Snowdonia Enterprise Zone

Strategic Plan 2015

Updated July 2017
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1. BACKGROUND

Wales Enterprise Zones

In 2012, the Welsh Government launched seven Enterprise Zones across Wales. The Enterprise Zones are designated geographical areas that support new and expanding businesses by providing a first class business infrastructure and support.

Each of the Enterprise Zones has a focus on one or more key business sectors. They are:

- **Anglesey Enterprise Zone** – focusing on the energy and environment sector;
- **Central Cardiff Enterprise Zone** – focusing on the financial & professional services sector;
- **Deeside Enterprise Zone** – focusing on the advanced materials and manufacturing sector;
- **Ebbw Vale Enterprise Zone** – focusing on the advanced materials and manufacturing sector;
• **Haven Waterway Enterprise Zone** – focusing on the energy & environment sector;

• **Snowdonia Enterprise Zone** – focusing on the energy & environment, aerospace, and ICT sectors.

• **St Athan – Cardiff Airport Enterprise Zone** – focusing on the advanced materials and manufacturing sector and in particular its aerospace sub-sector.

**Enterprise Zone Boards**

Each Enterprise Zone has an independent, private-sector led advisory Board. The role of the Enterprise Zone Boards is to advise the Welsh Government on the implementation and delivery of action plans and priorities for the Zones, including:

• Strategic advice towards investment opportunities
• Encouraging supply chain development
• Identifying property and infrastructure needs
• Marketing and promotion of Enterprise Boards.

A full list of Board Members is published at [www.business.wales.gov.uk/enterprisezones](http://www.business.wales.gov.uk/enterprisezones)
2. VISION


The Snowdonia Enterprise Zone consists of two sites; the Trawsfynydd decommissioning site with its exceptional energy infrastructure and Llanbedr Aviation Centre & Enterprise Park, which has the capacity to accommodate a range of both airside and non airside uses and the potential to increase Wales’ Remotely Piloted Aircraft Systems (RPAS) capability.

The overall vision for the Zone is that Snowdonia Enterprise Zone will be the preferred location for high quality aerospace, digital and low carbon technology enterprises, maximising the unique characteristics and strategic assets of both sites; building upon its location at the heart of the National Park to help transform the area’s economic prospects.

The Snowdonia Enterprise Zone presents specific challenges with no quick fixes. Concerted effort is required to create the conditions conducive to private sector investment and to develop propositions for the medium-long term which offer sustained employment opportunities, particularly in the context of Trawsfynydd. More immediate, short-medium term opportunities can be achieved at Llanbedr by working alongside the site owners and wider partners, supporting both inward investing and indigenous businesses.
3. KEY PRIORITIES

Priorities for delivery are predicated on the sustainable exploitation of the zone’s unique characteristics and are closely aligned to the Welsh Government’s key sectors.

**Digital/ICT**

- To promote the Trawsfynydd site both in the UK and internationally as a niche Data Centre location emphasising the site’s comparative advantages and the only welsh EZ with an ICT focus

- To facilitate the development of a Data Centre(s) at Snowdonia Enterprise Zone by offering bespoke packages of support tailored to the needs of inward investors

- To use the presence of a Data Centre(s) and enhanced connectivity as a catalyst for the development of a digital enterprise hub/ICT ecosystem to stimulate the creation of new, innovative businesses within the Zone and across the wider region

- To take advantage of the prioritisation of Next Generation Broadband to facilitate and stimulate the creation of new enterprises and business development

**Energy & Environment**

- To promote the site both in the UK and internationally as a centre of excellence in the commercialisation of low carbon technologies by emphasising the comparative advantages of the site and the wider region.

- To explore opportunities to utilize the highly skilled workforce in related activity and to collaborate with the Anglesey EZ for the benefit of both Trawsfynydd and Wylfa nuclear sites

- To maximise the opportunities associated with at the nuclear licensed site, including R&D and other employment opportunities

- To facilitate the development of investment by commercial / academic partnerships at the site by offering a bespoke support tailored to the needs of investors

- To continue to engage with the new Parent Body Organisation and the NDA to minimise the effects of accelerated decommissioning and to maximise socio-economic benefits for both the local community and wider region
Aerospace

- To continue working with the site owners at Llanbedr Aviation Centre & Enterprise Park to develop the site as a highly competitive centre of excellence for a range of on-wing and off-wing aviation and aerospace activities

- Within this context to develop and promote the site as an extension of the unique West Wales RPAS environment and a location of choice for RPAS test and evaluation

- To support infrastructure investment at the site for the benefit of all users, including small locally based enterprises

- To engage with the UK Government to better understand the site selection process for the UK Spaceport and continue to explore the economic benefits for Wales

Key infrastructure and property considerations

Significant infrastructure investment has been made at the Llanbedr site to create the conditions which can foster ongoing private sector interest and job creation; whilst the development of robust propositions at Trawsfynydd means that identifying detailed infrastructure and property requirements at this stage is premature. Immediate priorities relate to:

- progressing the next phase of preparatory works to improve access to both sites to and from the A496 and connectivity into the wider strategic road network
- Completing the roll out of Superfast Cymru Roll-out to both sites

A Plan led approach to development at Snowdonia Enterprise Zone

The Zone lies at the heart of the National Park which is a major strength – the area’s environmental assets can be harnessed as economic drivers and future development at both sites must be in line with the principles of sustainable development and the SNPA’s policies.

The Board is eager to explore ways in which to engage in the forthcoming review of the Local Development Plan in the pursuit of sustainable employment opportunities in the context of specific EZ related policies. Continued engagement and joint working with National Park is envisaged to pursue this opportunity.
Deliverables and outcomes

The Board aims to embark on a number of activities to meet strategic objectives and key priorities as outlined above. The aim is to provide the foundations which support economic development and create the conditions which can foster private sector investment and job creation.

Key milestones

- The establishment of propositions for the Trawsfynydd site aligned to ICT and Energy & Environment sectors
- The establishment of an Initial Operating Capability (IOC) at the Llanbedr site, successfully assimilating both airspace management and airfield services to accommodate RPAS flight testing and evaluation
- The successful delivery of the first RPAS Campaign from the Llanbedr site under the newly created IOC
- The successful delivery of a civil RPAS demonstration project from the Llanbedr site
- The completion of the first phase of preparatory work to enhance road access to the Llanbedr site from the A496
- Re-engagement by the UK Government to outline the UK Spaceport site selection process
- The successful roll-out of Superfast Cymru Broadband to both Trawsfynydd and Llanbedr sites, including neighbouring communities
- The development of specific EZ policies developed as part of the Snowdonia National Park Local Development Plan review process.

Partnership Working

The Board recognises that there are a number of influencing factors which will have an impact upon the deliverability of the Enterprise Zone. Central to this will be the need for the Board to work alongside its key partners and stakeholders to pursue common objectives and add value to activities. Equally important will be the need to work in conjunction with other zones with a common sectoral focus to advocate and demonstrate the depth and breadth of the offering available across Wales.
4. CROSS SECTORAL PRIORITIES

In addition to identifying priority areas for delivery across the Enterprise Zones, the Enterprise Zone Boards have also considered and made recommendations on a series of key cross cutting delivery areas which are key to the future success of the Enterprise Zones. These include transport, ICT and skills. Work being undertaken across these areas includes:

- **Transport**

Planned transport investment into the Enterprise Zones is being reviewed to ensure that it is directed to enhance transport connectivity to each of the Enterprise Zones, align with the Enterprise Zone Boards' transport priorities and maximise economic impact.

The Ministerial Task Force on North Wales Transport, which includes membership from the Anglesey, Deeside and Snowdonia Enterprise Zone Boards, has developed advice on the transport connectivity needs in North Wales required to support economic and social development. Its report and recommendations were submitted to the Minister for Economy, Science and Transport in December 2014. The report has informed the Minister’s vision for a rail modernisation programme which includes the submission of a Strategic Outline Business Case to the Department for Transport for the electrification of the North Wales Coast Mainline and work to develop and improve cross border rail movements.

Zone specific transport interventions include:

- The development of the business case for North Wales rail modernisation and progressing improvements to the A55, including the Conwy Tunnels, will support the ambitions of the Deeside, Snowdonia and Anglesey Enterprise Zone Boards.

- The approval for funding for preparatory work to assess all options for enhanced access into the Llanbedr site from the A496.

**Rail**

Access to the national rail network by means of the redundant railhead at the Trawsfynydd site and the disused branch line linked to the Conwy Valley Railway have been identified as potential enablers for securing energy and environment related developments. The Board considers the railhead an important asset.

- **Skills Development**

*Welsh Government Skills Strategy*
The Welsh Government’s Policy Statement on Skills, launched in January 2014, sets out the long-term vision for employment and Skills in Wales over the next 10 years. A fundamental commitment within the policy statement was the publication of a Skills Implementation Plan, which sets out how Welsh Government will strengthen the approach to regional skills delivery, building on the regional skills structures already in place across Wales.

The Plan has established three Regional Skills Partnerships across Wales to drive investment in skills and maximise opportunities for their local economies. Each partnership will develop and publish an Annual Regional Employment and Skills Plan which identifies investment priorities as well as local demands and opportunities; these will include priorities identified by the Enterprise Zone Boards.

**Enterprise Zone Specific Actions**

Across Enterprise Zones, the development and delivery of skills support to support the employment and skills needs identified in each Zone is being taken forward.

We recognise the very different challenge at Snowdonia Enterprise Zone and the current phase of work being undertaken to define clear propositions which can maximise the economic and job creating potential of both sites. Future proposals under development to meet the skills needs of all 3 north Wales zones can also ensure that the needs of business and emerging sectoral opportunities can be matched with tailored training support packages.

The Enterprise Zone Board is working closely with Magnox to identify wider employment opportunities across North and Mid Wales to ensure skills are retained and that those at Trawsfynydd are well placed to seek future employment.

With the Llanbedr site’s aspirations to become a centre of excellence for Remotely Piloted Aircraft Systems, there is scope to define more immediate skills development requirements and stimulate further interest in science, technology, engineering and mathematics (STEM) subjects locally amongst schools.

A Youth Engagement event held at the site in July 2014 reinforced the Welsh Government’s commitment to encouraging more young people, particularly girls, into careers in science and engineering and also played an important role in demonstrating future career and employment opportunities available locally. STEM subjects are critical in ensuring that Wales has a workforce which is globally competitive and at the forefront of growth and innovation – added to this are the considerable future opportunities for skills development.

- ICT
Superfast Cymru

Enterprise Zones are a priority under the Superfast Cymru programme. The Superfast Cymru roll-out plan takes into account the demographics and topography of Wales, together with our economic priorities, including Enterprise Zones. Our investment with BT will provide equal wholesale access for communications providers, encouraging a choice of internet service providers within each Zone.

In Snowdonia Enterprise Zone, there have been significant engineering challenges in these very rural locations; however engineering work is well underway within Trawsfynydd and Llanbedr.

A number of additional ICT Infrastructure interventions are also being explored which are intended to benefit the Enterprise Zones. These include looking at how very high bandwidth communications facilities can be made more widely available to improve Mobile and WiFi communication services. Investigation works and a series of studies are underway with Enterprise Zone delivery prioritised for support within all of these areas.

Ultrafast Connectivity Voucher Scheme

In November 2014 the Welsh Government launched the Ultrafast Connectivity Voucher scheme. This will assist businesses with funding of up to £10,000 to cover the capital costs associated with providing an ultrafast data connection. Enterprise Zones have been prioritised for inclusion in the scheme.

More information about the scheme including details of how to apply and the eligibility criteria are available at www.wales.gov.uk/broadband.

• Other infrastructure

Llanbedr Aviation Centre & Enterprise Park

An investment of over £1.5m by Llanbedr Airfield Estates (LAE), QinetiQ and the Welsh Government is now delivering tangible results and laying the foundations to attract further investment and jobs. With access to the world’s first segregated airspace (7,100 sq km) for RPAS flight testing, the airfield launched an Initial Operating Capability in November 2014 following the successful development and integration of processes and procedures for airspace management and airfield services.

The site has also been shortlisted as one of six preferred locations for the UK Spaceport. The Welsh Government is committed to supporting the UK Government realise its vision and investment made to support RPAS operations is wholly complementary with the requirements for Spaceport. The Welsh Government continues to explore the opportunity for Wales and awaits further engagement by the UK Government to outline the site selection process in detail.
• **Business Development & Marketing**

Driving existing and new business growth is key to success of the Enterprise Zones. In this context communicating the benefits of the Zones, their relevant specialisms and bespoke support is critical.

The marketing of the Enterprise Zones has been a clear priority focus since their inception with a dedicated website – ([www.business.wales.gov.uk/enterprisezones](http://www.business.wales.gov.uk/enterprisezones)), currently being refreshed, and the ongoing provision of new signage to mark the boundaries and key sites within the Zones.

A package of marketing materials has been developed for Snowdonia which includes literature, exhibition display stands, promotional videos and a 3D ‘fly through’ animation. A comprehensive programme of marketing activity, which includes both generic and Zone specific work to continue to promote the Zones, is in place.

Snowdonia is being promoted extensively as part of the broader Sector offering. Synergy with other Enterprise Zones with a similar sectoral focus will also be essential in order to avoid competition and ensure a joined-up approach.
5. PROGRESS TO DATE

Progress in the Zone in support of the Board’s objectives includes:

- Strategic Options Assessment for Trawsfynydd site and Llanbedr site Masterplan completed. Both are critical in informing the Enterprise Zone Board and the Welsh Government in terms of the future development of the Zone.

- Work is progressing to further develop detailed propositions at the Trawsfynydd site, aligned to the ICT and Energy & Environment sectors.

- The Welsh Government has supported the establishment of an Initial Operating Capability (IOC) at the Llanbedr site by investing in key site infrastructure. The refurbishment of the control tower for example is central to the successful development and integration of processes and procedures for test flight operations, signalling the reopening of Llanbedr Airfield as a centre of excellence for autonomous systems and expanding Wales' RPAS environment capability.

- The hosting of a successful Youth Engagement Day at the Llanbedr site to showcase the Snowdonia Enterprise Zone, outlining the potential career opportunities in science and engineering available to students in Meirionnydd.

- The Welsh Government, alongside its partners Llanbedr Airfield Estates and QinetiQ is fully committed to helping the UK realise its vision to host Europe’s first Spaceport. Partners are collaborating to explore this unique opportunity which could transform the region’s economic prospects and position Wales at the forefront of the rapidly growing UK and global space sector.

- Focussing on better transport connectivity by initiating preparatory work for road improvements on the A496 Maentwrog junction to Blaenau Ffestiniog and enhanced site access to the Llanbedr site.

- The successful promotion of the Zone at key trade events such as Farnborough Airshow, bringing Snowdonia to the attention of a global audience.

- Work is well underway to provide Superfast Broadband to this challenging rural area.

The focus of the Snowdonia Enterprise Zone Board remains on enabling infrastructure through continued activity at both the Trawsfynydd site and Snowdonia Aerospace Centre. The Board’s objective is to develop propositions for the medium to long term which offer sustained employment opportunities for the region, particularly in the context of positioning Trawsfynydd as the UK’s preferred location for Small Modular Reactor (SMR) development.
From inception to March 2016, 6 jobs have been created either through direct financial support or through wider assistance from the Welsh Government, with a further 2 safeguarded. During 16/17 financial year a further 12 jobs were created.

Whilst direct employment creation to date is relatively modest, much of the investment made at Snowdonia Aerospace Centre is to future proof the airfield for further opportunities, with the site undergoing real transformation to make it attractive to the marketplace. Investment in a newly created operating environment at the site supports a total of 30 full time and 4 part time employees and marks the first phase of site Masterplan delivery on a mixed use basis; a mixture of airside and non-airside activity. The EZ Board anticipate further employment to follow on a phased basis in line with the airfield’s development.

The Board remain focussed on delivering a prosperous environment for businesses and continued investment in key infrastructure to enhance the attractiveness of the zone. From inception of the zone to March 2014, over £150,000 was invested by Welsh Government (£20,000 capital spend and £130,000 of revenue spend). During this period £20,000 of investment was made in buildings/infrastructure, £31,000 investment in business and £99,000 other Welsh Government (ancillary) funding.

In financial year 14/15, £1m was invested by Welsh Government (£699,037 capital spend and £317,304 revenue spend). Financial year 15/16 has seen a further £844,000 of Welsh Government capital investment which has been supplemented by Private Sector investment into the zone of £340,000.

In Financial year 16/17, over £0.5m was invested by Welsh Government £438,219 capital spend and £61,893 revenue spend.

From inception to March 2016, 1 business within the Snowdonia Zone has been financially supported and financially assisted through Welsh Government business support programmes or direct interventions. During financial year 16/17, 2 businesses benefited from direct financial support from Welsh Government.
6. FUTURE PRIORITIES

The success of the Enterprise Zones ultimately depends on the jobs and growth generated by the private sector. The Welsh Government is committed to supporting such private sector activity through focussing upon delivering successful projects and outputs against Board priorities.

The private sector led Enterprise Zone Boards will continue to provide regular advice on priorities as well as regular reports on progress and implementation. The continuing advice from the Enterprise Zone Boards will shape the delivery of each Zone and assist the prioritisation of additional projects that will further support the Enterprise Zones to deliver jobs, growth and wealth to Wales. Going forward the Board will continue to:

- Take forward proposals and recommendations to develop robust propositions at the Trawsfynydd site aligned to the ICT and Energy & Environment sectors.
- Work with partners to maximise the investment made at Llanbedr Aviation Centre & Enterprise Park and to stimulate further private sector investment, with a particular focus on RPAS and aerospace activity.
- Explore the opportunity for the UK Spaceport at the Llanbedr Aviation Centre & Enterprise Park.
- Consider the next phase of work required to enhance site access and transport connectivity in the context of the zone’s relationship to Anglesey and Deeside zones.
- Promote and market the zone as part of the wider Welsh Government sector offering.
7. GOVERNANCE

There are seven Enterprise Zone Boards, set up to advise the Minister for Economy, Science & Transport on the opportunities and needs of each of the seven individual Zones.

The current appointments to the Boards were made on a ‘task and finish’ group basis for a period not exceeding 18 months. Board members are not remunerated. The Boards’ current terms end on 31 July 2015.

The Boards focus on providing the Welsh Government with advice on:

- The implementation and delivery of Enterprise Zone actions and priorities.
- Opportunity identification and securing jobs and investment in Enterprise Zones, ensuring that Equality and Diversity issues are addressed.
- Reviewing progress to date and activity in relation to Enterprise Zones, which may include strategic advice towards investment opportunities, encouraging supply chain development, identifying property and infrastructure needs, business support, international export, R&D, and marketing and promotion of the Enterprise Zone.
- Reviewing the existing strategies ensuring they remain current and reflect the opportunities presented to support Wales achieve strong growth in Jobs and wealth within Enterprise Zones.

The future governance of the Enterprise Zone Boards is currently under consideration.