

Agenda – Economy, Trade, and Rural Affairs Committee

Meeting Venue:

Committee room 4 – Tŷ Hywel
and video conference via Zoom

Meeting date: 26 June 2025

Meeting time: 09.40

For further information contact:

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Committee Clerk

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Hybrid

Private pre-meeting

09.25 – 09.40

Public session

09.40 – 12.40

1 Introductions, apologies, substitutions, and declarations of interest

09.40



2 City and Growth Deals: Panel 3 – Swansea Bay City Deal

09.40 – 11.00

(Pages 1 – 41)

Councillor Rob Stewart, Leader of Swansea Council, Chair of the Corporate Joint Committee for South West Wales, and Chair of the Swansea Bay City Region Joint Committee

Dr Jon Burnes, Portfolio Director, Swansea Bay City Deal

Craig Griffiths, Monitoring Officer, Corporate Joint Committee for South West Wales

Attached Documents:

Research brief

Evidence paper – Swansea Bay City Deal

Break

11.00 – 11.10

3 City and Growth Deals: Panel 4 – North Wales Growth Deal

11.10 – 12.40

(Pages 42 – 133)

Hedd Vaughan–Evans, Head of Operations, Ambition North Wales

Councillor Charlie McCoubrey, Leader of Conwy County Borough Council, and Vice–Chair of the North Wales Corporate Joint Committee (CJC)

Attached Documents:

Evidence paper – Ambition North Wales

4 Papers to note

12.40

4.1 Follow-up to the committee meeting held on 4 June 2025: City and Growth Deals

(Pages 134 – 136)

Attached Documents:

Letter from the Chair to Cardiff Capital Region – 11 June 2025

Letter from the Chair to Growing Mid Wales – 11 June 2025

4.2 International agreements: Amendments to the International Labour Convention on the Recognition of a Safe and Healthy Working Environment as a Fundamental Principle

(Page 137)

Attached Documents:

Letter from the Chair of the Legislation, Justice and Constitution Committee – 12 June 2025

4.3 Scrutiny of the Welsh Government Draft Budget: Consultation with Senedd Committees on documentation supporting Draft Budget scrutiny

(Pages 138 – 141)

Attached Documents:

Letter from the Chair of the Finance Committee to the Cabinet Secretary for Finance and Welsh Language – 16 June 2025

4.4 Welsh Government's response to the Economy, Trade and Rural Affairs Committee report: Legislative Consent Memoranda for the Data (Use and Access) Bill

(Pages 142 – 147)

Attached Documents:

Letter from the Cabinet Secretary for Economy, Energy and Planning – 17 June 2025

- 5 Motion under Standing Order 17.42(ix) to resolve to exclude the public from the remainder of the meeting**

12.40

Private session

12.40 – 13.00

- 6 City and Growth Deals: Consideration of evidence**

12.40 – 12.50

- 7 Feedback from visit to Port Talbot Steelworks Community Support Centre**

12.50 – 13.00

Agenda Item 2

Document is Restricted



Senedd Economy, Trade, and Rural Affairs Committee

**Swansea Bay City Deal
Evidence Pack**

June 2025



1. Progress to date and pace of delivery (including progress made against targets, and any pressures or challenges affecting delivery)

- 1.1. The SBCD Portfolio has a 15-year timeframe between 2017-2033 and has entered its 9th year of delivery in F.Y. 2025/26.
- 1.2. The overall Portfolio estimated investment position is £1.374b, which has an overinvestment of £93m against a revised budget.
- 1.3. Significant progress has been made including the establishment of the Portfolio Management Office in 2020, approval of all 9 outline business cases by December 2021 and successful delivery of several projects.
- 1.4. The Portfolio's success and progress is reflected positively through assurance reviews and audits. The Portfolio has received 3 consecutive Amber/Green Delivery Confidence Assessment ratings through annual Gateway 0 Assurance Reviews. It has also been awarded 4 consecutive Green (substantial) ratings from internal audit, and positive Financial and Assurance & Risk assessments conducted by Audit Wales.
- 1.5. As of Q4 2024/25 quarterly monitoring, key progress highlights across the Portfolio include:
 - **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.
 - **£132.78m** Private Sector investment contribution secured.
 - **£44.34m** of private sector funding leveraged through the Digital Infrastructure programme reported in 2024-25.
 - **79,500m²** of completed floor space across the Portfolio.
 - **46 tenant companies** in-situ or with terms agreed.
 - **35,246** Additional Skills and **119** new course frameworks delivered by the Skills and Talent Programme.
 - **230 FTE** apprenticeship opportunities created or continued.
 - **1,078** Homes as Power Stations homes delivered leveraging **£83.6m** of investment, in addition to another **£17.4m** of public and private sector investment.
 - **To date 300+** construction contracts won, worth over £300m, including **250+** contracts awarded to Welsh based companies worth over **£133m**.
 - Successful launch of the updated SBCD Website - [Home | Swansea Bay City Deal](#)
- 1.6. Tables 1 and 2 below summarise the delivery status of the nine programme / project and their associated business cases for the SBCD Portfolio. Details include anticipated level of investment (£m), Lead Delivery Organisation (LDO), Senior Responsible Owner (SRO) and Project Manager (PM), and project and business case status.

Project / Programme name	Component	Anticipated Investment (£m)	Lead Authority	SRO	Project Lead	Project Status	Business Case Status		
							SOC	OBC	FBC*
Swansea City & Waterfront Digital District	Arena & Digital Square	74.4	Swansea	Martin Nicholls	Lee Richards	Completed			
	71/72 Kingsway	46.06				Completed			*
	Innovation Matrix	18.09				Completed			*
	Innovation Precinct	17.42				Pre-delivery			
	Hotel	19				Delivery			
Creative Digital Cluster - Yr Egin	Phase 1	14.87	Carmarthen	Deborah Williams	Geraint Flowers	Completed			
	Phase 2	10.3				Pre-delivery			
Digital Infrastructure	Connected Places	141.93	Carmarthen	Simon Davies	Rebecca Llewellyn	Delivery			
	Rural Connectivity				Dija Oliver	Delivery			
	Next Gen. Wireless				Gareth Thomas	Delivery			
Skills and Talent	Skills Analysis	30	Carmarthen	Andrew Cornish	Samantha Cutlan	Delivery			
	Career Development					Delivery			
	Frameworks					Delivery			
	Centres of Excellence					Pre-delivery			
SBCD Campuses	Singleton Ph 1	17.4	Swansea	Keith Lloyd	Clare Henson	Delivery			*
	Singleton Ph 2	65.9				Pre-delivery			
	Morrison Ph 1	2.8				Pre-delivery			
	Morrison Ph 2	49				Pre-delivery			
Pentre Awel	Z1 - Canolfan	96.5	Carmarthen	Chris Moore	Alex Williams	Delivery			
	Z2 - Nursing Care & Resi rehab.	25.5				Pre-delivery			
	Z4 - Affordable / Social Housing	12				Pre-delivery			
	Z3 - Bus. Ctr. Expansion.	27.5				Pre-delivery			
	Z3 - Assisted Living	27.5				Pre-delivery			
	Z4 - Hotel	16.9				Delivery			
Homes as Power Stations	Z4 - Open Market resi Housing	12.7				Pre-delivery			
	Adopt Green Tech	127.35	Neath Port Talbot	Nicola Pearce	Oonagh Gavigan	Pre-delivery			
	Monitor & Eval. Prog.	2.25				Delivery			
Regional Supply chain	375.9	Delivery							
Pembroke Dock Marine	PDI	47.7	Pembrokeshire	Rachel Moxey	Mari Williams (Project co-Ordinator)	Completed			
	MEECE	13.4				Delivery			
	META	0.78				Delivery			
	PDZ	5.8				Delivery			
Supporting Innovation and Low Carbon Growth	Bay Technology Centre	8.5	Neath Port Talbot	Nicola Pearce	Lisa Willis	Completed			*
	SWITCH	28.2				Delivery			
	AMPF/NNZSCoE	23.5				Pre-delivery			
	Air Quality Monitoring	0.55				Delivery			*
	Hydrogen Stimulus Project	2				Pre-delivery			
	LEV Charging Infrastructure	0.5				Delivery			*
	Property Development Fund	11.75				Delivery			
SBCD Portfolio	All projects above	1,373.95	Carmarthen	Wendy Walters	Jonathan Burnes	Delivery			

Key
Pre-delivery
Delivery (inc. Procurement/build)
Completed > Operation & Monitoring
* Indicates BC not updated

Table 1. Project status

1.7. The City Deal has made significant progress during 2024/25 towards its benefit targets as more of its projects move into delivery. The table below demonstrates achievement to date relating largely to direct investment and jobs created. Indirect impact is yet to be assessed and reported across the Portfolio.

Swansea Bay City Deal – Portfolio Benefits Summary					
Project/Programme	Original Investment Target as per BC	Current Projected Investment Target (£m)	Total Investment to date (£m)	Total Jobs Target	Total Jobs Created
Swansea Waterfront Digital District	175.28	174.97	133.80	1281	425
Homes as Power Stations	505.50	505.50	101.58	1804	51
SILCG	58.70	74.00	11.32	1335	125
Pentre Awel	202.48	218.60	94.43	1853	77
PDM	60.53	67.68	59.08	1881	77
Digital Infrastructure	55.00	142.23	109.64	0	13
Campuses	130.44	135.18	3.12	1120	9
Skills and Talent	30.00	30.00	7.78	0	2
Yr Egin	25.20	25.17	15.35	427	117
TOTAL	1243.2	1373.33	536.00	9701	896

Table 3. Benefits summary

1.8. The PoMo maintains a rigorous risk and issue monitoring regime to ensure that Governance boards are kept informed of any potential pressures or challenges to delivery. Red risks and issues at Q1 2025/26 are below:

Red Risks
<p>Risk: That increasing cost of construction will impact on budgets set in Programme/Project Business Cases</p> <p>Mitigation: 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.</p>
<p>Risk: Welsh Government (WG) 2021 update of Technical Advice Note (TAN) 15 development risk of flooding and coastal erosion and associated flood planning maps</p> <p>Mitigation: 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.</p>
<p>Risk: Ability for programmes/projects to deliver all outputs and outcomes within the business cases</p> <p>Mitigation: 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.</p>

Red Issues
<p>Issue: Rising construction costs - it has become common knowledge that the construction industry is experiencing rising costs and issues in relation to resource availability</p> <p>Mitigation: The SBCD PoMO devised a construction impact assessment in 2022, this document requests information from the Project Leads to provide a current and accurate picture of the Construction Industry. New version of CIA in place for Q4 24/25. Focusing on remaining 17 Business Case dependant construction projects returns show 1 green / 6 Amber, 2 red and 2 TBC.</p>
<p>Issue: In Year Variance</p> <p>Mitigation: 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. Variance Position paper drafted and submitted through Governance Boards May 2025.</p>
<p>Issue: Variance in delivery of programmes / projects against key milestones</p> <p>Mitigation: 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 in order 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>

1.9. As part of the Q4 2024/25 monitoring process for the red risk and red issue regarding the impact of construction costs, the PoMO maintains a Construction Impact Assessment where programmes and projects have undertaken a risk assessment for elements yet to be delivered:

Programme / Project	Element	Variance (£)	Development Position	Risk status
SILCG	SWITCH	8,000,000	Estimated	Green
	Advanced Manufacturing	4,395,189	Estimated	Amber
	NNZSCoE			Amber
Pentre Awel	Zone 2, Nursing Care and Residential Rehab Unit	3,487,662	Estimated	Amber
	Zone 2, Affordable / Social Housing	1,200,000	Estimated	Red
	Zone 3, Expansion Life Science Business Centre	4,699,166	Estimated	Red
	Zone 3, Assisted Living	5,047,932	Estimated	Amber
	Zone 4, Wellness Hotel	3,102,184	Estimated	Amber
	Zone 4, Open Market Residential	2,300,000	Estimated	Amber
Yr Egin	Phase 2	2,655,219	Estimated	tbc
Swansea Waterfront	Hotel	3,487,662	Estimated	Amber
	Innovation Precinct	3,668,475	Estimated	tbc
Campuses	Singleton Phase 1 Sketty Lane Innovation Centre	4,155,955	Estimated	Green
	Morrison Phase 1 Road Planning		Estimated	Green
	Morrison Phase 1 Refurbishment		tbc	Red
	Morrison Phase 2, Life Science Park		tbc	
	Sketty Lane Phase, 2 Swansea Bay Sports Park		tbc	
	Total	44,949,444		

Table 4 Future project delivery risk assessment

2. Consideration of some of the most significant projects and investments

- 2.1. In 2024-25 financial year, the SBCD invested £97.2m 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.

Digital Infrastructure

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
- 54 sites completed and fully migrated. 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
- 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

Skills & Talent

- 27 approved pilot projects and 6 Skills development projects to date
- 6 pilot projects have been successfully completed with all of them surpassing the set targets
- 230 FTE apprenticeship opportunities created or continued

Supporting Innovation & Low Carbon Growth

- South Wales Industrial Transition from Carbon Hub (SWITCH) awarded an additional £8.2 million , Advanced Manufacturing Production Facility (AMPF) / National Net Zero Skills Centre of Excellence (NNZSCoE) awarded £12.5m funding from UK Government to support more than 270 jobs as part of the UK Governments £80 million Tata Steel Port Talbot Transition Board fund
- The Bay Technology Centre continues to secure private sector investment and tenants to support jobs and growth. Occupancy rate at 85% capacity and Heads of Terms to be signed imminently

Pentre Awel

- Zone 1 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. Zone 1 officially named as Canolfan.
- 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.

Pembroke Dock Infrastructure (PDI)

- Official opening ceremony held August 2024 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 workspace. Deputy Prime Minister Angela Rayner, Prif Weinidog Eluned Morgan and the Secretary of State for Wales, Rt Hon Jo Stevens MP all attended the opening event.

Homes As Power Stations

- 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.

- 19 applications received for Financial Incentives Funds (FIF). This utilises £4.3m of City Deal funding and leveraged 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.

Campuses

- Willmott Dixon announced as the contractor for the Life Sciences facility at Sketty Lane following a review of the tender applications. Initial discussion and early planning meetings took place.
- In July 2024, the Campuses project launched the National Network for Innovation in Sport and Health.
- 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.

Yr Egin

- 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.

Waterfront

- Swansea Building Society Arena - Nearly 750,000 visitors have been to the since its opening in March 2022.
- 71/72 Kingsway - Full practical completion of the construction work from Bouygues UK, with a formal hand over back to Swansea Council.
- Innovation Matrix - Celebration event in March 2025 held to mark the official opening of the building which is currently 100% occupied. 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.

3. Understanding the impact of the deals (including the regional spread of activity)

- 3.1. The SBCD Portfolio has recently developed an Evaluation Framework whereby all Programmes / Projects have committed to economic evaluations. These evaluations will detail the wider impact of the SBCD Infrastructure and development projects and will be reported from 2025/26 onwards.
- 3.2. To date, 6 SBCD infrastructure projects have been completed and are in operation across the region, accommodating over 40 companies. These are:
 - Carmarthenshire, Yr Egin, 16 tenants
 - Neath Port Talbot, Bay Technology Centre, 13 tenants
 - Swansea Building Society Arena, 1 operator, 1 tenant
 - Swansea, Innovation Matrix, 10 tenants
 - Swansea, 71/72 Kingsway, 3 tenants with more to be announced
 - Pembroke Dock, PDM Hangar Annexes, 2 tenants
- 3.3. Working with academia and the private sector the regional Skills and Talent initiative has 27 approved pilot projects and 6 Skills development projects in delivery across the region with 6 pilot projects successfully completed and exceeding the original targets
- 3.4. The Digital Infrastructure Programme is in full delivery with multiple projects mobilised to improve both fixed and mobile connectivity across the region. These include a £1.9m million investment to upgrade 69 public sector sites to full fibre regionwide and building two dark fibre networks valued at £1.3m and £3.5m respectively across Carmarthenshire, Swansea, and Neath Port Talbot to futureproof public sector assets, improve service delivery and support the digital transformation agendas of partners.

The programme has also entered into a £9.87m contract with BT to deliver full fibre to 1533 of our poorest served residential and business premises ensuring those who aren't included in existing commercial plans or public interventions are not left behind. Additionally, the programme facilitates a £2.5m 5G Innovation Fund to support with the costs associated with building 5G infrastructure to accelerate the rollout of 5G, realise its true benefits and foster innovation, enabling applicants to fully exploit the use of IoT and emerging technology.

The Digital Champions funded by the programme in each local authority play a key role in removing barriers and working with industry and key internal teams in ensuring the deployment of infrastructure is as efficient as possible. The region is the first in Wales to adopt this approach which is championed by both industry and government and critical in ensuring existing and forthcoming investments in digital infrastructure are maximised.

The programme continues to ensure an equitable spread of activity and investment across the region adopting a data driven, evidence-based approach to delivery to complement on-going commercial and government interventions, and working with both industry, Welsh, and UK Government to maximise impact and drive economic growth across the region

- 3.5. Over 800,000 people have attended events and performances at Yr Egin and Swansea Arena since opening
- 3.6. SBCD project activity has also leveraged significant funding from other sources.

Project/ Programme	Source	Value
HAPS	UK Government Shared Prosperity Fund Creation of two HAPS Demo Houses	£0.25m
	Microgeneration Certification Scheme (MCS)	£0.08m
	AHRC (Arts & Humanities Council) Transforming Housing and Homes for Future Generations	£4.6m
SILCG/HAPS	Engineering and Physical Sciences Research Council (EPSRC) / UK Research & Innovation Investment	£5m
SILCG	Launchpad, Innovate UK for business-led innovation projects and wrap-around support	£7.5m

	Engineering and Physical Sciences Research Council (EPSRC) Place Based Impact Acceleration Account (PBIAA) funding	£4m
	European Horizon project H2SHIFT funding Led by SNAM of Italy	£3.4m
Pentre Awel	UK Government Shared Prosperity Fund Accelerate Pentre Awel	£0.2m
	UK Government Shared Prosperity Fund Pentre Awel Business Preparedness	£0.3m
	UK Government Shared Prosperity Fund CCC's Actif leisure team aims to invest in community sport and fitness initiatives,	£0.14m
PDM	Welsh Government Legacy funding secured	£0.25m
	Public and Private sector contributions Added value contributions achieved by project partners MEECE, PDZ, META	£1m+
Yr Egin	Economic impact to the Welsh economy in 2022-23	£21.6m
	Economic Impact to the economy of Carmarthenshire in 2022-23	£7.6m
	UK Government Shared Prosperity Fund "TANIO" project, which delivers Creative and Digital Clubs for children	£0.18m
Campuses	HEFCW Swansea University 3G Pitch	£1.45m
	UK Government Shared Prosperity Fund Accelerate Pentre Awel	£0.38m
	SBCD Skills and Talent Agor Skills, Sport, Health & Wellbeing	£0.31m
	Swansea University Floodlighting	£0.13m
	Swansea Council Hockey Stand Swansea University	£0.12m
	Swansea University Modular Changing facilities	£1.2m
	Swansea University Spectator facilities on hockey pitches	£0.04m
	SBCD Digital Infrastructure Swansea University Swansea Bay 5G Innovation Testbed Vodafone	£2.6m
	UK Government Shared Prosperity Fund Swansea Bay Sports Park Feasibility Study	£0.29m
	Ospreys, Swansea University, Women's Player Development Centre (West Wales) Welsh Rugby Union	£0.1m
	Swansea University Consultancy Stakeholder Mapping Engagement and Comms	£0.02m
	Swansea University Consultancy Future Investment Opportunities	£0.02m
	Swansea University Consultancy Service Improvement and Patient Impact	£0.05

Table 5 Extra funding leveraged

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

- **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.
- Extensive networking and awareness raising through attendance and exhibiting 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.

4. Governance and democratic accountability (including the role of Corporate Joint Committees)

4.1. Swansea Bay City Deal Governance Arrangements

4.1.1. Each SBCD programme/project is led by one of the four regional local authorities, as shown in the below table, with each supported by the SBCD PoMO. Of the nine headline projects, three are regional projects being delivered across South West Wales: Skills and Talent, Digital Infrastructure and Homes as Power Stations. The other six projects are placed based but with a regional impact.

Lead Organisation	Programme / Project	Strategic theme
Carmarthenshire County Council	Yr Egin	Economic Acceleration
	Skills & Talent	Economic Acceleration
	Digital Infrastructure	Economic Acceleration
	Pentre Awel (LS &WB Village)	Life Science & Well-being
Swansea Council	Swansea Waterfront	Economic Acceleration
	Campuses Project	Life Science & Well-being
Neath Port Talbot Council	Homes as Power Stations	Energy/Smart Manufacturing
	Supporting Innovation and Low Carbon Growth	Energy/Smart Manufacturing
Pembrokeshire County Council	Pembroke Dock Marine	Energy/Smart Manufacturing

Table 6 project to theme table

4.1.2. The SBCD governance and assurance arrangements have continued to advance with all governance committees established and fully operational. A SBCD Senior Responsible Owner (SRO) was appointed in June 2020 and the Portfolio Director having started in post in March 2020. The establishment of the Portfolio Management Office (PoMO) was completed by November 2020.

4.1.3. Carmarthenshire County Council is the SBCD Accountable Body. Representatives from each of the eight partner organisations are members of the SBCD Joint Committee and Programme (Portfolio) Board, which are the two formal governance groups that report to the regional stakeholders, UKG and WG. Regional advisers from the business community form the basis for the SBCD Economic Strategy Board, with each board and committee supported by the SBCD Portfolio Management Office (PoMO).



Figure 1 SBCD Governance Structure

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

- 4.1.5. Joint Committee (JC):** Chair, Cllr Rob Stewart, Leader of Swansea Council. Comprising of the four regional Local Authority Leaders as decision makers for the SBCR JC. In addition, senior representatives from all eight primary partner organisations. JC holds the Programme (Portfolio) Board and PoMO to account and has overall responsibility for scrutiny and approvals.
- 4.1.6. Economic Strategy Board (ESB):** Chair, Chris Foxall. A private sector advisory body which acts as the voice of business. The ESB provides strategic direction for the City Deal through advice to the Joint Committee on matters relating to the City Region.
- 4.1.7. Programme (Portfolio) Board (PB):** Chair, Wendy Walters, Chief Executive Officer, Carmarthenshire County Council. Responsible for overseeing the operations of the City Deal Programme (Portfolio) Board which receives Portfolio progress updates and reviews risks, issues and changes to business case delivery.
- 4.1.8. Portfolio Management Office:** Robust monitoring and reporting arrangements for SBCD are in place and reflect the good progress that is being made with the Portfolio. There have been positive outcomes from the assurance and audit reviews, and the region continues to have close and productive working relationships with both Governments. Design solutions for several projects will be progressed over the next 12 months, along with developing a plan to undertake key economic evaluations to show the impact the projects have having through their operation.
- 4.1.9. Programme / Project Leads:** Experienced individuals who manage the development of the programme / project Business Cases and implement the Assurance and Approval plan and project plan. Also works with the Portfolio Director and PoMO to apply the Portfolio Development Roadmap. Depending on the size and complexity of the programme / project the Programme / Project Manager will run the Programme / Project Team and manage external advisers.
- 4.1.10. SBCD Senior Responsible Owner (SRO):** Appointed by the Joint Committee, the SRO is also the chairperson of the Programme (Portfolio) Board to champion the SBCD and drive its successful implementation by overseeing portfolio delivery and ensuring that appropriate governance arrangements are in place. The SRO holds the Portfolio Director to account.
- 4.1.11. Joint Scrutiny Committee (JSC):** Chair, Cllr Tim Bowen, Elected Member, Neath Port Talbot Council. The Committee provides advice, challenge and support to the Joint Committee and consists of three elected members from each of the four local authorities.

4.2. South West Wales Corporate Joint Committee (SWWCJC)

4.2.1. Background

- The Senedd Cymru passed the Local Government and Elections (Wales) Act 2021 in November 2021, establishing a new public body for the region to be known as the South West Wales Corporate Joint Committee (SWWCJC). The SWWCJC has three key areas of responsibility:
 - Strategic Development Plans
 - Regional Transport Plans
 - Enhancing or promoting the economic wellbeing of the area (the ‘Economic Wellbeing Function’)
- Formally constituted in January 2022, the SWWCJC covers the local authority areas of Carmarthenshire, Neath Port Talbot, Pembrokeshire and Swansea.
- The SWWCJC comprises representation from Carmarthenshire Council, Neath Port Talbot Council, Pembrokeshire Council and Swansea Council, as well as the Bannau Brycheiniog National Park Authority and the Pembrokeshire Coast National Park Authority (in respect of strategic planning).
- Co-Opted Members have been appointed to strengthen the breadth of experience and skills available to the SWWCJC, to enable local input or to provide for local representation and to

provide specialist expertise on specific issues. They are co-opted on the basis they are non-voting members.

- Regional Learning and Skills Partnership
 - University of Trinity St David
 - Swansea University
 - Hywel Dda University Health Board
 - Swansea Bay University Health Board
 - Chair of Private Sector Advisory Board

- The SWWCJC has also established a Private Sector Advisory Board comprising leading figures in industry. The advisory group serves as a strategic partner to the SWWCJC, offering expert guidance on regional development, transport, economic well-being, and energy. It provides market insights, supports alignment with national and local strategies, and forms task groups to advise on funding opportunities. The advisory board facilitates valuable connections for investment and collaboration, engages stakeholders to identify opportunities and risks, and ensures transparent communication with governance bodies. Additionally, it promotes the region nationally, contributes to strategic planning and investment initiatives, and offers thought leadership on regional and external policy matters

4.2.2. SWWCJC Governance

- The SWWCJC’s Constitution is published on its website at alongside an overview of its Governance Framework
- Details of the SWWCJC’s members and meetings are published on its website and meetings of the SWWCJC open to the public to attend, except where confidential information or exempt information is being discussed.
- The SWWCJC publishes a Forward Plan of the key decisions it intends to make at least 28 days in advance of the meeting and agendas and reports are published at least three clear working days prior to each meeting at which a decision is to be taken, along with how the public can attend or view such meetings.
- The SWWCJC has established several sub-committees to discharge its functions, these are outlined within figure 2. South West Wales Corporate Joint Committee (SWWCJC) Political Structure.



Figure 2. South West Wales Corporate Joint Committee Political Structure

- To facilitate the work programme, a professional structure has been established comprising representatives of the constituent authorities, as outlined within figure 3. South West Wales Corporate Joint Committee (SWWCJC) Professional Structure.

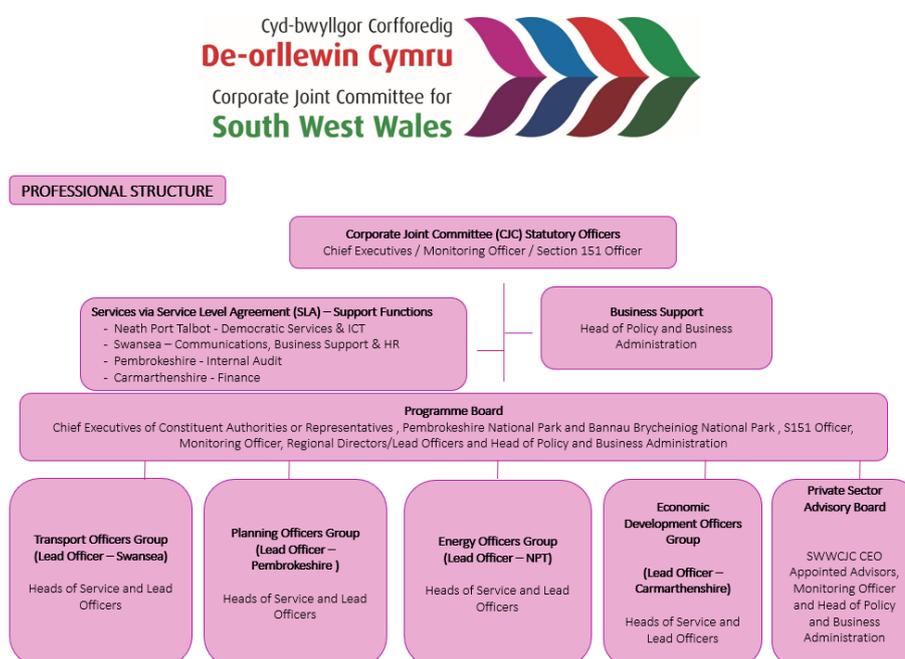


Figure 3. South West Wales Corporate Joint Committee Professional Structure

4.2.3. Alignment of SBCD and SWWCJC

- The SBCD and SWWCJC are two significant initiatives aimed at driving economic growth and development in the region. Officers are currently exploring ways to ensure that the key obligations of both arrangements are met through effective collaboration and integration of efforts.
- The SWWCJC has been focusing on finalising its governance arrangements and corporate plan. This includes ensuring effective oversight of public funds and compliance with statutory duties. The SBCD, on the other hand, has been working on monitoring and evaluating its Portfolio, including developing alternative economic metrics for project interventions. Officers are looking at aligning these governance frameworks to streamline oversight and reporting processes.
- Primacy for the City Deal resource review process rests with the SBCD, but as part of this review it is recognised that further collaboration between the SBCD and the SWWCJC is a strategic move to ensure that the key obligations of both arrangements are met. Given that these are two programmes of work focusing on economic development, it is important that in the interests of efficiency and to ensure financial resources are allocated in the appropriate way. It is necessary to make decisions as to the future role, structure and funding arrangements that will support the SBCD over the remainder of the programme, and accordingly ways in which the SWWCJC and SBCD can work in closer alignment. By aligning governance frameworks, integrating strategic plans, streamlining funding processes, and enhancing communication, officers are working towards a unified approach to regional development. This collaborative effort is expected to drive economic growth, improve public services, and create a sustainable future for the region.
- The conclusions of the review will be brought to a future SBCD and SWWCJC for determination.

5. Availability of private sector investment

5.1. Programme/Project Financial Forecast Summary

- The SBCD Programme and Project teams remain confident that the private sector contribution to the SBCD remains viable and achievable over the portfolio duration
- Leveraging private sector contributions to support programme and project delivery remains one of the SBCD's highest priorities. £132.87m of private sector investment has been secured at the end of the financial year 2024/25 with forecasts in coming years to achieve our £600m+ Portfolio target
- Following a financial reprofile in Q3 2023/24 the Business Case forecast for private sector contributions was **£636.56m**
- The current (Q4 24/25) private sector investment forecast is circa **£719.97m** which indicates a **£89.4m** increase over the Q3 23/24 reprofiled target.
- This is circa **£83m** over the original Portfolio target of **£637m**.

5.2. Table 7 below summarises the latest private sector contribution forecasts for the nine headline business cases at Q4 2024/25:

Project/ programme	Private sector status	Private sector target £m	Actuals (Yr 1-6) £m	Actuals 24-25 £m	Forecast 25-33 £m	Forecast Total £m	Supporting narrative
Digital Infrastructure		27.06	90.57	0.00	6.50	97.07	Stimulating additional investment and Commercial contributions to project and partner deployments i.e SRN, Accelerating and facilitating upgrade and roll out of 4G/ 5G, UK & Welsh Gov
Homes as Power Stations		375.90	1.47	14.75	359.68	375.90	RSL and Private developer build costs for new builds. Home owners and private rental sector contribution for retrofits. Match funding to grant schemes.
Skills and Talent		4.00	1.44	2.82	7.30	11.55	Value of Apprenticeships and industry contributions for pilot projects.
Campuses		57.43	0.82	0.37	60.98	62.17	Investor and tenant contributions, fit out and rental plus sectoral collaborations
PDM		17.09	17.76	0.11	2.66	20.53	PoMH capital contribution, berthing fees, rental income
Pentre Awel		108.20	0.00	0.00	110.10	110.10	None for Zone 1 build. Tenant commissioning and rentals going forward
SILCG		5.50	0.00	1.04	6.22	7.25	Match to property development fund
Swansea Waterfront		33.90	1.00	0.25	32.65	33.90	Hotel build, ATG fit out of Arena, Rental income from Kingsway
Yr Egin		1.50	0.36	0.12	1.02	1.50	Tenant contributions and rental income
Total		630.57	113.42	19.45	587.10	719.97	

Table 7 private sector contribution summary

5.3. In the final quarter FY 2024/25 progress of note includes:

- The **Digital Infrastructure** programme is reporting a further **£44.3m** return on investment for 2023/24, now totalling circa **£90.6m**.
- The Pembroke Dock Marine (**PDM**) project has secured **£13.9m** from Milford Haven Port Authority plus a further **£3.09m** from project partners.
- The **Skills and Talent Initiative** has secured **£1.79m** private sector contribution from 230 apprenticeships and is delivering 25 approved pilot projects with a projected **£2.46m** of in-kind and financial contributions.
- **Homes As Power Stations (HAPS)** is has delivered **1,078** of the 10,300 HAPS homes target, 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 public and private sector investment has been leveraged in the delivery of the project.

6. How the activities of the City and Growth Deals fit within the wider business support landscape (including the Welsh Government's review of business support, and whether there are any opportunities for greater collaboration or coordination with Welsh Government activity)

6.1. The Swansea Bay City Region benefits from a broad ecosystem of organisations offering financial, advisory, innovation, and networking support to businesses. The business support ecosystem in South West Wales includes:

- Government-led programmes: Business Wales, Sell2Wales, Regional Engagement Teams
- Investment support: Development Bank of Wales, Foreign Direct Investment (FDI) initiatives, British Business Bank and independent investment companies.
- Business organisations: Federation of Small Businesses (FSB), The Institute of Directors (IoD), South West and Mid Wales Chambers of Commerce
- Local authorities: Economic Development Units in Swansea, Carmarthenshire, Neath Port Talbot, and Pembrokeshire
- Academic partners: Swansea University, University of Wales Trinity Saint David (UWTSD)
- Network groups: Local and sector-based business forums including Swansea Bay Business Club, SA1 Business Club, 4theRegion
- Third-sector entities: Cwmpas, supporting co-operatives and social enterprises
- National innovation bodies: Innovate UK, including Catapult Centres

6.2. The SBCD PoMO work closely with the Portfolio Lead Delivery Organisations, sharing opportunities, contacts and enquiries. Maintaining good relationships with WG and UK gov business support teams especially Business Wales and Sell2Wales, and with financial bodies such as Development Bank of Wales and British Business Bank helps to identify opportunities and potential for collaborative ways of working. The PoMO also work closely with Innovate UK and the Catapult network to identify opportunities that may be beneficial to Portfolio delivery.

6.3. The Investment fund for the SBCD is a capital fund pre-allocated to the 9 headline programmes and projects and as such the Portfolio has limited ability to financially support businesses directly. Within the programmes and projects some elements can provide direct financial support to businesses:

- Skills & Talent via the pilot project programme
- HAPS via the Supply Chain and Incentive funds
- SILCG via the Property Development Fund

6.4. However, although the region benefits from strong business support networks, feedback suggests that improvements in visibility, integration, and usability are needed to maximise the impact for all business types. Simplifying the landscape and creating more intuitive access points will be key to enabling inclusive and sustainable regional economic growth.

6.5. Key Strengths:

- Strong institutional presence and diverse support offer.
- National and regional backing for innovation and investment.
- Active business networks and support from Chambers, FSB, and third-sector partners.
- Universities act as innovation and talent anchors.

6.6. While the support infrastructure is comprehensive, businesses often face challenges in accessing and navigating services. These include:

- Fragmentation across support offers and overlapping roles.
- Uneven visibility and accessibility across counties.
- Complexity of funding and innovation application processes.

6.7. Potential solutions to the current situation could be:

- Developing a Regional 'One-Stop-Shop' to provide a unified business support portal (digital and physical) for all local, regional, and national services. This resource could also act as the regional inward investment portal and could lead on regional marketing opportunities
- Enhance outreach and engagement to target underrepresented groups, rural businesses, and sectors unfamiliar with formal support, including engagement with microbusinesses and rural entrepreneurs
- Simplify Processes, streamline grant, loan, and tender application workflows; consider tiered guidance for new vs. established businesses.
- Strengthen Integration and foster greater collaboration between universities, local authorities, and business groups.
- Establish Feedback Mechanisms and regularly gather and act on business feedback to improve responsiveness and performance.

North Wales Growth Deal Progress Update

September 2023 – June 2025

Table of Contents

Foreword	3
Introduction	4
Background	4
Ambition North Wales	4
North Wales Growth Deal	4
Growth Deal Programmes.....	5
Summary of key activities.....	6
Growth Deal key activities.....	6
Agri-food and Tourism Programme.....	6
Digital Connectivity Programme.....	6
Innovation in High Value Manufacturing Programme.....	7
Land and Property Programme	7
Low Carbon Energy Programme.....	8
Portfolio.....	8
Social Value	9
Corporate Joint Committee.....	10
Draft Regional Transport Plan	10
Strategic Development Plan	10
Investment Zone.....	10
Regional Skills Partnership	11
Shared Prosperity Funding.....	12
Strategic Energy	13
Priorities and work in progress.....	15
Governance and Resources.....	15
Growth Deal Delivery.....	15
Growth Deal Reserve List	16
Regional Skills Partnership	16
Investment Zone	17
Key risks and issues	18
Conclusions	19
Appendices.....	19

Foreword

This report provides an overview of our progress since attending the last committee meeting on 13th September, 2023. The report outlines our progress in implementing the transformative North Wales Growth Deal along with the other complimentary activities undertaken by Ambition North Wales over this period. The Growth Deal a 15-year agreement with the Welsh and UK Governments—to sustainably develop North Wales and enhance economic, social, and environmental well-being.

We want North Wales to thrive at every level and compete on a global scale. This gives us a chance to build resilience, retain our talented young people and offer them jobs that can provide them with the standard of living they deserve.

The challenging economic and financial climate in recent years has significantly affected the speed at which capital projects can be delivered. The Growth Deal aims to address the failures in our economy by working together collaboratively across the partnership alongside Governments and the private sector in North Wales to overcome the hurdles and deliver these challenging projects together.

Our ambition through these transformational initiatives remains unchanged – they will bring new high-value jobs and investment as well as deliver on our wider aspiration to build a vibrant, sustainable, and resilient economy for North Wales.

Ambition North Wales have 4 projects in delivery, and another 6 have full business cases approved and will move into delivery once the necessary agreements are in place. The first project to move into delivery was the Digital Signal Processing Centre at Bangor University who are now entering year 4 of delivery. The Enterprise Engineering and Optics Centre was our first construction project into delivery and has completed the construction on the Plas Coch site. The refurbishment at the Henfaes site of the Centre for Environmental Biotechnology Plus project is now complete. The Tourism Talent Network project will see the construction and launch of private sector partner infrastructure during 2025.

Whilst we are disappointed by Governments decision not to award the annual funding drawdown of funding for the second consecutive year, we continue to work closely with Welsh Government and UK Government to increase the pace of delivery on the Growth Deal. We have carried out a review of Growth Deal projects, and a reserve list of projects is now in place.

We recognise that our vision for North Wales was developed a number of years ago, and plans are in place to refresh our vision in the context of the Corporate Joint Committee and the current economic climate.

Our progress reflects the strength of North Wales as a region and the resilience of the Ambition North Wales partnership. We are confident in our ability to seize opportunities, tackle challenges, and work towards a sustainable and prosperous future for our communities.

Introduction

This report provides an overview of key activities since Ambition North Wales last reported to the Senedd's Economy, Trade, and Rural Affairs Committee on the 13th of September, 2023. This report covers:

- Background
- Summary of key activities delivered
- Priorities and work in progress
- Roadmap for project business case development and delivery
- Key risks and issues
- Conclusions
- Appendices

Background

Ambition North Wales

The North Wales Economic Ambition Board partnership was established in 2012 to develop a regional approach to economic growth and to address the challenges and barriers facing the North Wales economy and operated under the Ambition North Wales brand name. The partnership covered the six local authority areas of North Wales comprising the councils of Gwynedd, Anglesey, Conwy, Denbighshire, Wrexham and Flintshire. The partnership also included Bangor University, Wrexham University, Coleg Cambria and Grŵp Llandrillo Menai.

The Portfolio Management Office, established to deliver the Growth Deal, delivers the strategic and operational activity of Ambition North Wales with a team of Programme and Project Managers delivering projects across a diverse portfolio, supported by a wider team of officers.

On 1st April 2025, the responsibility for delivering the Growth Deal transferred from the Economic Ambition Board to the North Wales Corporate Joint Committee. The Corporate Joint Committee comprises of the six local authorities and the Eryri National Park Authority and has new responsibilities for regional transport and strategic planning as well as a responsibility to enhance and promote the economic well-being of North Wales. The Corporate Joint Committee agreed to adopt the brand of Ambition North Wales.

The governance of the Growth Deal is now overseen by the Economic Wellbeing Sub-Committee of the Corporate Joint Committee. The Economic Ambition Board is still referred to in this update in relation to decisions taken before 1st April 2025.

North Wales Growth Deal

The North Wales Growth Deal is a tri-party agreement, signed in December 2020 between Ambition North Wales, UK Government and Welsh Government and has secured funding of £240million from Governments to invest in the North Wales economy as part of the £1bn deal.

The aim of the Growth Deal is to build a more vibrant, sustainable, and resilient economy in North Wales. Building on the region's strengths to boost productivity and tackling long term challenges and economic barriers to deliver inclusive growth. The approach is to promote growth in a scalable, inclusive, and sustainable way in line with Wellbeing of Future Generations (Wales) Act 2015.

The Growth Deal aims to bring over £1 billion of investment to North Wales in order to generate over 4,000 new jobs and increase GVA by £2.4 billion. The UK and Welsh governments have committed to jointly investing £240 million capital over a 15-year period, with the remainder leveraged from private and public sources.

The desired outcomes of this investment are to be delivered through the delivery of a portfolio of five separate programmes which:

- build on our regional strengths in manufacturing and low carbon energy
- target digital innovation and infrastructure to better connect the region
- invest in key sites and premises for the developer market
- enable innovation to boost productivity
- support our key industries in tourism and agriculture to develop for the future

Growth Deal Programmes

The five Growth Deal programmes are:

- Agri-food and Tourism,
- Digital Connectivity,
- Innovation in High-Value Manufacturing,
- Land and Property
- Low Carbon Energy.

Summary of key activities

This section summarises the key milestones, and outcomes delivered since Ambition North Wales last presented to the Committee in September 2023.

Growth Deal key activities

Here's an overview of the investment, jobs and business case approval position as of 12th of June 2025:



Agri-food and Tourism Programme

- The Outline Business Case for the Tourism Talent Network project was approved in October 2023, with Grŵp Llandrillo Menai leading the initiative. This was followed by Full Business Case approval in September 2024, securing £4.43 million of Growth Deal funding and unlocking a total investment of £19 million. The project officially launched in 2024, with the aim of developing a resilient, skilled, and future-ready workforce for the region's tourism and hospitality sectors. Zip World and Portmeirion were confirmed as initial spoke partners. In June 2025, Theatr Clwyd was announced as the latest spoke partner, contributing a wide range of training opportunities across visitor experience, arts and cultural tourism, and hospitality. These include areas such as marketing and communications, duty management, sales, events coordination, and roles within Theatr Clwyd's new hospitality and catering provision. The National Trust and Snowdonia Leisure and Hospitality have also joined the project, further strengthening its delivery and regional impact.
- The **Responsible Adventure** project led by Zip World had its Outline Business Case approved by the Economic Ambition Board in February 2024. The project is a major initiative aimed at promoting sustainable tourism, driving economic growth and delivering environmental benefits. As part of the Business Case approval the Board set three specific requirements for the company to address prior to presenting a Full Business Case, Zip World have successfully addressed the recommendations, and work is now continuing on the Full Business Case and a Change Request.
- In February 2025 the Economic Ambition Board approved a project change request for the **Glynllifon Rural Economy** project to include a state-of-the-art Rural Economy Hub, Sustainable Dairy Development and Sheep Milk Wales into the project. Along with an agri-tech aspect, linking all three elements in order to deliver high level technical skills and a technology base – which will be available to Agri businesses in the region.

Digital Connectivity Programme

- The Business Justification Case for years 2 and 3 of the **Digital Signal Processing Centre** project have been approved by Ambition North Wales. The current phase of the project involves increasing engagement to pursue

commercial research with regional businesses and installation of a 5G private network to demonstrate the technology's benefits to businesses.

- The **4G+** Outline (15th March 2024) and Full Business Case (11th April 2025) were approved. The aim of the project is to tackle long standing mobile coverage challenges across key locations and to maximise economic benefits for the region. Four interventions will address a range of opportunities including a regional telecoms forum, improving access to publicly owned infrastructure for operators and grant funding to directly enhance 4G network coverage and capacity.
- The **Advanced Wireless** Outline Business Case was approved by the Economic Ambition Board in September 2024 with the Full Business Case due to go the Economic Well-Being Sub-Committee in July 2025. The project will deliver a grant scheme to support private and public sector users adopt advanced wireless technologies such as 5G, sharing a similar scope to the UK Wireless Infrastructure Strategy and the UK 5G Innovation Regions Programme.
- The **LPWAN** Business Justification Case was approved by the Economic Ambition Board on 19th July 2024. It will deliver accessible and cost effective low power wireless connectivity to support users adopt Internet of Things applications. Following approval, the procurement of the hardware has been prepared and participating councils have developed plans to host the network using council owned premises. A further project will now support farm businesses trial the use of the new network to achieve business benefits and promote the technology.

Innovation in High Value Manufacturing Programme

- The **Enterprise Engineering and Optic Centre** project was the first Growth Deal construction project to move into delivery following the approval of the Full Business Case in November 2023. The construction of the facility at the Plas Coch campus in Wrexham is now complete with a formal opening expected in September. The delivery of improved facilities at the Optic Centre in St. Asaph is expected to commence this financial year.
- In July 2024 the Economic Ambition Board approved the Business Justification Case for the **Centre for Environmental Biotechnology Plus** project. The project will provide scale-up facilities, based at the Henfaes Research Centre near Abergwyngregyn, with the refurbishment now complete the centre aims to open up more widely for business collaboration. The project has already started to deliver against the key North Wales Growth Deal objectives of job creation, increased GVA and enhanced levels of investment in the region.

Land and Property Programme

- Design and Consultancy Teams for the **Parc Bryn Cegin** project were appointed by Welsh Government to obtain a project scheme and submit for planning and other consents. Both Outline (6th December 2024) and Full (14th February 2025) Business Case approval from the Economic Ambition Board was secured for the project. This followed with full planning consent granted by Cyngor Gwynedd in March 2025. New employment units are set to be delivered in collaboration with Welsh Government, providing 1,730sqm of modern, energy-efficient business floor-space at Parc Bryn Cegin.
- The approval of both the Outline (2nd February 2024) and Full (17th May 2024) Business Cases for the **Former North Wales Hospital** project were given by the Economic Ambition Board. The £107m capital investment project to be delivered by Jones Bros, will redevelop the derelict 53-acre site. Negotiations are continuing between Ambition North Wales, Jones Bros and Denbighshire County Council on completion of the Section 106 Agreement and Grant Funding Agreement to enable the project to move into delivery.

Low Carbon Energy Programme

- Both the Outline (19th July 2024) and Full (14th February 2025) Business Cases for the **Cydnerth** project received Economic Ambition Board approval. The Cydnerth project will futureproof the Morlais tidal energy scheme run by social enterprise, Menter Môn. By investing in its infrastructure, the Growth Deal will enable the scheme's 18MW grid capacity to increase over time to allow the full 240MW.
- Ambition North Wales formally accepted the withdrawal of the **Deeside Anaerobic Digestion Plant** project from the Growth Deal in November 2024. The project confirmed it was proceeding without the need for the allocated £6.4m of Growth Deal funding. The successful outcome was made possible due to the close collaboration between Ambition North Wales and The Circular Economy Developments Ltd, which enabled their investors to commit to the funding required for the plant. Work is progressing well on site.
- We appointed WCVA and UMi, following a competitive procurement process, to prepare and mobilise the **Clean Energy Fund** project. The Full Business Case for the project was approved by the Economic Well-being Sub-Committee on 16th of May 2025.

Portfolio

- A **portfolio review** of the Growth Deal was undertaken during March 2025 at the request of the Economic Ambition Board and both Governments. The review focused on the five projects which were at the time reporting red, as well as four additional projects reporting amber or with an element of the project reporting amber. The Economic Well-being Sub-Committee made the decision to:
 - Withdraw the current Trawsfynydd project from the Growth Deal, and place the Trawsfynydd alternative scheme proposal on the reserve list.
 - Withdraw the Last Few % project from the Growth Deal.
 - Move the Kinmel Studios project to the reserve list.
 - Move the New-H2 project to the reserve list.
 - Withdraw the Full Fibre (Connected Key Sites and Corridors) project from the Growth Deal.

This released a total of £51m (including the previous withdrawal of the Deeside Anaerobic Digestion Plant project) Growth Deal funding which would be available for re-investment through the Reserve List and new project selection process.

The Sub-Committee agreed the establishment of a Growth Deal reserve list and the criteria and timetable for the Expression of Interest process. An Expression of Interest process was launched in March 2025 with Ambition North Wales partners and Governments given the opportunity to bring forward EOIs. Following submissions and assessments of the proposals, the Economic Well-being Sub-Committee approved the [reserve list](#) for the Growth Deal.

The reserve list is a strong pipeline of new projects, that are invited to develop their business cases which would only be presented to the Sub-Committee for a decision when strict criteria around deliverability have been met, including securing planning permission where appropriate. This new approach will de-risk delivery at the portfolio level and will increase the certainty on delivery once business cases are approved.

- The Portfolio Management Office recognized the challenges with enabling decision making through the Growth Deal process and gained approval by the Economic Well-being Sub-Committee and Governments on a **streamlined assurance and approvals process**. The streamlined process includes:
 - Increased use of single stage business cases in line with the proposed framework
 - Gateway Reviews – removing the requirement for all projects to go through Gateway 2 assurance reviews and adopting a risk assessment approach in line with internal Welsh Government processes.

- In partnership with the Welsh Local Government Association (WLGA) we launched phase 2 of the **Emissions and Biodiversity** project with the aim of streamlining the approach in line with local authority business case processes. The streamlined methodology is being finalised and shared. Discussions are underway to consider supporting a small number of Local Authorities as ‘Pioneer Councils’ to help embed the methodology. Some of our team, along with partners from the region, attended **Climate Clarity training**. Through Climate Fresk and Biodiversity Collage workshops participants were able to build knowledge, as well as a real understanding of challenges and impactful solutions.

Social Value

Ambition North Wales has always sought to maximise the benefits to the region from the capital expenditure associated with the Growth Deal and our procurement principles put a strong emphasis on securing added value through procurement activity. A key part of this is commitment to embedding social value in Growth Deal delivery. All procurement packages over £100k are required to include social value commitments with project sponsors required to include a 15% social value weighting in their scoring criteria. The primary aim here is to secure additional social value and community benefits from projects but a secondary objective is to support local and regional and national companies to secure contracts as they are often well placed to deliver social value and community benefits.

This work aligns with the Well-being of Future Generations Act and the Social Partnership and Public Procurement Act—ensuring economic growth delivers environmental and community benefits.

A recent survey of the Welsh market undertaken by Ambition North Wales revealed Larger North Wales organisations often have formal social value strategies. SMEs show strong ethical practices but need more support to formalise efforts. Ambition North Wales will continue to develop the support and resource packs to support SME’s (especially with procurement) with Social Value delivery in North Wales.

Project Highlights

- **Talent Tourism Network**

A £2.9M contract has been awarded to a local North Wales supplier, supporting the delivery of two spokes within the programme. Both spokes have committed to using the same supplier, who will deliver a strong Social Value offer, including:

- Promoting the benefits of the circular economy to local businesses
- Investing in the promotion of green spaces and biodiversity within local education settings
- Contributing time and resources to support environmental education and community engagement
- Supporting STEM curriculum activities in local schools and colleges

- **Centre for Environmental Biotechnology**

£500k+ contract awarded to a local North Wales supplier with strong social value offer, including:

- Circular economy support
- Donations to biodiversity and community projects
- STEM and university curriculum support
- Volunteering and wildlife protection

- **Enterprise Engineering and Optic Centre**

A £10M+ contract has been awarded to a local North Wales supplier, recognised for delivering exceptional social value. The supplier’s social value commitments are already making a tangible impact, including:

- Creating local apprenticeship opportunities
- Sustaining and generating local jobs
- Providing meaningful support to the local community

Corporate Joint Committee

Officers from the Portfolio Management Office have been supporting the North Wales Corporate Joint Committee over the past two years and in April 2025, Ambition North Wales, the Growth Deal and the Portfolio Management Office formally transferred into the Corporate Joint Committee.

As a Corporate Joint Committee, Ambition North Wales has two new statutory responsibilities - for regional transport and strategic planning, as well as a non-statutory responsibility to enhance and promote the economic well-being of North Wales.

The Corporate Joint Committee has adopted the brand Ambition North Wales and operates as a partnership organisation - comprising the six local authorities in North Wales and the Eryri National Park Authority.

During 2024/25, Ambition North Wales worked towards successfully transferring its Portfolio Management Office and the North Wales Growth Deal into the Corporate Joint Committee on 1 April, 2025.

Draft Regional Transport Plan

We developed a **Draft Regional Transport Plan** alongside partners including local authorities, Transport for Wales and Welsh Government.

The Plan outlined our strategic policies and interventions until 2030, across various modes of transport and travel. Focusing on integration and innovation, it aimed to provide residents and visitors with more travel choices and better digital connectivity, while also reducing our environmental impact.

The 12-week public consultation opened on 20 January 2025, encouraging the public, businesses, third sector organisations, community groups, visitors to look at the draft Plan, and feedback. The consultation concluded on 14th April having received 1,684 responses of which 1,421 related to a campaign supported by the Wildlife Trusts Wales.

To ensure the Plan was widely accessible, it was produced as an 'Easy Read' by Learning Disability Wales, and Frequently Asked Questions were published. Channels for responding included FREEPOST, email, phone line and via a Virtual Engagement Room.

The Regional Transport Plan is currently being finalised for approval by the CJC prior to submission to Welsh Government in July 2025.

Strategic Development Plan

The Corporate Joint Committee has commenced work on its Strategic Development Plan and has prepared a draft Delivery Agreement which sets out how the plan will be produced, who will be involved and how, and how long the plan will take to produce. The Strategic Planning Sub Committee has also been convened and is currently considering the draft Delivery Agreement. The Delivery Agreement has already been shared informally with Welsh Government officials and Officers from each Local Planning Authority with favourable feedback received to date. The next stage is to consult a range of stakeholders and interested parties on the Delivery Agreement over the summer, with a view to reporting back to the sub-committee and Corporate Joint Committee in September. In parallel the ability of the Corporate Joint Committee to fully fund the SDP it is being assessed, a brief for consultancy support has been developed with a view to procuring suitable consultants shortly, and liaison and collaborative working is ongoing with other Corporate Joint Committees who are at different stages with the preparation of their Delivery Agreement.

Investment Zone

A joint commitment by both UK and Welsh governments - the Investment Zone aims to enhance and grow a globally significant advanced manufacturing cluster in North-East Wales.

We are working in partnership with Flintshire and Wrexham councils to deliver the Flintshire and Wrexham Investment Zone – which will see an investment of up to £160m over 10 years.

It will unleash further potential for Flintshire and Wrexham, which are already home to high-value manufacturing operations and strategic industrial sites, by offering a unique blend of support, infrastructure and targeted incentives designed to attract and sustain businesses. Benefits will be far reaching benefits, extending across North Wales and beyond.

Working with Flintshire and Wrexham Councils we announced an open call for projects and sites to inform the development of an Advanced Manufacturing Investment Zone for North-East Wales.

The aim was to develop an understanding of suitable sites and investment projects in order to help set out the scope and ambition for what the Flintshire and Wrexham Investment Zone can achieve.

The commitment by both UK and Welsh Governments proposes an investment of up to £160m, over 10 years - with far reaching benefits, extending across North Wales and beyond.

Regional Skills Partnership

North Wales has a demonstrated history of co-working and collaboration which allows us to link capital investment programmes, such as the North Wales Growth Deal, with the skills ecosystem represented by the Regional Skills Partnership (RSP). This critical relationship means we can plan effectively for current and future employment opportunities in North Wales. The North Wales Regional Skills Partnership has delivered the following activities:

- Low Carbon Energy Prospectus & Video - In collaboration with providers in the region, the Regional Skills Partnership have developed a prospectus and short video to highlight the excellent educational and training facilities available in North Wales to support the low carbon energy industry.
- The Young Person's Toolkit launched in January 2024 and will be used to better understand available options for young people by showcasing a high-level overview into different pathways, transferrable skills and sector insights.
- In April 2024, the Regional Skills Partnership successfully hosted an event for employers in Venue Cymru this month. The event included keynote speaker - Craig Weeks, Operations Director for JCB, panel discussions, breakout sessions, experts' exhibitions and networking opportunities. Over 150 guests attended the event.
- In March 2025 the Regional Skills Partnership, successfully ran a campaign for National careers week highlighting North Wales' priority sectors by showcasing in-demand job roles, work profile statistics and salaries. In collaboration with Mari Evans from Saer Architects they wrote an [article](#) aimed at breaking down barriers for women to consider careers in the construction sector.
- A new Advanced Manufacturing and Energy Employer Cluster Group was established by the Regional Skills Partnership. Bringing together key flagship employers and energy developers within the region. They aim to provide insights into the regional workforce requirements, enabling the Regional Skills Partnership to address the skills challenges employers in both advanced manufacturing and the energy industry face.
- Up-to-date LMI is an integral part of the Regional Skills Partnership's work - it allows the Regional Skills Partnership, local providers and key stakeholders to better understand the evolving labour market in their 9 key and growth sectors. A report was commissioned to study the latest available data, combined with the future trends and forecasts to highlight the needs for the region in the medium and long term. This information will also be beneficial for Growth Deal projects to better understand what the future projections are in their

industries to ensure investments being made lead to meaningful, long-term economic impact. You can read the report [here](#).

- To better understand the migration of graduates, the Regional Skills Partnership commissioned Darogan Talent to explore the trends and assess the needs of local businesses in terms of graduate recruitment. Some key findings suggest that although young people don't necessarily return to North Wales straight after graduating, they do return later in life. Next steps for the Regional Skills Partnership include reviewing the recommendations within the report and working with partners to explore the potential for piloting regional initiatives, such as a graduate programme tailored to local employer needs. If you're keen to know more, you can find the report [here](#).
- The North Wales Skills Portal, launched in January 2025, is already recognised as a key enabler of cross-sector skills collaboration and connectivity. With thousands of users and positive feedback from employers, training providers, and stakeholders, it is driving collaboration and aligning skills provision with economic need. The Portal is emerging as an impactful enabler of individual progression, business growth, and strategic initiatives such as the Flintshire and Wrexham Investment Zone and Freeport.
- Delivered in collaboration with key regional partners, the Anglesey Career Pathways Pilot was developed to better align education with employer needs, enhance career readiness among young people, and support local economic development. The pilot has successfully tested three projects in 2024:
 - Inspire to Build – introduced sixth form students to a range of careers in construction, from architecture to civil engineering, through employer engagement, a site visit and hands on project management challenges.
 - Social Care Insights – engaged over 700 Year 9 pupils to explore diverse roles within social care ahead of their GCSE choices, aiming to raise awareness and interest in a sector with growing workforce demand.
 - Teacher-Employer Encounters – brought together over 30 teachers and local employers to deepen understanding of the skills young people need to succeed in the workplace, helping educators better connect classroom learning to real labour market expectations.

With strong engagement and positive outcomes, discussions are underway to replicate this approach with other local authorities, supporting workforce pipeline development aligned to key regional sectors.

Shared Prosperity Funding

Ambition North Wales secured over £1m of Shared Prosperity funding for North Wales. The funding aimed at supporting and complimenting Growth Deal delivery. The project concluded at the end of March 2025, having successfully delivered across 8 workstreams:

- A new online portal, the **North Wales Skills Portal** was launched in January 2025 - a website that connects individuals and employers with local skills development, employment opportunities, training, and support providers. Within the first 10 days of launching, the Portal received over 1,000 unique visitors - emphasising the demand for this regional asset.
- Community organisations and small enterprises in North Wales were able to apply for a **bid writing support grant** for clean energy projects. The support funded consultations with specialist advisors on crafting effective funding applications. Grants were awarded to 16 small and community organisations.
- Local authorities were supported to investigate the feasibility of signing **Access Agreements**, which would allow network providers to use their land to install, operate or maintain a digital communications infrastructure. In line with UK Government's desire for local government to play an active role in facilitating the improvement of digital infrastructure, every council agreed that signing the Access Agreements was a feasible and positive step

forward – with some signing agreements during the course of the work – making it easier for network operators to invest in improving connection for the residents and businesses of North Wales.

- In January 2025, specialist **4G survey equipment** was purchased to conduct independent evaluations of the mobile signal across the region. Consultants from the supplier organisation – Keysight, provided operational training to relevant members of the Ambition North Wales team, alongside partner organisations. The new kit will now be transported by refuse lorries on established routes across the region – meaning the location of coverage or connectivity issues can be identified. This new capability will inform the direction of Growth Deal investment by providing information to operators in relation to location specific issues and needs.
- The **Rural Digital Connectivity Support** was a new project to support communities across North Wales to understand their options around improving broadband connectivity. Annog Cyf, the commercial arm of Menter Mon, was appointed to undertake the work in association with Cadwyn Clwyd, forming an effective partnership amplified by local intelligence and resourcing. Over 500 people were guided on their broadband options, and events were held throughout the region to shout about the type of support available.
- The **SME Connectivity Assessments** digital workstream led by delivery partner BIC Innovation, we worked with businesses to map out their current technology systems, present options for improving connectivity and give tailored recommendations on how to adopt new and relevant advanced wireless tech to enhance operational efficiency and innovation. Insights will feed into and inform the Growth Deal Advanced Wireless project.
- In Summer 2024, we conducted a survey into how familiar the region’s organisations were with the concept of **social value** and whether they have strategies to drive this element of the wellbeing economy. We wanted to identify who was doing well and what type of support was needed, with a view of sparking a more collaborative multisectoral approach to tackle common goals. Based on the response, our Social Value Lead designed a 2hr online workshop, which was attended by 77 people. It provided a walk-through of all things social value and addressing each difficulty expressed by the respondents, with 4 guest speakers sharing valuable insights and best practice from the public, private and third sector.
- We shared best practice and delivered training sessions on how **climate change** considerations should inform business case development.

Strategic Energy

The Strategic Energy Team have worked closely with the 5 local authorities (with Conwy’s plan having already been developed) and ARUP, the Carbon Trust and Afallen to deliver Local Area Energy Plans (LAEP) specific to each Local Authority area. The team have now moved into the monitoring phase, creating tools and processes to join up projects, stakeholders and funding opportunities.

- All Local Area Energy Plans have been completed, three have been endorsed by the local authorities and three are in the political process.
- Four directories have been developed – projects, stakeholders, funding and actions. These can be integrated to track decarbonisation projects across the region, sharing available funding opportunities with stakeholders and track our progress to net zero.

Agri-tech and Food Technology Cluster for Mid and North Wales

In partnership with Growing Mid Wales, M-SParc and AberInnovation we were pleased to announce the official launch of the Cluster Management Organisation (CMO) to drive agri-tech and food technology innovation across North and Mid Wales.

The Cluster Management Organisation coordinates activities and promotes funding opportunities available through a project that will run initially for two years using funding from Innovate UK. The aim is to strengthen collaboration between businesses, research institutions, and regional partners to boost innovation and competitiveness in the agri-food and agri-tech sectors.

A strategic steering group overseeing the Cluster Management Organisation is led by Growing Mid Wales and Ambition North Wales in partnership with AberInnovation and M-SParc. Together, they support businesses through events, webinars and funding opportunities - strengthening networks and collaboration across the region.

Recently, a fresh wave of innovation emerged across Mid and North Wales, with thirteen pioneering businesses receiving support from Innovate UK's Nurturing Innovation in the Agri-tech and Food Technology Cluster. Funded through the MFA route, these projects tackle key challenges like sustainable production, food safety, and robotics, enabling small-scale R&D and feasibility work that lays the foundation for future industry transformation.

Priorities and work in progress

Over the next twelve months, our focus, alongside our partners remains unchanged. We will drive our projects forward to deliver new jobs and attract the investment needed to secure North Wales' future prosperity.

We are at the beginning of a significant change with the Portfolio Management Office team and the North Wales Growth Deal now transferred into the Corporate Joint Committee. We will focus on meeting the statutory duties of the Corporate Joint Committee – the Regional Transport Plan, Strategic Development Plan and promote regional economic wellbeing including delivering the Growth Deal.

Governance and Resources

Following the transfer into the Corporate Joint Committee work is underway to ensure we have the right resources in place and the right governance structures to support delivery. The appointment of a permanent Corporate Joint Committee Chief Executive is due to be confirmed during June 2025.

Work is underway to review the Economic Well-being Sub-Committee in particular the role of our education partners and how we could facilitate a more formal relationship with the Regional Skills Partnership at Sub-Committee level. Approval has also been secured to appoint two Non-Executive Advisors for Ambition North Wales to support the Sub-Committee, along with Terms of Reference approved for a new Business Advisory Board, and the recruitment process for these is due to commence over coming months. We are also in the process of appointing a commercial advisor through the through the Ambition North Wales framework to support delivery.

Growth Deal Delivery

In terms of the Growth Deal portfolio, we always understood that our projects would take time to mature and deliver, which is reflected in the fifteen-year term of the Growth Deal. There have been some significant challenges to date that are reflected in the next section of the report, however progress is being made and we are now seeing a significant increase in the number of projects moving into delivery and the first jobs being created. We move into 2025/26 with confidence that this will be a significant year for delivery, with an estimated £25-30m of Growth Deal funding being released to projects this financial year. The bullet points below summarise some of the key milestones ahead in the coming year including:

- The £24.6m **Clean Energy Fund** is set to launch on the 10th of July, the fund will comprise of two sub-funds, with WCVA working in conjunction with Community Energy Wales on the voluntary sector sub-fund; and UMi leading the sub-fund targeting the private sector.
- The Full Business Case for the **Advanced Wireless** project is targeting Economic Well-being Sub-Committee approval during July 2025. This will enable the project to move into delivery with the initial phase focusing on design before the capital funding is rolled out to eligible organisations.
- Complete the negotiations on the Funding Agreements for **Former North Wales Hospital, Cydnerth** and **Parc Bryn Cegin** in order for the projects to move into delivery. The Joint Venture Agreement will also need to be agreed and signed between Ambition North Wales and Welsh Government for the **Parc Bryn Cegin** project.
- Work is now proceeding to establish the two grant schemes for the **4G+** the project, establishing a regional telecoms forum and supporting more public sector organisations to adopt open access agreements to provide access to their infrastructure for mobile network operators, accelerating private sector investment.
- Reaching investment decisions on the **Glynllifon Rural Economy Hub, Responsible Adventure** and **Egni** projects.

- Procurement of LoRaWAN gateways and submission of final LoRaWAN deployment plans for the **LPWAN** project to be submitted. Installation of gateways will get underway by the summer with sensor applications installed in parallel with regional promotion of the availability of the network to the wider private sector.
- With three spokes in place for the **Tourism Talent Network** project, Grŵp Llandrillo Menai will appoint an additional spoke for the project during the year ahead.
- The next phase of the **Enterprise Engineering and Optics Centre** project will see the finalisation of procuring for the specialist equipment, refurb and full kit out of the OpTIC and installation of a hydrogen lab.
- The second phase of the equipment for the **Centre for Environmental Biotechnology Plus** project is ongoing, the equipment for the Thoday building has arrived, and work is due to start on installing the equipment at Henfaes' refurbished facilities.

Growth Deal Reserve List

Following the Portfolio Review earlier this year which resulted in some projects being withdrawn from the Growth Deal and others being moved to the newly created Reserve List there is now £51m of unallocated funding within the Growth Deal.

Projects on the newly created reserve list will be competing to secure this funding over the next 12-18 months and the Portfolio Management Office will be working with project sponsors to enable the most mature projects that can deliver the biggest impact in the region to present their business case for approval. With projects on the Reserve List seeking in excess of £100m in funding, this creates a really healthy pipeline for the Growth Deal and de-risks the portfolio if projects stall or further funding is released.

The reserve list is not intended to be a static list and should represent the best opportunities in the region for the Growth Deal to deliver on its objectives. The reserve list will be subject to regular review every six months, in order to consider any new Expressions of Interests received and assess progress of existing reserve list projects and whether they should be retained/removed.

As a result of these changes the Portfolio Management Office will be working to re-profile the deal and agree a revised drawdown funding profile with Welsh Government and UK Government.

Regional Skills Partnership

In 2025/2026 the Regional Skills Partnership will continue to play a key role in supporting Welsh Government's Jobs and Green Growth and Net Zero ambitions. By working closely with employers, the Regional Skills Partnership will gather real-time, localised intelligence to identify emerging skills gaps and workforce needs in key sectors.

As part of the North Wales Net Zero Skills Delivery Plan, priorities for 2025–26 include:

- Mapping emerging green jobs and associated skills, particularly in renewable energy;
- Work with Medr, Further Education & Higher Education Institutions to develop responsive qualifications, training and apprenticeships;
- Supporting employers to upskill existing staff in line with green growth opportunities.

Delivery will also focus on responding to other key Welsh Government policy areas including:

- Digital Skills - Understanding digital skills and emerging technologies in the region, showcasing digital skills pathways to individuals and employers.

- Careers and the World of Work - Work with schools and pre-16 providers to support curriculum design and progression pathway and collaborate with Careers Wales to raise awareness of key sector opportunities
- Aligning skills planning with economic development and infrastructure – Work with Anglesey Freeport, Flintshire & Wrexham Investment Zone by ensuring that local employers can meet workforce demands.

As North Wales responds to emerging economic opportunities and evolving workforce demands, the North Wales RSP will continue to play a vital role in aligning education and training with the region's future labour market needs.

Investment Zone

The priority for this year is working with colleagues at Wrexham and Flintshire councils to secure approval to the remaining gateways ahead of agreeing the Memorandum of understanding and delivery plan before signing the Year 1 grant award and moving into delivery.

Key risks and issues

The Portfolio Risk Register is updated on a regular basis by the Portfolio Management Office and reviewed by the Portfolio Board and the Economic Well-being Sub-Committee (previously the North Wales Economic Ambition Board) on a quarterly basis.

While the risk profile remains stable, the risk profile does remain high with a number of red residual risks including affordability, consenting, delay and investment. These are being managed by the Portfolio Management Office and project sponsors.

The North Wales Growth Deal has faced significant challenges since the approval of the Final Deal in December 2020 with many of these outside our control including the impact of the Covid-19 pandemic in the early years, significant cost increases and an uncertain global economy. The impact of these events will have affected all major capital programmes but they have been a contributing factor to the delays experienced by the Growth Deal.

There are also a number of specific Growth Deal factors that have contributed to this position, namely:

- Significant optimism bias in early project delivery forecasts set an unachievable bar in terms of expectations and while delivery would have been delayed due to this factor, the delays have been compounded by the external factors.
- No revenue funding available to support project development through the Growth Deal means that project development costs are borne entirely by the project sponsor at their own risk. Economic uncertainty and unforeseen additional development costs can impact on an organisations appetite to invest at risk.
- Growth Deal funding is fixed at £240m and not linked to inflation. This is a significant issue for project as costs have increased substantially over the past five years and results in projects either needing to find additional funding or re-scope projects to deliver within existing funding envelopes which both take time and have a knock on impact on benefits realisation.

On a more project specific basis, the risk of consenting delays affecting project delivery has remained high throughout the Growth Deal and Ambition North Wales has worked pragmatically with sponsors to manage ongoing challenges. Similarly, other risks and issues associated with measures to mitigate environmental impacts have also affected delivery and both this and planning consent remains a highly rated risk for all projects involving the developed of land and property in several of the Programmes. The risk is increased by capacity issues in local authority planning departments and other consenting bodies which can also lead to delays.

The recent Portfolio Review and the establishment of the Reserve List is intended to reduce the risk of further delays at portfolio level. With a Reserve List of 20 projects now in place and competing for funding available rather than all funding being ringfenced to specific projects, the portfolio is protected should projects stall or further projects be withdrawn from the Deal. This provides a more resilient and flexible Growth Deal with the ability to take advantage of emerging opportunities and should provide Welsh and UK Government with additional confidence in our ability as a region to deliver.

There is a need to re-profile the Growth Deal following these changes. Ambition North Wales remain committed to delivering on the original Growth Deal targets, but believe government need to be receptive to considering changes to these targets where appropriate given the changes since December 2020. The removal of the existing Trawsfynydd scheme from the Growth Deal with an alternative scheme to be considered as part of the Reserve List should not be underestimated. The original project accounted for 12.5% of the jobs target and 40% of the investment target for the Growth Deal.

Ambition North Wales undertakes annual independent Portfolio Assurance Reviews (PARs) and following the last PAR in October 2024 actions have been taken in response to the recommendations. These include increasing flexibility within the Portfolio Management Office resources to manage priority projects, establishing quarterly meetings between the Portfolio Management Office and Welsh Government to maintain a cycle of strategic level communication and accelerating the reviewing and approvals of business cases. The Portfolio Management Office has since further developed a more streamlined set of requirements for sponsors to adhere to in business case development, while maintaining the high standards of assurance required for projects. The rate of projects being approved and entering delivery has substantially increased in the last 12 months and Ambition North Wales expects to maintain this pace with the remaining projects yet to enter delivery and for those new projects which have more recently been invited to develop business cases.

Conclusions

The report provides a summary of the activity and progress on the North Wales Growth Deal and the wider remit of Ambition North Wales. Additional detail and information is included in the appendices.

We will be happy to address the Committee's questions at the session on the 26th of June.

Appendices

- Appendix 1 - Programme infographics
- Appendix 2 - Latest Quarter report – Quarter 4 2024/25
- Appendix 3 - Annual Report 2023/24
- Appendix 4 - Key project highlights 2024/25

THE NORTH WALES GROWTH DEAL



**Cynllun Twf
Gogledd Cymru
North Wales
Growth Deal**

funded by:



Llywodraeth Cymru
Welsh Government



UK Government
Llywodraeth y DU

Office of the Secretary of State for Wales
Swyddfa Ysgrifennydd Gabaedd Cymru



OVERVIEW OF THE GROWTH DEAL

- To build a more vibrant, sustainable and resilient economy in North Wales.
- To build on our strengths, to boost productivity while tackling long-term challenges and economic barriers to deliver inclusive growth.
- To promote growth in a scalable, inclusive and sustainable way, in line with the Well-being of Future Generations (Wales) Act 2015.

Pack Page 62

INVESTMENT



£240M

Growth Deal target investment



Total Target Investment: over **£1bn**

SPENDING OBJECTIVES



Create up to **4,200** new jobs



Generate up to **£2.4bn** net additional GVA

OUR PROGRAMMES



Innovation in High Value Manufacturing



Agri-food and Tourism



Digital Connectivity



Land and Property



Low Carbon Energy

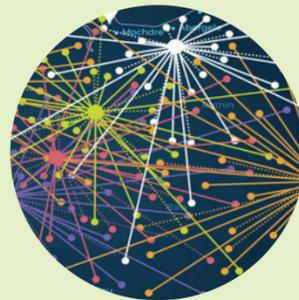
Agri-food and Tourism

The programme aims to promote and support employment and training in the Agri-food and Tourism sectors, building on world-leading skills and expertise already established within the region.



Glynllifon Rural Economy Hub

A distinctive, world class rural economy hub offering food-grade facilities and knowledge transfer services to enhance the food and drink sector.



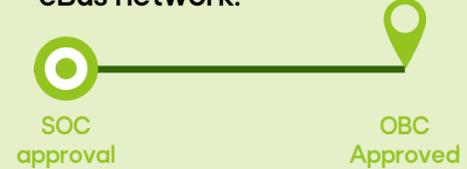
Tourism Talent Network

Future-proof tourism and hospitality skills provision and increase the commercial benefits from one of the best established and fastest growing sectors in the region.



Responsible Adventure

This project will promote North Wales as a leading sustainable tourism destination. It aims to attract additional visitors in a way which is environmentally sustainable and considerate to local communities. It consists of developing a new sustainable cable car, slate explorer and eBus network.



KEY
 SOC - Strategic Outline Case
 OBC - Outline Business Case
 FBC - Full Business Case

Pack Page 63



Digital Connectivity

Addressing connectivity challenges within the region, enhancing the capability to develop new technologies for the future ensuring that businesses and residents can benefit from fast, high-quality connectivity.

Pack Page 64



The Digital Signal Processing Centre



Research and development of new technologies which improve how data is processed efficiently and reliably between devices and people.



The Last Few %*



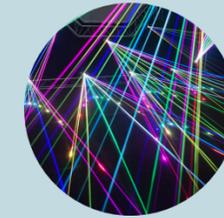
Providing a minimum 'superfast' (30Mbps) broadband to poorly connected communities across North Wales.



Full Fibre*



This project will deliver strategic investment in fibreoptic networks to provide wider access to gigabit capable connectivity supporting economic growth in the region.



4G+



This project will improve 4G mobile connectivity at key economic sites in the region, targeting transport routes, business and tourism hubs while supporting the further deployment of 5G network coverage in these areas.



Advanced Wireless



The Advanced Wireless project will support private and public sector organisations adopt the latest wireless technologies to support improved service delivery, business efficiencies, innovation and growth, particularly through the use of internet of things applications.



LPWAN



This project aims to deliver extensive and accessible LoRaWAN network coverage throughout the region, providing businesses and public sector users with a cost effective solution for adopting internet of things applications and supporting innovation.



KEY
 SOC - Strategic Outline Case
 OBC - Outline Business Case
 FBC - Full Business Case
 BJC - Business Justification Case

*Following a Portfolio Review, focusing on impact and deliverability, this project was removed from the North Wales Growth Deal in May 2025. A new Reserve List of projects can be viewed at www.ambitionnorth.wales



Innovation in High Value Manufacturing

Promote innovation and commercialisation of technology in the manufacturing industry, building on the existing strength of the sector within our region.

Pack Page 65



Centre for Environmental Biotechnology

Exploring the use of biological processes as low carbon alternatives to products and industrial manufacturing processes.



Enterprise Engineering and Optics Centre

Delivering state-of-the-art facilities to explore optics, photonics and composite materials as a lightweight material alternative, reducing carbon within the sector.



KEY
SOC - Strategic Outline Case
OBC - Outline Business Case
FBC - Full Business Case
BJC - Business Justification Case



Land and Property

Addressing land and property challenges within the region, to unlock opportunities and build on our strengths. The programme will develop sites to provide residential and employment premises. It will also maximise capacity at key transport links.

Pack Page 66

- KEY
- SOC - Strategic Outline Case
 - OBC - Outline Business Case
 - FBC - Full Business Case
 - BJC - Business Justification Case



Former North Wales Hospital

Remove dangerous buildings and prepare the site for new homes and new commercial units for new and existing businesses to relocate and expand.



Western Gateway, Wrexham

The provision of primary services to deliver development plots for new and existing businesses to expand or relocate.



Holyhead Gateway

Improve the port's capacity and facilities, creating a multi purpose berth for new energy projects, commercial traffic and cruise ships.



Kinmel Studios*

This project will design, build and operate a new film and television studio at Tir Llwyd Enterprise Park, Kinmel Bay.



Parc Bryn Cegin

Develop new build employment premises suitable for new and existing businesses to expand and relocate.



Wrexham Gateway

Part of the Wrexham Gateway masterplan, this project aims to deliver a transformative mixed-use regeneration scheme of the area around Wrexham General Station.



Warren Hall, Broughton

The provision of primary services to deliver development plots for new and existing businesses to expand or relocate.



*Following a Portfolio Review, focusing on impact and deliverability, this project was removed from the North Wales Growth Deal in May 2025. It is now included in a new Reserve List of projects which can be viewed at www.ambitionnorth.wales

Low Carbon Energy

Unlocking the benefits of developing low carbon energy projects within the region, positioning North Wales as a leading location for the low carbon energy sector.



Cydnarth (Morlais)
Develop additional grid connections for tidal energy suppliers to deploy more turbines within the zone.





Smart Local Energy
Support projects to achieve renewable energy, decarbonisation and have local ownership.





Egni
Developing a Centre of Excellence, enhancing research, design and innovation in low carbon energy.





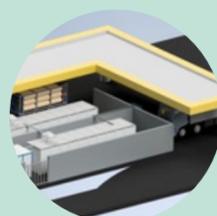
Trawsfynydd*
Deploy Small or Advanced Modular Reactors at the site to generate low carbon energy.





NEW-H2*
Kick-start the region's hydrogen economy by supporting and delivering a hydrogen hub.





Holyhead Hydrogen Hub
This project will establish a green hydrogen production and distribution facility, at Parc Cybi, Holyhead within the Anglesey Freeport zone.




*Following a Portfolio Review, focusing on impact and deliverability, this project was removed from the North Wales Growth Deal in May 2025. It is now included in a new Reserve List of projects which can be viewed at www.ambitionnorth.wales



Uchelgais Gogledd Cymru
Ambition North Wales

North Wales Growth Deal Quarterly Performance Report

2024-25 Quarter 4 (January - March 2025)

01	Portfolio Director Summary	3
02	Portfolio Performance	4
03	Digital Programme Performance	5
04	Low Carbon Energy Programme Performance	7
05	Land and Property Programme Performance	10
06	Agri-food and Tourism Programme Performance	13
07	Innovation in High Value Manufacturing Programme Performance	15
08	Project Progress Tracker	17
09	Growth Deal Project Delivery Pipeline - Portfolio Business Case 2024	18
10	Objective Tracker - Overview of delivery (March 2025)	19
11	Growth Deal Grant Expenditure Profile	20
12	Growth Deal Projects: Capital Funding Allocation Profile	21
13	Growth Deal Benefits Realisation	22
	APPENDIX A - Growth Deal Projects Summary	23

01 PORTFOLIO DIRECTOR SUMMARY

This quarter was focused on preparing for transferring the Growth Deal and the Portfolio Management Team to the Corporate Joint Committee on 1st of April 2025 alongside a clear focus on Growth Deal delivery.

The Economic Ambition Board approved three business cases. The Full Business Cases for Cydnerth and Parc Bryn Cegin and the Outline Business Case for the Responsible Adventure project. As part of approving the Responsible Adventure Business Case the board set out the requirement for Zip World to address three specific aspects within the next three months, namely - to provide a developed Local Benefits Scheme following engagement with local communities; a strategy and operational principles for its proposed e-bus network; and a progress report on its engagement plan.

The Board also approved a project change request for the Glynllifon project to include a state-of-the-art Rural Economy Hub, sustainable dairy development and Sheep milk Wales. There will also be an agri-tech aspect, linking all three elements in order to deliver high level technical skills and a technology base - which will be available to Agri businesses in the region.

We signed a £4.43m funding agreement which will unlock a total £19m investment in world class training and knowledge transfer facilities across five locations in North Wales. The Tourism Talent Network project, approved by the North Wales Economic Ambition Board last year, will see a network of state-of-the-art facilities become anchors for delivering apprenticeships and other specialist skills support, extensive SME and micro business engagement, as well as a comprehensive programme of school outreach across the region.

The Enterprise Engineering and Optics Centre project is progressing well, with the Plas Coch construction on track for completion in May. A change request was approved for the OpTIC refurbishment. The change was due to higher costs than anticipated at Full Business Case stage, and results in a slight modification in delivery, though there will be no impact on benefits or on the Growth Deal investment. The refurbishment at the Henfaes site for the Centre for Environmental Biotechnology project is continuing to schedule..

Our Shared Prosperity project successfully came to a close at the end of March. The key achievements included the launch of the North Wales Skills Portal, purchase of mobile survey Equipment, grant awards to 16 small and community organisations as well as work on new methodologies, training materials and training to over 100 people on benefits and climate change.

We continue to work closely with Welsh Government and UK Government to increase the pace of delivery on the Growth Deal and work commenced this quarter a Portfolio Review. The next quarter will focus on presenting the recommendations from portfolio review for a decision by the Economic Well-being Sub-Committee.



Alwen Williams

**Portfolio Director
Ambition North Wales**

O2 PORTFOLIO PERFORMANCE

Theme	RAG Status	Commentary
Portfolio Business Case	Amber	The Portfolio Business Case 2024 update was approved by the Economic Ambition Board in October and has been submitted to Welsh Government and UK Government as part of the annual award of funding process. An update will be produced for government following the completion of the portfolio review.
Delivery Pipeline	Amber	The delivery pipeline is consistent with the 2024 Portfolio Business Case, with projects reporting against this timetable currently.
Governance	Green	The Portfolio, Programme and Project Management Framework is now well established with the Portfolio Board and five Programme Boards operating effectively. A Conflicts of Interest procedure is in place across all Boards, and is updated annually.
Assurance	Amber	The fifth annual Growth Deal assurance review (Programme Assurance Review) was completed in October 2024 and the PMO is working with Welsh Government and UK Government to address the recommendations.
Resource and Capacity	Green	Interim arrangements are currently in place for the Low Carbon Energy Programme Manager with a new permanent member of staff starting in post in April. Budget approval has been secured to extend fixed term staff contracts beyond March 2026 with resourcing requirements currently being reviewed by the Portfolio Director and Head of Operations.
Finance	Amber	A total of £15.32m Growth Deal funding has been spent to date. This includes £2.15m on the Digital Signal Processing Centre, £9.81m on the Enterprise Engineering & Optic Centre, £0.58m on the Centre of Environmental Biotechnology, £1m on the Tourism Talent Network and £1.78m to fund the revenue expenditure.
Investment	Red	Securing the public and private sector investment required to deliver the Growth Deal remains a significant risk across the portfolio. The Economic Ambition Board approved the Investment Strategy during their meeting in March 2024.
Risk	Red	Overall risk profile remains consistent with Quarter 3. Procurement of the support services framework (2023 PAR recommendation) is complete. A number of high residual risks remain which are being managed by the PMO including affordability, consenting, delay and investment.
Benefits Monitoring & Evaluation	Green	Training sessions have been held with Ambition North Wales and Project Sponsors in how to use the Benefits Reporting platform. Projects have all uploaded their indicators, the three projects in delivery have populated the platform enabling the project, programme and portfolio teams to track progress towards spending objectives and benefits.
Emissions and Biodiversity	Green	The streamlined methodology is being finalised and shared. Discussions are underway to consider supporting a small number of Local Authorities as 'Pioneer Councils' to help embed the methodology. Some of our team, along with partners from the region, attended Climate Clarity training . Through Climate Fresk and Biodiversity Collage workshops participants were able to build knowledge, as well as a real understanding of challenges and impactful solutions.
Communication and Engagement	Green	We issued a number of press releases including on encouraging feedback on the North Wales Regional Transport public consultation, the launch of the North Wales Skills Portal, welcoming confirmation on the Flintshire and Wrexham Investment Zone by Welsh and UK Governments, successful projects benefitting from Agri-Food Tech Launchpad funding, approval of the Full Business Case for the Cydnerth project, signing of the funding agreement for the Tourism Talent Network project, and we published a case study article during Women in Construction Week. We worked with Business News Wales on a podcast and accompanying article which focused on the year ahead for the Growth Deal, as well as a podcast and article on the opportunities AI could bring to the private and public sectors in the region. Our social media channels covered promotion of our press releases with our engagement and reach on social media continued to grow and there were 11k active users of our website (up 33.5%, likely due to the RTP consultation).

03 DIGITAL PROGRAMME PERFORMANCE

Programme Aim

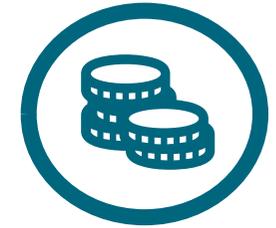
Deliver the step change in digital connectivity needed to ensure North Wales is able to satisfy user demand, maintain pace with the rest of the UK, unlock the potential of priority sectors and sites and underpin a flourishing innovation ecosystem.



Job Creation Target
380



GVA investment target
£158m



Total Investment
£41.7m

RAG Status	Programme Manager Commentary
<p style="writing-mode: vertical-rl; transform: rotate(180deg);">Back Page 72</p>	<ul style="list-style-type: none"> The Full Business Case for the 4G+ project has been prepared following extensive market engagement following Outline Business Case approval. The Connected Campuses LPWAN project is now advancing to the deployment of gateways following a procurement specification being agreed and first deployment plan received. The initial outcome of UK Government Project Gigabit cross regional contracts to deliver gigabit capable broadband has been received and impact of this on the Growth Deal spending objectives for the Last Few % and Full Fibre projects is being reviewed. Further information is expected next quarter associated with change requests currently being reviewed by UK Government which may amend the scope of contracted premises.



Cllr. Nia Jeffreys
Lead Member



David Fitzsimon
Senior Responsible
Owner



Stuart Whitfield
Programme
Manager



Delivering to Plan with only minor issues to address (no action required)



Delivery behind schedule and /moderate issues to address (management action in place)



Delivery significantly behind schedule and/or significant issues to address (urgent action required)

03 DIGITAL PROGRAMME PERFORMANCE

Project (Project Sponsor)		Project Stage	Key Milestones (this quarter)	Key Milestones (next quarter)	RAG Status	RAG Rationale
Digital Signal Processing Centre Bangor University		<ul style="list-style-type: none"> Project Implementation 	<ul style="list-style-type: none"> Approval of the business justification case and purchasing of equipment 	<ul style="list-style-type: none"> Purchasing of items associated with final phase of Growth deal funding 		<ul style="list-style-type: none"> Final Business Justification Case approved
Connecting the Last Few % Ambition North Wales		<ul style="list-style-type: none"> Developing the Full Business Case 	<ul style="list-style-type: none"> Final UK Government broadband investment contract to be awarded for the region. 	<ul style="list-style-type: none"> Review of impact of Project Gigabit on regional broadband investment plans on Growth Deal spending objectives. 		<ul style="list-style-type: none"> Project currently under review. UK Government investment in broadband in the region due to commence following current procurement for its 'cross regional' framework. Outcome of this will define premises for Growth Deal intervention..
Connected Key Sites and Corridors Ambition North Wales	4G+	<ul style="list-style-type: none"> Developing the Full Business Case 	<ul style="list-style-type: none"> 4G+ FBC to be submitted for PMO review. 	<ul style="list-style-type: none"> Economic Well-being Sub-Committee review of the 4G+ FBC. 		<ul style="list-style-type: none"> 4G+ FBC has been prepared for consideration by the Economic Well-Being Sub-Committee.
	Full Fibre	<ul style="list-style-type: none"> Developing the Outline Business Case 	<ul style="list-style-type: none"> Final UK Government broadband investment contract to be awarded for the region. 	<ul style="list-style-type: none"> Review of impact of Project Gigabit on regional broadband investment plans on Growth Deal spending objectives. 		<ul style="list-style-type: none"> Project element currently under review. Impact of Project Gigabit plans on Growth deal spending objectives to be reviewed.
Connected Campuses Ambition North Wales	Advanced Wireless	<ul style="list-style-type: none"> Developing the Full Business Case 	<ul style="list-style-type: none"> Grant scheme and draft FBC for Advanced Wireless project. 	<ul style="list-style-type: none"> PMO review of Advanced Wireless FBC. 		<ul style="list-style-type: none"> Advanced Wireless now developing Full Business Case.
	LPWAN	<ul style="list-style-type: none"> Project Implementation 	<ul style="list-style-type: none"> Procurement specification completed for equipment for LPWAN project and installation services. First LoRaWAN deployment plan submitted to Ambition North Wales prior to delivery. 	<ul style="list-style-type: none"> Procurement of LoRaWAN gateways. Final LoRaWAN deployment plans to be submitted. 		<ul style="list-style-type: none"> LPWAN progressing with network design advanced and capital procurement being prepared.

04 LOW CARBON ENERGY PROGRAMME PERFORMANCE

Programme Aim

To unlock the economic benefits of transformational low carbon energy projects and position North Wales as a leading UK location for low carbon energy generation, innovation and supply chain investment.



Job Creation Target
980



GVA investment target
£530m



Total Investment
£668.5m

Pack Page 74

RAG Status	Programme Manager Commentary
<div style="background-color: #FFD700; width: 100%; height: 100%;"></div>	<ul style="list-style-type: none"> • Cydnherth - The Full Business Case was approved during the quarter. • Smart Local Energy (Clean Energy Fund) - The draft Full Business Case is under development and has been presented to the Programme Board ahead of being presented to the Portfolio Board and Economic Well-being Sub-Committee.



Cllr Gary Pritchard
Lead Member



Dylan Williams
Senior Responsible
Owner



Meghan Davies
Programme
Manager



Delivering to Plan with only minor issues to address (no action required)



Delivery behind schedule and /moderate issues to address (management action in place)



Delivery significantly behind schedule and/or significant issues to address (urgent action required)

04 LOW CARBON ENERGY PROGRAMME PERFORMANCE

Project (Project Sponsor)	Project Stage	Key Milestones (this quarter)	Key Milestones (next quarter)	RAG Status	RAG Rationale
Cydnherth (Morlais) Menter Môn	The Full Business Case is approved, and the project is moving towards implementation.	<ul style="list-style-type: none"> FBC completed and approved. Project progressing into delivery at risk while funding agreement is finalised. 	<ul style="list-style-type: none"> Finalise and sign the funding agreement. Loan drawdown payments. 		<ul style="list-style-type: none"> Project is progressing well with the funding agreement expected to be signed in the next quarter.
NEW-H2 Ambition North Wales	Under review	<ul style="list-style-type: none"> Communications with Wales & West Utilities to encourage submission of revised project. Wales & West Utilities engagement with potential project partners. Ambition North Wales and West & Wales Utilities joint meeting 	<ul style="list-style-type: none"> Confirmation if Wales & West Utilities are submitting a new project proposal for consideration. 		<ul style="list-style-type: none"> Project currently under review.
Egri Bangor University	Developing the Full Business Case	<ul style="list-style-type: none"> Welsh Government has confirmed their funding can be used now by project team to progress from RIBA 4 to 5 without need to wait for UK Government Freeport funding confirmation. Bangor University will now progress this design work. 	<ul style="list-style-type: none"> Continue development of the Full Business Case. Complete design work. UK Government Freeport funding confirmation. 		<ul style="list-style-type: none"> Project is amber with some work progressing on the Full Business Case while waiting for a decision on freeport UK Government funding.
Smart Local Energy Ambition North Wales	Developing the Full Business Case	<ul style="list-style-type: none"> Investment strategies have been finalised. Full Business Case presented to Programme Board. 	<ul style="list-style-type: none"> Full Business Case for the Clean Energy Fund to be presented to the Portfolio Board and Economic Well-being Sub-Committee in May. 		<ul style="list-style-type: none"> Project is green as the development towards the Full Business Case is on track.
Trawsfynydd Cwmni Egino	Developing the Strategic Outline Business Case	<ul style="list-style-type: none"> Ongoing discussions with key stakeholders to consider potential options for the Trawsfynydd Site. 	<ul style="list-style-type: none"> No significant actions planned until decisions are made by Great British Nuclear (GBN) and UK Government on technology selection and site selection. 		<ul style="list-style-type: none"> Project currently under review.

04 LOW CARBON ENERGY PROGRAMME PERFORMANCE

Project (Project Sponsor)	Project Stage	Key Milestones (this quarter)	Key Milestones (next quarter)	RAG Status	RAG Rationale
Holyhead Hydrogen Hub Menter Môn Pack Page 76	Developing the Outline Business Case	<ul style="list-style-type: none"> • Joint Ambition North Wales and EDF submission to Department for Transport, Renewable Transport Fuel Obligation subsidy consultation to unlock Geopura offtake agreement. • £40k DEVEX provided to Menter Môn from Welsh Government underspend for business planning and promotion. • Ongoing discussion between Ambition North Wales, Welsh Government and Department for Energy Security and Net Zero moving closer to an outcome on securing and transferring £4.8m Department for Energy Security and Net Zero funds. 	<ul style="list-style-type: none"> • Potential confirmation re. RTFO from DfT • Potential confirmation from DESNZ re. £4.8m • Ambition North Wales and Menter Môn promoting the project at events to raise awareness and attract offtakers. • Exploration of hydrogen sub-fund to enable North Wales hydrogen development to support Holyhead Hydrogen Hub transport production facility. 		<ul style="list-style-type: none"> • RAG status remains amber while key outstanding matters assist resolution: Department for Transport, Renewable Transport Fuel Obligation; Department for Energy Security and Net Zero £4.8m; hydrogen sub-fund.

05 LAND AND PROPERTY PROGRAMME PERFORMANCE

Programme Aim

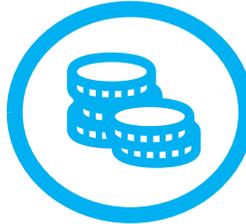
To address the shortage of suitable land and properties for business growth and to bring forward sites for housing development. To deliver improvements that stimulate investment in sites and premises in the Port of Holyhead and the wider region. Enables other programmes by ensuring the right land and property infrastructure is available.



Job Creation Target
2280



GVA investment target
£129bn



Total Investment
£355.4m

RAG Status	Programme Manager Commentary
Pack Page 77	<ul style="list-style-type: none"> • Warren Hall, Broughton - Welsh Government and their consultants are discussing the draft airfield safety compliance report for Warren Hall with Airbus UK. The report has been subject to a consultation exercise with Airbus and the draft is moving to an agreed draft which will then be shared with Airbus for their formal approval. • Western Gateway, Wrexham - WSP are to provide their early-stage conclusions for the Welsh Transport Appraisal Guidance (WelTAG) Lite assessment and submit a final report in May 2025. • Former North Wales Hospital, Denbigh - The S106 agreement did not complete in Q1 2025. Negotiations are ongoing between the Council and Jones Bros. Discussions on the funding agreement with Jones Bros and the document is close to a final agreed draft. • Parc Bryn Cegin, Bangor - The Project Full Business Case was approved in February 2025 and full planning consent was obtained in March.

05 LAND AND PROPERTY PROGRAMME PERFORMANCE

Project (Project Sponsor)	Project Stage	Key Milestones (this quarter)	Key Milestones (next quarter)	RAG Status	RAG Rationale
Western Gateway, Wrexham Wrexham County Borough Council	Developing the Outline Business Case	<ul style="list-style-type: none"> • WeLTAG Lite assessment continued with a report to be issued in May 2025. 	<ul style="list-style-type: none"> • Delivery of the WeLTAG Lite report by WSP with a recommendation as to how the Western Gateway project highway connectivity can proceed. 		<ul style="list-style-type: none"> • The project risk rating revised to amber pending the WeLTAG Lite report being issued on the project access to the main trunk roads and the ability to mitigate growth through active travel and modal shift.
Warren Hall, Broughton Welsh Government / Ambition North Wales	Developing the Outline Business Case	<ul style="list-style-type: none"> • Welsh Governments, their consultants and Airbus UK are agreeing the content of the draft report. The completed draft will then be shared formally with Airbus UK for their approval. 	<ul style="list-style-type: none"> • Welsh Government consultant's report formally approved by Airbus UK. 		<ul style="list-style-type: none"> • Project risk rating remains at amber as revising the airfield safety case is still to be fully assessed and agreed by Airbus UK.
Former North Wales Hospital, Denbighshire Jones Bros (Ruthin) Limited / Denbighshire County Council	The Full Business Case is approved, and the Project is moving towards implementation.	<ul style="list-style-type: none"> • Levelling Up funding Round 3 funding agreement shared with Jones Bros for comment and agreement. • S106 agreement continues to make slow progress. • Grant funding agreement discussions have re-commenced and an agreement on a completed draft is expected soon. • The District Valuation Office report has been received for the transfer value of the site from Denbighshire County Council to Jones Bros. 	<ul style="list-style-type: none"> • The Subsidy Support referral to the Competition and Markets Authority to be registered on the Authority website. • Complete the funding agreement with Jones Bros. • S106 to be approved by Denbighshire County Council and Jones Bros. • Construction of Bat Barns to commence using early release of Levelling Up Funding funding from Denbighshire County Council. 		<ul style="list-style-type: none"> • Risk rating moved to amber due to the slow progress with the S106 Agreement.
Parc Bryn Cegin, Bangor Welsh Government / Ambition North Wales	The Full Business Case is approved, and the Project is moving towards implementation.	<ul style="list-style-type: none"> • Full Business Case approved in February 2025. • Full planning consent obtained in March 2025. 	<ul style="list-style-type: none"> • Complete notification of Subsidy Support referral. • Complete Joint Venture Agreement • Commence Invitation to Tender 		<ul style="list-style-type: none"> • Green risk rating retained for the project as it is on programme for delivery in Summer 2025.

06 AGRI-FOOD AND TOURISM PROGRAMME PERFORMANCE

Project (Project Sponsor)	Project Stage	Key Milestones (this quarter)	Key Milestones (next quarter)	RAG Status	RAG Rationale
Holyhead Gateway Stena Line Ports Limited	Developing the Outline Business Case	<ul style="list-style-type: none"> Stena have asked to pause the project development pending the outcome of their commercial negotiations with the offshore energy sector. 	<ul style="list-style-type: none"> Ongoing dialogue with Stena now at a Senior Level. 		<ul style="list-style-type: none"> Risk rating remains as red as negotiations with end user of new port areas to be completed prior to proceeding.
Kinmel Studios	The Project is under review	<ul style="list-style-type: none"> Discussions with the former Managing Director has confirmed there is limited demand and funding support for new TV and Film Studios. This has been confirmed by a separate investigation by the Portfolio Management Office and the Council. 	<ul style="list-style-type: none"> Project under review. 		<ul style="list-style-type: none"> Project under review. Risk rating remains red given information of limited demand for TV and Film Studio space.
Wrexham Gateway Wrexham County Borough Council	Developing the Outline Business Case	<ul style="list-style-type: none"> Consultancy Team have submitted a pre-application planning pack to the Local Authority. 	<ul style="list-style-type: none"> Development of the Outline Business Case by the Council to commence. Outline Planning application to be submitted. 		<ul style="list-style-type: none"> Risk rating as green given project is progressing to OBC/Outline Planning stage.

Wrexham Gateway
Wrexham County Borough Council
Page 79



Cllr Jason McLellan
Lead Member



Andrew Farrow
Senior Responsible
Owner



David Mathews
Programme
Manager



Delivering to Plan with only minor issues to address
(no action required)



Delivery behind schedule and /moderate issues to address
(management action in place)



Delivery significantly behind schedule and/or significant issues
to address (urgent action required)

Programme Aim

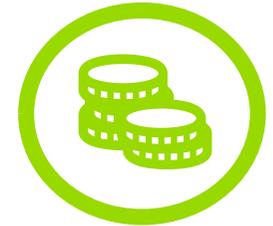
The Agri-food and Tourism Programme will optimise employment and training opportunities in North Wales by providing support facilities to ensure that the region has the skills needed to excel and become world leading. The Programme will also ensure prosperity through sustainably maximising our environment and landscape.



Job Creation Target
380



GVA investment target
£281m



Total Investment
£41.3m

Pack Page 80

AG Status	Programme Manager Commentary
	<ul style="list-style-type: none"> The Responsible Adventure project received approval of the Outline Business Case by the Economic Ambition Board (EAB) on the 14th February 2025. The board request a further report to address three specific concerns before inviting a Full Business Case for the Responsible Adventure project, and invite the company to address these within a 3 month period. The Tourism Talent Network's Grant Funding Agreement was finalised in late January 2025. The project has entered the delivery phase, with construction progressing well at Portmeirion and Zip World. The first funding claim has been submitted and successfully approved. Grŵp Llandrillo-Menai has identified Theatr Clwyd as the final spoke in the network. Additionally, the first draft of the Business Justification Case was presented to the Portfolio Management Office at the end of March Key agreements have been secured, including a Memorandum of Understanding with Snowdonia Hospitality and Leisure and a back-to-back agreement with Portmeirion. The Glynllifon Rural Economy Hub presented the change request to the Economic Ambition Board, which was approved on the 14th February 2025. The project team is currently drafting two Business Justification Cases, one for each dairy and will update the Full Business Case to reflect the revised scope of the Hub. Planning consent needs to be obtained for the Hub.



Cllr Charlie McCoubrey
Lead Member



Sioned Williams
Senior Responsible
Owner



Eilw Hughes
Programme Manager



Delivering to Plan with only minor issues to address (no action required)



Delivery behind schedule and /moderate issues to address (management action in place)



Delivery significantly behind schedule and/or significant issues to address (urgent action required)

07 INNOVATION IN HIGH VALUE MANUFACTURING PROGRAMME PERFORMANCE

Project (Project Sponsor)	Project Stage	Key Milestones (this quarter)	Key Milestones (next quarter)	RAG Status	RAG Rationale
Glynllifon Rural Economy Hub Grŵp Llandrillo Menai	Developing Business Justification Cases and updating the Full Business Case.	<ul style="list-style-type: none"> The project team presented the re-scoping of the project to the Economic Ambition Board, which was approved. Internal funding released to proceed with design phase. Pre-planning application submitted for the Hub. 	<ul style="list-style-type: none"> Present two Business Justification Cases for new elements of the project - <ol style="list-style-type: none"> Sheep Milk Dairy Sustainable Dairy Update the Full Business Case for the Rural Hub Submit planning permission for the Hub Start the procurement process. 		<ul style="list-style-type: none"> Amber rating due to project change request approval, main risks identified: <ol style="list-style-type: none"> Planning for the hub Procurement Process Financial implications of rising costs. Timescales
Tourism Talent Network Grŵp Llandrillo Menai	Project Implementation	<ul style="list-style-type: none"> Grant Funding Agreement agreed and sealed. Moved into delivery stage with construction going well at Portmeirion and Zip World. Final Spoke selection confirmed as Theatr Clwyd - draft Business Justification Case presented to the Portfolio Management Office. Rebranding soft launch by Grŵp Llandrillo Menai. Snowdonia Hospitality and Leisure signed a Memorandum of Understanding with Grŵp Llandrillo Menai. First claim submitted and approved. 	<ul style="list-style-type: none"> Seek approval of the Business Justification Case for Theatr Clwyd as final spoke. Submission of at least two claims. Official launch of new branding - Academi Croeso. Continuation to work with the possible replacement spoke before final decision and presenting a change request. 		<ul style="list-style-type: none"> Green rating as the Grant Funding Agreement has been sealed and the project has moved into delivery.
Responsible Adventure Zip World	Developing the Full Business Case.	<ul style="list-style-type: none"> Approval of Outline Business Case by the Economic Ambition Board, with a need for Zip World to address three requirements before presenting Full Business Case. Meeting held between Local Councillors, Zip World and Ambition North Wales (re-occurring monthly) Issues raised as a result of planning application for the swing are in progress to be actioned. Pre-planning applications for Slate explorer and cable car at the Llechwedd site. Pre-planning response received for Cable Car - delivery on requirements started. 	<ul style="list-style-type: none"> Present on the three requirements to Economic Well-being Sub-Committee. Monthly meetings with local councillors Establishment and first meeting of the eBUS working group Appoint a facilitator to work with Zip and the community Stakeholder engagement. Planning approval for swing Feedback on pre-application for Slate explorer, Submission of full planning applications for two adventures at the Llechwedd site. 		<ul style="list-style-type: none"> Amber rating primarily due to planning risk and lack of community engagement, however good progress has been made with approval of Outline Business Case and proposal to address the three requirements.

07 INNOVATION IN HIGH VALUE MANUFACTURING PROGRAMME PERFORMANCE

Programme Aim

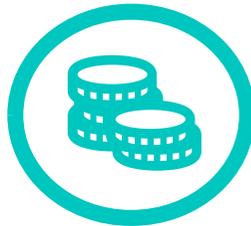
To consolidate North Wales position as a powerful and innovative high value manufacturing cluster, building on existing specialisms and leading expertise to create a higher value, more diverse economic base that supports the transition to a low carbon economy.



Job Creation Target
180



GVA investment target
£114m



Total Investment
£39.5m

PAG Status	Programme Manager Commentary
<p>Pack Page 82</p>	<ul style="list-style-type: none"> The Enterprise Engineering and Optics Centre project is progressing well, with Plas Coch construction on track for completion by May. A change request, endorsed by the Programme Board, has adjusted the delivery approach for the OpTIC refurbishment due to increased costs. The procurement process for Plas Coch equipment has been completed, leading to the submission of a first draft Business Justification Case for Portfolio Management Office review. Additionally, the relocation of the hydrogen hub now requires obtaining planning consent.. The Centre for Environmental Biotechnology project is progressing well, with the Henfaes refurbishment on schedule for completion by the end of April. Procurement for the second phase of equipment has been approved, though not all items were successfully procured. The first funding claim has been submitted for review.



Cllr David Hughes
Lead Member



Tony Ward
Senior Responsible
Owner



Eilw Hughes
Programme Manager



Delivering to Plan with only minor issues to address (no action required)



Delivery behind schedule and /moderate issues to address (management action in place)



Delivery significantly behind schedule and/or significant issues to address (urgent action required)

07 INNOVATION IN HIGH VALUE MANUFACTURING PROGRAMME PERFORMANCE

Project (Project Sponsor)	Project Stage	Key Milestones (this quarter)	Key Milestones (next quarter)	RAG Status	RAG Rationale
Enterprise Engineering and Optics Centre Wrexham University	Project Implementation	<ul style="list-style-type: none"> • Change request for OpTIC refurbishment endorsed by Programme Board. • Procurement activity for Plas Coch equipment. • First Draft of Business Justification Case presented to Portfolio Management Office. • Biodiversity enhancement actions taken place at Northop site. • Delivery and reporting of benefits. 	<ul style="list-style-type: none"> • Sign off of final award of tender for Plas Coch equipment. • Business Justification Case approval. • Final sign off of OpTIC change request. • Completion of Plas Coch Build - soft launch for internal stakeholders. • Communication activity to focus on the completion, biodiversity actions and social value activity. 		<ul style="list-style-type: none"> • Project in delivery and on track
Centre for Environmental Biotechnology Bangor University	Project Implementation	<ul style="list-style-type: none"> • Progression on Henfaes site nearing completion. • Procurement process for second phase equipment conducted and approved. Some items now successfully tendered - further work needed. • First claim submitted. • Delivery and reporting of benefits. 	<ul style="list-style-type: none"> • Completion of Henfaes refurbishment. • Procurement activity to conclude for items. • Possible change request to be drafted in light of underspend - re-profiling and finalisation of procurement to be completed before draft. 		<ul style="list-style-type: none"> • Project in delivery and on track

09 GROWTH DEAL PROJECT DELIVERY PIPELINE

APPENDIX M - PROJECT DELIVERY PLAN

		2021	2022	2023	2024	2025	2026	2027	OBC	Start on Site	Project Completion	
Digital Programme	Digital Signal Processing Centre	Business Case Development and Approval Phase (Approval of OBC pre procurement)		Procurement and Project Delivery Phase (Includes approval of FBC post procurement)			Operational and Benefits Realisation Phase		Dec-21	Jan-22	Dec-25	
	Connected Key Sites and Corridors 1 - 4G+	Business Case Development and Approval Phase (Approval of OBC pre procurement)		Procurement and Project Delivery Phase (Includes approval of FBC post procurement)			Operational and Benefits Realisation Phase		Mar-24	Apr-25	Mar-30	
	Connected Key Sites and Corridors- Full Fibre	Project timetable under review										
	Connected Campuses - Advanced Wireless	Business Case Development and Approval Phase (Approval of OBC pre procurement)		Procurement and Project Delivery Phase (Includes approval of FBC post procurement)			Operational and Benefits Realisation Phase		Mar-25	May-26	Dec-27	
	Connected Campuses - LPWAN (BJC)	Business Case Development and Approval Phase (Approval of OBC pre procurement)		Procurement and Project Delivery Phase (Includes approval of FBC post procurement)			Operational and Benefits Realisation Phase		Sep-24	Jul-25	Dec-28	
	The Last Few %	Project timetable under review										
Low Carbon Energy	Cydnherth (Morlais)	Business Case Development and Approval Phase (Approval of OBC pre procurement)		Procurement and Project Delivery Phase (Includes approval of FBC post procurement)			Operational and Benefits Realisation Phase		Jul-24	Mar-25	Mar-26	
	Egni	Business Case Development and Approval Phase (Approval of OBC pre procurement)		Procurement and Project Delivery Phase (Includes approval of FBC post procurement)			Operational and Benefits Realisation Phase		Dec-23	Aug-25	Nov-26	
	Trawsfynydd	Project timetable under review										
	NEW-H2	Project timetable under review										
	Smart Local Energy	Business Case Development and Approval Phase (Approval of OBC pre procurement)		Procurement and Project Delivery Phase (Includes approval of FBC post procurement)			Operational and Benefits Realisation Phase		Mar-23	Aug-25	Aug-29	
	Deeside Waste to Fuel	Project withdrawn										
	Holyhead Hydrogen Hub	Business Case Development and Approval Phase (Approval of OBC pre procurement)		Procurement and Project Delivery Phase (Includes approval of FBC post procurement)			Operational and Benefits Realisation Phase		Mar-25	Apr-26	Apr-28	
Land and Property	Holyhead Gateway, Anglesey	Project timetable under review										
	Warren Hall, Flintshire	Business Case Development and Approval Phase (Approval of OBC pre procurement)		Procurement and Project Delivery Phase (Includes approval of FBC post procurement)			Operational and Benefits Realisation Phase		Dec-26	Dec-27	Mar-29	
	Former North Wales Hospital, Denbighshire	Business Case Development and Approval Phase (Approval of OBC pre procurement)		Procurement and Project Delivery Phase (Includes approval of FBC post procurement)			Operational and Benefits Realisation Phase		Feb-24	Jun-25	May-27	
	Parc Bryn Cegin, Gwynedd	Business Case Development and Approval Phase (Approval of OBC pre procurement)		Procurement and Project Delivery Phase (Includes approval of FBC post procurement)			Operational and Benefits Realisation Phase		Nov-24	Oct-25	Nov-26	
	Western Gateway, Wrexham	Business Case Development and Approval Phase (Approval of OBC pre procurement)		Procurement and Project Delivery Phase (Includes approval of FBC post procurement)			Operational and Benefits Realisation Phase		Sep-26	Mar-28	Sep-29	
	Wrexham Gateway	Business Case Development and Approval Phase (Approval of OBC pre procurement)		Procurement and Project Delivery Phase (Includes approval of FBC post procurement)			Operational and Benefits Realisation Phase		Nov-25	Mar-27	Sep-28	
	Kinmel Studios	Project timetable under review										
Innovation in High Value Manufacturing	Centre for Environmental Biotechnology (BJC)	Business Case Development and Approval Phase (Approval of OBC pre procurement)		Procurement and Project Delivery Phase (Includes approval of FBC post procurement)			Operational and Benefits Realisation Phase		Mar-24	Oct-24	Jun-25	
	Enterprise Engineering and Optics Centre	Business Case Development and Approval Phase (Approval of OBC pre procurement)		Procurement and Project Delivery Phase (Includes approval of FBC post procurement)			Operational and Benefits Realisation Phase		Apr-22	Mar-24	Dec-25	
Agri-food and Tourism	Glynlifon Rural Economy Hub	Project timetable under review										
	Tourism Talent Network	Business Case Development and Approval Phase (Approval of OBC pre procurement)		Procurement and Project Delivery Phase (Includes approval of FBC post procurement)			Operational and Benefits Realisation Phase		Oct-23	Feb-25	Aug-26	
	Responsible Adventure	Business Case Development and Approval Phase (Approval of OBC pre procurement)		Procurement and Project Delivery Phase (Includes approval of FBC post procurement)			Operational and Benefits Realisation Phase		Feb-25	Oct-25	Oct-26	

■ Business Case Development and Approval Phase (Approval of OBC pre procurement)
 ■ Start on Site
 ■ Procurement and Project Delivery Phase (Includes approval of FBC post procurement)
 ■ Operational and Benefits Realisation Phase

10 OBJECTIVE TRACKER - OVERVIEW OF DELIVERY

Pack Page 86

		Portfolio Business Case 2024 Targets		Approved Project Business Case Targets			Actual		
		Jobs Created (net)	(£M) Total Investment*	OBC/ FBC**	Jobs Created (net)	(£M) Total Investment*	Jobs Created (net)	(£M) Total Investment*	
Digital	Digital Signal Processing Centre (DSP)	33	2.96	FBC	33	2.96	19	2.33	
	Connecting the last few %	133	4.17	OBC	130	4.17	n/a	n/a	
	Connected Key Sites and Corridors	4G+	82	10.04	OBC	TBC at FBC	n/a	n/a	0
		Fibre	35		n/a	n/a	n/a	n/a	n/a
	Connected Campuses	LPWAN	20	39.04	BJC	20	1.14	0	0
Advanced Wireless		165	OBC		130	20	n/a	n/a	
Low Carbon Energy	Cydnherth (Morlais)	233	13.87	FBC	230	16	n/a	n/a	
	NEW-H2	88	130.00	n/a	n/a	n/a	n/a	n/a	
	Egni	49	3.94	OBC	49	3.94	n/a	n/a	
	Smart Local Energy	177	102.00	OBC	174	106.0	n/a	0.00	
	Trawsfynydd	111	244.12	n/a	n/a	n/a	n/a	n/a	
	Holyhead Hydrogen Hub	20	28.77	n/a	n/a	n/a	n/a	n/a	
	Withdrawn project	33	31.64	n/a	n/a	n/a	n/a	n/a	
Land and Property	Western Gateway, Wrexham	360	43.36	n/a	n/a	n/a	n/a	n/a	
	Warren Hall, Broughton	445	69.76	n/a	n/a	n/a	n/a	n/a	
	Former North Wales Hospital, Denbigh	70	94.70	FBC	70	107.0	0	0	
	Parc Bryn Cegin, Bangor	47	6.62	FBC	54	7.11	n/a	n/a	
	Holyhead Gateway	647	170.70	n/a	n/a	n/a	n/a	n/a	
	Wrexham Gateway	150	14.37	n/a	n/a	n/a	n/a	n/a	
	Kimmel Studios	200	32.00	n/a	n/a	n/a	n/a	n/a	
Agrifood and Tourism	Glynllifon Rural Economy Hub	92	16.79	OBC	96	12.85	n/a	n/a	
	Tourism Talent Network	68	19.03	FBC	68	19.03	0	1.87	
	Responsible Adventure	175	12.40	OBC	290	16.6	n/a	n/a	
Innovation in High Value Manufacturing	Enterprise Engineering and Optics Centre	78	18.12	FBC	70	18.12	2	9.81	
	Centre for Environmental Biotechnology	65	3.46	BJC	65	3.46	7	0.83	
Portfolio Management Office Costs			5.15				7	1.77	
Growth Deal Portfolio Total		Targets		7 OBC 8 FBC	Approved		Delivered		
		3,576	1,123		1,479	338.38	35	16.61	

* Total investment shown here includes Portfolio Management Office costs

** OBC - Outline Business Case, FBC - Full Business Case

11 GROWTH DEAL GRANT EXPENDITURE PROFILE

Programme	Project	Project Sponsor	2021/22 (£m)	2022/2 3 (£m)	2023/2 4 (£m)	2024/2 5 (£m)	2025/2 6 (£m)	2026/27 (£m)	2027/28 (£m)	2028/2 9 (£m)	2029/3 0 (£m)	2030/31 (£m)	2031/32 (£m)	2032/3 3 (£m)	2033/3 4 (£m)	2034/3 5 (£m)	Total (£m)
Digital	Digital Signal Processing Centre (DSP)	Bangor University	0.12	166	0.37	0.81	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.96
Digital	Connected Key Sites and Corridors	Ambition North Wales	0.00	0.00	0.00	0.00	0.98	3.27	3.27	0.94	0.41	0.00	0.00	0.00	0.00	0.00	8.87
Digital	Connected Campus	Ambition North Wales	0.00	0.00	0.00	0.00	0.80	5.10	9.80	4.98	0.00	0.00	0.00	0.00	0.00	0.00	20.68
Digital	Connecting the last few percent	Ambition North Wales	0.00	0.00	0.00	0.00	0.00	2.32	1.85	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.17
Low carbon energy	Cydnherth (Morlais)	Menter Môn	0.00	0.00	0.00	0.00	4.43	4.44	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.87
Low carbon energy	Egni	Bangor University	0.00	0.00	0.00	0.00	1.97	1.97	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.94
Low carbon energy	Trawsfynydd Power Station	Cwmni Eginio	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.50	2.50	5.00	5.70	5.00	0.00	19.70
Low carbon energy	New H2	Ambition North Wales	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.00	2.30	2.30	3.10	1.53	0.00	0.00	11.23
Low carbon energy	Smart Local Energy	Ambition North Wales	0.00	0.00	0.00	0.00	3.00	9.25	9.25	3.13	0.00	0.00	0.00	0.00	0.00	0.00	24.63
Low carbon energy	Project Withdrawn (Deeside AD Plant)*	n/a	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.20	3.20	0.00	0.00	0.00	0.00	6.40
Low carbon energy	Holyhead Hydrogen Hub	Menter Môn	0.00	0.00	0.00	0.00	0.00	1.90	1.90	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.80
Land and property	Holyhead Gateway	Stena Line	0.00	0.00	0.00	0.00	0.00	0.00	11.49	11.49	11.49	0.00	0.00	0.00	0.00	0.00	34.47
Land and property	Warren Hall Strategic Site	Ambition North Wales	0.00	0.00	0.00	0.00	0.00	0.00	7.38	7.39	0.00	0.00	0.00	0.00	0.00	0.00	14.77
Land and property	Former North Wales Hospital, Denbigh	Ambition North Wales	0.00	0.00	0.00	0.00	3.47	3.47	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.94
Land and property	Parc Bryn Cegin Strategic Site	Ambition North Wales	0.00	0.00	0.00	0.00	3.93	1.98	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.91
Land and property	Western Gateway, Wrexham	Ambition North Wales	0.00	0.00	0.00	0.00	0.00	0.00	4.48	4.48	0.00	0.00	0.00	0.00	0.00	0.00	8.96
Land and property	Kinmel Studios	Stage Fifty	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.40	3.40	0.00	0.00	0.00	0.00	0.00	6.80
Land and property	Wrexham Gateway	Wrexham County Borough Council	0.00	0.00	0.00	0.00	0.00	2.79	2.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.79
Innovation in High Value Manufacturing	Centre of Environmental Biotechnology (CEB)	Bangor University	0.00	0.00	0.00	2.71	0.25	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.96
Innovation in High Value Manufacturing	Enterprise Engineering & Optics Centre	Wrexham University	0.00	0.00	0.75	6.52	4.28	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.55
Agri-food and tourism	Glynllifon Rural Economy Hub	Grŵp Llandrillo Menai	0.00	0.00	0.00	0.00	0.00	0.00	7.20	4.62	0.00	0.00	0.00	0.00	0.00	0.00	11.82
Agri-food and tourism	Tourism Talent Network	Grŵp Llandrillo Menai	0.00	0.00	0.00	1.57	2.85	0.01	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.43
Agri-food and tourism	Responsible Adventure	Zip World	0.00	0.00	0.00	0.00	2.30	3.70	0.20	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.20
15% to fund the Ambition North Wales revenue budget			0.22	0.28	0.56	0.90	1.35	0.66	0.46	0.15	0.15	0.10	0.10	0.10	0.07	0.05	5.15
Portfolio Total			0.34	1.94	1.68	12.51	29.61	40.86	59.28	42.58	22.45	8.10	8.20	7.33	5.07	0.05	240.00

Page 97

2021/22, 2022/23 and 2023/24 is actual expenditure. Remaining profile is as forecast in the 2024/25 Capital Budget. Capital Profile has been updated as part of the Financial Review (December 2024).

Note: Expenditure profile to be updated as part of Portfolio Review.

12 GROWTH DEAL PROJECTS: CAPITAL FUNDING ALLOCATION PROFILE

Pack Page 88

Programme	Project	Project Sponsor	Profile 24/25 (£m)	Actual YTD (£m)	Variance (£m)*	Rationale
Digital	Digital Signal Processing Centre	Bangor University	0.81	0.00	-0.81	The next claim for the DSP project will follow the approval of their BJC.
	Connecting the Last Few %	Ambition North Wales	0.00	0.00	0.00	
	Connected Key Sites and Corridors	Ambition North Wales	0.00	0.00	0.00	
	Connected Campuses	Ambition North Wales	0.00	0.00	0.00	
Low Carbon Energy	Cydnerth (Morlais)	Menter Môn	0.00	0.00	0.00	The Cydnerth project is moving in to delivery, and the FBC for the Smart Local Energy will be presented for approval in early April, and will start claiming in 2025/26.
	NEW-H2	Ambition North Wales	0.00	0.00	0.00	
	Egni	Bangor University	0.00	0.00	0.00	
	Smart Local Energy	Ambition North Wales	0.00	0.00	0.00	
	Trawsfynydd Power Station	Cwmni Eginio	0.00	0.00	0.00	
	Withdrawn Project	n/a	0.00	0.00	0.00	
	Holyhead Hydrogen Hub	Menter Môn	0.00	0.00	0.00	
Land and Property	Western Gateway, Wrexham	Ambition North Wales	0.00	0.00	0.00	The Former North Wales Hospital and Parc Bryn Cegin Projects are moving into delivery and will start claiming in 2025/26.
	Warren Hall, Broughton	Ambition North Wales	0.00	0.00	0.00	
	Former North Wales Hospital, Denbigh	Ambition North Wales	0.00	0.00	0.00	
	Parc Bryn Cegin, Bangor	Ambition North Wales	0.00	0.00	0.00	
	Holyhead Gateway	Stena line	0.00	0.00	0.00	
	Kinmel Studios		0.00	0.00	0.00	
	Wrexham Gateway	Wrexham County Borough Council	0.00	0.00	0.00	
Agri-food and Tourism	Glynllifon Rural Economy Hub	Grŵp Llandrillo Menai	0.00	0.00	0.00	The Tourism Talent Network Full Business Cases has been approved and their first claim processed.
	Tourism Talent Network	Grŵp Llandrillo Menai	157	1.00	-0.57	
	Responsible Adventure	Zip World	0.00	0.00	0.00	
Innovation in High Value Manufacturing	Enterprise Engineering and Optics Centre	Glyndwr University	6.52	9.06	2.54	Claims submitted for the EEOC and CEB project.
	Centre for Environmental Biotechnology	Bangor University	2.71	0.58	-2.13	
Portfolio Management Office Costs			0.90	0.71	-0.19	
Total			12.51	11.35	-1.16	

13 – GROWTH DEAL BENEFITS REALISATION



APPENDIX A - GROWTH DEAL PROJECTS SUMMARY

	Project	Sponsor	Summary
Digital	Digital Signal Processing Centre (DSP)	Bangor University	The project will allow the DSP Centre to expand its presence and remit, integrating fully with the National Strategy Project (NSP) and enable the scaling of key assets including a 5G testbed, research capacity and state-of-the-art equipment.
	The last few %	Ambition North Wales	This project targets universal superfast coverage across North Wales, which have yet to be served by other means and cannot obtain speeds of at least 30Mbps (download).
	Connected Key Sites and Corridors	Ambition North Wales	This project aims to enhance the reliability and quality of mobile services on the main roads and rail routes in North Wales, enabling full-fibre services to key commercial sites across the region. Focussing on developing fibreoptic networks, which are essential for delivering 4G, 5G and gigabit capable broadband.
	Connected Campuses	Ambition North Wales	The project will accelerate the development of a range of digital connectivity options with a current focus at 18 key regional economic sites.
Low Carbon Energy	Cydnerth (Morlais)	Menter Môn	Investing in infrastructure to connect to the National Grid network and monitor marine environmental effects. This will enable an increase in the deployment of turbines by tidal developers and the generation of renewable energy.
	NEW H2	Ambition North Wales	Support delivery of a demonstrator project involving the production of green hydrogen from low carbon energy sources and its use within regional transport networks.
	Egni (Low Carbon Energy Centre of Excellence)	Bangor University	Investing in the development of facilities at Bangor University and Menai Science Park, enhancing the North Wales and UK capabilities for innovation in low carbon energy and related areas, helping to create the conditions for new inward investment and business growth in the low carbon energy supply chain in North Wales.
	Smart Local Energy	Ambition North Wales	To help achieve renewable energy, decarbonisation and local ownership targets, the project will support innovative enabling projects and demonstrators that overcome market failures and unlock private and community sector investments in smart local energy solutions.
	Trawsfynydd	Cwmni Eginio	The site is uniquely placed for a 'First of A Kind' deployment of a Small Modular Reactor (SMR) or Advanced Modular Reactor (AMR). Alongside the public and private sector, the Growth Deal will contribute funding towards enabling infrastructure for this development.
	Holyhead Hydrogen Hub	Menter Môn	This project will build a green hydrogen production facility at Parc Cybi, Holyhead, producing around 2000+kg/day of green hydrogen, supplying road, maritime and rail transport customers across North Wales.
Land and Property	Western Gateway, Wrexham	Ambition North Wales	Delivery of primary services to enable the site to be brought to the market for sale and development.
	Warren Hall, Broughton	Ambition North Wales	Delivery of primary services to enable the 65-hectare mixed use site to be bought to the market for sale and then development by the private sector.
	Parc Bryn Cegin, Bangor	Ambition North Wales	Provide industrial floor space to meet known demand for units.
	Former North Wales Hospital, Denbigh	Ambition North Wales	The Growth Deal funding will assist in the delivery of a cleared and remediated site with primary services to bring forward a mixed-use commercial and residential development
	Holyhead Gateway	Stena Line	Future proof the Holyhead Port by providing new deep-water heavy loading and cruise facilities, improved vehicular access, guaranteeing the future of the breakwater and providing for the demands of regional energy projects.
	Wrexham Gateway	Wrexham County Borough Council	This project is a sustainable development of a vibrant regenerated area, creating a focal point to support business investment and a multi-modal transportation hub with links to active travel.
	Kinmel Studios		This project will design, build and operate film and television studios at Tir Llwyd Enterprise Park along with a training academy and incubator units.
Agri-food and Tourism	Glynllifon Rural Economy Hub	Grŵp Llandrillo Menai	The vision is to create a distinctive, world-class Rural Economy Hub at Glynllifon, offering a range of facilities and services to strengthen and enhance the regional economy, specifically through growing the food and drink sector.
	Tourism Talent Network	Grŵp Llandrillo Menai	Future-proofing the pipeline of skills provision and increase commercial benefits from one of the most established sectors in the region. The talent network will stimulate public-private collaboration to coordinate action on skills and product development to transform and accelerate the growth of the tourism and hospitality sector in the region.
	Responsible Adventure	Zip World	A multi-element project as part of a sustainable and eco-tourism package including a new sustainable Cable Car, Slate Explorer including visitor viewing platform, Swing and an eBus Network.
Innovation in High Value Manufacturing	Centre for Environmental Biotechnology (CEB)	Bangor University	The Centre for Engineering Biotechnology will be a world-leading centre in the discovery and characterisation of novel extremophilic enzymes of industrial relevance. The Centre for Engineering Biotechnology will provide a strong foundation for attracting world-leading researchers, significant public and commercial research funding, and inward investment to Wales.
	Enterprise Engineering & Optics Centre	Wrexham University	The Enterprise Engineering & Optics Centre will provide facilities targeted to boost high-level skills development for the region and enable Small and medium-sized enterprises (SME's) and large businesses to work in partnership with Wrexham Glyndwr University on commercially driven research and development in optics, composites and hydrogen fuel cells.



Uchelgais Gogledd Cymru
Ambition North Wales



Annual Report 2023/24

Pack Page 91



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Contents

Foreword	3
Progressing Growth in our region	4
Investing in North Wales	5
Milestones	6
2023-24 Quarterly Highlights	7
The North Wales Growth Deal	15
Beyond the Growth Deal	23
Skills and Employability	24
North Wales Corporate Joint Committee	27
Local Area Energy Plans	29
Shared Prosperity Funding	31
Tŷ Gobaith	33
The next 12 months	34

OUR AMBITION

To be confident and cohesive, focused on improving the region's economic, social and environmental well-being.

To see the region develop in a sustainable way, with opportunities for people to gain new skills, develop rewarding careers, for businesses to grow and communities to prosper.

To do this while championing the Welsh language, our culture and heritage, in line with the well-being goals for Wales.

Foreword

We are delighted to present the 2023-24 Annual Report, highlighting the progress made in delivering the North Wales Growth Deal in its third year. This 15-year agreement between Ambition North Wales, the UK Government, and the Welsh Government aims to create new high-value jobs and attract private sector investment, enhancing the economic, social, and environmental well-being of North Wales.

This summer, the long-awaited Harbour Revision Order, essential for the Holyhead port expansion project, received Welsh Ministerial approval. This milestone allows the Holyhead Gateway project, led by Stena Line, to proceed with reclaiming 11.7 hectares of land from the sea. The project which is subject to business case approval will secure capacity to create hundreds of new jobs and deliver a significant investment in the region.

Additionally, the UK Government's Shared Prosperity Fund allocated £126.5 million across our six councils. This allocation, based on a regional investment plan, focuses on building pride in place and increasing life chances. Collectively we have directed £1million of this funding to further enhance the impact and efficacy of the Growth Deal. Our shared regional priorities in Skills and Employability, Energy and Net Zero, Benefits and Social Value, and Digital Connectivity will deliver innovative projects designed to embed and enrich our current regional economic development plans.

Improving digital connectivity and ensuring that everyone has access to a fast and reliable digital connection is an absolute necessity in today's world. This year, through the Welsh Government's Local Broadband Fund we led a project to provide gigabit-capable fibreoptic broadband at seventeen public buildings including GP surgeries, libraries and village halls across North Wales.

Our commitment to sustainable development is exemplified through the emergence of Local Area Energy Plans - ensuring that all six of our councils set out a compelling vision for a net-zero carbon energy system by 2050 and an action plan to achieve this.

The Regional Skills Partnership is unquestionably respected in their leadership of the skills and employability agenda for North Wales and we hope to see this relationship continue to grow and gain more Welsh Government support.

Most of these examples go beyond the Growth Deal, they reflect the wider vision and ambition we hold for North Wales.

It has been our privilege to lead what has been a busy and productive year for Ambition North Wales.



Cllr. Dyfrig Siencyn
Chair of the Economic
Ambition Board



Cllr. Mark Pritchard
Vice-Chair of the
Economic Ambition Board

PROGRESSING GROWTH IN OUR REGION

It's three years since we signed the North Wales Growth deal agreement and this year we have seen another five of our projects achieve approval of their outline business cases - the Tourism Talent Network, Egni, Deeside Anaerobic Digestion Plant, 4G+ and the Former North Wales Hospital in Denbigh. This means that ten projects have now reached this stage over the last three years. Given the significance of global events during this time, I'm unashamed in my recognition of what the Ambition North Wales partnership has achieved.

The Enterprise Engineering and Optics Centre also moved into delivery after securing approval of its full business case to secure the Growth Deal funding. This is a significant milestone because it sees the first of our capital projects being built. Very soon after the turf cutting ceremony on the 22 February, Wynne Construction were on-site and at work at the Plas Coch site.

The early part of last year saw us go out to market to seek new and innovative projects to join the Growth Deal. After a rigorous process, in July we were delighted to announce that five new projects had been invited to submit their outline business cases, all seeking a slice of the £30m of available capital. Kinmel Studios, Responsible Adventure, Wrexham Gateway, and the Holyhead Hydrogen Hub are working on their outline business cases, with approval already gained for the Deeside Anaerobic Digestion Plant.

This just goes to show, that in contrast to last year - which saw two of our projects withdraw from the Growth Deal and another significantly change its scope, this year has been a year of strengthening our portfolio of projects. All signalling a positive year ahead as we plan to take these new projects through into delivery. Ultimately, our ambition through these transformational initiatives remains unchanged - they will bring new high-value jobs and investment as well as deliver on our wider aspiration to build a vibrant, sustainable, and resilient economy for North Wales.

The outlook is positive with the end of this year marked with an encouraging outcome to our Hydrogen Sponsor Challenge, with a sponsor appointment to lead the delivery of a Hydrogen Hub. A Memorandum of Understanding is currently being developed, prior to an official announcement on the project sponsor being made. The project will aim to help fossil fuel powered organisations become low carbon hydrogen customers and deliver an operational hydrogen production facility.

I am proud of my team, the partnership, and the momentum we are building for excellence in our ways of working. Last year we achieved recognition as a Leadership Case Study in the UK national carbon in infrastructure guidelines. Together, we are also aware of our social responsibility as a team, and have been raising funds over the year for our charity of the year children's hospice, Ty Gobaith.

With our passion for North Wales - its economy, businesses, communities and people, we are committed to seeing our region thrive in the future. I'm looking forward to being part of the journey over the next twelve months.



Alwen Williams
Portfolio Director

“
North Wales is making its mark - uniquely positioned to build on its strengths and rise to global challenges
”

Pack Page 95

Askar Sheibani

Chair of the Business Delivery Board



Global warming, international economic instability, and ongoing regional conflicts have prompted radical governmental policy changes worldwide. Many nations are struggling to adapt to the rapidly changing economic landscape. This has led to an acceleration in national defence and security spending, resulting in significant growth in the high-tech aerospace and engineering sectors.

According to the International Monetary Fund, achieving the Net Zero target requires an investment of up to \$6 trillion every year. In response to these global challenges, North Wales is uniquely positioned to play a pivotal role. The region has already begun laying the groundwork for substantial growth in renewable energy and decarbonisation projects.

One such project is the Tidal Stream project in Anglesey, aiming to eventually produce 240MW of low-carbon clean energy. North Wales is also home to the UK's largest solar farms, with further low-carbon energy projects planned across the region, including infrastructure for hydrogen energy.

Moreover, North Wales boasts a strong presence in the world's aerospace manufacturing and innovation sector. The region has aligned itself with the urgent global economic trajectory, making it one of the most sought-after regions for investment.

Supported by a team of highly experienced business leaders within the Business Delivery Board, Ambition North Wales is driving forward these initiatives. Their outstanding track record on an international level ensure North Wales remains at the forefront of economic development and innovation.

2023 - 24 MILESTONES

April 2023 - March 2024



April

We achieved recognition as a Leadership Case Study in the UK national carbon in infrastructure guidelines.



May

We presented on our progress, the RSP and opportunities for cross-border collaboration to the North Wales Cabinet Sub-Committee.



June

We launched the Hydrogen Sponsor challenge.



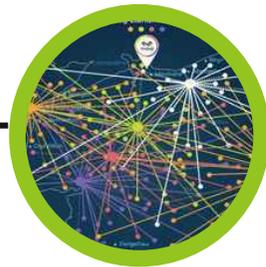
July

We welcomed 5 new projects to join the growth deal.



November

The Enterprise Engineering and Optics Centre Full Business Case was approved by the Economic Ambition Board.



October

The Tourism Talent Network Outline Business Case was approved by the Economic Ambition Board.



September

A Regional Skills Partnership collaboration launched a Low Carbon Energy Prospectus and Video.



August

We hosted a stand at the National Eisteddfod in Boduan.



December

The Deeside Anaerobic Digestion Plant and Egni Outline Business Cases were approved by the Economic Ambition Board.



January

The Regional Skills Partnership's Young Person's Toolkit launched to help young people follow the pathway that best suits them.



February

The Former North Wales Hospital Outline Business Case was approved by the Economic Ambition Board.



March

A series of workshops were held to review the key outputs of the Local Area Energy Plans.

Pack Page 96

LEADERSHIP CASE STUDY

We achieved recognition as a Leadership Case Study in the UK national carbon in infrastructure guidelines PAS 2080 which was hailed as a "game-changer" by the World Economic Forum. The guidelines provide a standard for managing carbon in buildings and infrastructure, reducing carbon and cost through intelligent design, construction, and use.

SPARCX

We sponsored SparcX alongside the Regional Skills Partnership. The event, hosted by M-Sparc, was an opportunity for employers and job seekers in the Science and Tech sector to meet to discuss recruitment opportunities. The event was a great success, with many job seekers securing job interviews.

CONTRACTS SIGNED FOR SECOND PHASE OF DSP

Contracts were signed for the second phase of the Digital Signal Processing Centre's Growth Deal funded equipment. The procurement also secured £101,415 additional social value from the suppliers, including annual technology seminars, potential internships, free equipment, and technical support.

WE ATTENDED THE WALES START UP AWARDS

We were sponsors for the North Wales category, with Plantsea Ltd taking the award. Plantsea Ltd aim to replace environmentally damaging petroleum-based plastics with biodegradable alternatives using natural resources found on the seashore.



HYDROGEN SPONSOR CHALLENGE PRE-LAUNCH EVENT

The Hydrogen Sponsor Challenge pre-launch event was held on the 18th April in Llandudno Junction - then Minister for Economy Vaughan Gething and then Under-Secretary of State for Wales James Davies MP delivered keynote speeches at the event. It was attended by over forty organisations from across the hydrogen value chain, government, and Ambition North Wales partners. The day was a success, with positive feedback and significant networking between organisations.

TWO YEARS INTO DELIVERY

The Digital Signal Processing (DSP) Centre

In early 2023, Bangor University's DSP Centre project entered its second year of delivery. Since its launch, the project has progressed to achieving academic and professional recognition in publications such as the Institute of Engineering Technology and more. To date the DSP Centre achieved the following:



created 13
gross direct
jobs



generated an
additional
£1.275m GVA



secured £1.5
million
additional
funding



53 people
attending skills
training



18 partners
in a
collaboration

Professor Paul Spencer, Pro-Vice-Chancellor, Research:

“As the first project to receive Growth Deal funding, the DSP Centre exemplifies how external investment can substantially drive economic development and foster the future growth and prosperity of North Wales.”



ABERINNOVATION

A delegation from the Innovation in High Value Manufacturing Programme Board visited AberInnovation in early July. The visit was a great networking opportunity and covered AberInnovation and IBERS work on agri-food, phenomics and climate adaptation work, as well as research from the Aberystwyth university cross-disciplinary Rural Futures Hub.

Pack Page 99



MINISTERIAL APPROVAL FOR THE HARBOUR REVISION ORDER

The Holyhead Gateway Port Expansion Project received Welsh Government Ministerial approval for the Harbour Revision Order in August. This removed one of the projects major uncertainties in relation to the project’s delivery.

LAUNCH - LOW CARBON ENERGY PROSPECTUS AND VIDEO

In collaboration with providers in the region, our Regional Skills Partnership developed resources to highlight the excellent educational and training facilities available in North Wales to support the low carbon energy industry.



NATIONAL EISTEDDFOD

We hosted a stand at the National Eisteddfod in Boduan. Those who visited the stand saw a demonstration of tidal energy through a turbine model, children enjoyed a treasure hunt, a postcard activity and a selfie frame. Portfolio Director, Alwen Williams participated in a panel discussion on Unlocking the North Wales Economy, hosted by Nia Thomas, BBC Broadcaster.





New projects join the Growth Deal

In July, we announced that the North Wales Economic Ambition Board had supported a recommendation to invite five new projects to join the Growth Deal portfolio. They were each awarded a provisional allocation of Growth Deal capital funding subject to agreeing a Memorandum of Understanding - setting out expectations of them in relation to securing the funding, and approval of their business cases.

All are transformational projects, which have the potential to bring significant addition to North Wales communities and the economy by generating additional investment and employment opportunities in key sectors. They reflect our vision for innovative and sustainable economic prosperity through collaboration between public and private sectors.

Responsible Adventure

Zip World

£6.2m

Wrexham Gateway

Wrexham County Borough Council

£4.79m

Holyhead Hydrogen Hub

Menter Môn

£3.8m

Kinmel Studios

Stage Fifty

£6.8m

Deeside Anaerobic Digestion Plant

The Circular Economy Developments Ltd

£6.4m

LOW CARBON ENERGY

The Deeside Anaerobic Digestion Plant and Egni Outline Business Cases were approved by the Economic Ambition Board.

The Deeside project will promote a local circular economy using waste materials from local industry as feedstock contributing to a greener future for North Wales.

Pack Page 101

The Egni project will see the build of a second building on the M-Sparc site, developing a Centre of Excellence, enhancing research, design and innovation in low carbon energy.



EEOC FULL BUSINESS CASE APPROVED

The Economic Ambition Board gave its approval to the full business case for Wrexham University's Enterprise Engineering and Optics Centre (EEOC). The Growth Deal will fund £11.55m of the total project value.

The project will deliver a specialist centre for research and development, business collaboration and skills development in optics, photonics and composites as lightweight alternatives for manufacturing.

PROGRESS FOR PARC BRYN CEGIN

The Design and Consultancy Teams for Parc Bryn Cegin, Bangor have been appointed by Welsh Government. This is the first step towards obtaining a project scheme which will be submitted for planning and other consents.



TOURISM TALENT NETWORK

We announced that the Tourism Talent Network had moved to its final Growth Deal funding stage, having had its outline business case approved by the Economic Ambition Board.

The project, led by Grŵp Llandrillo Menai, will see the first specialist tourism skills hub set up in Wales. It will aim to transform the approach to developing skills for the tourism and hospitality industry in the north.

FIRST CONSTRUCTION PROJECT UNDERWAY

Enterprise Engineering and Optics Centre

In early 2024, the Enterprise Engineering and Optics Centre was the Growth Deal's first construction project to move into delivery.

The Enterprise Engineering and Optics Centre is a pioneering build. It will deliver a specialist centre for research and development, business collaboration and skills development in optics, photonics and composites as lightweight alternatives for manufacturing. The result will be to offer regional manufacturing businesses support in reducing the environmental impact of their products and processes.

In addition, the development will integrate hydrogen as a substitute fuel source contributing to sustainable practices in industry.

A key part of the project is to attract investment to North Wales and create local employment, with between 70 and 90 new jobs projected and more than 1,000 people trained to deliver innovative solutions for the future.

The project also includes improvements for facilities at a second university site – the OpTIC Technology Centre at St Asaph.



Professor Maria Hinfelaar, Vice-Chancellor, Wrexham University:
“This investment has enabled a transformational build which - once operational - will support regional businesses to develop cutting-edge solutions to their manufacturing challenges, reducing carbon emissions and bringing potential cost and efficiency benefits.”



INVESTMENT STRATEGY

The Economic Ambition Board endorsed an Investment Strategy for North Wales. The aim of the strategy is to attract Growth Deal and wider regional economic development into the region.

FORMER NORTH WALES HOSPITAL OUTLINE BUSINESS CASE APPROVED

Pack Page 103

The Former North Wales Hospital Outline Business Case was approved by the Economic Ambition Board. The site looks set to become a central part of the community once again, providing employment and homes for local people.



HYDROGEN HUB GAINS SPONSOR

A sponsor was selected by the Economic Ambition Board for the Hydrogen Sponsor Challenge.

The project intends to implement full chain hydrogen production, transport and end use.

The next step in the process will see the sponsor agree a Memorandum of Understanding with Ambition North Wales before developing an outline business case over the coming year.

REGIONAL FOOD SYSTEMS IN NORTH WALES

Funding was secured from the Welsh Government towards a piece of research and analysis to strengthen local and regional food systems in North Wales. A series of workshops have taken place to identify possible future regional agri-food projects.



EEOC COMMENCES CONSTRUCTION

Together with Wrexham University we signed the funding agreement for the Enterprise Engineering and Optics Centre project.

This followed with an official Turf Cutting on the site - marking the start of the North Wales Growth Deal's first construction project. Fay Jones MP, Parliamentary Under-Secretary of State for Wales and Rebecca Evans MS, Minister for Finance and Local Government were joined on site at Wrexham University's Plas Coch Campus in Wrexham by representatives from the University, Ambition North Wales and Wynne Construction.

LOCAL BROADBAND FUND



The Local Broadband fund project concluded at the end of March. The project, led by Ambition North Wales, was funded through the Welsh Government's Local Broadband Fund. The project has upgraded broadband connections to 17 public sector managed sites, this involved the installation of gigabit-capable fibreoptic broadband at local authority and health sites in Wrexham, Gwynedd, Flintshire, Denbighshire and Conwy. These sites include libraries and village halls. The work has resulted in wider network improvements in the target areas.

Back Page 104

upgraded
broadband
connections to

17

public sector
managed sites



THE NORTH WALES GROWTH DEAL

Pack Page 105

funded by:



Llywodraeth Cymru
Welsh Government



UK Government
Llywodraeth y DU

Office of the Secretary of State for Wales
Yr Ysgrifennydd Iechyd a Chalon Cymru

OVERVIEW OF THE GROWTH DEAL

- To build a more vibrant, sustainable and resilient economy in North Wales.
- To build on our strengths, to boost productivity while tackling long-term challenges and economic barriers to deliver inclusive growth.
- To promote growth in a scalable, inclusive and sustainable way, in line with the Well-being of Future Generations (Wales) Act 2015.

INVESTMENT



£240M

Growth Deal target investment



Total Target Investment:
over **£1bn**

SPENDING OBJECTIVES



Create up to
4,200
new jobs



Generate up to
£2.4bn
net additional GVA

OUR PROGRAMMES



Innovation in High Value Manufacturing



Agri-food and Tourism



Digital Connectivity



Land and Property



Low Carbon Energy



Agri-food and Tourism

The programme aims to promote and support employment and training in the Agri-food and Tourism sectors, building on world-leading skills and expertise already established within the region.

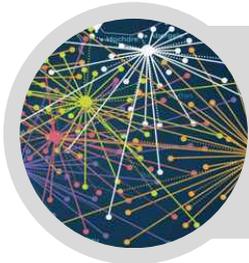


Glynllifon Rural Economy Hub

Lead Sponsor: Grŵp Llandrillo Menai

A distinctive, world class rural economy hub offering food-grade facilities and knowledge transfer services to enhance the food and drink sector.

Preparing the Full Business Case



Tourism Talent Network

Lead Sponsor: Grŵp Llandrillo Menai

Future-proof tourism and hospitality skills provision and increase the commercial benefits from one of the best established and fastest growing sectors in the region.

Preparing the Full Business Case



Responsible Adventure

Lead Sponsor: Zip World

This project will promote North Wales as a leading sustainable tourism destination. It aims to attract additional visitors in a way which is environmentally sustainable and considerate to local communities. It consists of developing a new sustainable cable car, slate explorer and eBus network.

Preparing the Outline Business Case





Digital Connectivity

Addressing connectivity challenges within the region, enhancing the capability to develop new technologies for the future ensuring that businesses and residents can benefit from fast, high-quality connectivity.

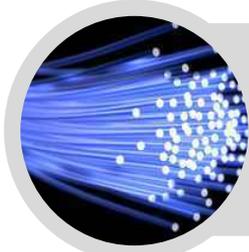


Connected Campuses

Lead Sponsor: Ambition North Wales

Establishing network coverage at key commercial sites in the region, supporting businesses with valuable connectivity options.

Preparing the
Outline Business
Case



Connected Key Sites and Corridors

Lead Sponsor: Ambition North Wales

Enhancing the reliability and quality of mobile services on the main roads and rail routes, enabling full-fibre services to key commercial sites across the region.

Preparing the Full
Business Case



The Digital Signal Processing Centre

Lead Sponsor: Bangor University

Research and development of new technologies which improve how data is processed efficiently and reliably between devices and people.

Project
Implementation and
Monitoring



The Last Few %

Lead Sponsor: Ambition North Wales

Providing a minimum 'superfast' (30Mbps) broadband to poorly connected communities across North Wales.

Preparing the Full
Business Case





Innovation in High Value Manufacturing

Promote innovation and commercialisation of technology in the manufacturing industry, building on the existing strength of the sector within our region.



Centre for Environmental Biotechnology

Lead Sponsor: Bangor University

Exploring the use of biological processes as low carbon alternatives to products and industrial manufacturing processes.

Preparing the
Business
Justification Case

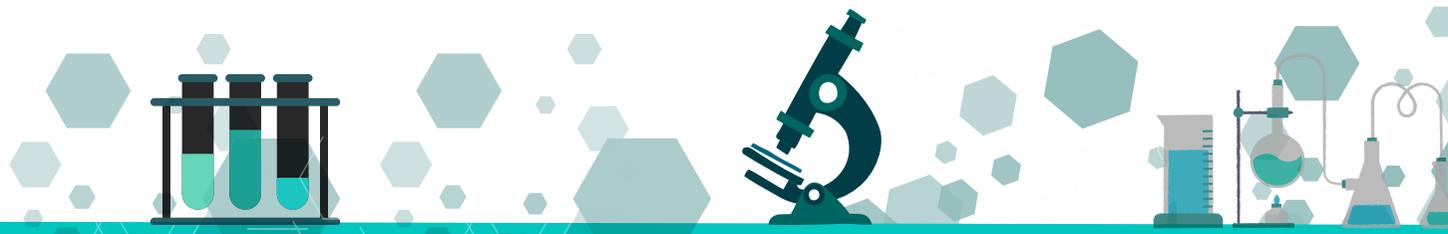


Enterprise Engineering and Optics Centre

Lead Sponsor: Wrexham University

Delivering state-of-the-art facilities to explore optics, photonics and composite materials as a lightweight material alternative, reducing carbon within the sector.

Project
Implementation
and Monitoring





Land and Property

Addressing land and property challenges within the region, to unlock opportunities and build on our strengths. The programme will develop sites to provide residential and employment premises. It will also maximise capacity at key transport links.

Pack Page 110



Former North Wales Hospital

Lead Sponsor: Jones Bros Civil Engineering UK

Remove dangerous buildings and prepare the site for new homes and new commercial units for new and existing businesses to relocate and expand.

Preparing the Full Business Case



Holyhead Gateway

Lead Sponsor: Stenaline

Improve the port's capacity and facilities, creating a multi purpose berth for new energy projects, commercial traffic and cruise ships.

Preparing the Outline Business Case



Parc Bryn Cegin

Lead Sponsor: Ambition North Wales

Develop new build employment premises suitable for new and existing businesses to expand and relocate.

Preparing the Outline Business Case



Warren Hall, Broughton

Lead Sponsor: Ambition North Wales and Welsh Government

The provision of primary services to deliver development plots for new and existing businesses to expand or relocate.

Preparing the Strategic Case



Western Gateway, Wrexham

Lead Sponsor: Ambition North Wales

The provision of primary services to deliver development plots for new and existing businesses to expand or relocate.

Preparing the Strategic Case



Kinmel Studios

Lead Sponsor: Stage Fifty

This project will design, build and operate a new film and television studio at Tir Llwyd Enterprise Park, Kinmel Bay.

Preparing the Strategic Case



Wrexham Gateway

Lead Sponsor: Wrexham County Borough Council

Part of the Wrexham Gateway masterplan, this project aims to deliver a transformative mixed-use regeneration scheme of the area around Wrexham General Station.

Preparing the Strategic Case



Low Carbon Energy

Unlocking the benefits of developing low carbon energy projects within the region, positioning North Wales as a leading location for the low carbon energy sector.



Cydnerth (Morlais)

Lead Sponsor: Menter Môn

Develop additional grid connections for tidal energy suppliers to deploy more turbines within the zone.

Preparing the Outline Business Case



Egni

Lead Sponsor: Bangor University

Developing a Centre of Excellence, enhancing research, design and innovation in low carbon energy.

Preparing the Full Business Case



Hydrogen Hub

Lead Sponsor: Ambition North Wales

Kick-start the region's hydrogen economy by supporting and delivering a hydrogen hub.

Preparing the Strategic Outline Case



Smart Local Energy

Lead Sponsor: Ambition North Wales

Support projects to achieve renewable energy, decarbonisation and have local ownership.

Preparing the Full Business Case



Trawsfynydd

Lead Sponsor: Cwmni Egin (Welsh Government)

Deploy Small or Advanced Modular Reactors at the site to generate low carbon energy.

Preparing the Strategic Outline Case



Deeside Anaerobic Digestion Plant

Lead Sponsor: The Circular Economy Developments Ltd

This project will promote a local circular economy using waste materials from local industry as feedstock contributing to a greener future for North Wales.

Preparing the Full Business Case



Holyhead Hydrogen Hub

Lead Sponsor: Menter Môn

This project will establish a green hydrogen production and distribution facility, at Parc Cybi, Holyhead within the Anglesey Freeport zone.

Preparing the Outline Business Case

GOVERNANCE OVERVIEW

Local authority partners established the Economic Ambition Board as a joint committee in 2019, and is the decision-making body for the North Wales Growth Deal, as well as leading regional economic collaboration.

Having secured the Growth Deal in December 2020, the partners entered 'Governance Agreement 2'. This agreement, a legally binding document, defines the role and function of the Economic Ambition Board and its use of delegated powers. It also outlines the decision-making structures and democratic accountability.

The Growth Deal's governance arrangements enable decisions to be made openly and transparently for the benefit of the whole of the region. While the Economic Ambition Board acts as the decision-making body for the Growth Deal, there are strong formal and informal links to the Welsh and UK Governments as funders of the Deal.

The Economic Ambition Board has adopted a delivery model based on a best-practice approach to portfolio, programme and project management. This approach is an integrated way of meeting an organisation's ambition, driving better decisions and increasing the likelihood of successful outcomes.

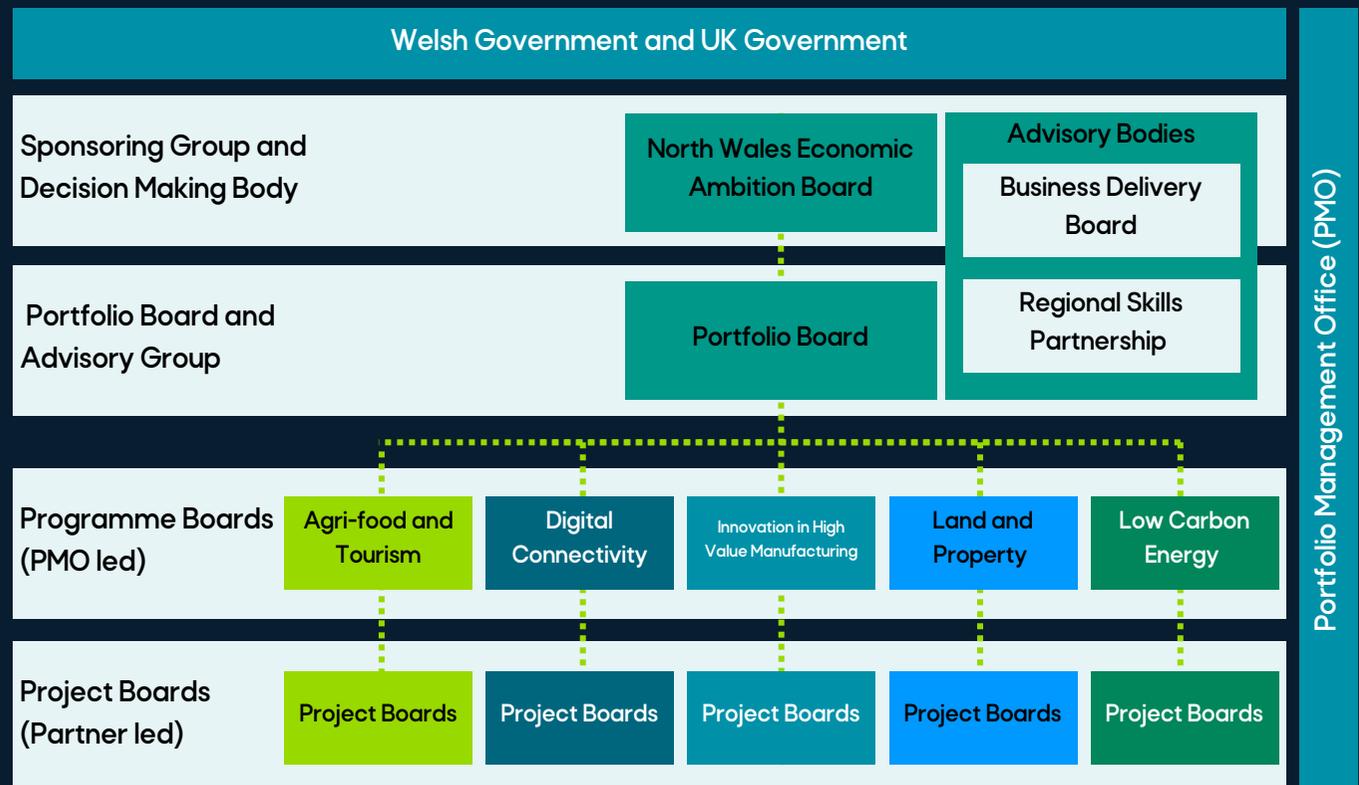
REPORTING

The Portfolio Management Office produce quarterly progress reports and an annual report on the Growth Deal which are shared with the Welsh Government and UK Government, the Economic Ambition Board and its partners. These reports are publicly available on our website.

SCRUTINY ARRANGEMENTS

Scrutiny of the North Wales Growth Deal is provided by the six local authorities through the existing Scrutiny Committee arrangements. The Scrutiny Committees consider the quarterly and annual reports produced by the Portfolio Management Office.

GROWTH DEAL PROJECT DELIVERY STRUCTURE





BEYOND THE GROWTH DEAL

Pack Page 113



Pack Page 114

SKILLS AND EMPLOYABILITY

OVERVIEW BY THE NORTH WALES REGIONAL SKILLS PARTNERSHIP (RSP):

It has been a busy year for the North Wales Regional Skills Partnership. Now 12 months into delivery of its 2023-25 Skills and Employment plan, the team have achieved so much in supporting employers and individuals - and facilitated connections between them. From commissioning research work, to developing resources for young people and employers, it has been a productive year - with a number of exciting projects in the pipeline.

HIGHLIGHTS OVER THE LAST 12 MONTHS:

Recruiting ex-offenders

Finding work after leaving prison can be difficult for individuals due to the myths of recruiting ex-offenders. To dispel some of these myths, the RSP, Ministry of Justice, Working Wales, Welsh Government and DWP worked together to offer employer visits to HMP Berwyn.

The aim was to show employers how individuals develop their competences while in the prison, gaining practical and transferable skills for the workplace.



Career Pathways Pilot

In collaboration with Anglesey Council's Education Department, Teachers, Coleg Menai, GWE, Careers Wales, and Llwyddo'n Lleol the RSP have established a Career Pathways Pilot on Anglesey. The aim is to inspire young minds about local training and career opportunities and the different pathways to their future - through pilot projects across all five secondary schools on the island.

One project for the group is the Teacher Encounter Pilot, which equips teachers with insights into regional job opportunities, allowing them to integrate this knowledge into their classroom teaching and make the connections between the curriculum and working skills.

Another initiative being developed is the 'Inspire to Build' project, led by the Construction Employer Sub-group. This will be a short-term programme, shining a spotlight on higher-level construction roles such as architecture, planning and quantity surveying.

Seren Conference Seminar: 'North Wales: Your Pathways to the Future'

The team held a seminar - 'North Wales: Your Pathways to the Future' at a Seren Conference in November to highlight graduate employment and training opportunities. Over 400 young people attended, where they received information on degree apprenticeships, labour market intelligence on key growth sectors, North Wales Growth Deal opportunities and employers with graduate roles.

Low Carbon Energy Skills Research

Low Carbon Energy is a major growth area in North Wales. To better understand the sector, Wavehill were commissioned to undertake a skills analysis across the low carbon energy industry in the region. This involved offshore and onshore Wind, Marine energy i.e. tidal, as well as Nuclear including SMR developments and Decommissioning. The project objective was to better understand the skills and job roles required by developers and their supply chain, now and over the next 10 years. Key developers in the region, RWE, Magnox, BP, Cwmni Eginio and Morlais steered the execution of the work. The RSP will now work with providers to understand available provision against industry requirements and identify any gaps.

Pack Page 116

Low Carbon Energy Prospectus and Video

In collaboration with providers in the region, the RSP have developed resources to highlight the excellent educational and training facilities available in North Wales to support the low carbon energy industry as it evolves and grows. The aim was to collate engaging resources which inform and inspire businesses in the low carbon energy industry to establish in North Wales, due to the region's outstanding training facilities for staff.



Young Person's Toolkit

Young people are our future, so it's essential that they feel fully informed about their options. To support decision-making, a young person's toolkit has been developed - bringing together key information that will help them to feel confident when making choices about their future. The toolkit is also a great tool for parents, teachers, career advisors and others. Four key elements have been developed in the toolkit - a young person's skills plan, an animated video summary of the skills plan, written case studies and videos from individuals sharing their thoughts on working in the region.

Digital Skills Research

To better understand the Digital Skills landscape in North Wales, the RSP commissioned research - engaging with organisations of all sizes and across sectors. The purpose was to gain insights into the needs of employers when considering basic and advanced digital skills, tools and technologies, as well as workforce diversity. Tony Venus of ODAG Consulting, carried out the research and presented his findings, report and recommendations, which were approved by the RSP Board and the Digital Dozen. The latter will now take action on the recommendations.



Offshore Energy Alliance Skills Topic champion

Offshore Energy Alliance (OEA) and the RSP united to propel North Wales as a hub for a skilled local supply chain to the growing offshore wind industry. The region's coast is poised for a significant surge in offshore energy initiatives. With Mona, Morgan, and Awel y Môr, wind farms in the pipeline are set to play a pivotal role in the UK's renewable energy landscape. The RSP and OEA collaboration is designed to ensure skills requirements are exceeded.





Pack Page 117

NORTH WALES CORPORATE JOINT COMMITTEE

NORTH WALES CORPORATE JOINT COMMITTEE

CORPORATE JOINT COMMITTEE

Corporate Joint Committees (CJCs) are new regional corporate local government entities with similar powers, duties, governance, and administrative structures to local authorities in Wales.

The Welsh Government regulations came into place in April 2021 and from 30 June 2022 onwards the CJCs were assigned their statutory duties to prepare a Strategic Development Plan and a Regional Transport Plan. In addition, they have a responsibility to enhance and promote the economic well-being of the area.

The North Wales CJC comprises the six Local Authorities in North Wales and the Snowdonia National Park Authority.

This new corporate body will still be known as Ambition North Wales - ensuring we build on our established collaborative work and reputation. The North Wales Corporate Joint Committee will be our legal name.

TRANSFER OF AMBITION NORTH WALES

It has been agreed that the functions of the North Wales Economic Ambition Board will be transferred into the North Wales Corporate Joint Committee. Four independent workstreams will be established for the transfer, these are Legal and Governance; People and HR; Finance, Processes and Systems; and Communications and Engagement.

STRATEGIC DEVELOPMENT PLAN

A Strategic Development Plan recognises that planning for an individual local planning authority administrative area does not necessarily reflect how people live their lives, how markets operate or how business functions. Strategic Development Plan's offer the ability to ensure that a wider geographical area is considered in a single plan.

REGIONAL TRANSPORT PLAN

A Regional Transport Plan sets out the policies to achieve an accessible, sustainable, affordable, and integrated transport system for North Wales. Delivery of the plan and its priorities will support the economy to thrive, encourage modal shift away from private car use, and reduce the negative environmental impact of our transport network.



Pack Page 119

LOCAL AREA ENERGY PLANS

LOCAL AREA ENERGY PLANS AND REGIONAL ENERGY STRATEGY



The Strategic Energy Team have worked closely with the 5 local authorities (with Conwy's plan having already been developed) and consultants ARUP, The Carbon Trust and Afallen to deliver Local Area Energy Plans (LAEP) specific to each Local Authority area.

Pack Page 120

The Local Area Energy Plan outlines a compelling vision for what a net-zero carbon energy system could look like in 2050 for the local area. Drawing on a robust evidence base developed during the LAEP's creation, an action plan has been produced to drive the transition of the local energy system towards net zero.

Over the last year, our role has been:

- Managing the contract with ARUP, The Carbon Trust and Afallen
- Coordinate and facilitate stakeholder engagement, progress meetings, workshops and focus groups
- Providing a regional perspective to the plans and represent the region in national discussions
- Ensuring alignment between LAEP's, Regional Energy Strategy and National Plans and Policies

The LAEP's are being finalised and presented to each Local Authority during Q1 of 2024/25.





SHARED PROSPERITY FUNDING

SHARED PROSPERITY FUNDING

We secured over £1m of Shared Prosperity Funding to deliver on the following workstreams complimenting Growth Deal delivery:

Skills and Employability

Skills and Employability Portal

Skills and Employability Portal – Development of an online Skills and Employment Portal for North Wales. The portal will acknowledge flagship businesses, provide information about large scale job generating projects, raise awareness of future jobs and opportunities and inspire young people to consider a career within a priority sector.

Energy and Net Zero

Access to Smart Local Energy

A project to supply grants to SMEs, social enterprises and community organisations so they can procure bid writing consultation. The ultimate aim is for the awarded SME's and social enterprises to subsequently access funding through the Growth Deal Smart Local Energy Fund.

Carbon Emissions and Biodiversity

Sharing best practice and delivering training sessions on how climate change considerations should inform business case development.

Benefits and Social Value

Commitments and best practice

Develop an online monitoring platform for social value commitments and share best practice.

Digital

Rural Digital Community Support

Providing support for communities to improve their broadband connectivity.

SME Connectivity Assessments

Providing SMEs with business specific advice and guidance on how they can adopt the latest wireless network technologies to improve productivity and innovation.

Access Agreements

Providing information and support for councils to investigate the feasibility of adopting access agreements to enable use of lighting columns for 4G small cell deployment. The project goal is to supply the councils with the relevant information.

Mobile Coverage Survey

A project to purchase survey equipment to enable the region to assess 4G signal quality independently of network operators' own assessments. The capability will identify areas of need and help in lobbying operators on location specific issues.

POWERED BY

**LEVELLING
— UP —**

Tŷ GOBAITH

The team chose Tŷ Gobaith as the chosen charity for the year. Since September the team have been busy raising monies to support the charity.

The team have participated in Dark Runs across the region, hosted a bake sale at Sarn Mynach, and arranged a clothes donation for the charity's Llandudno shop.

Tŷ Gobaith is a centre of excellence for children's palliative care helping children and families with the best care and support when and where they need it.



To date the team have raised an amazing

£1,810

*including a match funding contribution from the Principality Building Society



THE NEXT TWELVE MONTHS

Over the next twelve months our focus, alongside our partners, remains unchanged. We will drive our projects forward to deliver the new jobs and investment that North Wales deserves.

Let us not forget that the Growth Deal is addressing chronic failures in our economy. If these projects were easy to deliver they would have been operational years ago. Solving these failures takes time, it takes patience and it takes resilience from everyone involved. Working collaboratively together, with both Governments and the private sector requires compassion in the way we form partnerships, in the way we lead and inspire teams to overcome the hurdles and deliver these challenging projects together.

Ultimately we are all striving for the same outcome, we want to see North Wales thrive at every level and compete on a global scale. This gives us a chance to retain our talented young people and offer them jobs that can provide them with the standard of living they deserve. This was not on offer when I was a school leaver so I feel very passionate about making a difference for those following in the generations behind me. I left North Wales at the age of 22 and I returned here to work at the age of 43. That's over two decades of my life - arguably the most important of all, spent building my career in Cardiff and London. I am privileged to now be in this role and despite the challenges I will make sure the Growth Deal investment makes a real difference and offers young people the choice I didn't have.

Looking ahead, we have an extremely busy first half of the year with a significant number of business cases expected to be approved including the Former North Wales Hospital, Denbigh project, the Deeside Anaerobic Digestion Plan and the Tourism Talent Network and the Centre for Environmental Biotechnology.

In addition to moving these key projects forward, we are embarking on a significant change which will see the Portfolio Management Office team and the North Wales Growth Deal transfer into the North Wales Corporate Joint Committee. My focus will be firmly on has to be on the successful and smooth transfer of projects but ultimately people into this new Local Government entity. From July 2024, I will move into the role of Chief Executive of the North Wales Corporate Joint Committee and will continue the work to ensure that we meet our statutory duties and produce a Regional Transport Plan, a Strategic Development Plan and do everything possible to promote regional economic wellbeing.

At a personal level, and in the spirit of transparency, this year for me has been the most challenging yet since joining Local Government in 2020. My team, the Ambition North Wales Partnership and wider colleagues who identify as being part of one 'Team North Wales' are an incredible cohort of people who are passionate about making a difference. Together we will navigate through all of the challenges ahead and look forward with wisdom, confidence and enthusiasm about the year ahead.



Alwen Williams
Portfolio Director

OUR PARTNERS



Pack Page 125

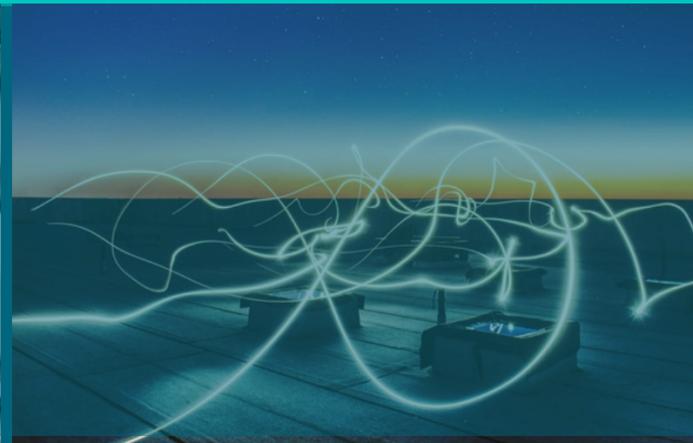
£240M OF GROWTH DEAL FUNDING BY



North Wales Growth Deal

Key Project Highlights

2024/25





Page 127

Progress on the first construction project

Enterprise Engineering and Optics Centre

At the beginning of 2024, the Enterprise Engineering and Optics Centre (EEOC) was the North Wales Growth Deal's first construction project to move into delivery – and at present, construction is a matter of weeks away from completion.

The EEOC at Wrexham University is a pioneering development, which will become a specialist centre for industry engagement, research, and innovation. The development will provide North Wales with a centre for collaboration and skills development in sustainability, renewables, and high value manufacturing. In particular focus are composites as lightweight alternatives for manufacturing, supporting the development and adoption of hydrogen technologies, and maximising the benefits of optics and photonics expertise.

The EEOC project is being delivered across two of the University sites – the Plas Coch campus in Wrexham and the OpTIC Technology Centre at the St Asaph campus.

£9.81m Total investment to date	2 gross direct jobs created	1 collaboration created	10 actions to develop local supply chain	1 enterprise supported

“The construction of the EEOC aligns with one of our key goals of our newly launched vision, which is around ensuring excellence in the quality and impacts of research and enterprise, and in turn, delivering successful innovation and transformational impact.

We look forward to the building opening for the start of the next academic year in September, and helping us to realise our ambitions of it being a specialist centre for research and development, and delivering innovation, which will drive economic growth, here in North Wales.

Thanks must go to Ambition North Wales, as this trail-blazing development would not be possible without investment from the North Wales Growth Deal.”

Professor Joe Yates, Vice-Chancellor, Wrexham University



Another year of the DSP

In early 2024, Bangor University's DSP Centre project entered its third year of delivery. Since its launch, the project has achieved academic and professional recognition.

Following Growth Deal investment this year, the DSP Centre has opened an innovation laboratory to showcase its technologies to regional partners. It will also demonstrate applications of 5G technology and will form the basis for a three year regional business engagement programme designed to encourage adoption and exploitation of digital technology across a range of regionally important sectors.



£2.33m
Total
investment
to date



created xx
gross direct
jobs



generated an
additional
£xxx GVA



secured £xx
million
additional
funding



xx people
attending skills
training



xx partners
in a
collaboration



Professor William Heath, Head of School, Computer Science and Engineering

“The North Wales Growth Deal investment enables the DSP Centre to develop and share its digital technology across the region. The partnership is already delivering benefits. I’m excited at the further opportunities to broaden our networks and create additional local jobs.”





Centre for Environmental Biotechnology Plus

In July 2024, Bangor University's second Growth Deal project was approved by the Economic Ambition Board. The aim of the Centre for Environmental Biotechnology Plus (CEB+) is to build on the academic success of the Centre for Environmental Biotechnology and the collaboration experience of the BioComposites Centre to create a new environment to explore and develop sustainable solutions to industrial and agricultural challenges. Using a catalogue of over 1,000 enzymes, the Centre will use new equipment and new scale-up facilities, funded by the Growth Deal to develop new products and processes which will tackle some of the most urgent challenges facing society today. The key objectives of the project are to

- Improve the economic prospects of the North Wales region and beyond through collaborative industrial research, job creation and by attracting inward regional investment.
- Create opportunities for industry to operate with better environmental outcomes.

The new scale-up facilities, based at the Henfaes Research Centre near Abergwyngregyn, are close to completion and this will enable to the project to open up more widely to business collaboration.

The project has already started to deliver the following against the key North Wales Growth Deal objectives of job creation, increased GVA and enhanced levels of investment in the region:

- High Value jobs directly in the Centre due to increased activity
- Additional inward investment and employment opportunities through the growth of related activity
- A growth in research activity at both the University and with partner organisations providing further high value employment.
- Graduating students and ongoing professional development relevant to the target sectors.



£0.83m Total investment to date



created 7 gross high value direct jobs



4 students completing qualifications



162m2 research floor space created

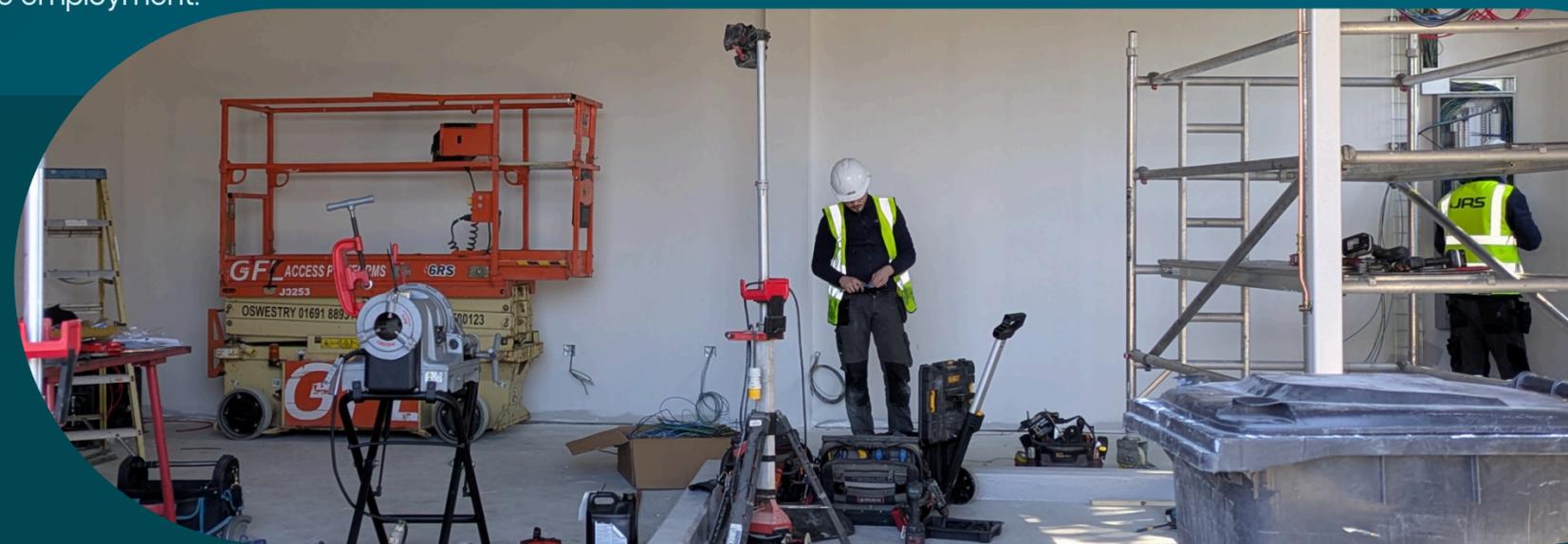


41 collaborations created in support of the project



Professor Paul Spencer, Pro-Vice-Chancellor, Research:

“The investment from the Growth Deal has enabled us to move to the vital next step in the translation of research excellence into real-life impact and will foster increased economic growth and prosperity in North Wales.”



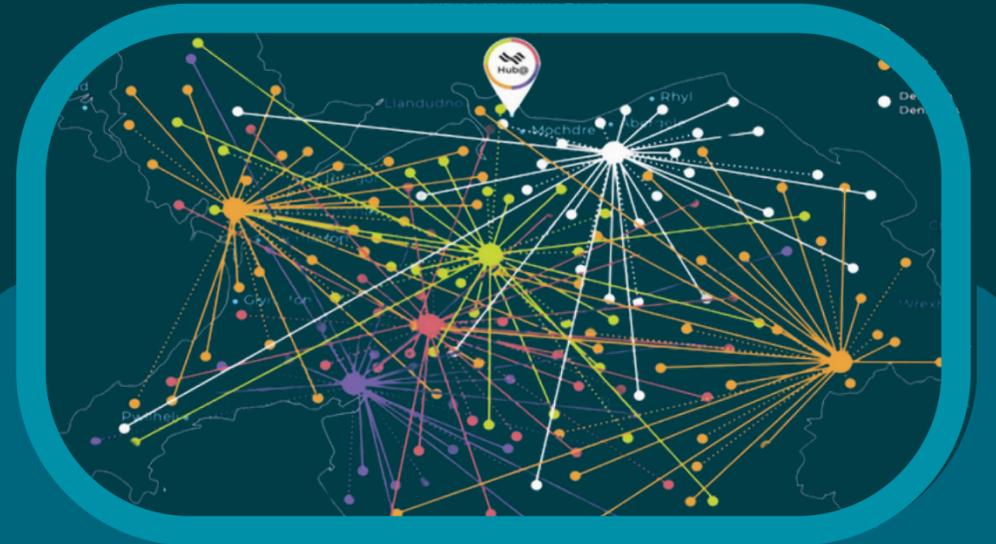
Tourism Talent Network

In 2024, the Tourism Talent Network was officially launched as part of the North Wales Growth Deal portfolio, with the goal of building a resilient, skilled, and future-ready workforce for the region's tourism and hospitality sectors.

At the heart of this project is the creation of a regional hub of excellence based at Coleg Llandrillo. This hub will be closely connected to a network of outstanding training facilities hosted by our Spoke partners: Zip World, Portmeirion, National Trust and Snowdonia Hospitality & Leisure. Together, these state-of-the-art facilities will deliver apprenticeships, skills development, and extensive support for SMEs, microbusinesses, and schools across the region.

By embedding a cross-cutting focus on sustainability, digitalisation, innovation, sense of place, and culture, the project will help to future-proof tourism and hospitality in North Wales. It will drive up quality, stimulate job creation, elevate the sector's profile, and position it as a career of choice for communities throughout the region.

Looking ahead, 2025 will see the construction and launch of private sector partner infrastructure, marking a major step in expanding the network's reach across North Wales.



"Recognising the scale and unique quality of the tourism and hospitality sector in North Wales, our vision for this pioneering project is to establish the region as a leader in sustainable tourism and hospitality innovation. We're proud to see this ambitious project move into its implementation phase and are confident it will bring lasting economic, social, cultural and environmental benefits to North Wales."

Aled Jones-Griffith
Chief Executive Officer
Grŵp Llandrillo Menai



£1.87M

Total investment to date



FUND ADVISORS APPOINTED TO DELIVER CLEAN ENERGY FUND

We appointed WCVA and UMi, following a competitive procurement process, to prepare and mobilise the Clean Energy Fund.

The £24.6m fund will comprise of two sub-funds, with WCVA working in conjunction with Community Energy Wales on the voluntary sector sub-fund; and UMi leading the sub-fund targeting the private sector.

The Clean Energy Fund project will aim to support initiatives which help achieve renewable energy and decarbonisation targets and that have an element of local ownership – meaning that assets owned by stakeholders located and operating in the region will benefit, whether that’s businesses, communities or voluntary sector organisations, subject to eligibility.

Both Funders Advisors are now preparing the sub-funds prior to the fund launch. WCVA and UMi will then conduct the project over a 5-year period initially – work which will include sourcing and recommending investments, due diligence as well as monitoring the progress and performance of all grants and loans.



Nicki Clark from Umi, said:

“We’re incredibly excited and privileged to have the opportunity to work in partnership with Ambition North Wales and WCVA, to enable organisations in North Wales to create real and lasting economic, environmental, and social impact through the adoption of clean and sustainable energy.”

Alun Jones, Head of Social Investment at WCVA, said:

All social businesses work to deliver ‘the triple bottom line’ of people, profit and planet and are only too aware of the responsibilities they carry in supporting the decarbonisation agenda. This fund offers them a huge opportunity to access funding to make their plans happen. We’re really looking forward to helping support some interesting and impactful projects.”



**Cronfa Ynni Glân
Clean Energy Fund**

Cross-sector collaboration secures total private sector funding for new plant

Ambition North Wales formally accepted the withdrawal of the Deeside Anaerobic Digestion Plant from the Growth Deal in November 2024.

The development will proceed without the need for the allocated £6.4m of Growth Deal funding. This successful outcome has been made possible thanks to close collaboration between Ambition North Wales and The Circular Economy Developments Ltd, which enabled investors to commit to the funding required for the plant.

The Deeside Anaerobic Digestion Plant will use food waste from the area to generate and export green electricity and biomethane for commercial use. Alongside creating high value employment, the new site will be carbon negative - delivering a much-needed carbon zero energy source for local industry, including helping the local Toyota Manufacturing Facility to meet decarbonisation targets. The processed digestate will then be used to produce fertiliser for local farms and CO₂ will be captured for storage or industrial use.



We are excited to solidify our commitment to Deeside as the location for TCE's headquarters. This decision reinforces our dedication to supporting local growth, creating sustainable job opportunities, and contributing positively to the region's economic landscape.

By working closely together with Ambition North Wales, we have strengthened our shared commitment to sustainable development in Deeside, fostering meaningful connections that will drive local growth and support a greener economy.

Mac Andrade
Chief Executive Officer
The Circular Economy Developments Ltd



**Economy, Trade, and
Rural Affairs Committee**

Kellie Beirne
Chief Executive, Cardiff Capital Region

Councillor Mary Ann Brocklesby
Chair, Cardiff Capital Region

11 June 2025

Dear Kellie and Mary Ann,

Independent Review – Terms of Reference

Thank you both for attending the Committee's evidence session on 4 June, and for your openness regarding the settlement sum on the Aberthaw procurement issue.

As outlined during the session when discussing the independent review currently being undertaken by Deloitte following these issues, the Committee would welcome receiving the terms of reference of this review.

I would be grateful to receive any information you can share in this regard by 30 June please.

Yours sincerely,



Andrew RT Davies MS
Chair: Economy, Trade and Rural Affairs Committee

We welcome correspondence in Welsh or English



Councillor Jake Berriman
Joint Chair of the Growing Mid Wales Board

Councillor Bryan Davies
Joint Chair of the Growing Mid Wales Board

Carwyn Jones-Evans
Portfolio Senior Responsible Officer, Growing Mid Wales

11 June 2025

Dear Jake, Bryan and Carwyn,

Follow-up to meeting of 4 June 2025

Thank you all for attending the evidence session on 4 June 2025 in support of the Committee's inquiry into City and Growth Deals. As discussed at the end of the session, due to time constraints there were some questions we could not cover in the session. These are focussed on the business support landscape, and are set out below:

- How do the activities of the Growth Deal fit within the wider business support landscape?
- How do you ensure you develop projects or funding schemes that add to rather than duplicate existing business support provision? For example, how does the scope of the Mid Wales Commercial Property Investment Fund differ from the commercial property loans offered via the Development Bank of Wales?
- What involvement do you expect to have in the Welsh Government's review of business support and what potential improvements would they wish to see being taken forward as a result of the review? We note that your written evidence states "We do not believe we

have been formally made aware of the review of the business support landscape by Welsh Government”.

I would be grateful to receive your written response to these points by 11 July 2025.

Yours sincerely,

A handwritten signature in black ink that reads "Andrew RT Davies". The signature is written in a cursive style with some capital letters.

Andrew RT Davies MS

Chair: Economy, Trade and Rural Affairs Committee

We welcome correspondence in Welsh or English



Andrew RT Davies MS
Chair, Economy, Trade and Rural Affairs Committee

12 June 2025

Dear Andrew,

Amendments to the International Labour Convention on the Recognition of a Safe and Healthy Working Environment as a Fundamental Principle

As you are aware, the Legislation, Justice and Constitution Committee is responsible for monitoring the implementation of non-trade international agreements in the Sixth Senedd.

During our meeting on 19 May 2025, we considered International Labour Convention No. 191 concerning Amendments to Standards Consequential to the Recognition of a Safe and Healthy Working Environment as a Fundamental Principle. The purpose of the agreement is to introduce amendments to other International Labour Organisation Conventions and instruments. These amendments reflect the inclusion of the right to a safe and healthy working environment in the International Labour Organisation's framework of fundamental principles and rights at work in June 2022.

Although the agreement relates to a reserved matter in Wales, we agreed to draw the agreement to the attention of your Committee, in light of its economy remit.

Our latest report, which covers this agreement, was laid on 5 June 2025 and is available [here](#).

Yours sincerely,



Mike Hedges
Chair

Mark Drakeford MS,
Cabinet Secretary for Finance and Welsh Language

16 June 2025

Dear Mark,

Consultation with Senedd Committees on documentation supporting Draft Budget scrutiny

As you are aware, the Committee concluded in our [report](#) on the scrutiny of the Welsh Government Draft Budget 2025-26 that it would consult Senedd committees involved in budget scrutiny ahead of the Welsh Spending Review and the 2026-27 budget round to explore ways to maximise budgetary scrutiny in the Senedd.

This year, we wrote to all Senedd Committees on [1 April 2025](#) and received responses from the following Committees:

- [Economy, Trade, and Rural Affairs Committee \(ETRA\)](#)
- [Local Government and Housing Committee \(LGH\)](#)
- [Culture, Communications, Welsh Language, Sport and International Relations Committee \(CCWLSIR\)](#)
- [Children and Young People and Education Committee \(CYPE\)](#)
- [Health and Social Care Committee \(HSC\)](#)

These responses build on themes identified during similar consultation exercises held in 2023 and 2024 and are summarised under the following headings:

Timing

ETRA, CCWLSIR and LGH all expressed disappointment that the timing of the Draft Budget 2025-26 fell over the Christmas period and asked for this to be avoided in future budget rounds. LGH stated that:

"Over the past three years, the draft budget scrutiny process has felt rushed, with our report being laid the day before the Plenary debate. This raises questions in relation to the extent in which Senedd Members, the Welsh Government and stakeholders can meaningfully consider committee reports before the debate."

CCWLSIR added that the Welsh Government should be taking steps to ensure the earliest possible publication of its draft budget and supporting documentation to facilitate meaningful scrutiny.

This reflects our concerns about the time available to scrutinise the 2025-26 Draft Budget, encapsulated in our [recommendation](#) that the Cabinet Secretary works with the Committee to identify ways in which scrutiny opportunities can be enhanced, as well as continuing the approach of holding pre-budget evidence sessions early in the autumn term in years when the publication of the Draft Budget is delayed.

We welcome your [response](#) which stated that you are keen to ensure that we make the best use of the time available for the 2026-27 budget round, and we hope you can take the additional views expressed above into account when considering the forthcoming timetable.

Quality and usefulness of evidence

The quality of evidence produced by the Welsh Government in support of the Draft Budget has been a common concern amongst Senedd Committees to date.

ETRA was "broadly content" with the evidence received from the Welsh Government in relation to the Draft Budget 2025-26, particularly the breakdown of actions by BEL activity tables. CYPE also stated that they had "no concerns with the timeliness, quality or usefulness of the 2025-26 Draft Budget documentation".

However, committees did focus on ways in which transparency in the information provided by the Welsh Government could be enhanced.

ETRA stated that they would like to see further information provided on the engagement undertaken by the Welsh Government with stakeholders and the public prior to the Draft Budget's publication to allow the Committee to better understand the basis for the budgetary decisions taken.

LGH also stated that there is room for more clarity and transparency in the documentation provided, stating that:

"We would like to see more detail under each BEL, for example the homelessness prevention BEL needs to account for the Housing Support Grant separately, alongside the other element of the BEL.

LGH added that it would also be helpful if the Welsh Government could set out in written evidence how the provisional local government settlement considers the requirement for the sector to comply with certain statutory duties and/or Programme for Government priorities, such as the Welsh language; inequalities and the nature and climate emergency.

In its response, CCWLSIR identified several policy areas where the evidence provided was limited and was not sufficient to inform effective scrutiny. This included its work in scrutinising budgets relating to the Welsh Language, international relations and the financial performance of Cadw.

CYPE called for the Welsh Government to provide multi-year projections of both its revenue and capital budgets following the spending review in June 2025. Alongside this, they stated that the Welsh Government should clearly set out its funding priorities and the mechanisms by which it will use the funding at its disposal to achieve its policy objectives.

HSC also raised specific points relating to the information it would like to see published alongside the Draft Budget, and reiterated recommendations made in its report on the Draft Budget 2025-26 calling on the Welsh Government to:

- publish the Cabinet Secretary for Health and Social Service's Health Board Allocation letter along with the NHS Planning Framework, which guide health boards' Integrated Medium-Term Plans, either ahead of, or alongside, publication of the other Welsh Government draft budget documentation;
- provide an annual update about the work of the Value and Sustainability Board, the efficiencies that have been implemented, and the opportunities it has identified to support financial improvement; and
- provide a comprehensive breakdown of preventative spending across all NHS bodies in Wales, along with detailed evidence of how the budget allocated to prevention initiatives is being used.

We believe these suggestions are reasonable and believe that addressing the concerns above for 2026-27 will lead to increased transparency, more effective scrutiny and better outcomes.

I welcome your ongoing engagement on these issues and look forward to hearing more about the Welsh Government's approach to the 2026-27 budget during your statement on Plenary on 1 July. I also hope to explore these issues further as part of the Committee's annual budget priorities debate in Plenary prior to the summer recess, where I will provide a summary of the views expressed in our summer engagement events and citizen focus groups.



A copy of this letter has been sent to the Chairs of the Economy, Trade, and Rural Affairs Committee; the Local Government and Housing Committee; the Culture, Communications, Welsh Language, Sport and International Relations Committee; the Children and Young People and Education Committee; and the Health and Social Care Committee.

Yours sincerely,

A handwritten signature in black ink, appearing to read 'Peredur Owen Griffiths'. The signature is fluid and cursive, with a prominent initial 'P' and a long horizontal stroke at the end.

Peredur Owen Griffiths MS
Chair, Finance Committee

Croesewir gohebiaeth yn Gymraeg neu Saesneg | We welcome correspondence in Welsh or English.

Agenda Item 4.4

Rebecca Evans AS/MS
Cabinet Secretary for Economy, Energy and Planning
Ysgrifennydd y Cabinet dros yr Economi, Ynni a Chynllunio



Llywodraeth Cymru
Welsh Government

Ein cyf/Our Ref: MA/RE/1216/25

Andrew RT Davies MS
Chair
Economy, Trade, and Rural Affairs Committee
Senedd Cymru
Cardiff Bay

17 June 2025

Dear Andrew,

I am writing in response to the Economy, Trade and Rural Affairs Committee's report laid on 2 May 2025 on the first two Legislative Consent Memoranda laid in respect of the Data (Use and Access) Bill ("the Bill").

As you will be aware, the Senedd plenary debate for the Legislative Consent Motion on the Bill was held on 6 May 2025. My recommendation was that the Senedd give its consent for the relevant provisions within the Bill, and I am pleased that the motion was agreed. I have since laid a further SLCM (No.5) on 16 May 2025 regarding provisions within Part 3 of the Bill, which make supplementary provision to the clauses for which consent was previously sought.

I would like to thank the members of the Committee for their scrutiny of the first Legislative Consent Memorandum (LCM) laid on 2 January 2025 and Supplementary LCM (SLCM) (No.2) laid on 12 March 2025. I have considered the recommendations made and have responded to each one in the accompanying report.

On the matter of scrutiny as set out in Conclusion 1, I appreciate the concerns of the Committee regarding the need to have sufficient time to scrutinise LCMs properly, particularly where the two-week period has been exceeded. I am also aware that amendments tabled during the recent report stage of the Bill left the Senedd with less than usual reporting opportunity. However, I remain committed to enabling efficient discharge of the legislative consent process and I am grateful for the engagement by UK Government which enabled us to move quickly with the laying of SLCMs No.3 and No.4.

Yours sincerely,

Rebecca Evans AS/MS
Cabinet Secretary for Economy, Energy and Planning
Ysgrifennydd y Cabinet dros yr Economi, Ynni a Chynllunio

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Correspondence.Rebecca.Evans@gov.wales
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Rydym yn croesawu derbyn gohebiaeth yn Gymraeg. Byddwn yn ateb gohebiaeth a dderbynnir yn Gymraeg yn Gymraeg ac ni fydd gohebu yn Gymraeg yn arwain at oedi.

We welcome receiving correspondence in Welsh. Any correspondence received in Welsh will be answered in Welsh and corresponding in Welsh will not lead to a delay in responding.



Report on the Legislative Consent Memoranda on the Data (Use and Access) Bill

Response to the ETRA Committee report (May 2025)

17/06/2025

In May 2025, the Economy, Trade and Rural Affairs (ETRA) Committee laid its report on the Welsh Government's Legislative Consent Memoranda on the Data (Use and Access) Bill. The report includes three recommendations.

This is the Welsh Government's response to the recommendations in the report.

Contents

1. Introduction	3
2. Response to the recommendations	5
Recommendation 1	5
Recommendation 2	5
Recommendation 3	6

1. Introduction

The Data (Use and Access) Bill was introduced in the House of Lords on 23 October 2024. It completed its passage through the House of Lords on 5 February 2025 and was introduced into the House of Commons on 6 February 2025. At the time of publication, the Bill was in the stage of consideration of amendments ('Ping Pong').

The Bill has been designed to achieve three policy objectives by the UK Government namely, to harness the power of data for economic growth, support a modern digital government, and improve people's lives.

It was the view of both the Welsh and UK Governments that the Bill required the legislative consent of the Senedd. To this end a Legislative Consent Memorandum (LCM) was laid in the Senedd on 2 January 2025.

The LCM stated that whilst the Welsh Government was supportive of the policy intent behind the Bill, there remained concerns from a constitutional perspective with several provisions in the Bill. Therefore, further engagement was required with the UK Government on the role of the Welsh Ministers and the Senedd within the Bill on these matters. As a result, the LCM did not provide a recommendation as to whether the Senedd should give consent to this Bill.

A Supplementary LCM (SLCM) No.2 was subsequently laid on 12 March 2025 in respect of UK Government amendments tabled on the Bill on 26 February 2025. As discussions with the UK Government regarding constitutional concerns were still ongoing at that time, LCM No.2 stated further engagement was required with the UK Government on the role of the Welsh Ministers and the Senedd within the Bill before a recommendation could be given on whether the Senedd should give consent to this Bill.

Following positive discussions between the two governments, amendments were tabled on 25 March 2025 by the UK Government at Report Stage in the House of Commons. As a result, in SLCM No.3 laid on 3 April 2025, the Cabinet Secretary for Economy, Energy and Planning recommended that the Senedd supported the Bill and gave its consent.

SLCM No.4 was laid on 28 April 2025 following further UK Government Report Stage amendments, tabled on the same day.

On 6 May 2025, the Legislative Consent Motion debate on the Bill was held in the Senedd. The Senedd voted to agree the motion and consent to the Bill.

SLCM No.5 was laid on 16 May 2025 following further UK Government amendments tabled on 8 May 2025 during Ping Pong stage.

The Welsh Government has set out its response to the individual recommendations in the Committee's report below.

2. Response to the recommendations

Recommendation 1

The Committee recommends that

The Welsh Government should continue discussions with the UK Government regarding the Bill and the UK's EU Data Adequacy decision, including continued requests for the UK Government to share its risk assessment.

Response:

Agree

The Welsh Government will continue to engage with the UK Government in relation to the Bill and EU-UK data adequacy decisions through the appropriate inter-governmental channels.

Recommendation 2

The Committee recommends that

The Welsh Government should provide regular updates to this Committee on its discussions with the UK Government on EU Data Adequacy and any implications the Bill may have on trade until the UK's adequacy status beyond December 2025 is secured.

Response:

Agree

The Welsh Government will provide updates on these matters to the Committee as part of general Ministerial scrutiny meetings, which take place regularly. Further updates will be provided at other times, as and when there is anything significant to report.

Recommendation 3

The Committee recommends that

The Cabinet Secretary should, during the Plenary debate on the Legislative Consent Motion, explain how her recommendation for consent for the Bill reconciles with the Welsh Government's concerns about the loss of EU Data Adequacy.

Response:

Agree

The Cabinet Secretary for Economy, Energy and Planning set out the Welsh Government's position on data adequacy concerns in relation to consent for the Bill during the Legislative Consent Motion debate on 6 May 2025.