

DRAFT IN DEVELOPMENT – For engagement & consultation with GMW Board. This is a document in development, and is **not definitive at this stage**. It will be shaped and developed in further iterations.

It serves as a starting point of the potential proposals that currently are being proposed/scoped. This list can, and will be added to, and will be periodically reviewed.

MID WALES GROWTH DEAL – LONG LIST

Version: 8.1

Status: Working draft – shared as a starting point.

Development history: This document was developed following technical workshops 1a-1d and workshop 2 of the Growth Deal development process throughout the Autumn/Winter of 2020/21. Technical input from officers was provided through a workstream structure – and serves to provide an initial long-list that draws together the main contenders and known proposals to help develop the Growth Deal portfolio.

The proposals were drawn from a combination of the previous public workshops held in the region during 2018 and 2019, individual proposals being proposed to the Local Authorities, and the work of the workstream leads engaging with key stakeholders and partners in Industry and Government in the region.

The list is not definitive, and never will be. It serves as the broad scope of potential opportunities, that demonstrate what is currently being considered.

New ideas/proposals are welcomed at any time. Subject to the Board’s agreement, further information on the emerging Portfolio will be placed on the GMW website. The Portfolio approach means that the door is always open for proposals that fit within these 8 themes, and with the vision and objectives of the Growth Deal.

A lot of activity on this list are not immediately fundable from the Growth Deal – but they are on the list for context, to ensure the region does not lose sight of the activity that needs to happen alongside the Growth Deal.

Applied Research & Innovation

Scheme / Project Title	Project / Scheme Detail	Advantages General and in relation to CSF's	Disadvantages General and in relation to CSF's	Phase/Time scale	Categorisation Must /should /Could	Conclusions (to be completed at workshop 2)
Scoping & Feasibility study commissioned for this thematic area	This will develop project ideas What are the key areas that will bring investment to the region	Will be clear once feasibility completed	Will be clear once feasibility completed	Short	Must - Already commissioned	ACTIVITY – will provide the evidence base for delivering some of the activities below and maybe alternative projects.
Centre for Alternative Technology	Project ideas for expansion requiring capital funding – repositioning to make more main stream	Please see tourism and energy workstreams		Short	Should	Under Strengthening the Tourism Offer – not considered further in the W/stream.
Global Applied AI centre AU	Growth for private sector agri tech company	<ul style="list-style-type: none"> Strategic – good alignment with UK priorities and strong evidence of regional collaboration Business needs – will contribute to tackling issues relating to productivity, employment decline and narrow economic base 	<ul style="list-style-type: none"> Concept needs defining better – will come out of study. 	Short	Must	<p>PROJECT - Carried forward subject to findings of Applied Research and Innovation Study.</p> <p>ACTION: Workstream Lead to identify project proposer and determine if project brief can be developed (at risk, and subject to scoping work).</p>

		<ul style="list-style-type: none"> • Will both broaden and strengthen economy • Potential to leverage private and public sector research funding • Achievability – feasibility study being undertaken. Anchor company already in region. 				
Radiospectrum Centre	The National Spectrum Centre is a collaboration between QinetiQ and Aberystwyth University. It aims to use the unique Welsh environments as test ranges and provide easy access to spectrum and user environments, national facilities, capabilities and know-how.	<ul style="list-style-type: none"> • Strategic fit – strong potential to contribute to digital agenda • Business needs – potential to tackle issues relating to productivity, narrow economic base, decline in jobs between 42 and 66.5 permanent high value jobs projected) hidden nature of rural economy • Will broaden, strengthen and connect economy • Supply – skills supply in region Achievability – feasibility/phase one work underway 	<ul style="list-style-type: none"> • Scope of centre activity partially dependent on UK Gov making spectrum available 	Short to medium	Should	<p>PROJECT - Carried forward subject to findings of Applied Research and Innovation Study.</p> <p>ACTION: Workstream Lead to identify project proposer and determine if project brief can be developed (at risk, and subject to scoping work).</p>
BEACON facility development	Expansion of Centre of Excellence for Biorefining in Wales	<ul style="list-style-type: none"> • Strategic fit – Strong fit with LC agenda • Business needs – potential to combat issues relating to productivity, narrow economic base, rural economy • Supply side – skills and knowledge in place from past ESIF investment. Potential to leverage further research investment. • Achievability – building on past success 	<ul style="list-style-type: none"> • Good commercial links – but what about in region? 	Short	Must	<p>PROJECT - Carried forward subject to findings of Applied Research and Innovation Study.</p> <p>ACTION: Workstream Lead to identify project proposer and determine if project brief can be developed (at risk, and subject to scoping work).</p>
Controlled environment agriculture	Next stage research – development of zero carbon standard?	<ul style="list-style-type: none"> • Strategic fit – strong fit with food supply/sustainability agenda • Business needs – contribute to tackling narrow base and rural economy • Will broaden and strengthen economy Supply – anchor company interested? Skills in university. 	<ul style="list-style-type: none"> • Needs to demonstrate potential for commercial application • By nature of activity needs to be part of larger research network – other dependencies 	Short	Should	<p>PROJECT - Carried forward subject to findings of Applied Research and Innovation Study.</p> <p>ACTION: Workstream Lead to identify project proposer and determine if project brief can be developed (at risk, and subject to scoping work).</p>
Global Centre for Rail Excellence	A rail testing complex. This will allow rolling stock and infrastructure testing of new rail technologies.	<ul style="list-style-type: none"> • Strategic fit – priority for WG. Strong evidence of collaboration. • Business needs – potential to tackle issues relating to productivity, narrow base economic base and employment decline. • Would broaden and strengthen economy. 	<ul style="list-style-type: none"> • UK Gov yet to confirm support • Rival site being developed by 	Short to medium	Should	<p>PROJECT – being developed and driven by another strategy at this time. Total project cost is larger than entire GD budget at this stage.</p>

		<ul style="list-style-type: none"> Supply side – needs investment from WG and UK Gov Achievability – achievable if political support given 	private sector in England			Not carried forward for now – however, note it could develop and be brought in the next review.
Green Hydrogen	Feasibility study to refine areas of activity and define potential	Not covered in this stream – please see energy stream		Short for feasibility Medium for implementation	Should	ACTIVITY - This is covered in more detail in the Energy section. Not considered further.
Advanced Manufacturing Cluster	Ecosystem support to advanced manufacturing (clusters, e.g. Severn Valley?)			Short	Should	Activity – officer or organisation needs to be identified to develop this proposal further. ACTION: Workstream Lead to identify project proposer and determine if project brief can be developed (at risk, and subject to scoping work).
Liquid processing innovations	Infrastructure to add value to liquid (dairy) food products	<ul style="list-style-type: none"> Strategic fit – strong strategic fit Business needs – potential to contribute to productivity, strengthen economic base, market failure??? Will strengthen economy Supply side – identified as important to regional and national supply chains	<ul style="list-style-type: none"> 	Short	Should	PROJECT – picked up in the Agriculture, Food and Drink Priority. Not considered further.
Veterinary Health/Animal Cluster Developments	Investments to add value to animal cluster in Mid (VetHub, Vet School, Tb research centre etc) Also linked potential developments around a Phage Institute.	<ul style="list-style-type: none"> Strategic fit – strong strategic fit (one health and covid resilience) Would strengthen economy Supply – skills and knowledge in region Achievability – critical mass emerging 	Not evident how it would contribute to business needs at present	Short	Must	PROJECT - Carried forward subject to findings of Applied Research and Innovation Study. ACTION: Workstream Lead to identify project proposer and determine if project brief can be developed (at risk, and subject to scoping work).
Digital repository (National Library of Wales)	Establishing a national trusted digital repository for the arts, humanities and social sciences	<ul style="list-style-type: none"> Strategic fit - Culturally significant. Collaboration in place. Investment expected by AU – how much? From where? 	Not evident how it would contribute to business needs at present	Short - Medium	Should/could	PROJECT – Requires significant development from concept. Not carried forward at this time - Revisit at later date. Linked to the tourism theme.
Aberystwyth Innovation Park	Infrastructure development allied to research strengths in region	<ul style="list-style-type: none"> Strategic fit – strong strategic fit Business needs – would contribute to tackling issues relating to productivity, narrow economic base, employment decline Would strengthen and broaden economy 	<ul style="list-style-type: none"> 	Short	Should	PROJECT - Carried forward subject to findings of Applied Research and Innovation Study + feasibility study commissioned for the proposal.

		<ul style="list-style-type: none"> Supply side – potential for investment from BBSRC? Affordability and achievability being determined as part of ongoing feasibility study (all cases will be considered) 				ACTION: Workstream Lead to identify project proposer and determine if project brief can be developed (at risk, and subject to scoping work).
New ways of working	Related to the feasibility study underway	•	•	Short	Innovation study looking at ecosystem as whole	Activity – partially related to the feasibility study underway. No further action required.
Aberporth UAE developments	Related infrastructure	• Private sector interest	•	Short	Could	Activity – partially related to the feasibility study underway. No further action required.
How as a region do we become more innovative – Feasibility Study	Feasibility study underway			Short	Must	Activity –related to the feasibility study underway. No further action required.
Sites and premises - Feasibility	Feasibility study underway					Activity – being picked up in the Supporting Enterprise priority.
Mid Wales Public Sector Challenge Fund	Scoping underway. Potential to establish a challenge fund (similar to Cardiff) to propose public sector challenges. That would then align with the research and commercialisation expertise of regional academic/research assets with solutions from the private sector.	<ul style="list-style-type: none"> Aligns strongly with strategic fit – to create a new platform to draw in private sector investment and solutions to public sector challenges. Rooted in existing strengths academically/research (business school, bioscience and computer science). 	Needs scoping	Short-Medium	Must	ACTIVITY – not carried forward at this stage, as it requires significant scoping, and to run a pilot initially before considering something like the Growth Deal.

Discussion Note:

- Feasibility commissioned relating to infrastructure elements
- How do we encourage business sector across the region to more innovative and embrace innovation
- Focus shouldn't be on funding the existing business but looking at investment for the proposal/programme
- Creating a programme would be a good idea as we have a clear set of benefits/targets we want to achieve. Tells potential partner organisations

R&I – Think it would be timely to define the potential veterinary health project. Aber Uni have already got a lot of the basic building blocks in place so how exactly do we add value to it? There's a lot going on at Aber between Vet health/animal health/TB and other zoonosis research. Given the current impetus on building resilience in case of future coronavirus/zoonosis I think this one could be attractive to UK Gov and Welsh Gov if packaged right and defined promptly.

DRAFT IN DEVELOPMENT

Strengthened Tourism Offer

Strengthening the tourism offer of the Mid Wales region by investing in high quality, year round experiences beneficial to both visitors and host communities.

Scheme /Project Title	Scheme /Project Detail	Advantages General and in relation to CSF's	Disadvantages General and in relation to CSF's	Phase / Time scale	Categorisation Must /Should / Could	Conclusions (to be completed at workshop 2)
<p>Centre for Alternative Technology - Cynefin Project (link to innovation & energy themes)</p>	<p>Cynefin Visitor Infrastructure Development Project – to develop a flagship regional visitor experience and world leading skills centre. It would include a new Visitor Centre, outdoor spaces and trails, an eco-flyer attraction, exhibitions and learning spaces, and onsite all year accommodation.</p>	<p>Strategic fit- strategic outline business case completed by CAT. Fits with overall strategic priorities and tourism investment need to develop regional flagship visitor attraction.</p> <p>Business needs- widen appeal and interest in the existing business. Job creation opportunity. Links to innovation, research and low carbon/energy themes.</p> <p>Optimise social welfare – strengthen local economy through job creation and year-round visitor revenue</p> <p>Supply side C&C – ambition to create a world leading skills and research centre.</p> <p>Affordability – £20m project overall</p> <p>Achievability – Multi-phase project</p>	<p>Affordability – £20m project overall. No details in SOBC about funding routes explored.</p> <p>Achievability – Multi-phase project, but dependent on securing funds.</p> <p>Further work required to prioritise project components and add detail to funding requirements.</p>	<p>Short / Medium</p>	<p>Must</p>	<p>PROJECT - Carried forward subject to further development work required (at risk by project proposer).</p> <p>ACTION: Workstream Lead to identify project proposer and determine if project brief can be developed (at risk). Resource to develop (by proposer) needs consideration.</p>
<p>Ceredigion Harbours Development</p>	<p>Investment in harbour infrastructure in Aberaeron and / or Aberystwyth to facilitate the growth of sailing tourism on the Ceredigion coast.</p> <p>The project would also enable the development of ancillary investments to support the development of marine engineering jobs in the region.</p>	<p>General:</p> <ul style="list-style-type: none"> Will support the development of tourism facilities in region that meets the need to improve quality and lead to higher levels of daily spend by visitors. Investment would facilitate other key investments in the towns. <p>CSF</p> <ul style="list-style-type: none"> Good Strategic fit – Economic Action Plan (investment in tourism facilities that develop high quality attractions and infrastructure) Ceredigion C, owners and manager of the harbours supportive of the development – in line with and adding value to flood defence work. Business needs – Will help create employment, including higher skilled engineering roles. Will help strengthen the tourism economy, and broaden its reach by attracting new visitors. 	<ul style="list-style-type: none"> Some planning and procurement challenges to be overcome to reach next project stage. Large and complex project, with multi phases of delivery – will require revenue investment to provide the project expertise to realise the potential that exists 	<p>Short</p>	<p>Must</p>	<p>PROJECT - Carried forward subject to further development work required (at risk by project proposer).</p> <p>ACTION: Workstream Lead to identify project proposer and determine if project brief can be developed (at risk). Resource to develop (by proposer) needs consideration.</p>

		<ul style="list-style-type: none"> The investment would be based around existing natural and physical assets available in the region, and a growing reputation. Private sector investment and expertise already identified to help deliver the project. 				
<p>Water-Based Site Development</p> <p>(Lakes/Canals/Waterfalls/Water Authority sites)</p> <p>-Access & visitor experience</p> <p>-Potential projects:</p> <p>(Visitor Centre, Accessibility, Trail/Cycle Routes).</p>	<p>Visitor Infrastructure Development Projects in strategically important water-based sites.</p> <p>Includes Montgomery/ Monmouthshire and Brecon Canals – opportunity to exploit canal holidays, infrastructure restoration and develop visitor economy.</p> <p>This has been identified as a potential strategic priority and has political support.</p> <p>Further work needed by Powys CC to secure lead partner commitment and scope potential project/s and wider economic/visitor benefits.</p>	<p>Strategic fit - Potential strategic fit</p> <p>Business needs – potential to strengthen economic base and create jobs.</p> <p>Optimise social welfare – information not yet available</p> <p>Supply side C&C -information not yet available</p> <p>Affordability - information not yet available</p> <p>Achievability –</p> <p>Information not yet available.</p>	<p>Awaiting further scoping information.</p> <p>Not evident how it would contribute to business needs at present.</p>	Medium	Should	<p>PROJECT/PROGRAMME:</p> <p>Not carried forward at this time - Concept/feasibility to be looked at by both LA's (plus need to identify resources to take forward)</p> <p>ACTION: Workstream Lead to identify proposer and identify resource to pursue further discussions around the concept.</p>
<p>Mid Wales Dark Skies development.</p> <p>Facilities in Knighton, but not observatory/site to market this (commercially focused centre built on this USP).</p>	<p>Develop site specific infrastructure for the enjoyment and accessibility of Dark skies across the region.</p> <p>Infrastructure could include DS centre, carparks, viewing areas, complimentary accommodation/attractions, educational resources etc.</p>	<p>Strategic fit-</p> <p>Business needs-</p> <p>Optimise social welfare –</p> <p>Supply side C&C -</p> <p>Affordability -</p> <p>Achievability –</p> <p>Information not yet available.</p>	<p>Awaiting further scoping information.</p> <p>Not evident how it would contribute to business needs at present.</p>	Medium	could	<p>PROJECT:</p> <p>Not carried forward at this time - Concept/feasibility to be looked at by both LA's (plus need to identify resources to take forward)</p> <p>ACTION: Workstream Lead to identify proposer and identify resource to pursue further discussions around the concept.</p>

	Further work needed to scope potential project/s and identify partners					
Downhill MTB centre – nothing in Mid, existing centres in North/South.	<p>Potential new downhill/mountain bike visitor attraction for region.</p> <p>Concept stage, no private sector partner engaged to lead.</p> <p>Further work needed to scope potential project.</p>	<p>Strategic fit-</p> <p>Business needs-</p> <p>Optimise social welfare –</p> <p>Supply side C&C -</p> <p>Affordability -</p> <p>Achievability –</p> <p>Information not yet available</p>	<p>Awaiting further scoping information.</p> <p>Not evident how it would contribute to business needs at present.</p>	Medium	Could	<p>PROJECT:</p> <p>Not carried forward at this time - Concept/feasibility to be looked at by both LA's (plus need to identify resources to take forward)</p> <p>ACTION: Workstream Lead to identify proposer and identify resource to pursue further discussions around the concept.</p>
<p>Mid Wales Steam Railways – development opportunities</p> <p>Links across to wider commercial transportation options.</p>	<p>Enhanced visitor experience and co-ordinated visitor marketing project.</p> <p>Further work needed to scope potential project/s</p>	<p>Strategic fit-</p> <p>Business needs-</p> <p>Optimise social welfare –</p> <p>Supply side C&C -</p> <p>Affordability -</p> <p>Achievability –</p> <p>Information not yet available</p>	<p>Awaiting further scoping information.</p> <p>Not evident how it would contribute to business needs at present.</p>	Medium	Could	<p>PROJECT:</p> <p>Not carried forward at this time - Concept/feasibility to be looked at by both LA's (plus need to identify resources to take forward)</p> <p>ACTION: Workstream Lead to identify proposer and identify resource to pursue further discussions around the concept.</p>
Cultural/Heritage Product development – Strata Florida Abbey (CADW) and Church Tourism	<p>Develop cultural heritage tourism infrastructure projects across the Region.</p> <p>Mid Wales is home to significant heritage and cultural assets and institutions (e.g. National Library for Wales, Royal Commission for Ancient and Heritage Monuments).</p> <p>Further work needed to scope potential project/s</p>	<p>Strategic fit-</p> <p>Business needs-</p> <p>Optimise social welfare –</p> <p>Supply side C&C -</p> <p>Affordability -</p> <p>Achievability –</p> <p>Information not yet available.</p>	<p>Awaiting further scoping information.</p> <p>Not evident how it would contribute to business needs at present.</p> <p>Concept needs to be explored and developed in tandem with relevant organisations.</p>	Medium	Could	<p>PROJECT:</p> <p>Not carried forward at this time - Concept/feasibility to be looked at by both LA's (plus need to identify resources to take forward)</p> <p>ACTION: Workstream Lead to identify proposer and identify resource to pursue further discussions around the concept.</p>

Mid Wales Centre for Rural Life	Potential flagship visitor attraction for the region as a focal point for rural ways of life, culture and heritage. Concept stage. Further work needed to scope potential project/feasibility study. Would need to be private sector led.	Strategic fit- Business needs- Optimise social welfare – Supply side C&C - Affordability - Achievability – Information not yet available.	Awaiting further scoping information. Not evident how it would contribute to business needs at present.	Medium	Could	PROJECT: Not carried forward at this time - Concept/feasibility to be looked at by both LA's (plus need to identify resources to take forward) ACTION: Workstream Lead to identify proposer and identify resource to pursue further discussions around the concept.
Storey Arms – Pen y Fan Improvements. (National Trust project)	Visitor Infrastructure Development Project, to include car parking and toilet facilities and improvements at key access sites to PYF. Project in development phase led by National Trust. Further discussion needed to see if MW Growth Deal could add value to National Trust project. Powys CC to progress this.	Strategic fit- Business needs- Optimise social welfare – Supply side C&C - Affordability - Achievability – Information not yet available.	Awaiting further information. Not evident how it would contribute to business needs at present.	Medium	could	PROJECT: Not carried forward at this time - Concept/feasibility to be looked at by both LA's (plus need to identify resources to take forward) ACTION: Workstream Lead to identify proposer and identify resource to pursue further discussions around the concept.
Skills development across the tourism sector needs to go hand in hand with infrastructure development	Investing in key skills and labour marketing development for the regional tourism economy			Short Skills - Cross cutting across all sectors	Should	No proposal to take forward – Requires development of regional tourism strategy. Include in emerging RLSP development. ACTION: Workstream Lead to identify resource to pursue further discussions to develop the needs analysis.
Need to understand visitor patterns/trends to identify segmented audiences?	Evidence gathering and data analysis to inform key investment decisions Feasibility Study to be completed.			Short	Should	No proposal to take forward – development of regional tourism strategy. ACTION: Workstream Lead to identify resource to pursue further discussions to develop the proposal.

<p>-To identify what support businesses require in region to grow/develop?</p> <p>Report by Miller research funded by LEADER – so need to look at this, and possibly build on if needed.</p>	<p>Current data to be mapped before commissioning</p>					
<p>Links to transport infrastructure.</p> <p>(Marketing activity based on increased numbers.)</p> <p>Links to The Wales Way - including WW business engagement</p>	<p>Transport and regional connectivity marketing.</p>			<p>Short/ medium</p>	<p>should</p>	<p>No proposal to take forward – Requires development of regional tourism strategy.</p> <p>ACTION: Workstream Lead to identify resource to pursue further discussions to develop the proposal.</p>
<p>Visitor Marketing/ Communication (cannot be considered separately to infrastructure developments.)</p>	<p>Strengthened Mid Wales regional identity and coordinated visitor marketing.</p> <p>Elevating & refining what we have in terms of USP</p> <p>More co-ordination of marketing work across the MW region, both public and private sector play a role in this.</p>			<p>Short/ medium</p>	<p>Should</p>	<p>No proposal to take forward – Requires development of regional tourism strategy.</p> <p>ACTION: Workstream Lead to identify resource to pursue further discussions to develop the proposal.</p>

DISCUSSION:

- Strong part of our economy... Difficult area – visitor behaviour that attracts, existing infrastructure in private sector and public assets in key locations needs to be improved.
- So key is understanding where public investment best placed.
- Need to strengthen out of-season/all year offer
- Challenge: natural environment bring people in, but often does not capture economic benefit. As people can visit and perhaps not “dwell” in our towns/local economic spend.
- Tourism assets are outdoors – all-weather issue – needs investment in
- Market Towns – transport and town improvements to facilitate tourism spend. (linkages across to sites/interests of visitors...). Need to improve the look and feel of our towns to encourage people to visit, dwell and spend money. Put on outdoor events, improve outdoor trading opportunities, possible pedestrianisation of some areas to make movement around towns easier and safer.
- Need to future proof our towns centres to allow them to respond better to situations similar to those that we are currently dealing with.
- Visitor Spend – crucial for how we target investments..
- Marketing/Branding – segmented and targeted? Messaging around respect, sustainability.
- National Trust? CADW?
- Accommodation/service sector Occupancy/Quality
- Does this require a strengthened focus regionally – e.g. strategy/vision?

DRAFT IN DEVELOPMENT

Energy

Scheme / Project Title	Scheme/ Project Detail	Advantages General and in relation to CSF's	Disadvantages General and in relation to CSF's	Phase Time scale	Categorisation Must /Should/ Could)	Conclusions (to be completed at workshop 2)
Green Hydrogen Feasibility study	Study brief prepared – ready to go out to procurement			Short	Must	<p>PROGRAMME?PROJECT: Carried forward subject to results of feasibility study. This will likely give a number of proposals which can be taken forward and supported.</p> <p>ACTION: Workstream Lead to progress the feasibility as a priority (date by March 2021).</p>
Energy Programme (with possible sub-programmes)					can be influenced from existing govt plans	Nothing to be carried forward.
<p>SP1: Grid?</p> <ul style="list-style-type: none"> - Arup grid study underway NRW/WG findings will support region 	<p>Evidence base requires building to support power of argument for investment in MW Grid, future sites/locations for regional economic development identified to enable discussions with DNO's regarding future planning and cost outlays (private sector voice important as barrier to growth evidence, grid will make transition to EV's charging infrastructure and electrification of heat very difficult and risks leaving MW lagging</p>	<p>Strong strategic fit complements regional and national policies,</p> <p>Unlocking the MW grid potential will have a positive impact against the core regional business need offering business, social and economic benefits</p> <p>A strengthened MW grid would support other workstreams, businesses to broaden, strengthen and connect the MW economy offering social cost benefit by investment in a much-needed infrastructure</p>	<p>Affordability and appropriateness to invest GD money directly on grid upgrades is questionable</p> <p>Timescales from identification to completed works of a grid upgrade between 5 – 7 years</p> <p>Achievability would likely require additional or external support</p> <p>Strong evidence base required for network operators SPEN, WPD and W&WU to challenge Ofgem for future investment in MW grid</p>	Short/ Medium	Could	Unlikely to be delivered through growth deal given the activity, scale and costs involved. Would need to be funded via national programme.

			(MW study will start this process but until the findings are shared unclear on additional work			
<p>SP2: Decarbonisation of Transport</p> <p>-Project: EV charging?</p> <p>-Hydrogen?</p> <p>-Biogas</p> <p>- LA fleet green transition</p>	<p>- Strategic approach to identify charging/fuelling infrastructure locations (potential to link up with other regions e.g. marches) Underpinned by business and tourism flow data</p>	<p>Strong strategic fit with the regions aspirations, complements local and national policies and strategies</p> <p>Business needs will likely be more social and environmental but there is potential for economic benefits with EV, hydrogen roll out extending to businesses like Riversimple, Electric classic cars and green jobs</p> <p>Strong alignment to strengthening and connecting strategic outcomes but opportunities exist within broadening, long term social welfare benefits from investment</p> <p>Affordable and achievable with likely additional funding available from UK & WG – potential to work cross border with Marches. Supply capacity likely to be external to MW with inward investment</p>	<p>Unsure if would be solely GD investment as likely to be additional funding opportunities through UK & WG</p> <p>Work ongoing in LA's on EV rollout need to engage should we wish to take a more strategic approach</p> <p>MW grid likely to constrain wide/rapid rollout on scale – MW lacks EV infrastructure especially Rapid charge</p>	Short-medium	Could	Unlikely to be delivered through growth deal given the scale and costs involved. Would need to be funded via national programme.
<p>SP3: Generation for Economic</p> <p>-bio/renewable?</p> <p>-CEA?</p> <p>– AD</p> <p>-CEA (linked to R&I IBERS/BEACON)</p>	<p>Use: Programme will explore opportunities relating to energy generation and storage within the region including local models of production and use (hydrogen potential) (potential links to decarbonisation of transport)</p> <p>utilise chicken waste in MW for energy and heat bi-product for CEA</p>	<p>Aligned with regional and national strategic fit and policy/strategy aspirations</p> <p>Opportunity to indirectly support some of the regions core business needs and potentially directly create economic growth and green job creation short and long term jobs</p> <p>Opportunity to create strong links between academic institutions like IBERS/ Bio Innovation and key sectors like agriculture post Brexit diversification and support further reduction in emissions – strong capacity and capability in region already opportunities to extend to marches harper adams</p>	<p>The mid wales energy strategy suggests MW Boosts the use of renewable energy in the region, so we are generating twice the amount required 200% through new generation and storage for export potential to support the Welsh Government target that 70% of the electricity consumption in Wales come from Welsh renewables by 2030 and to support ambitions within the MWES. Wind turbines have been met with significant backlash in</p>	Short - Medium	Could	<p>Unlikely to be delivered through growth deal given the scale and costs involved. Would need to be funded via national programme</p> <p>Hydrogen feasibility study may identify elements suitable for growth deal and should therefore be carries forward at this stage.</p>

		<p>Strongly aligned to social cost benefit and core strategic objectives broadening, strengthening, and connecting</p>	<p>the past we would need to look at mitigating this with improved investment opportunities, job creation, supply chain stimulation and community benefit funds to ensure social cost benefits weigh up</p> <p>Affordability would be costly and likely larger schemes will be driven by inward investment which links to reduced social benefit as a consequence and would require additional capacity and perhaps external resource to manage and deliver</p> <p>Marches looking to develop region as national centre for innovation in agri and low carbon and build upon strengths in AD. We would need to diversify our approach to be unique in this arena</p>			
<p>SP4: Energy Efficient MW –</p>	<p>Programme will support delivery of the MW Energy Strategy supporting energy efficiency improvements and decarbonisation of the public and private sector</p>	<p>Strong strategic fit local, regional and national policy and aspiration contributor.</p> <p>Positive impact could be provided on business needs front, potential for jobs, skills/upskilling, tackle fuel poverty, business efficiency and energy savings long term – contributes positively to social cost benefit, social, environmental and wellbeing benefits and regions strengthening, broadening and connecting core objectives</p>	<p>Supply and capability would need to be upskilled at pace to deliver scale of change required (skills, MW RLSP focus)</p> <p>Funding packages likely to be available outside of growth deal but could be supplemented by GD</p>	<p>Short - Medium</p>	<p>Could</p>	<p>Unlikely to be delivered through growth deal given the scale and costs involved. Would need to be funded via national programme</p>

<p>Work with SWEA to replicate schemes to improve energy efficiency in homes/industry (quick wins) (grant based)</p>	<p>E.G. BEEP and Keep Herefordshire Warm schemes also Marches Renewable Energy Project</p>	<p>Supply side capacity and capability available but will require supplementary upskilling at pace to meet scale of change required</p> <p>Likely to be affordable as governments likely to push funding, policy and resource into this sector</p> <p>Linked to previous advantages</p> <p>Individual merits are strong strategic fit, strong social cost benefit, supply side capacity and capability in place and can support sectors local and independent supply chains to grow, very affordable and achievable as incentive based</p>	<p>funds should private sector wish to invest</p> <p>Work likely to be developed and progressed in MWES at a starting point but scale of challenge and resourcing to progress within the region will require dedicated lead resource and support resource</p> <p>Questionable whether this would be growth deal funding as likely grant based which is revenue? But I believe this is an important component in energy efficiency improvements in region and should be easily replicated and a potential quick win (early engagement and discussions held with SWEA CEO)</p>	<p>Short - Medium</p>	<p>Could</p>	
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Feasibility/programme scoping required for above.				Now	Should	No proposal to take forward at this stage
Comms project to drive cultural change on energy usage/efficiency				Short - Long	Should	No proposal to take forward at this stage
Skills programme to support low carbon transition	eg. retrofitting, heat pumps, renewable energy generation technology and installation	Covered in SP4 and 5		Short	Must/Should	

Discussion Notes:

- Main issue with energy generation in the region is lack of grid capacity to export and lack of solutions for storage
- Need to consider energy creation v's energy storage.
- Decarbonisation of transport – fits under transport heading as well as the EV charging points would come under the transport but the provision of power for the charging points sits under this theme.
- Think about circular economy. Energy generation for local economic use. Link with Agriculture theme.
- Can cost justify expenditure against this theme by building on areas of work that have already been undertaken through other schemes.
- Feasibility should be broad and not focus on particular themes. It should tease out potential ideas.
- Energy usage/ energy efficiency. De-carbonisation agenda should be wider than just transport.
- Needs a lot of PR to support cultural change on attitudes to energy usage

DRAFT IN DEVELOPMENT

Skills and Employment (Cross-cutting)

Skills should be considered a dependency – if you do not get this element right you will not deliver on the other objectives.

No dedicated lead yet – however work to establish RLSP will bring capacity and focus to this area. To better understand the situation and develop proposals in response.

Scheme/Project Title	Scheme/Project Detail	Advantages General and in relation to CSF's	Disadvantages General and in relation to CSF's	Phase/ Timescale	Categorisation Must/should/ could	Conclusions (to be completed at workshop 2)
<p>Feasibility Study – what is needed, what is already being done? What are the gaps?</p> <p>RLSP- strategic co-ordination. –prog board?</p>				Now	Must	<p>Skills activity not funded under Growth Deal as revenue. Further discussions needed re: RLSP, as well as potential feasibility study. Treat as dependency for purpose of Growth Deal.</p> <p>However, capital elements may be required. Needs scoping.</p>
<p>“Developing skills & talent retention” programme (+project: rural academy - CofE?)</p> <p>-Focus: biz, young people.</p> <p>-Delivery: provision, accreditation</p> <p>Sub-programme: around pathways/delivery</p> <p>-Apprenticeships: stronger co-ordination/alignment of provision to biz needs. (Activity we should be doing now?-but above programme is</p>				Long (poss 15 yr)	Must	<p>ACTION: SROs to discuss the appointment of a Workstream Lead, resource needs identification ASAP.</p> <p>Mapping requirements and scoping exercise needs undertaking regionally.</p> <p>If proposals for capital elements emerge at a later date, bring back into Portfolio for consideration.</p>

required for this to happen).						
Programmes- will required programme briefs developed.						
Ambition 35				Long term		

Discussion Notes:

- There is currently a mismatch between skills training and job availability across the region
- What should the focus of the skills programme be?
 - Developing skills
 - Rural academy to address accreditation of workforce
 - Skills and talent retention
- Focus should be on business support and training young people in the area to keep them in the area.
- The overall programme should be 'Skills and talent retention to meet the needs of businesses'.
- Attracting inward investment
- Aspirations and

Skills – understand that this is a relatively undefined workstream at present, and we are only identifying some 'basics'. Think we should include some reference to skills programmes for the infrastructure elements that will arise out of other regional projects including growth deal e.g construction skills, green building skills. Already recognised we do not have these skills in region and this cross cutting element would further contribute to the integrated portfolio approach we are trying to achieve.

What are skills strengths of Mid Wales? Do we have USPs? Do we have critical mass/specialisms – for Centre of Excellence type investment?

e.g. green infrastructure, agri-food, research.

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Supporting Enterprise

Scheme/Project Title	Scheme/Project Detail	Advantages General and in relation to CSF's	Disadvantages General and in relation to CSF's	Phase / Time scale	Categorisation Must/should/could	Conclusions (to be completed at workshop 2)
Mid Wales Employment Sites & premises needs assessment and action plan. Feasibility study – clear understanding of the market in the region. Aging building stock. What is required in terms of sites and premises going forwards	Regional commission identifying need, action plan and strategic intervention to enable the provision of sites and premises to support business growth	Provides strategy and independent advice to identify need and prioritise regional interventions. Key enabler for other interventions and private sector investment	Study provides a snap-shot in time in term of demand and supply.	Short	Must	Activity – feasibility study to inform proposals. Underway. ACTION: Workstream Lead to identify next steps on the feasibility study as a priority. (linked to below).
Sites and premises programme Property investment fund	to ensure the right supply of good quality employment sites and premises to support and stimulate business growth. Potential delivery mechanisms could include a property investment fund	Provides a flexible programme of investment targeted as strategic interventions. Address clear business need and market failure. Key enabler for other interventions and private sector investment.	This may not be the most suitable intervention for a rural region. Further advice and discussion are required between stakeholders.	Short set up but long for delivery	Must	Carried forward subject to proposal being further developed by LA officers in conjunction with WG ACTION: Workstream Lead to identify needs requirement, identify resource, and commission a programme/project brief.
Clean growth programme – cross cutting with energy theme, skills and R & I	Capital investment to support the transition to a low carbon economy and development of associated business growth opportunities. Further feasibility work required.	Low carbon is a strategic priority and regional strength/opportunity. Integrates and supports other interventions. Potential for a “Green Deal” as a USP.	Need to ensure it doesn't duplicate other planned or future initiatives at a national level. Programme not yet defined.	Short	Should	Not taken forward at this time – proposal needs further development
Identify specific needs of businesses in the region to feed into Business Wales review plus broader inward investment, innovation and promotion	Programme of business support measures to enable business growth. Further engagement required to identify need and opportunities	Potential to add value and tailor support to address the specific needs of the Mid Wales economy and business base.	Likely to be more focused on revenue funded interventions.	Short	Should	Activity – not taken forward for GD. Picked up in BAU for the 2 LAs.

Support for businesses for skills and personnel – demand led – ongoing market research into impact of Covid on businesses, Linked to RLSP	Programme of interventions to support the development and retention of the workforce and skills required to support business growth	Skills and recruitment issues are frequently sighted as a significant barrier to business growth. Higher value employment and training opportunities will help retain and attract young people in the region	Likely to be more focused on revenue funded interventions.	Short	Should	Activity – not taken forward for GD. Picked up in BAU for the 2 LAs.
Enterprise Hub development – linked to new ways of working.	Development of a network of high quality digitally enabled sites/ network to encourage entrepreneurship, new business and innovation. Link with employment sites, R&D, business support, digital.	Delivery model to exploit high speed digital connectivity in a rural location. Supports new enterprise and diversification of business base. Potential hub-spoke model.	Potential impact of Covid on office based working and demand. Some duplication with WG Enterprise Hubs. Revenue implications and demand unclear.	Short	Should	Not taken forward at this time – proposal needs further development
Business Park Development	Investment in strategic site development linked to innovation and R&D eg, Aber Innovation, Severn Valley	Clear business need identified through Sites and Premises Study and business engagement. Opportunity to link to and support innovation and growth sectors. Expected to be deliverable over short, medium and long term.	Availability of suitable sites and constraints need to be assessed. Potential need for new local plan allocations.	Short	Should	Not taken forward at this time – proposal needs further development. Some activity covered by other proposals.
Home Grown Homes	Work ongoing already on developing this concept. Further feasibility and development work ongoing to establish the concept. Sited under this theme for now as it is market development (looking at supply-side ability to create a new market for meet existing current/future demand for homes).	Concept in development – however, likely to have significant alignment.	To be developed.	Short-Medium	Should	Not taken forward at this time – work ongoing to develop the concept further. However, may develop into a proposal in the future.

Discussion Note:

- Portfolio, demand led, agile.
- Innovation is important but nothing if businesses aren't set up to use this innovation.
- Cross cutting R & D
- Public sector support aligning to needs and demands of enterprises in the region including with the right people and skills as well as investment
- Can we tap into research being done by National and Welsh Government
- Continued demand for good high quality premises despite pandemic
- No point talking about buildings if you haven't got the infrastructure

Transport

Transport is a key dependency/enabler – many of the other priorities rely on the proposal below being implemented. From a Growth Deal perspective – it is considered “out of scope” for now, due to funding constraints – but still remains within the Portfolio, if circumstances change. Noted that a lot of key schemes on list are being worked up/pursued through other regional avenues.

Scheme/Project Title	Scheme/Project Detail	Advantages General and in relation to CSF's	Disadvantages General and in relation to CSF's	Phase / Time scale	Categorisation Must /Should / Could	Conclusions (To be completed at workshop 2)
<p>Strategic Corridor Interventions (freight/business)</p> <p>-defined projects within this :</p> <p>A483 Pant-Llanymynech,</p> <p>A485 –Buttington Cross to Wollaston</p>	<p>Highways England leading on WebTAG/WeITAG scheme in RIS 2/3</p> <p>Was on Highways England forward programme until 2009,. Included in Mid Wales and Shrewsbury cross border study. Requires WeITAG/WebTAG commencement, to go back on HE list</p>	<p>Economic Action Plan – WG and Regional Framework</p> <p>The A483 in the strategic North-South route linking Deeside Enterprise Zone to South Wales. It is also part of the wider West Midlands (Western Corridor) for strategic freight movements. This location poor resilience leading to long delays and extensive diversion routes.</p> <p>Connecting the economy</p> <p>Reduce carbon emissions.</p> <p>Strengthens the economy and supports business growth</p> <p>A458 Shrewsbury-Welshpool Road, poor resilience leading to long delays and diversion routes. (AS Above)</p>	<p>Environment mitigation required for new road building.</p> <p>Can funding come together from both governments (joint cross border project)</p> <p>As Above</p>	<p>Short-Medium</p> <p>Medium-Long</p>	<p>Should</p> <p>Should</p>	<p>Current the project is not identified to be supported through Growth Deal.</p> <p>This work is currently being considered through Highways England RIS2 & 3 programmes and Welsh Governments, Wales Transport Strategy Delivery Plan.</p>
<p>WG Pinch point Programme & overtaking opportunity (A487, A470, A483 & A44)</p>	<p>Trunk Agency programmed project</p>	<p>Economic Action Plan – WG and Regional Framework- to obtain resilience along the strategic road corridor to support freight</p> <p>Welsh Transport Strategy</p>	<p>Environment mitigation required for online road improvements</p>	<p>Short-Medium</p>	<p>Must</p>	<p>Current the project is not identified to be supported through Growth Deal.</p>

						This work will be programmed within Welsh Governments, Wales Transport Strategy Delivery Plan.
Regional Connectivity <ul style="list-style-type: none"> North-South (A486 Carmarthen) off A487 synod-inn- A478 Haverfordwest Cardigan- 	<p>Investment on the corridor for last 20yr only the middle section between LLandysul and Alltwalis requires improvement to improve resilience, and support HGV movements. (evidence Ceredigion link road business case)</p> <p>Road not currently on a forward programme- full assessment required.</p>	<p>This corridor links the west Wales coast to M4 corridor</p> <p>Support economic action plan. Connects the economy.</p> <p>This corridor will be required should the new hospital be constructed at Narberth and St Clears on the A40 corridor.</p>	<p>Environment mitigation required for online road improvements</p> <p>Change of policy direction regarding health borders and hospital locations.</p>	<p>Medium – Long</p> <p>Long</p>	<p>Should</p> <p>Could</p>	<p>Current the project is not identified to be supported through Growth Deal.</p> <p>These project is out of Region and will need to either included and programmed within Welsh Governments, Wales Transport Strategy Delivery Plan. OR South West Wales Regional Transport Plan. Only a one section of the A478 within Ceredigion and will be included in the Mid Wales Regional Transport Plan.</p>
Public Transport (Bus/Rail) <ul style="list-style-type: none"> Faster more frequent Connection to HS2 (Crewe) Through London Train Improved quality of infrastructure (TrawsCymru project) 	<p>Ongoing commitment within the 15 yr. rail franchise.</p>	<p>Increase provision along the strategic road and rail corridors will support the decarbonisation agenda within the WTS. This supports Economic Action Plan and connects the economy</p>	<p>No revenue funding to support increased services – reduced demand due to Covid 19</p>	<p>Short</p> <p>Long</p>	<p>Must</p> <p>Could</p>	<p>Current the project is not identified to be supported through Growth Deal.</p> <p>These projects to be programmed within Welsh Governments, Wales Transport Strategy Delivery Plan</p>

	TrawsCymru infrastructure within the Welsh Transport Strategy	Local collaboration – working with TraCC		Short Short	Should Must	and Mid Wales Regional Transport Plan
Behaviour Change • Active Travel Programme	As part of the decarbonisation agenda and the policy development within the WTS getting people more active is the 1 st priority	WTS transport plan delivery programme (5yrs) Well Being and Future Generations Act	No enough funding available	Short-Medium-Long	Must	Current the project is not identified to be supported through Growth Deal. This project to be programmed within Welsh Governments, Wales Transport Strategy Delivery Plan and Mid Wales Regional Transport Plan
Decarbonisation • Electric Vehicle charging Programme (link to Improving Towns programme) • Modal Shift to public transport (marketing review project)	As part of the decarbonisation agenda and the policy development within the WTS getting people more active is the 1 st priority	WTS transport plan delivery programme (5yrs) Well Being and Future Generations Act	No enough funding available	Short- medium Short-medium-long	Must Must	Current the project is not identified to be supported through Growth Deal. This project to be programmed within Welsh Governments, Wales Transport Strategy Delivery Plan and Mid Wales Regional Transport Plan
Regional Transport Plan Review	Statutory requirement under the Transport Act 2000	Regional Transport Plan - delivered regionally through TraCC -5yr plan Supports Connecting the economy Well Being and Future Generations Act	Insufficient funding to deliver plan	Short	Must	Local Authority Statutory Duty delivered Regional through TraCC
Public Transport Hub/Interchange development and network planning	TfW currently undertaking bus network review	Regional Transport Plan delivered regionally through TraCC - 5yr plan Supports Connecting the economy Well Being and Future Generations Act	Insufficient funding to deliver plan	Short-Medium	Should	Current the project is not identified to be supported through Growth Deal. This project to be programmed within Welsh Governments, Wales Transport Strategy Delivery Plan and Mid Wales Regional Transport Plan

<p>Logistics – key issue. Mid Wales perception/reality of distance to “market”?</p> <p>Land availability proximal to key transport infrastructure an issue.</p> <p>-Need to bring networks together, interfacing small businesses in region to logistics/distribution.</p> <p>Need to scope this. (Sites & prem started to look at it, but needs a specific piece to go further).</p>	<p>Marches and Mid Wales Freight Strategy -A44 WeITAG</p> <p>(linked to :_Mid Wales Employment Sites & premises needs assessment and action plan)</p>	<p>WTS transport plan delivery programme (5yrs)</p> <p>Well Being and Future Generations Act</p>	<p>Business cases needs development in order to be included in delivery plan</p>	<p>Short</p>	<p>Should</p>	<p>Activity – need to look at the needs requirements.</p> <p>ACTION: Workstream Lead to identify the opportunities/needs requirements. Identify resource to scope/plan requirements.</p>
<p>Skills: driver training public transport (bus/train). Lot of region is over 50 – issue of succession planning.</p> <p>Also new tech training for electrification/hydrogen – servicing and fuel supply/charging.</p>	<p>Requires further information on training requirements</p>			<p>Medium- Long</p> <p>Medium-Long</p>	<p>Must</p>	<p>Activity - The delivery of new skills and skills training requirements need to be identified within the RLSP.</p>

Discussion:

- Joint transport partnership established since the 90s. Delivery programmes and transport /plan in place. Running up to 2022. Awaiting WG refresh of national transport strategy, which will give us policy direction to review.
- Headlines in current regional plan are consistent with Govt ambitions (improved resilience, frequency and accessibility of public transport, decarbonisation, active travel).
- Evidence base: cross-border work to identify strategic corridors.

Agriculture, Food and Drink

Scheme/Project Title	Scheme/Project Detail	Advantages General and in relation to CSF's	Disadvantages General and in relation to CSF's	Phase / Timescale	Categorisation Must/should/could /	Conclusions (to be completed at workshop 2)
Public Sector land/assets development.				Short	Should	Not taken forward at this time as not a project in its own right – opportunity to be explored.
MARKET DEVELOPMENT Business Support –	<p>Signposting and wrap around in Mid Wales (ensure regional businesses take advantage of existing support for sector development, marketing, brand dev etc).</p> <p>Financial products for agri businesses - young entrants, innovative businesses (non environment focused) that may fall through gaps in future but are important to mid wales economy</p>	<ul style="list-style-type: none"> • Good fit with the Strategic needs – Welsh Government has a focus on growing a productive food and drink manufacturing sector in Wales. • Meets Business needs – will help fill productivity gap and create employment. • It will help to broaden and strengthen the economy by enabling sustainable, resilient growth. • Scope for growth is large – good history and tradition of food sector in the region. • Support organisations in region to help deliver. • Whilst it is not a capital element, ensuring the support is delivered effectively around other capital investments will ensure that other investments are more effectively delivered. • Affordable, in that it doesn't require large investment – only better co-ordination of the support programmes available currently across Wales, including in region. 	This is not a capital programme, therefore is not a Growth Deal project, but the point needs to be made that the support programme outlined is required to support the effectiveness of other investment projects in the programme.	Short	Should	For context only – key dependency
MARKET DEVELOPMENT		General:	General:	Short	Must	PROJECT - Carried forward subject to further development work

<p>University of Gastronomy – site identified in Lampeter.</p>	<p>Training / Centre of Excellence facility with the aim of increasing level of local produce in hospitality sector across region. Capital project with revenue requirement</p> <p>-possible link to skills and wider business support environment.</p>	<ul style="list-style-type: none"> Recent feasibility demonstrates support for the project within the industry. Delivery partner identified. Potential to deliver benefits economically across the region, and further afield. Would fit wider town ambitions to build on food-focused strengths. <p>CSF focused:</p> <ul style="list-style-type: none"> Contributes to key strategies – WBFGA, Prosperity for all, Economic Action Plan (Welsh Food Strategy) Meets business needs in the sector, as identified and supported in the feasibility study Works to support the tourism sector, and has the potential to tackle a key weakness – relatively low spend per head in the visitor economy. Strengthens an existing economic sector by driving up quality. Supply side / capacity – already a key sector in the economy, and appetite exists to strengthen further. HE partner wishes to establish the centre as part of their forward plans for the campus. Deliverable within the timeframe. Meets other key strategic needs (e.g. transforming towns agenda). Fits with the HE partner’s long term plans, so has deliverability in future. First stage feasibility complete, so has opportunity to achieve key timeframes in terms of project governance. 	<ul style="list-style-type: none"> Whist deliverability and support are clear, evidence of contribution to higher-paid jobs or GVA may be less clear currently (GVA growth linked to raising quality of offer) Sources of finance – unclear currently about the level of funding from the partner organisation and whether private sector funding can be leveraged up-front, rather than through the delivery of training and other support services. 			<p>required (at risk by project proposer).</p> <p>ACTION: Workstream Lead to identify project proposer and determine if project brief can be developed (at risk). Resource to develop (by proposer) needs consideration.</p>
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<p>MARKET DEVELOPMENT</p> <p>Food Retail experience centre –</p>	<p>Development of ‘Porthi’ – Welsh Food Centre in Builth Wells</p> <p>-With potential to look at hub & spoke. (linked to business environment proposal) –also link to Food Innovation Wales, Cywain project and skills/academy.</p> <p>The development would house Test kitchens, start-up commercial production facilities, training facilities as well as a farm shop / café to raise awareness of and promote food manufactured in the region</p>	<p>General:</p> <ul style="list-style-type: none"> • This would be a key ‘statement’ project for the food and drink industry in Mid Wales. • RWAS is an enthusiastic partner. • Welsh Government Food Division supportive of the project. • Could be a key driver for developing new food businesses in the region. <p>CSF:</p> <ul style="list-style-type: none"> • Good Strategic Fit – Food Strategy and other key strategies, with WG support • Will be a key driver to develop new business start ups in the food industry. • Will play a key role in strengthening the Agri-Food sector of the economy. • Capacity and capability – Royal Welsh Show is a key asset that is well-placed to house the development. Supply chain also well placed to support the initiative. Centrally located to play a key role in Welsh food promotion. • Could be a key asset to engage buyers - hospitality and retail sectors. • Affordability – potential match funding from RWAS feature county programme alongside WG capital. Potential for land to be made available via RWAS. • Achievability – could be seen as a key landmark / statement project that would be supported by the GMW Board. 	<ul style="list-style-type: none"> • Potential Covid impact on availability of match funding. • Location, whilst central is remote in comparison with buyer location. • May not drive productivity 	<p>Short-medium</p>	<p>Must</p>	<p>PROJECT - Carried forward subject to further development work required (at risk by project proposer).</p> <p>ACTION: Workstream Lead to identify project proposer and determine if project brief can be developed (at risk). Resource to develop (by proposer) needs consideration.</p>
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<p>MARKET DEVELOPMENT</p> <p>Mid Wales Agri-Food produce quality branding project</p>	<p>Branding/Added value/Quality – local/regional food – also products. Links to public procurement.</p> <p>(e.g. Cambrian Mountain Lamb). Camb Mountains looking at this also.</p> <p>(e.g. Wool – as a product that there poss new uses e.g. sustainable building insulation).</p>	<p>Development of a long term brand identity and communication project for agri-food products from mid Wales</p>	<p>Not a Growth Deal Project – Revenue - enabling project</p>	<p>Short</p>	<p>Should</p>	<p>Not carried forward at this time as activity/revenue project.</p> <p>ACTION: Workstream Lead to identify the opportunities/needs requirements. Identify resource to scope/plan requirements.</p>
<p>INNOVATION</p> <p>Controlled Environment Agri -Opp here re council farms etc.</p> <p>Work developing here. Feasibility underway by private companies. Area of growth UK-wide. Poss here lose market share to urban areas.</p>				<p>Medium</p>	<p>Should</p>	<p>Not carried forward at this time as proposal needs further development.</p> <p>ACTION: Workstream Lead to identify the opportunities/needs requirements. Identify resource to scope/plan requirements.</p>
<p>INNOVATION</p> <p>Food Manufacturing Innovation Centre (MIC)</p>	<p>This facility will meet a genuine need for an independent pilot plant facility, designed for flexible and innovative research using specialist equipment that will provide reliable results, capable of scale up in their own manufacturing facilities.</p> <p>Land identified and purchased, FCW Horeb. Private business interest – but also wider across</p>	<p>General:</p> <ul style="list-style-type: none"> Key statement project for food manufacturing in Mid Wales – would provide a genuinely unique facility with USP at Wales/ UK or event European level. <p>CSF</p> <ul style="list-style-type: none"> Strategic fit – UK Industrial; Strategy – help drive innovation and productivity in key food and drink sectors. 	<ul style="list-style-type: none"> Location may be deemed to be remote, but is located in a milk field and next to a complementary facility. Securing up-from private sector investment may be challenging. 	<p>Short</p>	<p>Must</p>	<p>PROJECT - Carried forward subject to further development work required (at risk by project proposer).</p> <p>ACTION: Workstream Lead to identify project proposer and determine if project brief can be developed (at risk). Resource to develop (by proposer) needs consideration.</p>

	<p>regional supply/demand chain.</p> <p>The facility would be a Wales/UK first, and unique in Europe.</p> <p>It would provide facilities to support development of products in</p> <p>Dairy, Sauces, Brewing, Water, Fruit, Meat alternatives, Analogue foods, Alternative proteins and functional foods, Nutraceuticals, Waste Products and Powders.</p> <p>Many of these sectors have a key presence in the region</p>	<p>Prosperity for all – would provide support for the industry to combat waste.</p> <ul style="list-style-type: none"> • Business needs – would support industry efforts to become more productive; would build resilience in key sectors that may face issues around resilience in future (specifically dairy sector in mid / south west Wales. • Would support the strengthening of the food and drink industry in Wales; Wold help to broaden the agri-food economy by enabling diversification into new products. • Capacity / capability. The facility would be based as part of Food Centre Wales, a food and drink support centre in Ceredigion. Existing facilities and expertise would support its establishment and roll out. The project would support, and be supported by some the largest agri-food companies in mid Wales. • Affordability. Land would be provided for the development. The uniqueness of the facility in the UK would place it well to attract investment funding from the UK and Welsh Governments. Its output would have high commercial value, and would substitute output from facilities in Ireland and Germany. 				
<p>INNOVATION</p> <p>Agri-tech centre</p>	<p>Private sector interest in developing a centre of excellence in region to capitalise on industry strengths in region.</p> <p>(See Applied Innovation section)</p>			<p>Short</p>	<p>Must</p>	<p>PROJECT – being picked up in the Applied R&I Workstream, falls within scope of the feasibility underway. Not considered further in this workstream.</p>

<p>BUSINESS DEVELOPMENT</p> <p>Food-grade incubator units.</p>	<p>Establish a network of food-grade incubator units (start-up and growth units) in targeted sites across region to ensure coverage and support for sector in Mid Wales.</p> <p>Mid Wales feasibility builds on the sites & premises assessment already underway.</p> <p>Locations to include: Aberystwyth, Llandysul, Newtown / Welshpool and Brecon.</p> <p>Build on the Food Innovation Wales network across Wales – hub and spoke model to support new business growth in sector.</p> <p>Investment would help add value to primary production. E.g. red meat, poultry etc.</p>	<ul style="list-style-type: none"> • The expansion of the incubator unit network would support other interventions in the sector, by providing facilities to enable ideas to be turned into action. • Good strategic fit – Welsh food and drink strategy • Business needs – enabling strengthening of the agri-food sector of the economy. • It would support the development of employment through self employment and by supporting the development of businesses from small to medium sized enterprises. • There is a growing network of incubation units in Wales and further afield. Inability to provide such facilities may reduce the region’s ability to complete to attract new business growth. • Land identified and available (paid for) in Llandysul (Horeb Food Park) 	<ul style="list-style-type: none"> • Ability to attract private sector development funding towards the growing network in mid Wales may be challenging because of the cost / value gap (which amplifies the need for public support funding to close the gap). • Cyclical demand pattern. Current high level of demand for start-up and growth facilities, but demand can change, leading to potential voids. • Land not yet identified in Aberystwyth and in Powys. 	<p>Short</p>	<p>Should</p>	<p>Not carried forward at this time as proposal needs further development.</p> <p>ACTION: Workstream Lead to identify the opportunities/needs requirements. Identify resource to scope/plan requirements.</p>
<p>Crickhowell model – needs further exploring in terms of potential scale-up/wider reach.</p>			<p>Revenue project</p>	<p>Medium</p>	<p>Must/Should</p>	<p>Not a growth deal project at this stage – for context only.</p>
<p>BUSINESS DEVELOPMENT</p> <p>Associated infrastructure to support these projects/ambitions.</p>			<p>Revenue project</p>	<p>Short</p>	<p>Must (in the context of the projects/investments if taking place)</p>	<p>Not a growth deal project at this stage – for context only.</p>

Public sector food – purchasing/market development	Emerging concept project across the public sector on food procurement/supply chain aligned to process and purchasing efficiencies and nutrition control in the preparation of meals (e.g. for health, schools)	Too early to determine	Too early to determine	Medium	Should	Concept being developed under the auspices of work ongoing with the PSBs and Foundational Economy. To note for now – but may develop into a proposal.
<p>SKILLS</p> <p>Sector-skills support requirements. Needs linking in with RLSP.</p> <p>Bio-innovation/IBERS is a USP and needs capturing with wider regional businesses.</p>			Revenue project	Short	Must	Not a growth deal project – for context only.
<p>COMMS</p> <p>Massive growth worldwide on primary production, sustainability etc.</p> <p>Exposure of industry potentially useful in terms of farming methods/practices – local/regional supply chain development.</p> <p>Platform for brand recognition, and known as an area for food & drink.</p> <p>Opp here also around TfW food procurement (FCW/Cywain).</p>			Revenue project			Not a growth deal project – for context only.

Discussion

-Large land mass, strengths in agri/food production. Assets and skills – needs capitalising on potential. Public land holdings (e.g. council farms).

- Potential around agri-tech. Aber Uni and Harper Adams – both strong pedigree/expertise in these areas.
- Study being undertaken by NWGD on potential Food Innovation Park in Wrexham which would be useful resource to look at one complete.

Digital (Cross-Cutting)

Scheme/ Project Title	Scheme/Project Detail	Advantages General and in relation to CSF's	Disadvantages General and in relation to CSF's	Phase / Time scale	Categorisation Must/should/could	Conclusions (to be completed at workshop 2)
Digital Connectivity Programme – Feasibility Study	Consultancy commission to advise on potential strategic interventions within the region to support improved connectivity and exploitation of technology.	Required to provide technical input and advice. Need to understand and add value to existing and proposed UK & WG interventions and assess need.	Rapidly changing external environment and sector makes interventions difficult to quantify and assess.	Short Term - Now	Must	Carried forward subject to outcome of feasibility study which should highlight other project proposals to take forward
Digital Connectivity Programme (?) -Poss consider split into two sub-programmes. One on higher-end application (Biz/R&D/Innovation), second on general/resident.	Programme of interventions to support the delivery and exploitation of good quality digital connectivity across the region.	Digital connectivity is an essential enabler for business growth and the Mid Wales economy. Potential to add value and support the planned investment by UK & Welsh Govt.	Difficulty in identifying and demonstrating added value. Likely significant cost to strategic interventions that make a tangible difference. UK Future programme yet to be announced.	Short-Medium-Long (tbc)	Must	Carried forward subject to outcome of feasibility study
Project: Gigabit Hub (needs scoping, poss as part of feasibility work for above)	Development of a network of high quality digitally enabled sites/ network to encourage entrepreneurship, new business and innovation. Link with employment sites, R&D, business support, digital.	Delivery model to exploit high speed digital connectivity in a rural location. Supports new enterprise and diversification of business base. Potential hub-spoke model.	Potential impact of Covid on office based working and demand. Some duplication with WG Enterprise Hubs. Revenue implications and demand unclear.	Short	Should	Business Support
Exploitation of digital technology by businesses	Programme of measures to support the take up and exploitation of digital technology by businesses.	Key cross cutting enabler linked to innovation, R&D, skills and growth sectors. Essential to support businesses growth and improve productivity.	Potential duplication with national programmes. Further work needed to identify however focus likely to be on revenue funded interventions.			Not a Growth Deal Project -Revenue

Cambrian Railway Line digital corridor	Provision of digital infrastructure (broadband & mobile) along strategic regional transport corridor to improve connectivity adjacent to route and enable exploitation at station hubs. Further feasibility work required.	Ties in with digital signal upgrade to route. Proven model in other parts of UK eg. Cross Pennine route. Additional to UK & WG current interventions.	Demand for infrastructure by suppliers and end users currently unknown. Regional benefit currently unknown.	Short	Must	Carried forward subject to outcome of feasibility study
Support the delivery of gigabit capable fibre to the premises roll out across Mid Wales	Add value and help accelerate UK & Welsh Govt roll out of FTTP to enable the next generation of good quality reliable digital connectivity for residents and businesses.	Essential infrastructure to enable business investment and growth. Risk that Mid Wales falls further behind other regions without investment. Potential to build on UK & WG investment	Difficulty in identifying added value. High cost of interventions. Significant challenges with delivery in remote rural areas.	Short	Must	Carried forward subject to outcome of feasibility study

Discussion notes:

- The feasibility study needs to look at what is already being done across the region through other schemes and then identify the gaps. These gaps could then be Digital projects.
- Discussion over whether we need to do the research first or can we add to this list now.
- Digital is a cross cutting theme.
- Needs to be clarity on who and digital connectivity programme would be for. Who should benefit? Should it be for economic/business benefit or for community benefit? This proposal was split into two levels/sub-programmes.
- Digital connectivity in communities is important for economic growth