

Executive Summary

Welcome to the 2024/25 Swansea Bay City Deal (SBCD) Annual Report. As we reach the mid-point of the City Deal, exciting progress is becoming more visible across our region. In particular, the last 12 months has seen significant infrastructure being procured, built and moving into operation. Housing tenants, facilitating collaboration, and helping businesses establish and grow the City Deal is helping to transform South West Wales into a place of opportunity, where people can live and work, and businesses thrive through the creation of well-paid jobs, new skills and a first-class business environment.

The City Deal provides South West Wales a unique opportunity through a £1.3 billion Portfolio investment across nine headline programmes and projects, in 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.
- Contributing **£1.8-2.4 billion** of economic impact.
- Upskilling **14,000** people through **2,200** training opportunities and over **3,000** new apprenticeships.

Progress is detailed within this annual report, which includes key information, activity, achievements, and In Focus case studies.

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 create 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.

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

“As we pass the midpoint of the City Deal it is encouraging to reflect and celebrate the hard work of our partners to successfully deliver many of our projects, especially considering the difficult economic climate we experienced during the start of the City Deal.

“Looking back over the last 12 months, progress has been fantastic across the entire Portfolio. We have celebrated the opening of key projects such as the Innovation Matrix and Pembroke Dock Infrastructure and Pentre Awel and 71/72 Kingsway have also taken significant strides forward and are due to open imminently. There is so much more to come over the next few years, as some projects become established and the remaining construction projects are delivered and become operational.

“Creating over 9,000 jobs and contributing up to £2.4 billion of economic impact to South West Wales, the City Deal as a catalyst for further investment. Along with many other local and regional initiatives, it will strengthen the region for our residents and help businesses to thrive.”

Benefits

The City Deal has made significant progress during 2024/25 towards its benefit targets as its projects excel in delivery. These targets will continue to accelerate over the remaining lifetime of the Portfolio.

Some headline achievements to date include:

- **£536m** of total investment.
£354m investment in 2024/25.
- **£132.78m** of private sector investment contribution secured.
- At least **890+** Full Time Equivalent (FTE) jobs created*.
- **230 FTE** apprenticeship opportunities created or continued.
- **79,500m²** of completed floor space.
- **35,246** additional skills and **119** new course frameworks delivered through the Skills and Talent programme.
- **£44.34m** private sector funding leveraged through the Digital Infrastructure programme reported in 2024/25.
- **1,078** of the **10,300** Homes as Power Stations homes have been delivered leveraging **£83.6m** of investment. In addition, a further **£17.4m** of investment has been leveraged in the delivery of the project.
- **250+** contracts awarded to Welsh based companies worth over **£133m**.
- **6** projects completed, in operation and monitoring with a value of £210m
- **19** projects in build or delivery with a value of £761m
- **14** projects in pre-delivery with a value of £403m

*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

“2024/25 has marked a pivotal year for the Swansea Bay City Deal. As we move into the second half of Portfolio delivery, we're seeing the vision become reality — not just in physical infrastructure, but in the transformative effect it's having on our communities, our economy, and our future. With over £536 million already invested, we are delivering change that's visible and measurable across South West Wales.

From the continued development of Pentre Awel and the progress of Pembroke Dock Marine to the growing impact of Swansea Arena, Yr Egin, and the Bay Technology Centre, the City Deal is driving regeneration and innovation at scale. These projects are not only supporting existing sectors but are also attracting new investment and opening doors for future industries.

What's particularly exciting is the collaborative energy the Deal is unlocking. Partnerships across academia, business, and the public sector are deepening — strengthening our capacity for innovation, talent development, and inclusive growth.

Looking ahead, the regional projects — including Homes as Power Stations, Digital Infrastructure and Skills and Talent — will be critical in ensuring that no community is left behind. Together, we're laying the groundwork for a smarter, greener, and more connected region.

The Swansea Bay City Deal is more than a portfolio of projects, it's a catalyst for a new era of opportunity for South West Wales. And we're only just getting started”.

Dame Nia Griffith, Wales Office Minister, UK Government in Wales

“The Swansea Bay City Deal is making a real difference to the regional economy across South West Wales. The deal is delivering economic growth, creating good well-paid jobs and putting more money into people's pockets.

“The deal has ensured partners across the region are working together to deliver on people's priorities and I am looking forward to seeing continued delivery of the broad range of projects supported by the Swansea Bay City Deal.”

Rebecca Evans, Welsh Government Cabinet Secretary for Economy, Energy and Planning, said:

“Significant progress that has been achieved by the Swansea Bay City Deal over the past year. This is testament to the commitment and hard work of all partners involved.

“Ambitious initiatives such as this are a key part of our vision for a stronger, fairer, greener economic future. I look forward to seeing the City Deal continue to deliver for businesses and residents across the region.”

Project Updates:

Digital Infrastructure

Through three workstreams this programme addresses areas of poor connectivity in rural settings, supports the rollout of 4G & 5G to drive the adoption of emerging technologies and provides full fibre connectivity to strategic public sector sites.

Find out more about Digital Infrastructure

Key milestones and achievements:

- The **Connected Places** workstream drives investment across the region's economic growth zones and will connect several key strategic sites, supporting our regional public sector partners' digital transformation agendas and driving additional inward investment across the region. Progress included:
 - Upgrading 69 public sector sites from copper to full fibre networks – delivered by BT Public Sector Broadband Aggregation (PSBA)
 - 54 sites completed and fully migrated, actively benefitting from improved connectivity.
 - 5 sites complete, pending final migration.
 - 10 sites build in progress.
 - £1,050,000 Local Broadband Fund (LBF) funding utilised in full for works undertake to 31st March 2024
 - Dark Fibre East - Building a dedicated dark fibre network across Llanelli, Neath Port Talbot and Swansea to accommodate the growing digital needs of partners – delivered by Virgin Media O2
 - 19 connections completed and handed over to partners.
 - 22 connections completed all design, and survey works and are in various stages of build.
 - 1 additional connection is at the design stage.
 - UWTSD's ring across 8 University sites in Swansea City centre fully connected.
 - The Rural workstream addresses the challenge of bridging the gap in connectivity, which is widely recognised, especially in rural areas where costs to build gigabit capable networks can be prohibitive.
 - Better Broadband Infill project – The tender closed for bid submission in mid-March with 3 bids received.
 - Project Gigabit - Several voucher schemes in delivery across the region. Schemes were closed for new applications while the project is finalised for each call off.
 - Welsh Government Access Broadband Cymru – A grant was available of £400 or £800 towards the installation costs of better broadband connections which was widely used in the region for alternative technology such as 4G and Satellite.
- The **Next Generation Wireless** workstream facilitates the rollout of 4G and 5G across the region.
- 4G/5G Public sector assets project – Making public sector assets available to accommodate digital infrastructure such as small cells to address capacity on the networks.
 - Swansea Council signed a non-exclusive access agreement with Freshwave allowing them to use council-owned assets for hosting small cells. These are small, low-power devices that improve mobile coverage in busy areas, reducing congestion and providing better signal.
 - In partnership with Freshwave, Virgin Media O2 selected Swansea as one of the locations for their next phase of outdoor small cell deployment. The installation of the small cell was completed in February 2025, with all eight units continuing to improve mobile coverage in Swansea city centre during busy times.
 - Digital Innovation Network – Deployment of Long-Range Wide Area Network (LoRaWAN) gateways to facilitate the use of IoT across local authority partners.

- Regional public sector partners have completed the rollout of LoRaWAN gateways to support IoT applications and are utilising the network to trial several pilot projects to drive operational efficiencies and cost savings.
- Swansea Council have successfully trialled a SMART Bins Project, using LoRaWAN sensors to capture data and measure the capacity levels of waste bins across the city, enabling the waste team to respond proactively with their route planning.
- Carmarthenshire County Council in partnership with Dyfed Powys Police are using sensor technology to tackle anti-social behaviour. This is providing useful data to inform where local police officers need to focus their efforts.
- Neath Port Talbot Council have used sensors in their car parks to identify trends and gain insights on how their main car parks are being used. Helping to drive decisions around car park management and investment.
- Pembrokeshire County Council are using sensor technology across several use cases everything from bee hives to environmental management in Council buildings.
- 5G Innovation Fund – A grant fund to support with capital costs associated with deploying 5G infrastructure and advanced wireless technology for specific use cases aligned to the strategic goals of the Swansea Bay City Deal
 - Swansea University signed a contract with Vodafone to deliver the infrastructure that will underpin the Campuses 5G Project which was awarded to the university in November 2023. Planning has been approved for the infrastructure builds in Swansea and three PhDs have been awarded which will utilise the new infrastructure to conduct research and trial innovative solutions in health and wellbeing.
 - Pentre Awel are in discussions with their tenants to understand the opportunities associated with 5G/advance wireless technology that could be realised at this world class health and medical research facility.
 - Ospreys' rugby hosted a workshop in early 2025 showcasing their plans for a stadium of the future with key stakeholders, which includes creating a private standalone 5G network to enhance the fan experience, provide high quality broadcasting and management of stadium operations. Bid expected in Quarter 1 2025/26.
- The region's Digital Champions were shortlisted for the Barrier Removal Award at Connected Britain 2024 which is a great recognition to the barrier busting work carried out by both the regional and local authority teams.
- Held first annual Digital Innovations and 5G Technology event highlighting how this technology can shape the future.
- A series of video case studies have been developed along with educational animations that address common questions from businesses and residents.

Key activity for 2025-26:

- Complete upgrading of 69 public sector sites across the region from copper to full fiber networks.
- Complete Dark Fibre East by Virgin Media O2 Business. This includes providing 42 connections at 34 public sector sites in Llanelli, Swansea and Neath Port Talbot.
- Better Broadband Infill Project tender awarded, which is part of the rural workstream and will address remaining gaps in connectivity by contracting a commercial partner to build a gigabit capable network to provide fast, reliable broadband to residential and business premises.
- Delivery of 5G Innovation Fund Campuses Project. In November 2023 £1.55m was awarded to the project to fund a world-first research and innovation environment that harnesses 5G infrastructure to improve population health and wellbeing.
- Host the annual event - Navigating the Path to Better Connectivity. It will provide an overview of the current landscape, ongoing initiatives, and the critical issues surrounding digital connectivity.

In Focus – Working together to get better broadband.

Dale, a small rural community on the coast of Pembrokeshire, has long endured poor internet connectivity that has plagued its residents with little to no ability to use the internet for work, entertainment or communication.

As more services and day-to-day tasks are digitised, having limited internet access was having a detrimental effect on residents.

However, after being told about a UK Government funded project by Pembrokeshire County Council's Digital Champions, this has changed and much of Dale is now connected to gigabit-capable broadband that serves the whole village.

The Gigabit Broadband Voucher Scheme is part of the UK Government's Project Gigabit programme, focused on helping hard-to-reach communities upgrade their broadband connection. Eligible homes and businesses can apply for up to £4,500 to cover the costs of a gigabit-capable connection. With the voucher scheme, residents and businesses in eligible areas have been able to apply for financial help to cover the costs of installing gigabit broadband.

Kevin Rogers, Dale resident said, "The difficulty for me working in a technological environment, broadband connection was pretty limited when I moved back to Dale – moving large files, not being able to make video conference calls, we were stuck with old fashioned copper telephone lines. The Gigabit broadband scheme was like a lifebuoy thrown to us as we were drowning in the slow lane of the internet. The scheme has meant our lives are enhanced and it's a benefit to our community."

Homes As Power Stations (HAPS)

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

Find out more about Homes as Power Stations

This regional project will:

- Create **1,804** jobs.
- Support **10,300** new and existing homes with renewable technologies
- Create over **10,417 KWh** energy savings.
- Reduce CO2 emissions by over **19,000 tonnes** per year.
- **£251 million** contribution to regional GVA

Key milestones and achievements:

- Installation of HAPS technologies into the demo houses in Margam, NPT, was completed and open days held to showcase the houses. These were developed in conjunction with Tai Tarian and Cardiff University's Welsh School of Architecture, funded through £250k of UK Governments Shared Prosperity Funding by NPT Council.
- Two further applications agreed in principle to receive Financial Incentives Funds (FIF) which means 19 applications have now been approved since the funding opened. This utilises £4.3m of City Deal funding and leverages an additional £49.5m of public and private sector funding.
- Successful allocation of £200k Skills and Talent programme funding for the Renewable Horizons pilot project. Rewise, a training provider. They will be attending schools across the region to deliver renewable energy workshops, working alongside HAPS to highlight local development.
- Outputs and levels of monitoring required for retrofit houses was designed and devices installation commenced.
- Worked with the Development Bank of Wales to share information and ensure all housing developments across the region are maximising the opportunity for creating HAPS homes.
- Ongoing Technical Monitoring and Evaluation planning meetings with Cardiff University Welsh School of Architecture to ensure collaboration with existing work and current opportunities.
- Recruitment of Joel Stenlake as the HAPS Technical Co-Ordinator.
- Events:
 - Led on the Supporting Businesses in Neath Port Talbot / Meet the City Deal Event held in Margam Park which welcomed over 75 attendees.
 - Co-ordinated the Daikin Stakeholder Engagement event in the Botanical Gardens, Carmarthenshire to showcase the opportunities of head pump technologies.
 - Presented at the South West RLSP Retrofit Conference in Parc y Scarlets, Carmarthenshire which outlined industry requirements and areas of development.
 - Attended Welsh Governments Net Zero Carbon HWB Skills and Training Group

Key activity for 2025-26:

- 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.
- HAPS Event to showcase the housing schemes that are benefiting from the FIF.
- Allocating the remaining FIF, aligned to each of the Local Authority's needs.
- Continue to seek opportunities to leverage additional funding that support the project objectives.

In Focus: Demonstration Houses

In March 2024, HAPS hosted a series of open house events to successfully showcase the HAPS Demo Houses in NPT. Funded through UK Shared Prosperity Funds and working with Tai Tarian and Cardiff University's Welsh School of Architecture, two 1950's houses were retrofitted with HAPS technologies including a heat pump, battery and solar panels.

Created to support the objectives of the HAPS project, the purpose was to showcase the range of retrofit solutions available, helping to create a healthy and affordable home and create 'landlords of the future'. The demo houses also educated a wide range of stakeholders of the installation process, lessons learned and benefits.

In addition to the two retrofitted houses, the funding extended to fitting an additional 41 Tai Tarian homes with iOpt systems, non-invasive remote property monitoring sensors for Social Housing Providers that can measure electricity usage as well as humidity levels. This enables Tai Tarian to become 'landlords of the future' where they receive data directly to manage the properties and support the tenants.

The success of the project included:

- Over 370 people visited the houses through 24 events including local residents, installers, government and public sector officials and representatives from 38 different companies across the UK.
- 13 low or zero carbon energy infrastructure installed, over double the set target.
- Supported 43 houses, with an expected target of 4.

Craig Maybery-Thomas, Head of Asset Management and Decarbonisation at Tai Tarian, said

"We were delighted to have had the opportunity to partner with HAPS and Cardiff University's Welsh School of Architecture to showcase the delivery of a cleaner, greener, more energy-efficient home. Having the opportunity to welcome visitors to the property, including tenants, staff, educators, contractors, and representatives from government, added real value. It allowed everyone to see firsthand the how green energy solutions coupled with energy improvement measures are possible as part of a retrofit project, whilst sharing ideas and building strong local connections that will support the future delivery of successful retrofit projects. We look forward to learning from this experience and using it to help us plan the effective retrofit of more of our homes."

Skills & Talent

Led by the Regional Learning and Skills Partnership (RLSP) and focussing on high growth areas in the digital, construction, energy, smart manufacturing and health and wellbeing sectors, the Skills and Talent programme will deliver:

- **2,200** additional skills
- **14,000** higher skilled individuals
- At least **3,000** new apprenticeships
- **20** new courses frameworks
- At least **2** centres of excellence

Working across the region and alongside partners from the private sector, higher and further education, schools and the third sector, the programme team identify gaps in current provision and establish the changes needed to develop new courses and frameworks to meet these skill gaps.

Pilot projects are being developed and deployed which align to the needs of industry and the key SBCD themes.

Key milestones and achievements:

- 6 further skills pilot projects approved by the Regional Learning and Skills Partnership (RLSP) board, taking the total number of approved pilots to 27 and 6 apprenticeship/skills developments since the programme began (see In Focus piece).
- 6 pilot projects have been completed with all of them exceeding the original targets.
- Skills Barometer reviewed and updated with training provision migrated onto a digital system.
- Further development of website 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.
- Additional marketing material produced and circulated to students, parents and businesses showing career pathways roadmaps available in colleges and universities across the region.
- Work Experience pilot rolled out at Ysgol Dyffryn Aman school, which includes real life industry experience alongside classroom project work. A scoping exercise is being carried out for roll out to other Local Authorities.
- Dean Ward, Founder and CEO of DCW Group appointed as the new chair of the RLSP.
- 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.
- 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 2025/26:

- First cohort of user centred design apprentices due to complete. This is the first in the UK in development and delivery, meaning that South West Wales is leading the way in meeting global digital skills gaps.
- Launch of flagship Regional Skills Intervention built to meet employer skills needs in real time, reacting immediately to sector demands.
- 8 companies from the region have been approved for the Fit For Offshore Programme funded through the Skills and Talent programme, which will enhance opportunities for companies to compete in the offshore marketplace.
- Further workshop to be held with pilot project leads and SBCD PMs to share best practice and what activities have been undertaken, encouraging further collaboration.
- Further pilot projects moving to completion.

- Identify skills gaps that remain in the region.

In Focus – Pilot Project Success

Secured investment to date.

Public Sector Match Funding of £1,731,314

Private Sector Match Funding of £1,465,985

Private Apprenticeships Investment of £1,794,000

New Pilot Projects Approved

Over the last 12 months the Skills & Talent programme has approved 6 new pilot projects which will prepare young people for upcoming jobs across the region.

1. Developing a Welsh Medium learning pathway in Engineering and IT

LOGO – UWTSD, Ysgol Bro Myrddin, Ysgol Maes y Gwendraeth

Specifically addressing a skill gap, this project involves two Welsh Medium schools (Ysgol Gyfun Bro Myrddin and Ysgol Gyfun Maes Y Gwendraeth) along with University of Wales Trinity St David working together for the opportunity to achieve level 2 and 3 qualifications in Engineering and Digital Studies in Welsh. By working with the University, the students will gain a greater awareness of the sectors opportunities and help develop more practical skills using the equipment and research creating a seamless transition to higher education.

403 Higher Skilled Individuals gaining a qualification.

This is an extension of a tested project approved in 2019 which offered the first opportunity in Wales for young people in two schools in Carmarthenshire to study Engineering and Digital studies through the medium of Welsh at a Level 2 and Level 3. The schools skilled over 800 pupils between 2019 and 2023.

Dr Llinos Jones, Headteacher Ysgol Gyfun Gymraeg Bro Myrddin said "The Skills and Talent Programme Awards have been a catalyst for transformative change, enabling our innovative educational initiative to reach new heights within our schools. This funding has not only expanded access to vital learning resources but also empowered learners with future-ready skills, fostering long-term regional growth and opportunity."

2. Net Zero Wales

LOGO – Swansea University

Developing a framework of short, micro credential courses designed to address the increasing issue of the green skills gap in manufacturing related industries both in the private and public sectors. These innovative range of courses will help build knowledge and skills as well as develop career pathways to support Wales in meeting the national net zero goal.

70 Higher Skilled Individuals gaining a qualification.

3. Green Work Experience

LOGO – Coleg Sir Gar, Cyfle

A crucial initiative that practically addresses the net zero agenda by offering onsite placements to students with coordinated learning and mentoring support throughout. Working closely with local businesses it will build awareness and routes into net zero construction. It covers both new build and retrofit of houses and includes the new technologies such as heat source pumps, solar, and thermal renewables that reduce energy and carbon emissions.

200 Higher Skilled Individuals gaining a qualification.

80 Apprenticeships created.

4. Renewable Horizons

LOGO – Rewise

This innovative STEM education project focuses on the renewable energy industry, with an emphasis on the growing offshore wind generation and solar farm sector. Working closely with industry partners, it will design a

new qualification for Key Stage 3 learners covering themes and skills that will act as an entry point to the renewable energy sector. Engaging with 40 schools across the region, it will deliver a unique hands-on learning experience and inspire learners to expand their knowledge of the sector and the range of opportunities it can offer.

800 Higher Skilled Individuals gaining a qualification.

5. Advanced Skills in Technology and Robotics Applications (ASTRA)

LOGO – NPT Colleg, UWTSD, Control 2k, Reeco Automation, RM Group

A pilot project that enables the establishment of a cutting-edge Automation Lab within Neath Port Talbot College to address the evolving needs of the region's engineering sector. It will support the development of new units in the current curriculum, specifically around smart factory and logic controllers. Working closely with local industry, it will allow students to be exposed to advanced equipment and tools giving them a hands-on, clear career pathway and progression opportunities in this new technology.

20 Higher Skilled Individuals gaining a qualification.

6. Future workforce skills

LOGO – Gower College, Coleg sir Gar, Pembs College, NPT College

Led by Gower College, this project sees the region's colleges working in partnership to deliver work relevant skills to 5,000 individuals.

The project will support demand led interventions at level 3 and above to address key skills gaps in the labour market which will support economic growth and individual progression. It is designed to meet the needs of employers, facilitating organisational growth and adaptability to economic and labour market challenges and supporting individuals to prosper and progress within the labour market.

4,500 Higher Skilled Individuals gaining a qualification.

Completed Pilot Projects

Over the last 12 months 6 pilot projects have also been completed, and all of them exceeded the targets that they set out to achieve.

1. Nurturing Health and Wellbeing in a Digital Sector

LOGOS – Swansea Council, Careers Wales, Gowerton School

Led by Gowerton Comprehensive School and working within schools across Swansea, this pilot taught 16-year-old pupils about the life science, health and sports sectors including the development of new technologies to support a healthy and well-balanced lifestyle.

- 9,549 individuals taught.
- 1 new career pathways opportunities created.

2. Careers in the Digital Sector

LOGOS – NPT College, NPT Council, Swansea University

Delivered east of the region by Neath Port Talbot Council this focuses on the need for enhanced digital skills in the creative industry for pre- and post-16 learners.

- 183 higher skilled individuals gained a qualification.
- 2,320 individuals benefited from increase learning.
- 1 new career pathways opportunities created.

3. Net Zero: How Green was my valley?

LOGOS – Aspire2B

This built a cohort of teachers into a knowledgeable and effective workforce that used digital skills and gaming to train pupils about climate change, the importance of net zero and the opportunities from the circular economy. Delivered in a 'train-the-trainer' style to teachers who then delivered the information back to the classroom.

- 281 higher level qualifications
- Created a career pathway for 8430 pupils.

4. Net Zero Wales Skills

LOGOS – Swansea University

Designed to address the green skill gaps in the private and public sector in manufacturing related industries this pilot also builds knowledge and skills to create career pathways to support Wales in meeting its net zero goals. It was delivered to secondary and post 16 learners with the content tailored to real, everyday working practices.

- 83 higher skilled individuals gaining qualifications.
- 6 new or updated course frameworks developed.

Success of Destination Renewables Pilot

LOGOS – Pembrokeshire College, EDF Renewables UK DP Energy, Blue Gem Wind, Bombora Wave and Ore Catapult

The first pilot to be approved, this unique pilot brought together students in Pembrokeshire from 5-19 years old, along with companies in the renewable energy sector to create an industry led framework on Blue-Green Energy. Taught by Pembrokeshire College, Milford Haven Secondary School and Ysgol Harri Tudur it educated learners about renewable energy including wave, tidal, solar and offshore and onshore wind, helping to prepare them for a job in the sector.

- 1,350 individuals taught.
- 30 higher skilled individuals gained qualifications.
- 2 new career pathways opportunities created.
- 3 new or updated course frameworks developed.
- Won 3 industry accredited awards.
- Finalist for 3 other industry accredited awards
- Rolled out and in delivery in 4 other colleges (NPTC Group of Colleges, Falmouth Marine School, Chelmsford College and Colchester Institute)
- In discussion for roll out with 2 other colleges

Tim Berry, Lecturer on Designation Renewables in Pembrokeshire College said, “A truly exciting time to be spear heading the transition to renewable energy; it's not just a necessity for the planet's future, but an opportunity for innovation, growth and long-term job resilience for this region. With a rich energy sector heritage, of strategic importance, embracing 'Destination Renewables' is the key to a sustainable and affordable future”.

PJ Gallacher, a learner on Destination Renewables said “This course has opened my eyes to the incredible potential of renewable energy. It's not just about the technology; it's about how we can help transform our local community and help the planet. The interactive lectures and real-world applications make the learning process so much more engaging and meaningful. I'm excited to be part of this shift towards a sustainable future.”

Success of Low Carbon Net Zero Awareness Raising Pilot

LOGOS - Cyfle

Cyfle, a leader in providing building skills and apprenticeships, has successfully completed its pilot project, collaborating with regional schools and colleges to raise awareness of net zero and low carbon technologies within the construction sector. Closely linked with several City Deal projects its aim was to address the urgent need for carbon reduction in the construction industry by delivering industry-relevant carbon reduction training.

By the end of the project, Cyfle had equipped individuals with the skills necessary to meet the growing demand for expertise in this area and superseded its targets. Key achievements included:

- 1,124 individuals gained additional skills.
- 157 people were helped into apprenticeships.
- 30 pupils engaged with additional skills.

- 164 individuals supported into jobs.

A learner from Coleg Sir Gar said, “I think it’s a great idea that businesses come in to talk about their business because it expands my knowledge and gives me an understanding of their aims for the future”.

Abigail Salini, Thermal Earth said “It’s really important for us to attend local colleges to educate students about renewable technology. Going through the apprenticeship it educates the apprentice about the renewable technologies available and that they can implement in their workplace as well as establishing what can affect the later on in life through climate change.”

Campuses

This project focuses on growing and improving the Sports Technology and Medical Technology sector through three interlinked projects across two sites in Singleton and Morriston in Swansea and creating a sector focused network of expertise.

Find out more about Campuses

This Swansea based project will deliver:

- **1,120 jobs**
- **2,000 sq. metres** of Sports Tech and Med Tech research and innovation space
- **700 sq. meters** centre for commercial and academic collaboration
- A network of over **300** cluster companies
- Over **100** innovation and commercial opportunities
- **£150 million** contribution to regional GVA

Key Milestones and Achievements:

- Willmott Dixon announced as the contractor for the Life Sciences facility at Sketty Lane following a successful procurement and tender process. Initial discussion and early planning meetings took place.
- Public consultation event held for Sketty Lane to engage with the local community and address any concerns and answer questions.
- Launched the National Network for Innovation In Sport and Health (NNIISH) (see In Focus piece).
- Former Wales Rugby international Alun Wyn Jones announced as a Strategic Advisor for NNIISH.
- Continued to work with the Digital Infrastructure project and Vodafone on the 5G Innovation Fund project which has secured £1.5m Digital Infrastructure programme funding.
- Continued to progress with the Agor Skills Sport Health and Well-being pilot project which successful secured £150k of Skills and Talent programme funding.
- Attended the 4th eRegion City Centre Conference in Swansea and took part in a panel discussion on Innovation in Sport and Health in the region.
- Accelerate Healthcare Technology Centre, a project within Swansea University engaged with Campuses and the Pentre Awel project to bring together expertise on innovation and collaborative opportunities in life science.
- Headline sponsors of the Sports Technology Awards 2025 held in London in April 2024.
- Built strategic partnerships with key organisations in target sectors including Ospreys, Sports Wales, Vodafone and Hockey Wales.

Key Milestones for 2025/26:

- Submit planning, approve planning and begin construction for Sketty Lane development.
- 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.

In Focus: The Launch of NNIISH

In July 2024, the Campuses project launched the National Network for Innovation in Sport and Health. The dynamic community is dedicated to advancing innovation in sport, health, and wellbeing and will connect sport-tech and med-tech experts to accelerate the development of solutions in this sector. The network is growing rapidly with members including Vodafone, and also a range of SMEs, healthcare professionals and sporting bodies, all with the shared goal of improving sport and wellbeing in Wales and beyond.

Members can join the network virtually to enjoy the benefits of collaboration with other network members, and there is also events and webinars, as well as access to Swansea University's community of academics and facilities, and local health board professionals. Members can also connect on-campus by hot-desking or renting office space at Swansea University or Morriston Hospital.

Siôn Charles, A Regional Collaboration for Health (ARCH) Head of Strategy and Service Planning said “ARCH is proud to be supporting the network, which promotes innovation, enterprise and research growth across the region. I’m looking forward to developing collaboration projects to build on regional expertise in life science, well-being and clinical innovation to help prevent ill-health and develop better treatments and improved quality of life”.

Joe Charman, Co-Founder of Imersifi said “Working with the network and being located on campus adds great benefit to the team at Imersifi. We regularly meet with academics and get the chance to showcase our technology to a wider audience. It also makes the technology more accessible to students so we can develop and deploy educational experiences to courses more efficiently.”

Pembroke Dock Marine (PDM)

This project aims to establish world class marine energy and engineering, fabrication and testing facilities to grow the low carbon economy through four headline projects.

Find out more about Pembroke Dock Marine

Based in Pembrokeshire, PDM is anticipated to deliver:

- 1,881 jobs
- 60,600 sq. metres of physical infrastructure
- 1,000 MW contribution to decarbonisation targets
- £343.3 million contribution to regional GVA

Key milestones and achievements:

Pembroke Dock Infrastructure (PDI)

- Official opening ceremony to mark the completion of PDI which includes a supersized slipway and workboat pontoons, extensive laydown space and the renovation of the Sunderland Hangar Annexes into offices and work space. Deputy Prime Minister Angela Rayner, Prif Weinidog Eluned Morgan and the Secretary of State for Wales, Rt Hon Jo Stevens MP attended the opening event. (see In Focus piece).
- Welcomed new customers to use the new workboat pontoons and to the Hangar Annexes.
- Hosted several investor delegation visits
- Hosted the Global Underwater Hub (GUH) supply chain event for the Welsh subsea supply chain to engage directly with GUH and discovered how their extensive resources, networks, and industry insights can benefit subsea operations.
- Held regular commercial property open days to promote new Hangar Annex facilities.

Pembrokeshire Demonstration Zone (PDZ)

- Celtic Sea Power (CSP), as third-party manager for the PDZ continued to build advocacy on the back of credible evidence for broadening the zones lease from a wave and tidal energy site to also include offshore wind and hydrogen technologies.
- Its proximity to Celtic Sea lease areas, the industrial capability and capacity including Pembroke and Port Talbot make it a strong candidate to deliver commercial scale test site for the UK, which if realised could significantly contribute to regional growth from offshore wind innovation and delivery.
- Leverage investment and collaborate to progress PDZs mission:
 - Provided £70k funding to CSP's collaborative Milford Haven: Energy Kingdom (MHEK), which leveraged £1.44m of funded activity from Innovate UK, Wales and West Utilities and private sector funding from Dolphyn Hydrogen. MHEK will help develop engineering design for a commercial investment into the PDZ using ERM's Dolphyn Hydrogen technology. ERM is the world's largest specialist in sustainability consultancy.
 - CSP were the architects of the Subsea Soundscape Project and supported Offshore Renewable Energy Catapult (OREC) to secure funding from the Offshore Wind Growth Partnership. £150k of funding has leveraged a further £350k from the fund and will provide baseline environmental data for the PDZ and wider Celtic Sea.

Marine Energy Test Area (META)

- Tests concluded at various META sites including:
 - Dale Road and East Pickard Bay: PEBL (Welsh a Welsh environmental monitoring organisation) deployed novel remote environmental monitoring stations and successfully completed the trials of remote monitoring stations.
 - Criterion Jetty: ERM Hydrogen Barge deployed.
- The Coasting into Marine Energy schools project was launched in the previous financial year in conjunction with the Skills and Talent programme, Lloyds Register Foundation and the Port of Milford Haven where 5 groups of learners from Pembrokeshire put forward an idea for a tests or experiment linked to Marine Energy. Groups from Gelli Aur School and Fenton County Primary School developed ideas to create microhabitats for hard structures which were presented to experts. These ideas were

tested with an experiment in META, and pupils analysed their results. Saundersfoot County Primary also made models of Floating wind platforms and investigated how to improve their stability.

Marine Energy Engineering Centre of Excellence (MEECE)

- Partnered with Celtic Sea Power and University of Exeter to deliver the Subsea Soundscape project. Funded by The Crown Estate, the project will pioneer a new regional approach to monitoring underwater sound in the Celtic Sea to support with future environmental assessments for new floating offshore wind in the region.
- £29k of funding to support delivery of the Hydrogen Port Refuelling project (HyPR 2) led by Port of Milford Haven and funded by the Welsh Government HyBRID SBRI 2.0 Phase 2 programme.
- £23k of funding from Agile Cymru to encourage cooperation across the Irish sea on offshore wind decommissioning and circular economy.
- Attended, exhibited and delivered a supply chain panel session in conjunction with High Value Manufacturing Catapult at Future Energy Wales conference.
- Exhibited in a 2-day Spotlight event in London, attended a Celtic Sea All-Party Parliamentary Group meeting in Westminster and supported the Port of Milford Haven with a presentation to Japan Marine United.
- Won £328k Innovate UK funding under bilateral UK-Singapore programme to deliver the AMBROSIA project demonstrating innovative offshore environmental monitoring technology.

Key Milestones for 2025-26:

- PDI: Continue commercial operations in the workboat pontoons, Hangar Annexes, slipway, and laydown space. Port of Milford Haven will evaluate the business case for lot 3 works.
- PDZ: Celtic Sea Power to secure lease variation from The Crown Estate.
- META: Established as a marine energy test facility, it will conclude its SBCE funding in June 2025. It will strive forward as a fully operational facility attracting next generation devices to Wales for testing and validation.
- MEECE: ORE Catapult will deliver an Environmental Monitoring Innovation Competition, supporting three new technologies to be demonstrated in META. Aim to generate £200k revenue from external funders.

Pembroke Dock Marine – Official opening of Pembroke Dock Infrastructure

In August 2024, PDM achieved a significant milestone with the official opening of the Pembroke Dock Infrastructure (PDI) element of the project. Held in Pembroke Port, the event celebrated the launch of a new, multipurpose green energy and engineering hub for Wales with a focus on innovation and operational efficiency. Guests included Deputy Prime Minister Angela Rayner, Prif Weinidog Eluned Morgan and the Secretary of State for Wales, Rt Hon Jo Stevens MP.

Led by the Port of Milford Haven, this development has delivered new, world-leading port infrastructure in Pembroke Dock which included a supsize slipway and workboat pontoons, extensive laydown space and the renovation of the Sunderland Hangar Annexes into flexible workspace for companies in the green energy sector.

Working collaboratively with META and MEECE and exploring the advances in the potential of the PDZ, the completion of PDI marks a huge step forward in driving innovation and creating new opportunities for industrial growth in the energy and engineering sector. In addition to the successful Celtic Freeport bid the region is starting to attract the attention from global renewable energy investors and developers.

Deputy Prime Minister Angela Rayner said “Pembrokeshire’s long heritage of maritime excellence is leading the way for the future of the UK with the launch of this Pembroke Dock Marine programme. This is a major step towards us becoming a world leader in zero-carbon marine engineering and tackling climate change for a cleaner, greener, more ambitious future for us all.

And a future where we see our bold ambitions on growth and jobs for and with every part of the UK go hand in hand with our ambitions on Net Zero and sustainable energy.”

Pentre Awel

Pentre Awel combines world-class medical research, business development facilities, community healthcare, assisted living and a state-of-the-art leisure and aquatics centre, to support and encourage people to lead active and healthy lives.

Find out more about Pentre Awel

This Carmarthenshire based project will deliver:

- **1,853 jobs**
- **50,000 sq. metre** development across all four zones
- **20,000 sq. meters** of business, research, education, clinical, leisure and community facilities within Canolfan (Zone 1).
- **80 businesses** established and supported within life sciences, health and social care sectors.
- **£467 million** contribution to regional GVA

Key milestones and achievements:

- Zone 1 officially named as Canolfan.
- Canolfan construction work progressed which included the completion of the external envelope and transition to internal mechanical and electrical services, ceilings, floors, partitioning and fit-out activities. Internal works are now well advanced and centred on final finishes, decorations, fixtures and fixings.
- March 31st 2025 marked week 113 of construction works onsite.
- Hywel Dda University Health Board signed an Agreement to Lease for its health and research space at Canolfan.
- Footpath to the north of the lake completed which created a 1.38km of walk/cycle path around the lake.
- Arup commissioned as the landscape architect to undertake RIBA Stage 1 design development of the green space to the north of the site and work completed.
- Contracts awarded to Nest EV and Sustainable Energy Group for EV charging operator and Chase Services Group for site security.
- BREEAM design stage certificate issued with a score of 75.7% achieving BREEAM “excellent”.
- Bouygues UK has:
 - Exceeded its contractual commitment of 4,680 person weeks of targeted recruitment and training. It achieved a total of 5,205 person weeks to date, inclusive of 67 apprentices, 76 new entrants; 32 trainees; 11 work experience placements and 8 graduates.
 - Interacted with 817 school pupils and delivered 213 hours of school’s engagement. A second cohort of primary and secondary school pupils are participating in a real-world learning project and have been tasked with designing Zone 2 nursing home or Zone 4 wellness hotel. The project was runner-up in November’s Welsh STEM awards.
 - Four Community Newsletters issued, and four Resident Surgeries held. Community and Public Engagement events also held in Morfa, Antioch and Selwyn Samuel centres in Llanelli.
 - 75% (£54m) of Zone 1 construction spend has been retained in Wales with the use of Welsh subcontractors and suppliers, maximising the value of the Welsh pound.
- Zone 2 design brief prepared for the nursing/residential home and extra care unit which will provide a clear masterplan, programme, cost plan and concept design for the zone.
- Competitive dialogue in progress to identify a preferred development partner/operator for the Wellness Hotel in Zone 4.

Key Milestones for 2025-26:

- Opening of Zone 1 and transition of Llanelli Leisure Centre to Pentre Awel.
- Deliver programme of fit-out works to health and business spaces and secure tenants.
- Conclude competitive dialogue exercise for Wellness Hotel in Zone 4, identifying a preferred development partner/operator.
- Confirm feasibility of assisted living accommodation in Zones 2 and 3 following initial concept designs.

In Focus - Net Zero in Construction

Bouygues UK, the principal contractor building Pentre Awel, has worked with its sub-contractors and supply chain through the 24-month build to achieve net zero on the construction stage.

This includes:

- Over 90% reduction on direct emissions of all fuels on site
- 10% reduction in waste production and energy and water consumption.

Resulting in a saving of over 450 tonnes of carbon emissions.

The project has implemented energy, waste and resource-saving initiatives including:

- Adopting sustainability-certified hydrotreated vegetable oil (HVO) as fuel. This initiative will be rolled out to all Bouygues UK sites across the UK.
- Sourcing recycled and green materials.

24 specific initiatives were targeted to help reduce emissions, waste and energy which included:

- Solar-powered site office and CCTV cameras.
- Source recycled building materials including reinforced bars with 98% recycled content and structural steel with 80% recycled content.
- Soil from the surface during excavating taken to a local recycling facility to be segregated, treated and reused.
- Partnership with Gaia to identify, monitor and reduce power consumption using AI and sensors. Energy savings using Gaia is 47.9%
- A carbon consultant to identify low carbon solutions, monitor waste, carbon and deliveries and upskilling the workforce on climate and environmental topics.

Peter Sharpe, Project Director at Pentre Awel, said “We are immensely proud of this achievement. As well as building a state of the art, top quality facility, as a project team we set our minds to reducing as much of our carbon emissions as possible. We set out a plan and I’m so pleased to say that we have achieved it.

“This would not have happened had it not been for the determination and support of not only the Bouygues UK staff here at Pentre Awel, but also our amazing sub-contractors and supply chain partners who came with us on this net zero journey.”

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.

Find out more about Supporting Innovation and Low Carbon Growth

This Neath Port Talbot based programme will deliver:

- **1,320** jobs
- **18,500** sq. metres of floor space created for the low energy sector.
- **£10** million Property Development Fund
- **45** enterprise contribution to supported research.
- **4** patents registered for products
- **£93** million contribution to regional GVA

Key milestones and achievements:

Overall:

- Civic partner on the UKRI Place Based Impact Accelerator Account 'Switch to Net Zero Buildings' ensuring research is aligned to the net zero economy.
- Led on the Supporting Businesses in Neath Port Talbot / Meet the City Deal Event held in Margam Park which welcomed over 75 attendees.

Bay Technology Centre (BTC)

- Continues to secure private sector investment and tenants to support jobs and economic growth.
- Occupancy rate at 75% capacity and Heads of Terms to be signed imminently with two further companies, taking the rate up to 85%.
- High Value Manufacturing Catapult taken occupancy with a suite of rooms which will provide an opportunity for Welsh based organisations to access the wider Catapult network.
- Strategic partnerships office established for use by UK Shared Prosperity Fund innovative strategic projects to increase the interaction with existing tenants.

South Wales Industrial Transition from Carbon Hub (SWITCH)

- Planning permission secured for the facility on Harbourside.
- Awarded an additional £8.2 million funding from UK Government to support more than 100 jobs as part of the UK Governments £80 million Tata Steel Port Talbot Transition Board fund. This additional funding announcement was made during a visit by UK Government Secretary of State for Wales Jo Stevens who learnt more about the project.
- Planning permission approved in February 2025
- Heads of Terms for Lease in development for approval by Swansea University and NPT Council

Advanced Manufacturing Production Facility (AMPF)

- Land purchase secured for the Advanced Manufacturing Production Facility to allow project to progress.
- 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

- Ongoing discussion with academia, industry and key stakeholders to develop the scope and delivery model of the facility to ensure alignment with the innovation ecosystem of the region.

Property Development Fund (PDF)

- Round one - The three projects that were shortlisted commenced on-site work,
- Round Two - Three projects are currently going through the application process.
- The PDF is currently oversubscribed. In 2024- 25 PDF projects secured £1,037,789.00 of private investment and is projected to exceed its £5.5m target by the end of the project.

Hydrogen Stimulus Project (HSP)

- Private and public sector hydrogen project developments underway at the University of South Wales (USW) Hydrogen Centre site at Baglan Energy Park, which have led to further opportunities to optimise the hydrogen refuelling station configuration on site.
- USW are finalising the engineering approach and will be inviting tenders for installation of the additional electrolyser.
- Opportunities explored to see how the technical scope of the H2 Stimulus project and the switch to Net Zero Buildings project can complement each other.
- Further exploration of hydrogen vehicle options is being explored with NPT Fleet Management as well as other regional fleet operators.

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.
- Upgrade to the Automatic Urban and Rural Network (AURN) monitoring station completed.

Low Emission Vehicle Charging Infrastructure (LEV)

- NPT Zero Emissions Vehicle Infrastructure Strategy document approved by NPT Cabinet.
- A valleys-based case study exploring solutions for on-street electric vehicle charging is being progressed.
- Hosted finishing point of the GreenFleet EV Rally of Cymru during Wales Climate Week.

Key Milestones for 2025-26:

- **BTC:** Continue to market facility to attract tenants until building is fully occupied. There is a pipeline tenants at various stages of signing Heads of Terms agreements.
- **SWITCH:** Ground breaking event and start work on-site expected Summer 2025
- **AMPF / National Net Zero Skills Centre of Excellence:** Develop a detailed scope and operations model aligning to the regional innovation ecosystem.
- **PDF:** Project completions for Round 1 applications and project approvals for the Round 2 projects.
- **AQMP:** End of project report with on-going monitoring.
- **HSP:** Develop a business case for hydrogen vehicles.
- **LEV Charging infrastructure:** Continue regional coordination work, maximise LEV related funding opportunities, progress on-street charging case study.

In Focus: Corryn Biotechnologies take up space at the Bay Technology Centre

In June 2024, Corryn Biotechnologies Ltd, a medical technology company that was founded to help with complex wounds moved into the Bay Technology Centre. Corryn have created a medical device which applies a polymer dressing to a wound, and the dressing gets absorbed, so does not require removal. They already have a client base in the UK and Europe.

Corryn, a spin-in at Swansea University, quickly outgrew their space in the University due to rapid growth. They approached Neath Port Talbot Council to find them suitable space in the county and the award-winning Bay Technology Centre was selected as the ideal facility due to its convenient location and flexible space.

They initially set up a manufacturing laboratory consisting of one office and one lab but quickly grew to include an additional laboratory as well as a state-of-the-art clean room manufacturing facility. They now occupy 141sq meters at the Bay Technology Centre. The expansion is also supported by the UK Shared Prosperity Fund.

Luke Burke, Co-Founder and Director of Corryn Biotechnologies Ltd said "The Bay Technology Centre has been instrumental in Corryn Biotechnologies' growth and development, providing a fantastic space and support to develop our world-first medical technology right here in South Wales."

Swansea City Centre and Waterfront Digital District

This project focuses on driving economic growing in Swansea through five key elements – Swansea Building Society Arena, hotel development and space for business to grow at 71/72 Kingsway, the Innovation Matrix and the Innovation Precinct.

Find out more about Swansea Waterfront

The Swansea based programme will deliver:

- **1,281** jobs
- **10,684** sq. metre facility for digitally focussed businesses
- Over **50** opportunities and space for graduate start-ups
- Over **10,000** training weeks across the construction of Swansea Building Society Arena, 71/72 Kingsway and the Innovation Matrix
- **£669.8** million contribution to regional GVA

Key milestones and achievements:

Swansea Building Society Arena and Hotel

- Nearly 750,000 visitors have been to the since its opening in March 2022 and key highlights for the last 12 months included:
 - Sell out performances from Rhod Gilbert, Jimmy Carr, Sarah Millican, BBC National Orchestra of Wales, Bowling For Soup, and Paul Smith.
 - Events including the Child of Wales Awards, Maggie's Christmas Extravaganza fundraiser and 4theRegion's "It's Your Swansea" Conference for a 4th year running.
 - 17 graduation ceremonies including Swansea University and UWTSD, with approximately 22,500 attendees.
 - Creative learning activities (workshops and tours) for 2,500 attendees and creative learning events (live-streamed coffee shop sessions and main stage sessions) for 3,000 attendees
 - Over 1m impressions on live-stream acoustic performances in the coffee shop, featuring emerging artists from South Wales.
- Swansea Building Society signed as a Naming Rights Partner and the name was officially changed to Swansea Building Society Arena.
- Peter Lynn & Partners signed as a Creative Learning Sponsor to strengthen the core outreach arm of the business.
- Hotel developer options reviewed following six expressions of interest, and heads of terms negotiated with the preferred developer.

71/72 Kingsway

- Full practical completion of the construction work from Bouygues UK, with a formal hand over back to Swansea Council. The handover was celebrated with an event (see In Focus piece).
- Two tenants announced - TUI and IWG, taking up to 27,000 square feet of the building.
- Majority of the remaining office space under offer and the Council is in advanced discussions with several other tenants, some of which are new to Swansea.
- Discussions are ongoing with an occupier for the retail/food & beverage units fronting onto the Kingsway.
- Internal fit out progressed and building signage in place.
- Savills appointed as the Managing Agents for the premises and mobilisation taking place.
- Vodafone completed ducting from Copr Bay to the Kingsway and fibre connections finalised.

Innovation Matrix:

- Celebration event to mark the official opening of the building (see In Focus piece).
- Building fully occupied subject to final legal contracts.
- Tennant Management Board established.
- University's INSPIRE team relocated to the building to support in developing appropriate and lasting partnerships with tenants.

Innovation Precinct:

- Continued discussions with the University and Swansea Council around the development of a market appropriate delivery model.

Key Milestones for 2025-26:**Swansea Arena and hotel:**

- Continue to host a schedule of programmes with over 200 events during the year including Greg Davies, Manic Street Preachers, Paw Patrol Live, Jason Manford and Wet Wet Wet.
- Anticipated to welcome the 1 millionth visitor since opening.
- Appoint hotel development partner and work towards planning and design.
- Finalise Heads of Terms agreement with the hotel developer.
- Finalise the planning application for the hotel.

71/72 Kingsway:

- Complete tenancy agreements to lease the first, second and fourth floors.
- Complete internal tenant fit outs and welcome tenants to the building.
- Official opening ceremony, bringing together everyone involved in the project to celebrate its success.
- Complete work on the public areas of the building including the external garden area called Mowbray yard, named after the former Project Manager.

Innovation Matrix:

- Continue to market facility to maximise tenant occupancy and ensure that the building operating model is enabled to promote lasting and sustainable tenant partnerships with the University.
- Continue to market facility to secure tenants until building is fully occupied.

Innovation Precinct:

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

In Focus: Swansea Waterfront – Official opening of the Innovation Matrix

In March 2025, the University of Wales Trinity Saint David (UWTSD) officially opened the Innovation Matrix through a celebration event which marked the completion of the cutting edge 2,200 sq.m facility in Swansea's SA1 Waterfront. The event was attended by representatives of the Welsh and UK governments, civic leaders, and industry partners, including Rebecca Evans, MS, Cabinet Secretary for Economy, Energy and Planning, Welsh Government, Dame Nia Griffiths, DBE, MP, Parliamentary Under-Secretary of State, Wales Office, UK Government and Councillor Rob Stewart, Swansea Council Leader.

The building was developed by Kier Construction who secured £6 million worth of contracts for Wales-based businesses during the construction process.

Designed to drive digital innovation, entrepreneurship, and industry collaboration, the Matrix is situated alongside the university's existing IQ and Y Fforwm buildings. It has already attracted nine businesses to its high-quality working spaces, creating a dynamic cluster with the added benefit of direct access to UWTSD's expertise and research.

Dame Nia Griffith, MP, said

"It's great that UK Government funding, through the Swansea Bay City Deal, has contributed to building this wonderful facility. Our key mission, as set out in our Plan for Change, is economic growth. The Innovation Matrix will provide space for established businesses to grow and new businesses to start up, creating jobs in the high-tech industries of the future."

Cabinet Secretary for Economy, Energy and Planning, Rebecca Evans, said

“We want Wales to be at the forefront of innovating new technologies that drive meaningful change in society and benefit people in their day-to-day lives. This exciting development will nurture a first-class ecosystem for digital innovation and enterprise that can be a catalyst for economic growth and prosperity. It is a testament to the excellence partnership working can deliver for regional economies in Wales and is another step forward on our journey to a stronger, fairer, greener future.”

In Focus: Swansea Waterfront – Official handover and first tenants announced for 71/72 Kingsway.

In February 2025, Bouygues UK, the contractor building the Kingsway development officially handed the premises back to Swansea Council ahead of the fit out. A handover event was held and attended by representatives of the Welsh and UK Governments, local councillors, and developers. Guests including Rebecca Evans, MS, Cabinet Secretary for Economy, Energy and Planning, Welsh Government, and Torsten Bell, MP for Swansea West were hosted by Councillor Rob Stewart, Swansea Council Leader and Swansea Council Cabinet Members.

The first two tenants were announced during the event – International Workplace Group (IWG) Plc and TUI, accounting for over 2500 sq.m meters of the building.

IWG, a flexible workspace provider will be taking up 1850 sq.m meters at the building, and once in operation plan to rent out space to businesses.

Travel and leisure company TUI are also taking approximately 650 meters. Currently based in Alexandra House, the TUI contact centre employees will move to the new development, helping retain jobs in Swansea Centre.

The majority of the remaining space is also under offer, with advanced discussions happening with a number of tenants that will be new to Swansea.

Wayne Berger, IWG's UK CEO, said

"IWG is looking forward to working closely with Swansea Council to deliver a best-in-class workspace for the Swansea business community. IWG's Spaces brand at 71-72 Kingsway will be an amazing asset for businesses of all sizes in the city, providing first class facilities on their doorstep as well as access to a global network of thousands of workspaces worldwide."

Neil Swanson, TUI UK&I Managing Director, said

"We're excited about the move for our contact centre employees in Swansea. The 71/72 Kingsway building has a real 'wow' factor and aligns with our approach on sustainability. Every aspect of space, facilities and layout at the building has been meticulously planned to create an exceptional work environment that supports the well-being of our teams."

Yr Egin

Canolfan S4C Yr Egin is a digital and creative hub located in Carmarthen. The iconic centre boasts an auditorium, superfast connectivity, state-of-the-art office and hotdesking spaces along with post-production facilities for professionals and a varied programme of training and community activities.

Find out more about Yr Egin

This project, based in Carmarthen, Yr Egin will deliver:

- **427 jobs**
- **363 sq. metres** of workspace
- **150** skills and training opportunities
- **167** construction workplace employment opportunities
- **£89.5 million** contribution to regional GVA

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

Key milestones and achievements:

Phase 1:

- Over 50,000 attendees for performances, workshops, masterclasses, cinema and live events since opening 6 years ago.
- 100% office space occupancy with tenants including Atebol, Carlam, Moilin, Rural Office, S4C, Stiwdiobox and Theatr Cymru.
- Winners of the Careers Wales Award for Best Promoters of the Welsh Language in the Workplace for their outstanding contribution.
- Programmes made and broadcast from Yr Egin include Busnes Bwyd (Captain Jac), Only Foals and Horses (Carlam), News at 6 and News at 10 (BBC), Jonathan (Afanti) and S4C @ 40 (Orchard)
- Creative West Wales network series of events, engagement programme and promotion of the creative industries developed across 5 counties.
- Community Outreach programme that included Creative Clubs for children and young people and digital platform Shwmae Sir Gâr (digital reach of 185,000+) successfully delivered.
- Regular exhibition of independent and Made in Wales films with collaboration with WOW Film Festival, Cardiff Animation On Tour and Iris Film Festival.

Phase 2:

- UWTSO continued to engage with the Local Authority to ensure that delivery model for Egin 2 is relevant to the needs of the creative sector marketplace.

Key Milestones for 2025-26:

- Progress with planning for Phase 2.

Phase 1:

- Further develop the expanding hotdesking community, which currently includes Libera Agency, Cwmpas, Trywydd and freelancers.
- Remain a high-quality destination and host for conferences and meetings, with increased use of in-house facilities and expertise that provide high-quality livestreaming.
- Continue to grow the independent cinema provision available to audiences in our area with support from Film Hub Wales.
- 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.
- Continue to engage with schools and further education colleges to provide workshops and experiences that enrich the Curriculum for Wales and understanding of the available pathways available in the creative industries.

In Focus: Current Tenants

Carlam

Carlam is a production company which was established in 2017 by Euros Morgan, a graduate of UWTSO. The company employs 15 staff and freelancers and produces content for S4C, BBC One & BBC Radio Cymru as well as several corporate companies and charitable organisations globally.

Euros Morgan, Director at Carlam explains how being located at Yr Egin was crucial in providing networking opportunities to grow the company.

“As soon as I was based in Yr Egin, I found that I was meeting other businesses, some corporate and some production companies, just by being in the midst of people and naturally bumping into them. If you’re arranging meetings by email, you can be waiting for weeks or months. Here you can bump into commissioners in passing and say ‘hello’, this can lead to a chat which turns into an opportunity. There is a community here, there’s no telling who comes in and conversations happen naturally.”

“Yr Egin has succeeded in bringing the community in. It’s managed to be open and accessible, opening the door to people who in the past might have felt the media industry was not for people like them”.

Carlam hope to continue to develop and grow the company at Yr Egin, providing more employment opportunities in the local area.

Rural Office Architecture

Rural Office is an award-winning architecture, strategy and research company with 11 employees. The company developed the concept design for Yr Egin building and became a tenant in 2022, taking up one of the larger commercial units.

The office space they occupy within Yr Egin offers their staff a creative environment, which they consider to be important to the type of work they do. Remote working is not really a viable option for this creative business and therefore having a modern, professional work environment is very important to them.

Rural Office feel that being located in Yr Egin supports their staff members and being in a creative environment with likeminded companies makes a big difference in the company’s ability to retain staff.

The shared location spaces, including communal meeting areas and the café, mean that businesses working in different spaces often end up having informal discussions with each other; discussions which sometimes result in mutually beneficial information, advice and contacts being exchanged that would not otherwise be shared.

Niall Maxwell, Founder of Rural Office said

“There’s a real creative energy within the place which really helps us and our staff to be more creative ourselves. The centre provides a collegiate environment for tenants which creates a sense of identity, so you as a tenant feel like you are part of something bigger than your own business. This environment also leads to a natural level of engagement and information sharing between tenants”.

Martha's Story

Social Media and Marketing Apprentice,
Homes As Power Stations Project

After studying for a degree in Media and Journalism at Cardiff University for 3 years, Martha joined the Homes As Power Stations project as a Social Media and Marketing Apprentice for 2 years. Her role involves helping with the social media and marketing for the project, which includes creating graphics, press releases, organising and attending events and updating social media channels.

Martha hopes that through this apprenticeship opportunity she will develop essential skills and fantastic experiences to gain an understanding of the marketing sector and how to create successful and impactful marketing campaigns. She has started to achieve this by being able to work with a huge range of people within the industry and in other complementary sectors.

"I would encourage anyone thinking about applying for an apprentice opportunity to do so, and research the different sectors you are interested in before applying. There are so many great apprenticeships around that allow you to work directly with people in sectors you are interested in, and you'll receive hands on experience whilst getting paid! An apprenticeship is a great way to enter the workforce as you are guaranteed to have a good support network around you that will teach you everything you need to know".

Businesses at the Heart of SBCD Infrastructure

To date five key SBCD infrastructure projects have been completed and are in operation across the region, accommodating over 40 companies. These are Yr Egin, Bay Technology Centre, Swansea Building Society Arena, Innovation Matrix and the PDM Hangar Annexes.

Both 71/72 Kingsway and Pentre Awel are due to open in 2025-26 and have already started to attract tenants into the spaces prior to their official opening.

Tenants across the Portfolio include:

Yr Egin (16 companies)

- **S4C** – Anchor tenant at Yr Egin. National TV channel of Wales, broad casting over 100 hours of Welsh language programming per week.
- **Rural Office** – An award-winning practice with a reputation for delivering considered architecture, strategic thinking and research. Investing in research into the built environment with specific interest in rural Welsh context.
- **Asset Finance Solutions** – An expert in the field of corporate finance/asset finance. Works across all sectors specialising in the professional, agricultural and renewable energy fields.
- **Carlam Ltd** – A multi-skilled and ambitious production company eager to adapt to the changing challenges of the television and media industries.
- **Atebol** – A multi-media award-winning publishing and digital company, publishing ground breaking and imaginative titles for people of all ages. Provides professional translation, editing and proofreading services.
- **Arts Council Wales** – Working with artists to present and exhibit the arts to reach as many people as possible. They also research ways to protect and sustain creative activities in Wales.
- **Optimwm** – A digital production company providing specialist services creating digital content for a variety of platforms such as virtual 360 experiences, promotional films, learning resources and apps.
- **Moilin** – Develop highly creative digital solutions using cutting edge technologies. Primarily developing solutions for tourism, events, media and education sectors utilising the latest immersive technologies to identify new ways of learning and storytelling.
- **Captain Jac** – An independent production company excel at producing documentaries and factual programmes from fly on the wall series to historical documentaries for a variety of broadcasters including BBC Four, BBC Three, S4C, Discovery Channel and Animal Planet as well as creating video content for corporate clients.
- **Theatr Genedlaethol Cymru** – A national touring theatre company that puts Wales and its people on the map ensuring a bright future for the Welsh language and culture.
- **Police Pass** – A provider of e-learning, face to face training and textbooks to help inspectors and sergeants pass their examinations.
- **Urdd Gobaith Cymru** – A national voluntary youth body with over 55,000 members. Providing opportunities for children and young people to enjoy experiences through the medium of Welsh.
- **Stiwdio Box** – Offering bilingual services that inspire, engage and educate audiences in the use of the latest digital and broadcast technology. Specialising in radio production, podcasts, event hosting, digital content, voiceover production and talent, audio books and online workshops.
- **Twrrw Ltd** – Sound recording and music publishing activities.
- **Trywydd** – One of Wales' leading translation companies which include written translation, editing and proofreading, simultaneous translation and equipment hire.
- **Stiwdio Steff** – Steffan has over 20 years of experience working in the media industry, including working on all genres from programmes and live music broadcasts to documentaries and children's programmes.

Bay Technology Centre (14 companies)

- **Corryn Biotechnologies Ltd** – A med tech company that was founded to help with complex wounds. (See In Focus piece)

- **High Value Manufacturing Catapult** – Part of the Innovate UK Catapult Network of industrial research and innovation centres that link research, business and government to develop technologies that can help achieve digital and sustainability goals.
- **Promaterial Ltd** – Providing high-performance UK-supplied magnets with recycled materials.
- **AilArian** – Facilitating the recycling of electronic waste without the use of highly toxic chemicals.
- **Opergy Energy Ltd** – Delivering expert services and solutions across the energy, infrastructure, engineering, transport, digital and low carbon technology sectors.
- **SWS Certification Services Ltd** – Skilled designers, engineers and certification experts who deliver excellence in aircraft interiors approvals.
- **Iyris Technology** – Pioneering Agricultural Climate Technology company that develops innovative technologies to enable sustainable commercial farming in hot climates worldwide.
- **SolutionsDX Ltd** – Providing diagnostic and digital health solutions to improve early detection of control of infectious diseases like tuberculosis and HIV.
- **Health Tech Services Group Ltd** – Leading innovator in the healthcare industry. It adapts cutting-edge technologies such as facial recognition, artificial intelligence, and machine learning to provide comprehensive solutions for safeguarding vulnerable adults.
- **Winfield Energy UK** – Specialists in solar energy projects including ground mounted solar farms, industrial and commercial rooftop solar arrays, and car park solar canopies.
- **McCann & Partners Ltd** – Specialists in providing a full range of building services associated with Mechanical, Electrical and Public Health Engineering Systems.
- **TrueCommerce Netalogue** – Helping businesses to improve supply chain performance to drive better business outcomes.
- **NPT UK Shared Prosperity Fund (SPF)** – NPT Council's office for UK SPF staff, providing business with information and support with applications for funding.

Swansea Building Society Arena (2 companies)

- **Ambassador Theatre Group (ATG)** – Entertainment operator, bringing world class entertainment including musicians, comedians and performing arts shows to the Arena.
- **The Green Room Bar and Kitchen** – Food and beverage operator serving breakfast, brunch and lunch during the day and a pre-gig venue in the night. Sustainability is at the heart of its ethos and produce is sourced locally.

Innovation Matrix (10 companies)

- **Kaydiar Medical** – Medical start-up company developing orthotic technology for wound prevention.
- **BroadReach Integrity** – Manufacturer of cutting-edge corrosion detection scanners.
- **Rockfield** – High end technology company provide leading edge, numerical based simulation systems coupled with their industrial applications.
- **Gwyr Films** – Not-for-profit storytelling initiative promoting Welsh arts and culture.
- **IDNS** – Digital solutions provider transforming collaboration and engagement.
- **Wolfestone** – Leading provider of end-to-end language services, helping businesses communicate across global markets.
- **Visit Digital** – Specialists in harnessing the power of business data, providing clients with actionable insights and tailored strategies that enable faster, better-informed decision-making.
- **Purus** – Maritime services provider supporting offshore wind and low-carbon energy.
- **ATiC** – Provider using the latest User Experience and Usability Evaluation facilities to support prototyping and rapid development of new health technologies.
- **Forever Mortal** – Innovative award-winning platform built to preserve online family stories and memories once a person has passed away.

Governance Structure

Jonathan Burnes, Swansea Bay City Deal's Portfolio Director

“Good progress has been made across the SBCD Portfolio and governance structures are in place and robust to inform progress and challenges that delivery partners are experiencing. The co-ordination and communication remains a high priority, where we will continue working with all partners and our wider stakeholders to maximise opportunities for South West Wales and the SBCD.”

The SBCD is one of four City and Growth Deals in Wales which are overseen by the Welsh Cities and Growth Deals Implementation Board. This is a joint UK Government and Welsh Government Board with overall responsibility for the City and Growth Deals in Wales.

The Swansea Bay City Deal has a robust governance structure in place to ensure open, transparent and effective Portfolio management.

The Portfolio Management Office (PoMO) Team

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

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

Financial Update

The overall investment position of the Portfolio is estimated to be £1.374bn over its 15-year life cycle, as summarised below. Total SBCD investment from all sources was £536.68m, of which £132.86m was private sector investment at the end of the financial year 2024/25.

The economic climate during construction and operational phases continues to present Portfolio delivery challenges. Several macroeconomic factors, including availability of resources and recruitment, energy prices, construction costs, inflationary pressures, the COVID pandemic, and the war in Ukraine have resulted in delivery variance and escalating cost pressures over the last five 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 2024/25 financial year, the SBCD invested £98.25m 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 2025-29.

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 2024/25 from the Welsh Government and UK Government, releasing the seventh annual draw-down of City Deal funding. This has taken the total drawdown to £176.6m 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.

Business Engagement

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

“The ESB have continued to use their specialist knowledge and expertise to support SBCD Portfolio delivery. It has been a pleasure to participate in workshops on topics such as Business Engagement and Supply Chains with the SBCD projects. These interactive activities provided the opportunity to meet the project staff and to be able to network with them.

This past year has seen good progress with project delivery, and it has also been a pleasure to represent the Board at the opening of Pembroke Dock Marine Pembroke Dock Infrastructure (PDI) project and the opening of the Innovation Matrix.

The Board members had a very informative, if somewhat wet and blustery, visit to Pentre Awel in December to see how Canolfan was progressing. It is always amazing to see these projects come off paper and out of the ground, and we look forward to seeing Canolfan, Innovation Matrix and PDM thriving and busy when in full operation.

The ESB continues to be part of the ongoing arrangements for the Private Sector Board supporting Corporate Joint Committee and we look forward to seeing how the Board will be incorporated into that structure, including broadening expertise from sectors important to economic development priorities that will support wider and strategic regional working. We will continue to engage in the process as it develops.”

Private sector investment

Leveraging private sector contributions to support programme and project delivery remains one of the SBCD’s highest priorities. To date, over **£132.8m** 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 2024/25 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.

Business engagement workshop

One of the planned activities in the SBCD Communications, Marketing and Engagement Implementation Plan was the facilitation of a cross-portfolio business engagement workshop, to developing more effective business engagement that leads to impactful outcomes for the coming years. See In Focus piece.

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.

Achievements to date

Working with the business sector the SBCD Portfolio has achieved:

- **35,246** additional skills and **119** new course frameworks delivered through the Skills and Talent programme.
- **£44.34m** private sector funding leveraged through the Digital Infrastructure programme reported in 2024/25.
- **1,078** of the **10,300** Homes as Power Stations homes have been delivered leveraging **£83.6m** of investment. This includes circa **£16.23m** private sector costs for new build homes and retrofit schemes. In addition, a further **£17.4m** of investment has been leveraged in the delivery of the project.
- **250+** contracts awarded to Welsh based companies worth over **£133m**.
- **6** projects completed, in operation and monitoring with a value of £210m

- **19** projects in build or delivery with a value of £761m
- **14** projects in pre-delivery with a value of £403m

In Focus: Business Engagement Workshop

The successful workshop was held in June 2024 in the Beacon, Llanelli and attracted 19 participants across 6 of the SBCD projects and programmes. Chris Foxall, the Chair of the ESB guided the workshop and other board members attended and participated. Jill Davies from the Circular Economy Innovation Communities (CEIC) project, was an independent facilitator leading the activities. The workshop was split into four exercises.

The key objectives were to:

- Identify effective business engagement practices that positively impact on the SBCD Objectives.
- Create a business engagement process model.
- Scope potential for future SBCD engagement events

In the first exercise the groups discussed what they hoped to achieve from business engagement, with the outcomes being:

- Build networks, collaborations, and relationships.
- Raise awareness/profile of projects and programmes.
- Develop supply chains.
- Achieve effective press coverage / media and social media interest.
- Promote opportunities and support.
- Create a business engagement process model.

In the second exercise participants discussed who they are trying to engage with and how? They also discussed what methods are working and which aren't working? Ideas were shared and methods were ranked to help identify areas of focus.

Exercise three was a brainstorming activity which attendees were tasked with thinking as an individual and then combining ideas to work as a team. This proved the value of group thinking, with many more ideas considered compared to individual contributions.

In the final exercise the groups worked together, discussing how business engagement could be improved. They considered more adventurous possibilities not yet being used.

Key outcomes from the workshop:

- There is no one-size-fits-all approach to engagement.
- Project teams would like more activities/workshops of this type.
- Participants welcomed the opportunity to engage with the ESB.

Marketing and Communications

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

- Developed and launched a new City Deal website, working with Llanelli based Tinint. New pages including project and programme information, meet the team, latest news, about us, governance and a resource library. See In Focus piece.
- Commissioned and produced a City Deal animation. Working with Swansea based Eco-Works the animation explains how the City Deal funds benefit businesses and residents across the region. Content and design have been finalised and completed videos to be launched in Q1 2025-26. See In Focus piece.
- Updating the Portfolio Communications and Marketing Plan, Implementation Plan, protocols and guidelines and events planner.
- **229** mentions in local and national press including online and printed titles, across all projects and programmes. This included **110** different press releases in **67** different media titles.
- **18,098** Facebook post impressions, **1,018** followers, **120** published posts and **262** clicked links.
- **12,817** X post impressions, **1,479** followers, **120** published posts and **298** clicked links.
- Ministerial Visits from UK Government and Welsh Government to the following projects: Pembroke Dock Marine, Innovation Matrix, 71/72 Kingsway, Homes as Power Stations and SWITCH.
- Attendance and exhibition space at 21 events including Welsh Business Show, Welsh Construction Show, 4theRegion City Centre Conference, Marine Energy Wales Conference and Green Economy Conference and a Careers Event in Gower College Swansea.
- Partnership working with key communications contacts at partner organisations and at the other Welsh City and Growth Deals.

In Focus: Marketing Workshop

A Marketing and Communications workshop was held in October 2024 in the Beacon, Llanelli and attracted 12 participants across 8 of the SBCD projects and programmes. Jon Burnes and Peter Austin from the City Deal PoMO facilitated the workshop, which involved three main exercises.

The key objectives were to:

- Raise importance of communicating the overarching SBCD messages.
- Understand current practice/approaches that are used and share ideas.
- Outline key milestone for the next 12 months and determine key messages arising from the milestones.
- Shape the Portfolio Communications, Marketing and Engagement Implementation Plan including the Portfolio key messages.
- Provide an opportunity for Marketing and Communications contacts to interact and build relationships with each other and develop a Community of Practice to maximise opportunities across the Portfolio.

In the first exercise the groups discussed the different stakeholders they communicated with and what methods they used. The power and influence matrix were updated and included in the Communications, Marketing and Engagement Implementation Plan.

In the second exercise, participants discussed with each other the key messages their projects and programmes would be communicating over the next 6 months.

In the final exercise, the groups looked at their own project and programme key messages and put together key messages for the SBCD Portfolio to use during the next year.

The workshop was very well received with:

- 86% satisfied with the overall workshop.

- 86% satisfied with the topics covered.
- 86% satisfied with the group activities.
- 71% wanted more events of this type.

A participant said, “I welcomed hearing about what marketing activity the other projects have coming up and how they're going about it. I also enjoyed the opportunity to network with the various teams. I found the workshop very useful and productive”

In Focus: Website Upgrade

The SBCD Portfolio website had become outdated and was on an unsupported version of its Content Management System. Working with Llanelli based supplier Tinint, the website has been rebuilt and is more informative, easier to navigate, and has a more modern look and feel.

Working closely with the SBCD programme and project teams, the new website now contains more detailed information about the City Deal and its projects and programmes than the previous site. This includes enhanced sections for:

- About us:
 - Meet the Portfolio Office and Meet the project teams.
 - An enhanced description of Portfolio governance, with links to Joint Committee and Joint Scrutiny minutes
 - The three SBCD themes and how the projects and programmes contribute to each.
 - Awards, celebrating the achievements of the City Deal project teams.
- Projects - Easier navigation to project pages, up to date narrative and images, separate pages at project level and team members photographs.
- Resources - New section giving easy access to documents such as the Annual Reports, Statements of Accounts and relevant strategies.
- Case Studies - New section featuring case studies of interest including apprenticeships, events, etc.
- Opportunities - New section signposting to rental opportunities, supplier Opportunities and events.
- Contact Us - New section for interested parties to contact the PoMO directly from the website.

The website is updated regularly with news articles and other content as it becomes available.

In focus: Animation

One of the most common questions asked at events and when networking is “how does the City Deal benefit me?”

Working with Swansea based supplier Echoworks, the PoMO produced a short animation, which explained the City Deal and how the headline £1.3bn flows into the region, and how it benefits people – residents and businesses.

Starting with the question “How does it benefit me?” the animation runs through sections which describe what the City Deal is, who the partners are and how the funding flows from the Governments to the region and on to construction and operation. It also describes the wider benefits of education, skills, improvements in digital connectivity and green/wellbeing initiatives.

The animation closes with the strapline “Creating our future together”.

The animation has been produced in four formats, allowing it to be used on websites, at events etc.

1. English voice over
2. Welsh voiceover
3. English subtitles
4. Welsh subtitles.

Events

Events play a major role in promoting the City Deal to attendees as well as exhibitors. Event attendance has led to new contacts being made, enabled relationship building, collaboration and raised awareness of the SBCD Portfolio activities to a wide range of audiences.

The PoMO have arranged or exhibited at 21 events throughout the year, including:

Event	Date	Location
Neath Port Talbot Meet the City Deal Event	April 2024	Margam Park Orangery, Port Talbot
SWWRCF Briefing Event	April 2024	Parc y Scarlets, Llanelli
4theRegion	May 2024	Pembrokeshire, Narberth
The Welsh Business Show	May 2024	Cardiff City Stadium, Cardiff
The Welsh Construction Show	May 2024	Cardiff City Stadium, Cardiff
University of Wales Trinity Saint David Industry Open Day	May 2024	SA1 Campus, Swansea
Regional Learning and Skills Partnership Keep Contracts Local Conference	May 2024	Parc y Scarlets, Llanelli
Digital Infrastructure Event	May 2024	Swansea.com Stadium, Swansea
Swansea Bay City Deal Business Engagement Workshop	June 2024	The Beacon, Llanelli
The Welsh Business Show	July 2024	Parc y Scarlets, Llanelli
4theRegion Carmarthenshire	July 2024	Yr Egin, Carmarthen
Business Expo Supply Chain Event	September 2024	Swansea Arena, Swansea
4theRegion Neath Port Talbot	September 2024	Margam Park Orangery, Port Talbot
Swansea Bay City Deal Marketing and Communications Workshop	October 2024	The Beacon, Llanelli
The Welsh Business Show	October 2024	Swansea.com Stadium, Swansea
The Welsh Construction Show	October 2024	Swansea.com Stadium, Swansea
4theRegion Green Economy Conference	November 2024	Swansea Arena, Swansea
Gower College Apprentice Recruitment Event	February 2025	Ty Coch Campus, Swansea
HAPS Stakeholder Engagement Event	February 2025	Botanical Gardens, Carmarthen
NNIISH Launch Event	February 2025	Swansea University, Swansea
4theRegion Swansea City Centre Conference	March 2025	Swansea Building Society Arena, Swansea

Assurance and Audit

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 undertook its previous strategic review in July 2023. A Portfolio review was not scheduled for 2024/25 due to the roust nature of the SBCD governance arrangements in place. The next review is planned for July 2025.

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

The table below shows the current assurance status across the Portfolio together with the Delivery Confidence Assessment rating (DCA) and the estimated date for the next assurance review.

Portfolio / Programme / Project	Stage	Current DCA Rating	Next Review Date
Portfolio	Gateway 0	Amber / Green	July 2025
Digital Infrastructure	Gateway 0	Amber / Green	June/July 2025
Pentre Awel	PAR / Gateway 3	Amber	October 2025
Supporting Innovation and Low Carbon Growth	PAR	Amber	Sept/Oct 2025
Homes As Power Stations	PAR	Amber	Sept/Oct 2025
Campuses	Gateway 0/3	Amber / Green	TBC 2025
Pembroke Dock Marine	Gateway 0	Amber / Green	2026
Swansea Waterfront & Digital District	PAR	Amber / Green	2026
Skills & Talent	Gateway 0	Green	2026
Yr Egin Phase 2	Gateway 1/2	Green	TBC

Portfolio Gateway 0 Review Recommendations

The 2023/24 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 2024/25. The audit returned a Substantial (Green) rating with 2 recommendations relating to forward financial planning and Service Level Agreements.

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 was prepared to report on progress via SBCD governance, which included alignment to CJC, benefits realisation/evaluation, Portfolio management arrangements, purpose of ESB, role of regional scrutiny, lessons learned and regional opportunities. Five of the areas are complete, five

are in progress, four are on-going and in progress and two are yet to be actioned. The next Audit Wales Review is scheduled for June 2025.

Portfolio Risks and Issues

The PoMO monitors and reports Portfolio risks and issues to Governance Boards on a quarterly basis, providing updates on status and mitigations.

The number of Portfolio risks reduced from 25 to 15 within the year with no new risks identified. The number has reduced due to risks being closed or elevated to issue status.

The total number of Portfolio issues increased from 7 to 8 within the year. Even though some issues have been closed from year ending Q4 2023-24, the overall number has increased as some of the risks have merged with current issues or moved from risk to an issue.

RISKS	2024/25	2023/24
Red	3	5
Amber	2	9
Green	10	11

ISSUES	2024/25	2023/24
Red	3	0
Amber	4	6
Green	1	1

Red Risks	Mitigation
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.
Ability for programmes/projects to deliver all outputs and outcomes within the business cases	Programmes/Projects have populated benefit realisation templates to incorporate into SBCD Governance reporting. Joint Committee have approved an Evaluation Framework. Evaluation Profile review complete Q4 2024/25. Construction Impact Assessment has been modified to assess Risk down to project level to provide confidence of delivery of physical infrastructure outputs across the Portfolio.

<u>Red Issues</u>	<u>Mitigation</u>
Rising construction costs - it has become common knowledge that the construction industry is experiencing rising costs and issues in relation to resource availability.	<p>The SBCD PoMO developed a Construction Impact Assessment in 2022, this document requests information from the Project Leads to provide a current assessment of likely impact on project delivery from issues affecting the construction industry.</p> <p>A new version of CIA has been developed for Q4 24/25. Focusing on remaining 17 Business Case dependant construction projects returns show 1 green / 6 Amber and 2 red with 2 to be confirmed.</p>
In Year Variance	<p>Review of investment components and timelines has been completed in conjunction with the Programme / Project Leads. These reviews have resulted in a more realistic investment forecast which will allow for Quarterly and Annual review and scrutiny to ensure continued progress towards this profile.</p> <p>Variance Position paper drafted and submitted through Governance Boards May 2025.</p>
Variance in delivery of programmes / projects against key milestones	<p>Due to numerous factors, there has been some variance in the original forecast investment, there will likely be some delays in delivery across the Portfolio for various reasons, including, COVID restrictions, postponements in business case submissions and approvals and other factors such as resource and material availability may need to be monitored and mitigated as infrastructure elements move further into delivery. The Portfolio level benefits have now been forecast for the remaining duration of the Portfolio. However, regular review will be required to ensure risks do not become issues and appropriate mitigation measures are adopted by the programmes and projects to meet the delivery commitments of the wider Portfolio.</p>

Lessons Learned

The PoMO has maintained a lesson learned log to share best practice with regional partners since 2020, as delivery provides many valuable experiences and interactions across the region. The PoMO also shares experiences and best practice with other City and Growth Deals across Wales, Northern Ireland and Scotland.

SBCD stakeholders shared 16 lessons learned for 2024/25 covering governance, reporting, collaboration, procurement, finance, networking, communication, resources and benefits.

Feedback is always welcomed on how the SBCD is performing and interacting.

Email: SBCD@carmarthenshire.gov.uk to share your views.

The key lessons and recommendations are summarised below:

Situation	Recommendation
Quarterly Reporting template now streamlined with clear instructions on how to complete in place, however discrepancies over Investment figures due to timing of requests.	Figures now taken from Financial returns. Quarterly meetings in place with Finance Manager and Senior Portfolio Support Officer to ensure figures are accurate and consistent in reports.
Due to the unique structure of the telecoms industry, additional due diligence checks are required during procurement. This can result in lengthy delays in contracting with the selected bidder.	Ensure sufficient time during procurement and contracting phase to allow for such eventualities.
Positive use of Computer-Generated Images (CGI), floor plans and internal flythroughs to raise awareness of business space prior to opening and secure pre-lets.	Continue to use CGI to promote infrastructure.
Holding local drop-in sessions to promote projects to the community received positive feedback. Holding separate sessions in the morning and afternoon worked well.	Use drop-in sessions to engage with community where possible, noting am/pm sessions working well.
Importance of having a deadline date within the Lease Agreement to mitigate tenant impact on the delays to the construction programme.	Consider using deadline date if there are any uncertainties on the length of the construction period. Reduces risk of tenants 'walking away' due to circumstances beyond the landlord's control.
Use of 'Employment Hubs' onsite to help recruit from hard-to-reach groups: NEETS (not in education, employment or training), economically inactive, long-term unemployed), and meet targeted recruitment and training goals.	Work with contractors to promote best practice and innovative ways to reach out to less accessible and hard to reach groups.
Additional resource and budget are required to deliver individual project/programme economic assessments.	Projects to ensure adequate resource and budget is in place to undertake economic assessments.