase 1 celebrated its five-year anniversary of operations.
- Fully occupied with tenants including S4C, Atebol, Carlam, Moilin, Rural Office, Stiwdioibox and Theatr Genedlaethol Cymru.
- Economic evaluation undertaken by Arad Research which demonstrates the significant impact Yr Egin is having on the economy.
- Launch of Creative West Wales network. The network aims to represent and engage the creative industries in the region, namely the counties of Swansea, Ceredigion, Pembrokeshire, Carmarthenshire and Neath Port Talbot. Creative West Wales's initial priority is to focus on the growth of the screen, music, digital and research and development sectors.
- 'Drws Agored' evening held where 18 local businesses showcased the opportunities, experiences, and jobs available in the creative sector to young people in Carmarthenshire.
- Shortlisted for 'Best Promoter of Welsh in the Workplace' in the Careers Wales Valued Partners Awards.
- Successful application to the Sustainable Communities Fund, which is part of the UK Shared Prosperity Fund that is distributed by Carmarthenshire County Council, for the "TANIO" project, with £178,636 being awarded for the project. Creative and Digital Clubs for children and young people to develop their creative skills in a series of weekly specialist clubs as well as the re-launch of Shwmae Sir Gâr, local online 'TV' service for Carmarthenshire, are the main strands of the project.
- Adventure Film Festival hosted. This was a new innovative event to celebrate adventurers and content creators, and allowed participants to enjoy film screenings and talks with industry experts.
- UWTSD has engaged with expert industry consultants to consider the most appropriate delivery model for Egin Phase 2.

### **Key Milestones for 2024-25:**

- Progress with planning for Yr Egin Phase 2.
- Yr Egin Phase 1:
  - Develop the Creative West Wales network further in all 5 counties (Carmarthenshire, Pembrokeshire, Swansea, Neath Port Talbot and Ceredigion) with a series of events, engagement programme and promotion of the creative industries in the region.
  - Exhibit more Independent, World and Made in Wales films at Yr Egin to grow the independent cinema provision available to audiences in our area.
  - Continue to engage with schools and further education colleges to provide workshops and experiences that enrich the Curriculum for Wales and understanding of the opportunities available in the creative industries.
  - Ensure business support and available funding is signposted and shared with tenant companies and network.
  - Provide quality event, conference and meeting spaces with seamless livestreaming and hybrid options to a growing client base.

### **Infographics for anticipated benefits:**

£89.5m contribution to Regional GVA

427 jobs created.

150 Skills and training opportunities created.  
167 Construction workplace employment opportunities  
363m<sup>2</sup> Workspace created.

## **In Focus: 5<sup>th</sup> Anniversary Celebration**

On 26<sup>th</sup> October 2023, Yr Egin celebrated its 5<sup>th</sup> anniversary. A day of celebration was organised by UWTSO, and stakeholders, tenants and guests were invited to mark this key milestone.

Over the last five years Yr Egin has:

- Developed into a vibrant cultural venue for business and established itself as a creative hub.
- Been home to S4C's headquarters, over 16 tenant organisations and additional companies and freelancers that make use of the hotdesking facilities.
- Catered for numerous events, workshops, meetings, conferences, performances and screenings with over 12,000 people engaging during 2022-23.

According to a recent economic impact report, Yr Egin has:

- Generated an economic impact of £21.6m to the Welsh economy (2022-23).
- Generated an economic impact of £7.6m to the economy of Carmarthenshire (2022-23).
- A total of 175 people employed at Yr Egin (September 2023).

### **Cllr. Darren Price, Leader of Carmarthenshire Council:**

"Yr Egin plays an integral role within the economy of Carmarthenshire and within the rich cultural network of our county and country. On behalf of Carmarthenshire County Council, I would like to wish a very happy birthday to Yr Egin and here's to the next successful 5-years and beyond."

### **Carys Ifan, Director of Canolfan S4C Yr Egin:**

"Leading this transformative project and developing a creative cluster in west Wales has been incredibly rewarding. The value and benefits of Yr Egin are priceless in my opinion, and its initial impact is substantial according to the recent study. Yr Egin has had an immediate effect on people's lives and livelihoods, a positive impact on people's confidence and use of the Welsh language as well as inspiring the next generation to be creative and ambitious. I'm already thoroughly excited about the outcomes and achievements of the next five years."

## **In Focus: Current Tenants**

Over the last 12 months the building has reached a 100% occupancy levels. Tenants include:

S4C  
Rural Office  
Asset Finance Solutions  
Carlam Ltd  
Atebol  
Arts Council Wales  
Optimwm  
Moilin  
Captain Jac  
Theatr Genedlaethol Cymru  
Police Pass  
Urdd Gobaith Cymru  
Stiwdio Box  
Twrw Ltd





Cyngor Celfyddydau Cymru  
Arts Council of Wales



Theatr  
Genedlaethol  
Cymru



Rural  
Office



Urdd



## **Swansea City Centre and Waterfront Digital District**

With the aim to drive regional and City economic development and growth, this programme includes:

1. **Swansea Arena** development at the £135m Copr Bay Phase One district in the city centre which also includes a hotel with around 150 rooms and a roof-top bar.
2. A state-of-the-art office development at **71/72 Kingsway** providing space for 600 jobs, flexible co-working environments and office space for the innovative technology and digital sectors. It will be aiming for carbon net zero when in operation.
3. **Innovation Matrix and Innovation Precinct** developments delivered by the University of Wales Trinity St David (UWTSD), to harbour startup businesses and foster entrepreneurship through close links with academia.

### **Key milestones and achievements:**

#### **Swansea Arena and hotel**

- Over 185,000 people have attended Swansea Arena for shows, with average occupancy of 87% for over for 70 ticketed performances. Highlights include:
  - Events such as Swansea Comic and Gaming Convention, 4theRegion's first Green Economy Conference, the ATG Tech Forum and Swansea Bay Business Club Beaujolais day celebrations.
  - 16 graduation ceremonies including Swansea University and UWTSD, with approximately 22,000 attendees.
  - Sell out performances for Jack Whitehall, Russell Howard, Hollywood Vampires, Nothing But Thieves, Busted and Rhod Gilbert.
- Finalising construction and fit out snagging works.
- Reviewing hotel developer options, which will continue into 2024-25.
- Arena won the Dewi-Prys Thomas Award 2024 in architecture. It recognises the importance of good design to the quality of life, identity and regeneration of Wales by rewarding projects of excellence in a range of fields including architecture, landscape and design, public realm design and public art.

#### **71/72 Kingsway**

- Construction work with Bouygues UK progressed and a 'Topping Out' ceremony to celebrate the completion of the highest structural feature on the seven-story building. UK Government Minister James Davies attended along with partners from the Welsh Government, local authority, and prospective tenants.
- Internal works and fit out commenced.
- Digital infrastructure and power supplies within the building planned by digital and data specialists.
- Second floor tenant secured. Potential occupiers for the remaining floors being progressed.
- Savills appointed as the Managing Agents for the premises.
- JLL and Avison Young appointed as joint Letting and Marketing Agents, and Cre8te appointed as Branding Agents.
- Service charges and landlord costs established.
- Design and scope of external signage finalised.

#### **Innovation Matrix:**

- Celebratory ground breaking events held by UWTSD and Kier to celebrate the commencement of the build. Guests included Welsh Government Minister for the Economy Vaughan Gething MS and UK Government Secretary of State for Wales David TC Davies, Swansea Council Leader Cllr Rob Steward as well as partners and potential tenants. Construction work progressed.
- Tenants in contract negotiations for approximately 70% of the lettable space.
- Ongoing engagement with potential tenants for the remaining space.

#### **Innovation Precinct:**

- Ongoing discussion between UWTSD and Swansea Council over potential changes to the delivery model to align with current market conditions.

## **Key Milestones for 2024-25:**

### **Swansea Arena and hotel:**

- Continue to host a schedule of programmes with over 200 events during the year including Jamie Cullum, Max Boyce, The Cult, Jimmy Carr, Rhod Gilbert and Katherine Ryan.
- Appoint hotel development partner and work towards planning and design.

### **71/72 Kingsway:**

- Practical completion of the building including internal landlord fit out.
- Digital infrastructure and full fibre broadband in place.
- Flex operator to be appointed, which will allow the space to be sub-let to small businesses and start-up companies.
- Sign lease with second floor tenants and discussions in place with potential tenants for the remaining floors.

### **Innovation Matrix:**

- Practical completion of the building in July 2024, followed by tenants moving in, and an official opening ceremony.
- Renewed focus on the operational model and achievement of benefits.

### **Innovation Precinct:**

- Continue discussions with partners around the development of a market appropriate delivery model.

### **Infographics for anticipated benefits:**

£669.8m contribution to Regional GVA

1,281 Jobs created

50+ opportunities and space for Graduate Start-Ups

8,700+ Training Weeks

10,684m<sup>2</sup> Facility for Digitally Focussed Businesses

3,500 Capacity Indoor Arena

## **Pentre Awel**

Combining life science research, business development facilities, community healthcare, assisted living and a state-of-the-art leisure and aquatics centre, Llanelli's Pentre Awel will be among the first development of its kind in Wales.

Education and training facilities will be at the heart of the project which will focus on training the next generation of the health and social care workforce.

### **Key milestones and achievements:**

- Zone 1 construction works progressed which included completing the piling work, excavation, cast and testing of the main pool and hydrotherapy, steel frame, formation of car park and commencement of internal works, including mechanical and electrical and partitioning.
- Topping Out Event held which showcased local procurement, and the media, stakeholders and potential tenants were invited.
  - Bouygues UK Community Benefits programme progressed with 'Employment Hubs' held to engage with target groups (unemployed, economically inactive, school leavers, NEETS) to promote recruitment and training opportunities available within the construction industry.
  - Three Community Newsletters issued and three Resident Surgeries held which included an opportunity for residents to meet the project team.
  - Sponsored 10 mechanical and electrical apprentices via Cyfle's Shared Apprenticeship Scheme.
  - 2,228 person weeks of Targeted Recruitment and Training delivered (inclusive of 31 apprentices, 44 new entrant jobs and 22 traineeships), interacted with 584 pupils and delivered 86 hours of engagement.
- Virtual Meet the Buyer event held to promote future Sell2Wales and sublet tendering opportunities.
- Communications Plan agreed and executed including regular PR and marketing activities.
- Swansea University signed an Agreement to Lease within Zone 1.
- Business and Innovation Plan approved which sets out the principles and methodology for sectors/businesses to be engaged onsite.
- Awarded Shared Prosperity Funds (SPF) for two projects:
  - £182k to Accelerate Pentre Awel, led by Swansea University.
  - £330k to Innovate Pentre Awel, delivered in partnership with Carmarthenshire County Council and Cardiff University.

### **Key Milestones for 2024-25:**

- Opening of Zone 1 and transition of Llanelli Leisure Centre to Pentre Awel.
- Procurements for current and future zones including commencing a competitive dialogue process for the development of the Wellness Hotel (Zone 4) and procuring an EV charging operator, site security and leisure equipment (Zone 1).
- Develop an Overall Site Management and Development Plan which includes recruitment to key roles.
- Forward planning for the Assisted Living development to include potential for a nursing home and rehabilitation beds alongside extra care.

### **Infographics for anticipated benefits:**

£467m contribution to Regional GVA

1,853 Jobs created

50,000m<sup>2</sup> Development across all four zones

12,000m<sup>2</sup> Community Research, Education and Clinical Space

80 Life Science Businesses Established / Supported

## **In Focus: Dragons Den Style Event**

Following the allocation of £88,750 Skills and Talent funding in the last financial year for the 21<sup>st</sup> Century Skills project, a very successful Dragons Den style event took place as part of the pilot. Funded by CCC, Bouygues UK and the Skills & Talent programme, a 2-week Real-World Learning project saw pupils from 5 Llanelli schools taking part in a design challenge under the mentorship of Bouygues professionals aimed at empowering them to discover a career in construction and design. The schools were given a brief to design a collaborative workspace aligned with innovation, positive health and well-being and environmental sustainability. They then showcased their final design in a Dragons Den Style pitch to the judging panel, and some schools wrote additional bid documents to support their presentation, made 3D scale models and digital fly-through videos.

Judges were very impressed by the designs, and it was difficult to single out an overall winner. St John Lloyds RC and Ysgol Gyfun Y Strade schools were joint overall winners and Ysgol Pen Rhos won the innovation / sustainability award.

A work experience programme will follow during 2024-25, allowing the pupils to gain further skills that they need for the future workforce.

### **Ellie (Learner on the project)**

“I think this project was a great idea as it involves getting young people to help design a space that they may want to work in, but also, I think it has taught us many skills”.

### **Nina Williams, Bouygues UK’s social value advisor**

“The engagement from all the schools was outstanding with some amazing designs and concepts. The project has helped schools and industry to build positive relationships, utilising the knowledge and experience of professionals to enhance and develop their knowledge base which can be applied in their future curriculum design.”

## **In Focus: Supporting the local economy.**

Bouygues UK is committed to using local subcontractors as part of its commitment to provide employment, training and skills opportunities to local people and underrepresented groups.

- 9% (£6.5m) of spend has been with SA postcode companies
- A further 63% (£44.5m) of spend has been with Welsh companies.
- 28% (£20m) of spend has been with companies outside of Wales

## **In Focus: Sustainable Construction and Community Benefits**

### **Pentre Awel**

Carbon reduction, sustainability, biodiversity and the environment are at the heart of the construction of Pentre Awel. Bouygues UK:

#### **Are using materials made from recycled content:**

- 98% recycled content in the reinforcement bar supplied by Dyfed Steels
- 80% recycled content in the structural steel supplied by Shufflebottom.

The steel frame also provided a historical link to the previous industrial buildings onsite including South Wales Tinplate Works and the Richard Thomas (Tinplate) Mills.

#### **Top marks in Considerate Constructors Scheme (CCS) assessment:**

- Total score of 45/45 across all the examination criteria
- 15/15 for Respect for the Community, Care for the Environment and Valuing our Workforce.

#### **Sustainable electricity and fuel:**

- All site offices, cabins and the CCTV system have solar panels. When not powered by sunlight, they use a hydrotreated vegetable oil (HVO) powered generator.
- Machinery and vehicles are fully converted to HVO fuel, through contractor Alan Griffiths. Although more expensive than white diesel, it can reduce carbon emissions by up to 90%.

#### **Biodiversity and consideration for the environment:**

- By completion, it is expected that biodiversity will increase by 137% at the site, and a 18.4% reduction in carbon.
- The project team has worked closely with ecology officers and Natural Resources Wales to ensure the build does not impact on the ecology and waterbodies.
- Measures are in place to safeguard reptiles, water vole, otters, nesting birds and bats.
- Environmental Champion who ensures all fencing around the site is fit for purpose.
- Preventative measures including minimising lighting at night to avoid impacting bats.

#### **Bouygues UK's Sustainability and Environment Manager Simon Hazel**

“What we do on reducing carbon at Pentre Awel compliments our wider Climate and Environment strategy. We have committed to diverting 98% of waste from landfill. Excavated material and soil from the site have been taken to a local recycling facility where the material can be segregated, treated and reused, reducing the amount of waste going to landfill.”

### **71/72 Kingsway**

A circular economy approach was used during the construction process for 71/72 Kingsway, to minimise waste and reduce the carbon footprint of the build.

Materials for a temporary access ramp into the two-storey basement came from a site less than 100 metres away, rather than new aggregate deliveries from the supply chain depot 17 miles away. This resulted in a reduction of carbon footprint associated with transport by 11.2 tonnes. There was also a reduction of 5 tonnes in carbon footprint by using recycled materials compared to virgin materials.

Several community projects have taken place which have repurposed the waste from the build. These include:

**Onsite planters project:** A trainee carpenter was hired from Cyfle for two weeks onsite work experience to create a range of planters, benches, flower beds and a notice board for the site from the old timber. When the site is demobilised, these will be donated to the local community.

**Vetch Community Garden:** Located a few minutes from the site, a local allotment group prides itself on using recycled materials from local sources to keep them within the circular economy. Bouygues UK donated 5m<sup>3</sup> of fence posts and rails to create new raised vegetable beds. The group will also advise the site team on what plants and seeds to grow on site.

**HM Prison Carpentry Workshop:** Prison Officers have collected around 5m<sup>3</sup> of fence posts, rails and panels for use in their carpentry workshop, which is used to re-skill and retrain inmates. Bird boxes, signs, furniture and props for their training room have been created. Bouygues UK is also working with the prison Employment Hub to support prisoners back into work post-release.

**Wall of Kindness:** Old clothes that would normally be sent to charity shops were placed on hooks on the hoarding on Oxford Street allowing the public to pass on jackets, gloves and hats to those more in need.

## **Innovation Matrix**

Community projects have taken place this year with the project, which include:

**Blaenymaes Drop-in Centre:** Working with supply chain partners, the drop-in centre has been refurbished to include installing a new shed and disability access ramp. The centre is run by community representatives to provide services such as free internet, phone calls, a food bank, as well as workshops to support health and well-being for the wider community.

**Donations:** Working with supply chain partner Mitie, Christmas Selection Boxes were donated to Women's Aid Charity. Air Purifiers were also donated to children's cancer charity 'The Megan Mai Foundation'.

### **Education Engagement:**

- Llamau's education and training centre in Swansea and CITB Neach College Students visited the Matrix site to learn about the project and careers in construction. The pupils were able to use the immersive equipment, to inspire them to consider a career in construction.
- Talks on the journey towards Net Zero have been delivered to UWTSD Students.
- Swansea University civil engineering students visited the site.

## **Supporting Innovation and Low Carbon Growth**

This programme will deliver eight interlinked projects that support jobs and growth in the low carbon technology and innovation sectors.

1. The **Bay Technology Centre (BTC)** is an energy positive building that provides flexible office and laboratory space for start-up businesses and indigenous business growth.
2. **South Wales Industrial Transition from Carbon Hub (SWITCH)** will be an industrial decarbonisation research facility.
3. The **Advanced Manufacturing Production Facility (AMPF)** provides hybrid facilities, production units and office space in conjunction with a National Net Zero Skills Centre of Excellence ensuring collaboration between industry, academia and government.
4. **National Net Zero Skills Centre of Excellence** builds on the existing AMPF to support the national, regional and local labour markets for the transition to a low carbon economy by addressing existing skills gaps.
5. **Property Development Fund (PDF)** consists of £4.5m of gap funding aimed to encourage private sector development in the Port Talbot Waterfront area.
6. To develop a **Low Emission Vehicle (LEV) charging strategy** including coordination and EV charging case study for the region.
7. The **Air Quality Monitoring Project (AQMP)** will test alternative low-cost sensors to assess air quality and pollution.
8. **Hydrogen Stimulus Project (HSP)** will enable excess renewable electricity from the Bay Technology Centre to be converted to hydrogen fuel for vehicles.

### **Key milestones and achievements:**

#### **Bay Technology Centre (BTC)**

- Official opening event with a showcase from contractors, partners and tenants and a tour of the Hydrogen Centre. UK Government Secretary of State for Wales David TC Davies attended, and a pre-recorded video was shown from Welsh Government Minister for the Economy Vaughan Gething.
- 4 companies and organisations took tenancy in 2023/24, taking occupancy to 53% of the total rentable floor space. Advanced discussions being held with potential tenants for both office and laboratory space.
- The building was shortlisted for the Association of Public Services Excellence (APSE) 2023, Best Climate Action or Decarbonisation initiative award.
- The building was featured as best practice at the Circular Economy Innovation Communities (CEIC) conference in Swansea.com, highlighting its energy saving, low carbon features.

#### **South Wales Industrial Transition from Carbon Hub (SWITCH)**

- Appointed Morgan Sindall as the contractor for the SWITCH facility on Harbourside.
- Concept design for RIBA stage 2 began and monthly meetings held to monitor progress.
- Heads of Terms and Agreement for Lease in development with Swansea University.
- Industry engagement with key stakeholders to provide updates and forward involvement.
- Engagement with academia to ensure alignment with Further Education and Higher Education ecosystem.
- Awarded £5m UK Research and Innovation (UKRI) Place Based Impact Acceleration Account (PBIAA) SWITCH to Net Zero Building funding.

#### **Advanced Manufacturing Production Facility (AMPF)**

- Ongoing discussions with Welsh Government around land and location for the facility.
- Ongoing dialogue with Industry Wales and Welsh Government to inform delivery model and synergy with other innovation investment.
- Ongoing discussion with academia, industry and key stakeholders to develop the scope and delivery model of the facility.

#### **National Net Zero Skills Centre of Excellence**



- Outline Business Case developed by NPT Council and approved by Welsh Government and UK Government, allocating the remaining £5.3m City Deal funding to the Centre of Excellence.

#### **Property Development Fund (PDF)**

- Round one of the PDF received five applications, of which three companies were awarded funding. The remaining two applications will have the opportunity to be resubmitted for consideration in 2024/25.
- Round two of the PDF launched by NPT Council inviting Expressions of Interest for the funding. Three applicants have been invited to progress to Stage 1 of the application process.

#### **Hydrogen Stimulus Project (HSP)**

- Infrastructure preparation works carried out in advance of purchase and installation of 100KW electrolyser which converts green energy at Hydrogen Research Centre on Baglan Energy Park.
- Funding agreement signed between NPT Council and University of South Wales.
- £4m of Engineering and Physical Science Research Council (EPSRC) PBIAA funding awarded to a consortium of universities with the Hydrogen Centre used as a key research centre for the activity.
- €3.4m European Horizon project H2SHIFT funding awarded to develop electrolytic hydrogen testing facilities in Baglan Energy Park.

#### **Air Quality Monitoring Project (AQMP)**

- Ricardo Environmental Specialists produced draft quality assurance report of the network with a year 1 data analysis report. A review of the findings is underway.
- Maintenance carried out and new sensors units were made available and deployed.
- An upgrade to the Automatic Urban and Rural Network (AURN) monitoring station in Port Talbot has been undertaken.

#### **Low Emission Vehicle Charging Infrastructure (LEV)**

- Working groups established to develop a case study in Valley areas exploring solutions for on-street electric vehicle charging.
- Hydrogen options explored for NPT Fleet, also linked to the Hydrogen Stimulus Project.
- Hosted 'Road to Zero' GreenFleet Cymru roundtable event and the CENEX Cymru roadshow as part of the regional coordination activity of this project.

#### **Key Milestones for 2024-25:**

- **BTC:** Continue to market facility to secure tenants until building is fully occupied.
- **SWITCH:** Submit pre-application consultation for the SWITCH facility
- **AMPF / National Net Zero Skills Centre of Excellence:** Develop a detailed scope and brief for collaborative delivery model and scope for facility engaging industry, academia and government.
- **PDF:** Delivery commence for PDF Round 1 approved projects Hydrogen Stimulus Project – procure and install Electrolyser, progress procurement of hydrogen fleet
- **AQMP:** Review findings of air quality reports
- **LEV Charging infrastructure:** Develop case study for on-street charging in valleys communities.

#### **Infographics for anticipated benefits:**

£93m contribution to Regional GVA  
 1,320 Jobs created.  
 18,500m<sup>2</sup> Development across all four zones  
 £10m Property Development Fund  
 45 Enterprises Contribution to Supported Research  
 4 patents registered for products.

#### **In Focus: Location, Location, Location**

The High Value Manufacturing Catapult (HVMC) has expanded to help bolster South Wales' manufacturing capabilities by fostering innovation, tackling regional industrial challenges, and seizing strategic opportunities. The new regional office is located within SBCD's award winning Bay Technology Centre in Baglan.

HVMC is an established network of seven leading research and technology organisations. Employing over 3,500 engineers across the UK, they have supported over 30,000 businesses to transform great ideas into valuable products and services. Half of the businesses supported by HVMC were Small to Medium Sized Enterprises (SMEs).

Locating the HVMC in Neath Port Talbot will strengthen and reinvigorate the importance that industry and manufacturing have to the identity of Wales. The hub will provide a place where existing and new industry can be creative, where new innovations can be developed and tested and deliver productive and sustainable approaches to manufacturing.

The BTC in Port Talbot will help catalyse manufacturing in South Wales through its:

- Central location positioned in the manufacturing heart of South Wales with useful motorway and rail connections.
- Purpose built; modern facility that aligns with HVMC aim to drive towards net-zero.
- Flexibility to collaborate with organisations from all industrial sectors and training providers.
- Proximity to an established and growing industrial and innovation ecosystem.
- Strategic alignment between NPT Council and HVMC
- Industrial landscape and transition to green steel and offshore wind
- Value for money in terms of investment and potential return

## **Pembroke Dock Marine (PDM)**

PDM will establish a world class marine energy and engineering fabrication, test and deployment hub, delivering the support and infrastructure needed to grow Wales' low carbon economy. The project will help grow the region's established facilities and extensive skill base, ensuring maximum operational efficiency and increased innovation opportunities, which will help drive down marine energy production costs.

Focusing on the growth of decarbonised energy production, the project includes dedicated early stage and commercial scale test sites, a CATAPULT innovation centre, and industry focused port infrastructure to ensure developers improve the effectiveness, cost efficiencies and installation of their innovative technology across four headline projects:

1. **Pembroke Dock Infrastructure (PDI)** will reshape the physical infrastructure of Pembroke Port to ensure maximum operational efficiencies for UK industry.
2. **Pembrokeshire Demonstration Zone (PDZ)** will enable offshore renewable infrastructure to catalyse the Celtic Sea floating offshore wind (FLOW) and marine energy opportunities.
3. **Marine Energy Test Area (META)** will create pre-consented and licensed zones within the Milford Haven Waterway for component and scaled device testing.
4. **Marine Energy Engineering Centre of Excellence (MEECE)** will support innovation by technology developers and their supply chains, capturing and embedding these innovations in Wales.

### **Key milestones and achievements:**

#### **Pembroke Dock Infrastructure (PDI)**

- Completion of 17,000 sqm of laydown space by the Walters Group, which has created a new flat, open laydown area to allow the marine energy and FLOW industries and supply chain to manoeuvre large devices, vessels and infrastructure.
- Completion of a supersized slipway and pontoon by BAM Nuttall. The new slipway can launch and recover large marine energy devices and vessels. The debris removed from the demolition of the old slipways was repurposed to infill the timber pond onsite.
- The construction of five new workboat pontoons near the existing ferry berth will provide berthing for marine energy/FLOW Operation and Maintenance vessels.
- Completion by R&M Williams of 1,967 sqm of new office and workshop space at Pembroke Port across four renovated Sunderland Hangar Annexes. It opened with tenants in place.

#### **Pembrokeshire Demonstration Zone (PDZ)**

- Delivered European Regional Development Fund business plan commitments including:
  - Technical Concept Study for a small multi-connection substation supporting the Test and Demonstration FLOW projects.
  - A 100MW project in the PDZ, showing a £90m consumer saving versus each project connecting independently.

#### **Marine Energy Test Area (META)**

- Tests concluded at various META sites including:
  - Dale Roads: Settlement lines experiment and trials of novel anchor designs.
  - Quay 1: Low carbon marine concrete experiment.
  - Warrior Way: Converging Acoustic Doppler Current Profiler (C-ADCP) demonstration and Swansea University Tidal Turbine successfully tested and validated.
  - Dale Roads and Warrior Way: Benthic habitat mapping.
  - Criterion Jetty: Wave buoy monitoring campaign in preparation for Dolphyn Hydrogen trials.
  - East Pickard Bay test site: Exo-engineering innovative scour protection test units successfully deployed.
- Schools project launched encouraging learning groups from Pembrokeshire to submit their ideas across three pivotal topics: underwater survey, platform stability and marine habitat creation.

#### **Marine Energy Engineering Centre of Excellence (MEECE)**

- Welsh European Funding Office (WEFO) funded activity completed.
- Analysis completed to show MEECE performance against targets, with overachievements celebrated in several areas including:
  - 41 from a target of 30 (137%) enterprises supported to introduce new to the market products.
  - 49 from a target of 30 (163%) enterprises supported to introduce new to the firm products.
  - 113 from a target of 60 (188%) partners co-operating in research projects.
  - £2,447,000 from a target of £1,710,000 (143%) private investment matching public support in innovation or R&D projects.
- Legacy funding secured, including a £250,000 grant from Welsh Government for the Tidal Lagoon Challenge: FLOMax project, and £218k from Milford Haven Hydrogen Kingdom project.

#### **Key Milestones for 2024-25:**

- PDI: Trials for the workboat pontoons and commercial operations. Official opening event for the Hangar Annexes, slipway, pontoon and laydown space. PDI expected to become part of the Celtic Freeport.
- PDZ: Celtic Sea Power to scope, engage and lead the collaboration to secure £880k Launchpad Southwest Wales funding from Innovate UK for the £1.4m Milford Haven Hydrogen Kingdom project.
- META: Continue to provide a pre-consented real sea test facility to reduce the time, cost and risks associated with deployment and commercialisation of marine energy technology. First of a kind floating hydrogen trial takes place at META.
- MEECE: ORE Catapult and High Value Manufacturing Catapult (HVMC) will respond to the offshore wind industrial growth plan showing ambitions for South Wales. ORE Catapult will also support the inclusion of innovation activity in the Celtic Freeport Full Business Case. Expect to sign a grant offer letter worth £600k of grant funding for a deployment of a network hydrophones across the Celtic Sea.

#### **Infographics for anticipated benefits:**

£343.3m contribution to Regional GVA

1,881 Jobs created.

1,000MW Contribution to Decarbonisation Targets

60,600m<sup>2</sup> Physical Infrastructure Creation

#### **In Focus: Tidal Turbine successfully trialled.**

A team of researchers at Swansea University, led by Professor of Ocean Energy, Ian Masters, has successfully trialled and recovered a tidal turbine. Deployed in the META Warrior Way site in Pembroke Dock, the tidal turbine is designed to provide reliable low-cost renewable power to remote communities. Meanwhile the floating platform used to mount the turbine and built by local Marine Contractor, Rudders Boatyard, is now in high demand from other tidal turbine and generator developers wanting to use it to test their designs at Warrior Way.

#### **Ian Masters, Professor of Ocean Energy, Swansea University**

It is a real privilege to be testing tidal energy in a realistic tidal flow. META has enabled us to take our research out of the lab and into the real world. We have gathered valuable data which we're going to share with the scientific community, providing the tidal energy community with data needed to move more quickly towards commercial viability.

## **In Focus: Changing career to be an apprentice.**

### **Luke's Story, Project Officer at Celtic Sea Power Delivery partner in Pembroke Dock Marine Project**

Having served in the HM Forces for over 12 years, Luke decided he wanted a change in career. He enrolled to study for a BEng in Renewable Energy Engineering at the University of Exeter, and shortly after graduating worked as a design engineer for a company installing solar PV, battery energy storage systems and heat pumps. This was an exciting role for Luke as he had always wanted to work in the renewable energy sector, and whilst completely different to his previous experiences in the military, he was able to adapt and use his transferable skills.

Luke then moved to Celtic Sea Power, where he works as a Project Officer, helping deliver part of the SBCD's PDM project. His main responsibility is exploring the role of concrete sub-structures which are needed for Floating Offshore Wind in the Celtic Sea. It involves engaging with the local supply chain and developing his skills and experience within the industry. This role has given him the opportunity to learn how the industry works and to interact with a diverse range of stakeholders at different levels within organisations.

"It's never too late to change your career path – I am proof of this. Look for something you are interested in and for graduate opportunities. Start to think early on in your placement about the type of job you would like and apply early for graduate schemes. I'd also recommend making contact within the industry to establish current challenges and base a dissertation or project around these challenges to help get a job."

## **In Focus: Celebrating women in construction.**

**Claire Lawrence, Project Manager at Port of Milford Haven  
Delivery partner in Pembroke Dock Marine Project**

After studying ALevels, Claire joined the Port of Milford Haven as an apprentice at the Port of Milford Haven's Estates department, looking after the business' property portfolio. On completion of a successful apprenticeship, she was offered a full-time position at the Port. Claire then completed a work-funded foundation degree in Construction Management at Pembrokeshire College, whilst working full time, which she passed with distinction. Following this she completed a BSc in Construction Management at the University of Wales Trinity Saint David, which she achieved a first-class honour.

Claire has progressed to assist and lead of some of the Ports most high-profile projects including the Ty Hotel on Milford Waterfront and more recently the Hangar Annexes Renovations, workboat pontoons and slipway as part of the Pembroke Dock Marine project.

**66% of young women already work in or have considered working in the construction industry.**

Claire is also part of the Pembrokeshire College SPARC panel, funded by the City Deal Skills and Talent programme, which is set up to empower the progress of females and promote gender diversity in Sustainable Power, Renewables and Construction (SPARC) industries.

“For me the Port is a fantastic place to work, and I’ve thoroughly enjoyed working on the City Deal’s PDM project, improving the Port’s infrastructure. No two days are the same and my role is challenging and exciting.”

“The sense of achievement when you see a previously disused area completely transform into a functioning asset for our community and stakeholders. As a social person, the opportunity to work with a wide variety of professionals, suppliers, stakeholders and within your own community is hugely rewarding.”

## Lessons Learned

Portfolio delivery provides many valuable experiences and interactions across the range of City Deal projects and partners across the region. The partners share these experiences to develop and improve their approaches and activities.

The Portfolio Office has maintained a lesson learned log to share best practice with regional partners since 2020.

SBCD stakeholders shared 21 lessons learned for 2023-24 covering governance, reporting, collaboration, procurement, finance, networking, communication, resources and benefits.

In a broader context, the SBCD also shares experiences and best practice with other City and Growth Deals in Wales.

We always seek feedback, so welcome your views of how the SBCD is performing and interacting. Email: [SBCD@carmarthenshire.gov.uk](mailto:SBCD@carmarthenshire.gov.uk) to share your views.

The key lessons and recommendations are summarised below:

Situation	Recommendation
Collaborative working between projects has been working well and proving valuable	Continue to facilitate collaborative and partnership working across projects and teams
Challenges of partnership working in delivering projects have led to things taking longer than anticipated	Ensure project/activity planning fully considers the required inputs from partners and allows for realistic timescales
Consistency required in approaches to benefits profiling and realisation	Projects/PoMO to continue to refine benefits reporting. Evaluation Framework will help with consistency across the Portfolio
Business case updates can be time-consuming, but have been valuable to the SBCD Portfolio	Business case updates will continue to be a requirement for the SBCD Portfolio
Assurance reviews help identify areas of focus to support delivery, and provides a delivery confidence rating for stakeholders	Projects and programmes to utilise the Assurance Framework and PoMO support to undertake periodic reviews
Effective PoMO meetings and support recognised	Continue to engage and enhance arrangements to maintain effective levels of PoMO support
Lack of resources in project teams' impact on ability to monitor and report effectively	Ensure project teams are resourced appropriately and prioritise workload
Events within and outside of the region have provided good opportunities for networking and promotion	Continue to promote the City Deal through regional and other events and achieve appropriate balance between promoting and networking
Inconsistencies in the process for quarterly claims and the accuracy/timeliness of returns	Claims process to be reviewed and requirements clarified
SBCD governance needs to be robust, but needs to be as streamlined as possible	Quarterly SBCD governance meetings implemented. Reporting arrangements are under review, including robustness of financial forecasting and recording of spend
Use of external consultants can be an expensive resource	Ensure value for money, along with balancing input from regional expertise through colleagues and partner organisations

## Financial Update

The overall investment position of the Portfolio is estimated to be £1,278.27m over its 15-year life cycle, as summarised below. Total SBCD investment from all sources was £354.01m, of which £33.17m was private sector investment at the end of the financial year.

The economic climate in which we operate continues to present Portfolio delivery challenges. Several macroeconomic factors, including availability of resources and recruitment, energy prices, construction costs, inflationary pressures, and the COVID pandemic have resulted in delivery slippage and escalating cost pressures over the last four years.

Despite these challenges, all projects and programmes are progressing through delivery and all partners are fully committed to the delivery of their SBCD initiatives.

In 2023-24 financial year, the SBCD invested £125m on the planning, procurement, build and operations across the majority of the nine of the Portfolio's projects and programmes. Further large investments through procurement and build will take place between 2024-28.

Close monitoring, mitigation and resolution of risks, issues and communicating delivery and financial profiles with all stakeholders is continually undertaken by the SBCD Portfolio Management Office. This helps to determine the impact that the macroeconomic climate is having on the delivery of the Portfolio.

The SBCD received a further funding award in 2023-24 from the Welsh Government and UK Government, releasing the sixth annual draw down of City Deal funding. This has taken the total drawdown to £142.6m since Portfolio commencement. The latest City Deal funding draw down included the accelerated UK Government grant which will now be awarded over a ten-year period, rather than the original fifteen-year period.

### Annual Investment Forecast Profile

Investment Component	Year 0-4 2017-22	Year 5 2022-23	Year 6 2023-24	Year 7 2024-25	Year 8 2025-26	Year 9 2026-27	Year 10 2027-28	Year 11 2028-29	Year 12 2029-30	Year 13 2030-31	Year 14 2031-32	Year 15 2032-33	Total
	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)
Capital/Revenue Investment													
Capital Investment	133.66	84.70	117.55	234.62	226.48	257.52	164.05	-	-	-	-	-	1,218.57
Revenue Investment	6.05	4.39	7.66	13.45	13.33	11.65	0.87	0.44	0.45	0.46	0.47	0.48	59.70
<b>Total</b>	<b>139.71</b>	<b>89.09</b>	<b>125.21</b>	<b>248.07</b>	<b>239.81</b>	<b>269.16</b>	<b>164.92</b>	<b>0.44</b>	<b>0.45</b>	<b>0.46</b>	<b>0.47</b>	<b>0.48</b>	<b>1,278.27</b>
<b>Funding</b>													
City Deal Investment	37.84	24.22	56.20	66.71	43.02	12.20	0.81	-	-	-	-	-	241.00
Public Sector Investment	86.04	53.18	63.36	65.14	53.69	57.74	16.47	-	-	-	-	-	395.62
Private Sector Investment	15.83	11.69	5.64	116.22	143.11	199.22	147.64	0.44	0.45	0.46	0.47	0.48	641.66
<b>Total</b>	<b>139.71</b>	<b>89.09</b>	<b>125.21</b>	<b>248.07</b>	<b>239.81</b>	<b>269.16</b>	<b>164.92</b>	<b>0.44</b>	<b>0.45</b>	<b>0.46</b>	<b>0.47</b>	<b>0.48</b>	<b>1,278.27</b>



## **Governance Structure**

### **Jonathan Burnes, Swansea Bay City Deal Portfolio Director:**

Robust monitoring and reporting arrangements for SBCD are in place and reflect the good progress that is being made with the Portfolio. There have been positive outcomes from the assurance and audit reviews, and the region continues to have close and productive working relationships with both Governments. Design solutions for several projects will be progressed over the next 12 months, along with developing a plan to undertake key economic evaluations to show the impact the projects have having through their operation.

### **Welsh Cities and Growth Deal Implementation Board**

A joint UK Government and Welsh Government Board with responsibility for providing assurance and advice to the Joint Chairs regarding strategic and operational issues, the release of funding to the Portfolio, the oversight and monitoring of projects, and effective governance and assurance.

### **Joint Committee (JC)**

Chair, Cllr Rob Stewart, Leader of Swansea Council

Comprising of the four regional Local Authority Leaders, as well as senior representatives from all eight primary partner organisations, it holds the Programme (Portfolio) Board and PoMO to account and has overall responsibility for scrutiny and approvals.

### **Economic Strategy Board (ESB)**

Chair, Chris Foxall

A private sector advisory body which acts as the voice of business. The ESB provides strategic direction for the City Deal through advice to the Joint Committee on matters relating to the City Region.

### **Programme (Portfolio) Board (PB)**

Chair, Wendy Walters, Chief Executive Officer, Carmarthenshire County Council

Responsible for overseeing the operations of the City Deal Programme (Portfolio) Board which receives Portfolio progress updates and reviews risks, issues and changes to business case delivery.

### **Joint Scrutiny Committee (JSC)**

Acting Chair, Cllr Tim Bowen, Elected Member, Neath Port Talbot Council

The Committee provides advice, challenge and support to the Joint Committee and consists of three elected members from each of the four local authorities.

## **The Portfolio Management Office Team**

The Portfolio Management Office (PoMO) is responsible for the day-to-day running of the Portfolio and is in regular contact with the wider City Deal teams and board members.

### DIAGRAM OF STRUCTURE

The SBCD is also supported by Carmarthenshire Council's Section 151 Officer and Swansea Council's Monitoring Officer as part of the statutory functions of the Portfolio.

#### **Chris Moore**

Director of Corporate Services, Carmarthenshire County Council and SBCD Section 151 Officer

Chris is responsible for the administration of the JC affairs under Section 151 of the Local Government Act 1972 and has overall responsibility for the financial administration of the City Deal.

#### **Debbie Smith**

Deputy Monitoring Officer, Swansea County Council and SBCD Monitoring Officer

Debbie is responsible for ensuring good governance and maintaining the highest ethical standard, ensuring the legality of arrangements and that the JC Agreement is complied with.

## Assurance and Audit

### Gateway Reviews

The SBCD Portfolio, programmes and projects are subject to Office of Government Commerce Gateway Reviews, facilitated by the Welsh Government Integrated Assurance Hub, the reviews provide third party assurance of successful progression and overall delivery of the portfolio and associated projects and programmes. The SBCD Portfolio has undertaken a further strategic review in July 2023 together with reviews on the Swansea Waterfront, Pembroke Dock Marine and Digital Infrastructure.

A schedule of forthcoming reviews has been developed for the next 12 months. Regular meetings of the SBCD Assurance Panel have been undertaken throughout the year, providing oversight and input into the assurance arrangements across the Portfolio.

The table below shows the most recent reviews undertaken across the Portfolio together with their Delivery Confidence Assessment rating (DCA) and the estimated date for the next assurance review.

Portfolio/Programme/Project	Stage	Latest Review Date	DCA Rating	Next Planned Review
Portfolio	0	July 2023		July 2025
Homes as Power Stations	PAR	Nov 2022		Sep 2024
SILCG	PAR (Critical Friend Review)	June 2020 (Oct 2020)		Nov 2024
Pentre Awel	PAR	Sep 2020		Oct 2024
Digital Infrastructure	0	Oct 2023		2026
Pembroke Dock Marine	PAR	Sep 2023		2026
Yr Egin	5	Nov 2021		2025
Swansea Waterfront and Digital district	PAR	Sep 2023		2027
Skills and Talent	0	Jan 2023		2027
Campuses	PAR	Aug 2021		Jan 2025

### Portfolio Gateway 0 Review Recommendations 2023

The 2023 Gateway assurance review for the Portfolio returned a third consecutive Amber/Green rating with 4 minor recommendations, all of which have been actioned. The recommendations covered communications regarding strategic intent, benefits management, governance alignment with the Corporate Joint Committee (CJC) and maximising value from dependencies and opportunities, particularly in relation to the private sector.

### Audit

An internal audit was undertaken for the SBCD by Pembrokeshire County Council for 2023/24. The audit returned a Substantial (Green) rating with 2 recommendations relating to the enhancement of monthly/quarterly reporting for projects and programmes and the submission grant claims on a more frequent basis.

An Audit Wales Assurance and Risk Assessment review was undertaken for the 2022/23 period. The review found that the SBCD portfolio management arrangements support clear insight into the portfolio's progress. Sixteen areas for resolution were identified to formally review the existing arrangements to ensure they are the right fit for future needs. An action plan has been prepared to report on progress via SBCD governance on a quarterly basis. Eight of the areas are in progress and eight are yet to be actioned.

## Portfolio Risks

The SBCD Portfolio Risks continue to be closely monitored and reported quarterly with updates on their status and mitigations. The total number of Portfolio risks reduced from 35 to 25 within the year. Two new risks were identified, and five risks were categorised as Red Risks.

PIE CHART

### **Risk Rating 2023 - 2024**

Red Risks	5
Amber Risks	9
Green Risks	11

### **Risk Rating 2022 - 2023**

Red Risks	7
Amber Risks	20
Green Risks	8

Portfolio Red Risks for 2023-24 were:

	<b>Mitigation</b>
Risk that increasing cost of construction will impact on budgets set in Programme/Project Business Cases	The PoMO is working closely with programme/project teams to identify potential impact. Quarterly Construction Impact Assessment provided to governance boards. Three key mitigations are being reported by projects: i) secure additional funding, ii) revisit design brief, iii) undertake detailed contractual negotiations during procurement
Welsh Government (WG) 2021 update of Technical Advice Note (TAN) 15 development risk of flooding and coastal erosion and associated flood planning maps	Flood Map for planning embedded. Welsh Government are monitoring effectiveness of Planning Policy Wales and TAN 15 through a notification direction and sustainable development indicators. WG have been working with NRW to understand the integrity of existing flood defences. WG expect to be putting advice to the Cabinet Secretary soon with a redrafted version of TAN 15
In Year Slippage - Having undertaken a reprofiling and baselining exercise across the Portfolio, there is a risk of an in-year underspend	PoMO and Finance Manager are working with Programmes and Projects to more accurately forecast progress and report spend. Financial Quarterly Monitoring Reports now includes supporting narrative on slippage. In year slippage has no reported effects on the overall investment of the Portfolio or the wider benefits and deliverables
Slippage in delivery of programmes/projects against key milestones	Portfolio level benefits have now been forecast for the remaining duration of the Portfolio. PoMO and Finance Manager to monitor progress on a quarterly basis via Financial Returns and the Procurement Pipeline. Programmes/Projects report slippage via the Change Management Process
Ability for programmes/projects to deliver all outputs and outcomes within the business case	Monitoring & Evaluation Task and Finish Group established. Programmes/Projects have populated benefit realisation templates to incorporate into SBCD Governance reporting. Joint Committee have approved an Evaluation Framework. Programme/Project Evaluation Profiles being drafted for submission through SBCD Governance

## **Marketing and Communications**

A range of Marketing and Communications activities have taken place over the last 12 months including:

- Updating the Portfolio Communications and Marketing Plan, including: an implementation plan, protocols and guidelines, and an events calendar.
- **222** positive mentions in local and national press including online and printed titles, across all projects and programmes.
- **12,746** Facebook impressions, **1,021** followers and **166** clicked links.
- **30,479** X impressions, **1,563** followers and **244** clicked links.
- Ministerial Visits from UK Government and Welsh Government to Pentre Awel, Innovation Matrix, 71/72 Kingsway and Pembroke Dock Marine.
- Attendance and exhibition space at **30** events including Introbiz, Welsh Business Show, Welsh Construction Show, 4theRegion, Marine Energy Wales Conference and Green Economy Conference.
- Attendance at **4** Careers Wales events to meet with year 10 students. Around **6,000** pupils attended, representing **31** different schools across Pembrokeshire, Carmarthenshire, Swansea and Neath Port Talbot.
- Organised **4** Meet the City Deal Events across the region, one in each local authority.
- Portfolio Director represented the region in the Wales Business Insider Investment Forum Event to discuss how Wales can attract commercial investment.
- Updated the City Deal website with latest news and project updates.
- Procured for a new website and undertaking early-stage planning.
- Partnership working with key communications contacts at partner organisations and at the other Welsh City and Growth Deals.
- Key Milestone Log developed to plan marketing activity.

## **Events**

Events play a major role in promoting the SBCD and supporting programme and project activity.

The PoMO have arranged or exhibited at 30 events throughout the year.

Participation at events provides a platform to network and promote the SBCD opportunities to attendees as well as exhibitors. Event attendance has led to new contacts being made, has enabled relationship building and raised awareness of the SBCD Portfolio activities to a wide range of audiences.

<b>Event</b>	<b>Date</b>	<b>Location</b>
UKREiiF	May 2023	City Centre, Leeds
Innovation Matrix Breaking Ground	June 2023	Y Fforwm, Swansea
Hydrogen Gateway Conference.	June 2023	International Convention Centre, Newport
Bay Technology Centre Official Opening	June 2023	Bay Technology Centre, Port Talbot
Regional Learning and Skills Partnership Summer Conference	June 2023	Swansea.com Stadium, Swansea
CEIC Summer Conference	July 2023	Cardiff Stadium
Welsh Business Show	July 2023	Parc y Scarlets, Llanelli
Pembrokeshire Meet the City Deal	July 2023	Bridge Innovation Centre, Pembroke Dock
Swansea University Sports Showcase	September 2023	SU Bay Campus, Swansea
Swansea & Neath Port Talbot Careers Event	October 2023	Brangwyn Hall, Swansea
Welsh Business Show	October 2023	Swansea.com stadium, Swansea
Welsh Construction Show	October 2023	Swansea.com stadium, Swansea
Carmarthenshire Careers Event	October 2023	Halliwell Centre, Carmarthen
Introbiz West Wales Expo	October 2023	Brangwyn Hall, Swansea
Yr Egin 5 Year Anniversary Event	October 2023	Yr Egin, Carmarthen
SA1 Business Club Showcase	November 2023	Dylan Thomas Centre, Swansea
Pembrokeshire Careers Event	November 2023	Pembrokeshire College Haverfordwest
4theRegion Green Conference	November 2023	Swansea Arena, Swansea
Carmarthenshire Meet the City Deal Event	November 2023	Yr Egin, Carmarthen
HAPS Duracell Event	February 2024	National Botanical Gardens, Carmarthen
Business Hub	February 2024	Margam Park Orangery, Port Talbot
HAPS Supply Chain Event	February 2024	Parc y Scarlets, Llanelli
Insider Magazine Investment Wales Forum	February 2024	Parkgate Hotel, Cardiff
Choose your Future Carmarthenshire	February 2024	Parc y Scarlets, Llanelli
Pentre Awel Topping Out Ceremony	February 2024	Pentre Awel, Llanelli
PDM Breakfast Meeting	March 2024	The Guard House, Pembroke Dock
4theRegion Swansea City Centre Conference	March 2024	Swansea Arena, Swansea
SPARC Launch Event	March 2024	Pembrokeshire College Haverfordwest
Marine Energy Wales Annual Conference	March 2024	Swansea Arena, Swansea
Swansea Meet the City Deal Event	March 2024	Swansea Arena, Swansea

## Meet the City Deal Events

4 Meet the City Deal Events were delivered locally for each Local Authority area in the Swansea Bay City Region. The events spanned across 2023-24 and were held at The Bridge Innovation Centre, Pembrokeshire; Yr Egin, Carmarthenshire; Swansea Arena, Swansea; and The Margam Orangery, Neath Port Talbot.

The events aimed to:

- Provide Portfolio insights including the latest project updates.
- Provide opportunities for local businesses to learn, engage and network with City Deal opportunities.
- Share information from the Local Authorities and partner organisations that enable businesses to grow, including grants and business support.

Key highlights from the events:



4 Events



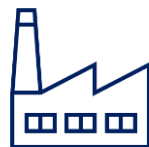
31 Exhibitors



509 registrations



296 attendees,  
58% of registrations



74% attendees from private sector



20% of attendees sent survey responses



84% of people surveyed would attend a future SBCD event.



80% of attendees found the events useful or very useful

**James Owen, Creative Director, Stori Cymru**

It's been a great to meet the City Deal team and the wider network at these engagement events. I've developed strong relationships with Swansea Bay City Deal because of this, and I'm proud to say that I've worked with Swansea University to develop a promotional video thanks to an introduction from the team.

**Howard Jacobson, Supply Chain Engagement Manager, Business Wales**

The Swansea Bay Meet The City Deal Events have provided Business Wales with unmissable opportunities to engage with local SMEs face to face and make them aware of how to access the support they require to find, bid and win public and large private sector contracts.

Additionally, it allows Business Wales to highlight and share the Welsh Government's fully funded service including general business support, carbon reduction, supply chain, skills, HR and International Trade.



## **Business Engagement**

### **Chris Foxall, Chair of the Economic Strategy Board (ESB)**

The ESB assisted the development of an exciting opportunity with Neath Port Talbot Council. The National Net Zero Skills Centre of Excellence, which is part of the SILCG Programme, will enhance the forthcoming Advanced Manufacturing Production Facility to develop the next generation workforce that will support business growth and new job opportunities.

The ESB were also busy supporting the Portfolio Office by attending and networking at a series of successful Meet the City Deal Events across the region. We are looking forward to a productive year to come as the Portfolio moves further into delivery and operations. We will be using our specialist knowledge and expertise to support workshops on topics such as Business Engagement and Supply Chains with the SBCD, and expanding our Board to incorporate expertise from wider regional economic development priorities that will support the Corporate Joint Committee.

ESB's Deputy Chair, Amanda Davies, announced her retirement from Pobl and ESB. On behalf of the ESB, I'd like to wish Amanda a happy retirement and thank her for her invaluable contributions over the past six years.

### **Private sector contributions:**

Leveraging private sector contributions to support programme and project delivery remains one of the SBCD's highest priorities. To date, over **£71m** of private sector contributions has been secured with forecasts in coming years to achieve our £600m+ Portfolio target.

### **Reaching out to businesses:**

Exhibiting at events during 2023-24 has helped to promote the SBCD to more than 1,000 businesses across South Wales.

The PoMO will continue to build on business engagement activities over the coming year, working with projects and programmes teams to identify new avenues of engagement.

### **Supply chain impact:**

Projects and programmes have a major impact to supply chains during the construction and operational phases of the SBCD Portfolio. Much of this impact is benefiting local and regional companies directly and through supply chains across Wales. They have also helped build on existing relationships and forged new collaborations that have mutual benefit to deliver the Portfolio across South West Wales.

To date, the SBCD Portfolio has generated:

- 250+ contracts worth over £176m.
- 80 contracts awarded to businesses in South West Wales, worth more than £15m.
- 95 further contracts awarded to Welsh based businesses worth more than £100m.
- 160 construction related apprenticeships opportunities.

### **Dafydd Johnson, Projects Development Manager, Qualitek Engineering**

“Attendance at the Swansea Bay City Deal events and support from the Business Engagement Manager have enhanced our ability to engage with major regional projects and connect with essential stakeholders. This has helped foster growth and development for Qualitek Engineering and led to being part of the NPT Cluster Group. We are better connected with access to a community of like-minded professionals and organisations to facilitate the sharing of resources, knowledge and support, which are essential for the successful progression of large-scale initiatives.”

## In Focus: Leveraging funding and collaborations.

Having a strategic regional Portfolio provides the vision and resources to forge collaboration and attract and leverage additional funding. With the SBCD in full delivery and operation, there is a growing momentum of activity securing additional funding across all projects and programmes.

Bringing regional and national stakeholders together with a common aim has helped support the region to shape and progress regionally critical initiatives such as the Masterplan for the development of Swansea City and creating the pathways that supported the Celtic Freeport bid. Below are some examples of the types of funding and collaborations the Swansea Bay City Region are progressing.

### Swansea City Centre Developments

The SBCD Swansea Waterfront Project has proven to be a significant catalyst for the City Centre and surrounding area. Swansea Arena and the 71/72 Kingsway development have helped leverage considerable private and public sector investment worth over within a **£1bn** regeneration programme, including:

- Award-winning regeneration company, Urban Splash, leading a £750m transformation portfolio.
- Hacer Developments leading the 'living building' at Picton Yard in partnership with Swansea University's BioHUB project and Pobl Group who will manage 50 affordable apartments.
- Tramshed Tech due to run shared workspace environment at The Palace Theatre, which is being brought back to life by the Council.
- Loft and Co. who are leading the transformation of the Albert Hall.
- Kartay Investments leading on several developments, including the Princess Quarter scheme, which will include over 15,000 square feet of office space, high-end retail units and a rooftop terrace with panoramic views over Swansea Bay.
- Bridgend-based DST innovations leading development around Swansea port include a tidal lagoon, a battery farm to store the renewable energy generated on site, a floating solar panel facility, eco-homes anchored in the water and a hyper-scale data centre.
- New Zealand-based Skyline Enterprises are proposing a major investment at Kilvey Hill that will, subject to planning permission, lead to a world class outdoor leisure destination.

### Examples of leveraged funding across the Portfolio through collaborative working include:

Project/ Programme	Source	Value	Description
<b>Skills and Talent</b>	Private and Public sector Contributions	<b>£1.23m</b>	21 pilot projects have been approved to date with private sector contributions already committed
<b>Digital Infrastructure</b>	Private Sector Contributions	<b>£48m+</b>	Secured through infrastructure deployments that the region and partners have supported and facilitated
<b>HAPS</b>	UK Government Shared Prosperity Fund	<b>£0.25m</b>	Creation of two HAPS Demo Houses in partnership with Tai Tarian and Cardiff University Welsh School of Architecture
	Microgeneration Certification Scheme (MCS)	<b>£0.08m</b>	Delivered in conjunction with Neath Port Talbot Group of Colleges, MOBIE (ministry of Building Innovation and Education) and Supply Chain Sustainability School
	AHRC (Arts & Humanities Council) Transforming Housing and Homes for Future Generations	<b>£4.6m</b>	Creating a new multi-partner, transdisciplinary, design ecosystem to transform housing for future generations using bio-based and non-extractive materials, together with renewable energy supply and storage.
<b>SILCG/HAPS</b>	Engineering and Physical Sciences Research Council	<b>£5m</b>	The Place Based Impact Accelerator Account 'SWITCH to Net Zero Buildings'– led by Swansea

	(EPSRC) / UK Research & Innovation Investment		University, with Neath Port Talbot Council as a civic partner, deployment of resources to unblock barriers to adoption of net zero buildings
<b>SILCG</b>	Launchpad, Innovate UK for business-led innovation projects and wrap-around support	<b>£7.5m</b>	A partnership project between Neath Port Talbot Council, Pembrokeshire Council and Net Zero Industry Wales. Strengthening the business case of innovative SMEs and larger industry
	New tenant	tbc	Attracting the High Value Manufacturing Catapult as a tenant in the Bay Technology Centre
	Engineering and Physical Sciences Research Council (EPSRC) Place Based Impact Acceleration Account (PBIAA) funding	<b>£4m</b>	Successful award to a consortium of universities with the Hydrogen Centre used as a key research centre for the activity.
	European Horizon project H2SHIFT funding	<b>€3.4m</b>	Led by SNAM of Italy, Europe's leading utility company for natural gas, to develop further hydrogen testing facilities, including development of electrolytic hydrogen testing facilities at University of South Wales Baglan
<b>Pentre Awel</b>	UK Government Shared Prosperity Fund	<b>£0.2m</b>	Accelerate Pentre Awel, led by Swansea University, based on the successful Accelerate model and will develop a Pentre Awel ecosystem of business, health, academic, and public sector collaborations
	UK Government Shared Prosperity Fund	<b>£0.3m</b>	Pentre Awel Business Preparedness, delivered in partnership between CCC and Cardiff University, includes: <ul style="list-style-type: none"> <li>• Business and clinical incubation.</li> <li>• Research and product development.</li> <li>• Social models and community health.</li> </ul> Project Managers have been appointed covering these specialist areas
	UK Government Shared Prosperity Fund	<b>£0.14m</b>	A supplementary SPF project by CCC's Actif leisure team aims to invest in community sport and fitness initiatives, with a particular focus on areas of deprivation including Pentre Awel
<b>PDM</b>	Welsh Government	<b>£0.25m</b>	Legacy funding secured, including the Tidal Lagoon Challenge: FLOMax project.
	Public and Private sector contributions	<b>£1m+</b>	Added value contributions achieved by project partners MEECE, PDZ, META
<b>Yr Egin</b>	Economic impact	<b>£21.6m</b>	Yr Egin economic impact of to the Welsh economy in 2022-23
	Economic Impact	<b>£7.6m</b>	Yr Egin economic impact of to the economy of Carmarthenshire in 2022-23
	UK Government Shared Prosperity Fund	<b>£0.18m</b>	"TANIO" project, which delivers Creative and Digital Clubs for children and young people to develop their creative skills in a series of weekly specialist clubs including

			the re-launch of Shwmae Sir Gâr, local online 'TV' service for Carmarthenshire.
<b>Campuses</b>	HEFCW Swansea University	<b>£1.45m</b>	3G Pitch
	UK Government Shared Prosperity Fund	<b>£0.38m</b>	Accelerate Pentre Awel
	SBCD Skills and Talent Swansea University	<b>£0.31m</b>	Agor Skills, Sport, Health & Wellbeing
	Swansea Council Swansea University	<b>£0.13m</b>	Floodlighting
	Swansea University	<b>£0.12m</b>	Hockey Stand
	Swansea University	<b>£1.2m</b>	Modular Changing facilities
	Swansea University	<b>£0.04m</b>	Spectator facilities on hockey pitches
	SBCD Digital Infrastructure Swansea University Vodafone	<b>£2.6m</b>	Swansea Bay 5G Innovation Testbed
	UK Government Shared Prosperity Fund	<b>£0.29m</b>	Swansea Bay Sports Park Feasibility Study
	Ospreys Swansea University Welsh Rugby Union	<b>£0.1m</b>	Womens Player Development Centre (West Wales)
	Swansea University	<b>£0.02m</b>	Consultancy Stakeholder Mapping Engagement and Comms
	Swansea University	<b>£0.02m</b>	Consultancy Future Investment Opportunities
	Swansea University	<b>£0.05</b>	Consultancy Service Improvement and Patient Impact

## Business Partners

The SBCD continues to work in partnership with many private sector companies across a range of industries to deliver the Portfolio's objectives.



## **Contact Details**

For further information on any of our projects and programmes please contact:

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