

An Economic Strategy for Bridgend County Borough

**Framing Economic Planning and Development for the Next 10
Years**

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in collaboration with BCBC Economic Development Team

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Executive Summary

This report is an economic strategy for Bridgend County, which presents overarching economic development recommendations informed by considerations at a national, regional/subregional, and local level. It is based on an analysis of current economic conditions and opportunities and presents overarching economic development recommendations informed by considerations at a national, regional/subregional, and local level. Aligned to the objectives in the BCBC Corporate Plan, it is intended to provide an analysis and framework to guide economic development interventions across Bridgend County over the next 10 years. During this time, progress executing the strategy will be monitored and Perform Green have been commissioned for two annual reviews of progress. The strategy will be updated as needed to suit the prevailing economic conditions with this update driven by the BCBC Economic Development team.

The economic strategy sets out a path to a sustainable recovery that can yield economic, social, and environmental returns. It describes a Bridgend County that meets its economic potential by ensuring a highly-skilled workforce, strong connectivity infrastructure and thriving business culture, whilst creating a Bridgend County that meets the wider social needs of all its people and in a sustainable manner.

For an economic strategy to deliver real and lasting community benefit, it must command widespread business and community support. Consequently, the development of the strategy has been informed by input from the business community, from elected representatives and from key stakeholder organisations across Bridgend County (these consultations are detailed in a later section). The strategy is also underpinned by evidence from a comprehensive review and assessment of relevant economic data and existing literature.

Delivery of strategic actions informed by this strategy will require a partnership between BCBC and key partners across the foundational economy, the business community, Cardiff Capital Region, Welsh Government and the UK Government. However, the key focus is on the actions that can be led or initiated at a Bridgend County level.

The ambition for the Bridgend County economic strategy is that it will provide a reference framework to ensure that the requirements for business and economic growth are balanced with community wellbeing, environmental imperatives and ecological health. This strategy sets the basis for an economic strategy for all in which no one gets left behind. Consequently, this economic strategy is designed to be used in conjunction with the BCBC corporate Plan, Bridgend County Local Development Plan, Wellbeing Plan and Net Zero Plan to create a holistic picture of the needs of the borough. Further, this strategy aligns with the UK Government agenda as set out in the Levelling Up White Paper published in Feb 2022 on key themes of skills, transport and internet connectivity, cultural life and well-being.

Specific ambitions of this strategy include:

- Supporting business growth
- Capacity building across Bridgend County-based businesses and the wider labour force

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- Addressing skills shortages
- Stimulating high-skilled jobs in the future economy and boosting regional integration
- Shifting to a low-carbon economy
- Preserving and enhancing ecological/natural capital
- Future-proofing education
- Improving physical and digital connectivity
- Strengthening the role for the public service and the foundational economy

Several substantial economic development initiatives are already being progressed in Bridgend County. This economic strategy has been developed to complement these major projects and to strengthen and underpin the economic benefits accruing from them. The key strategic recommendations in this report will create an economy with the necessary capacity and infrastructure to make the existing projects a success and provide the rationale for their necessity.

The 4 major projects ongoing in the County Borough are:

- the proposed plan for Bridgend Town Centre in the Bridgend Town Centre Masterplan;¹
- the renovation of the Maesteg Town Hall;
- the development plans for Porthcawl waterfront;
- and the “Employment Land” plans for the industrial areas outside Bridgend Town.

Addressing Economic Challenges and Supporting Economic Opportunities

The main challenges and barriers that Bridgend County faces generally fall into two broad and interrelated economic issues, that combine to limit Bridgend County’s performance and economic development as a wider area.

The first is around creating the conditions for growing the economy through:

- developing a skilled workforce that meets the needs of the businesses in the area but also positions Bridgend County as a high-skilled hub
- strengthening the transport infrastructure that means businesses can move their resources and their people efficiently
- substantial increase in the number of commercial premises to meet demand and increase capacity
- a supportive, collaborative and business-friendly local authority

The second relates to challenges that arise from deep-rooted economic and social problems within the areas. This is most clearly recognised in the labour market where there are issues of high economic inactivity and geographical inequality. Addressing the challenge can be achieved through:

¹ <https://www.bridgend.gov.uk/media/9844/bridgend-town-centre-masterplan-executive-summary.pdf>

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- a focus on skills provision both to the individual and to businesses
- ensuring economic development is achieved through the lens of the foundational economy and with equitable outcomes as a goal
- ensuring digital and transport connectivity is to a high level throughout the borough.

This economic strategy sets out 4 key pillars that are central to addressing these structural barriers. The 4 pillars categorisation is the result of hearing from stakeholders across the Borough, analysing the available datasets and reviewing existing policy and strategy from local, regional and national organisations. The 4 pillars capture the areas that were considered the most significant for the economic prospects of the Borough and reflect the priorities for the Borough from all levels.

These 4 pillars encompass the points above, form the backbone of the economic strategy for Bridgend County and provide structure for our strategic recommendations. The 4 pillars are

1. Connectivity and Infrastructure,
2. Business and Workforce Support,
3. Public Sector and Foundational Economy, and
4. Low Carbon Economy.

In addressing underlying issues in these 4 areas Bridgend County can create a thriving social and economic ecosystem that is attractive for incumbent and new businesses alike and has a skilled and prosperous workforce.

The evidence for demonstrating a need to address these pillars comes from a range of sources, from local stakeholders, economic data, regional and national governments, and other sources of literature:

Pillar	Topic	Data	Stakeholders	CCR / Regional	Wales Gov	UK Gov	Other sources
1. Business & Workforce Support	Capacity Building	Y	Y	Y	Y	Y	Y
	Business Support	Y	Y	Y	Y	Y	Y
2. Connectivity & Infrastructure	Digital	Y	Y	Y	Y	Y	Y
	Physical	N	Y	Y	Y	Y	Y
3. Foundational Economy & the role of the Public Sector	Public Sector	Y	Y	Y	Y	Y	Y
	Foundational Economy	Y	Y	Y	Y	Y	Y
4. Low Carbon Economy	Low Carbon Economy	Y	Y	Y	Y	Y	Y

The Summary of Strategic Actions section at the end of this report indicates how a “line-of-sight” can be drawn between the economic evidence, the strategy, the strategic actions, and the data needed to monitor progress and outcomes.

Pillar 1: Business Support and Workforce Development

Bridgend County has historically been home to some major high-skill employers largely focused on a small number of industries. Most notably this has been in skilled manufacturing jobs, firstly in car production and more recently in medical device engineering and technology. At the same time in some sectors, Bridgend County has historically suffered from a low skill base, and as a result, Bridgend County has performed below its economic potential.

Workforce capacity building requires a holistic approach encompassing both bottom-up and top-down approaches. Historically, infrastructure spending has tended to dominate economic strategy across the entirety of Bridgend County and the surrounding region. Infrastructure alone does not provide a sufficient basis to nurture and sustain the required skill-base. Low skill levels are seen as major barriers to making the transition to work, with a considerable proportion of those who are economically inactive lacking not only basic skills and specific work-related skills but also more generic skills that are core to a healthy economy.

Key opportunities and strategic actions are set out to address:

- Capacity Building
- Skills Shortages
- Preparing for Industries of the Future: Advanced Manufacturing
- Preparing for Industries of the Future: Low Carbon Economy
- Business Support
- Business Capacity Building: Supply Chains
- Business Skills
- Commercial Premises

Pillar 2: Connectivity and Infrastructure

Ensuring good digital connectivity for the entirety of Bridgend County will unlock the ability for all communities to access and engage in the economic opportunities that are present as well as provide a key cornerstone that will underpin the green economy as we move towards a future of smart inclusive communities. Furthermore, the economic importance of providing quality physical infrastructure is of vital importance to ensuring sustained social development and inclusive growth. The relationship between digital connectivity and physical infrastructure is mutually interconnected and will play a pivotal role in the future success of Bridgend County.

Key opportunities and strategic actions are set out to address:

1. Digital Connectivity
 - Internet connectivity: Individuals
 - Internet connectivity: Businesses
2. Physical Connectivity and Infrastructure
 - Travel and Transport connectivity
 - Sustainable Transport

Pillar 3: Foundational Economy and the role of the Public Sector

The public sector has an important role to play beyond its primary function of delivering services, indeed its impact reaches from reducing carbon emissions, supporting its supply chain, to its position as a significant property owner.

In particular, the Public Sector in Bridgend County is a significant employer across a range of job types and a large consumer of goods and services. Recognising and capitalising on this has the potential to benefit the local economy and work is already underway via the public sector services board to ensure the public sector understands and plays its role as anchor organisation.

Relatedly, the theme of Foundational Economy (that part of the economy that creates and distributes goods and services consumed by all because they support everyday life e.g. healthcare, education, housing, utilities and food) is a fundamental part of this economic strategy. The economic strategy in this report should be viewed through the lens of the Foundational Economy. In discussing the future of Bridgend County, we are envisioning a successful economy that can complement and support a thriving community and culture with a strong Foundational Economy.

Key opportunities and strategic actions are set out to address:

- Public Sector
 - Procurement and Anchor Organisations
 - Digital Delivery
- Foundational Economy
 - Placemaking
 - Well-being
 - Educational Equality and Online Learning
 - Cultural support

Pillar 4: Low Carbon Economy and the Natural Environment

The development of the low carbon economy and an ever-increasing emphasis on green infrastructure in the future has created an opportunity for Bridgend County to upskill its workforce to take advantage of the economic opportunity that this presents. There are going to be significant economic opportunities to be gained by regions and economies which take a lead in championing and developing expertise in low carbon technologies.

Bridgend County Borough Council (BCBC) is leading the way in its response to the challenges of climate change with a target to achieve a position of net-zero carbon as a public body by 2030. Bridgend County needs to add to this by leveraging change across the rest of the public and private sector by focussing on retrofit, energy sourcing and protection of nature.

Key opportunities and strategic actions are set out to address:

- Low Carbon Economy
- Retrofitting
- Energy
- Travel/Transport

- Natural Capital

Potential Sources of Funding

Bridgend County like many other local authorities will now have to decide which financing sources and mechanisms to use to fund their strategic recovery and economic development programmes. There are various forms of financing available for local and national governments to leverage. Public finance institutions, banks, institutional investors, corporations, and capital markets all have a crucial role to play. If local authorities can use this financing to power a sustainable economic recovery, there is potential to deliver a return on investment that far exceeds the initial capital outlay, both in the short and long term.

A range of potential funding options are presented, which will need to be fully researched before they can be considered by BCBC to fund economic development and, where appropriate approval sought from Cabinet and Council. These include the following priority areas:

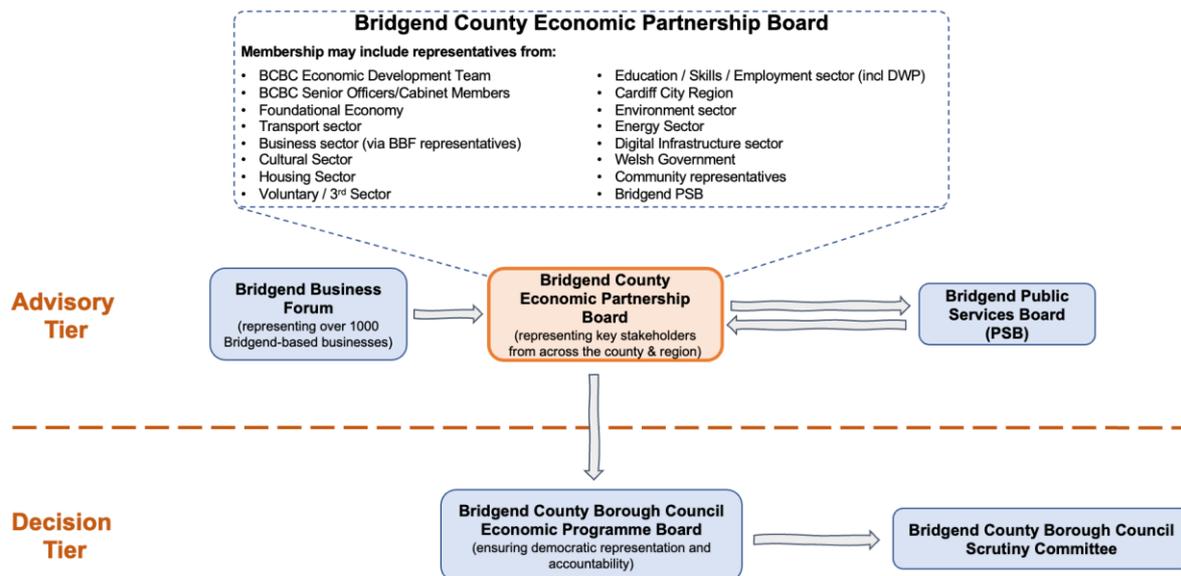
- The recent Levelling Up White Paper and the subsequent confirmation of funding details. We expect that the UK Shared Prosperity Fund will be a major source of funding for Bridgend County's ambitions to improve communities and place, people and skills, and support local business.
- BCBC should seek to access Levelling Up funds, in collaboration with the Welsh Government and Cardiff Capital Region.
- National/regional funds from the Welsh Government and Cardiff Capital Region may provide funding for specific projects, including digital infrastructure; innovation; protecting natural capital etc.
- The increase in the prevalence of Sustainability Bonds in recent years provides a real opportunity for BCBC to access funding, particularly as they look to expand on their existing projects in retrofitting, electric vehicles and alternative energies. Similarly, the new UK Infrastructure Bank is a timely source of funding as BCBC looks to expand its public transport infrastructure throughout the borough.
- On a micro-scale, the example of projects such as the Bike Workshop in Exeter serves to show the value that innovative solutions backed by the community (crowdfunding) can bring to solving real social problems.

Governance Model

An economic strategy Governance Model needs to balance democratic accountability with agility and good process, whilst ensuring that appropriate stakeholder input is sought and heard. Success in this vital element of strategy execution will ensure that delivery of the economic strategy commands widespread business and community support, and balances requirements for business growth with community wellbeing, environmental imperatives and ecological health.

A two-tier governance model is proposed, with one tier being advisory, and one as the decision tier, as represented in the following diagram:

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It is proposed that to enable timely responses to the rapidly changing external economy and economic pressures/shocks, the Bridgend Economic Partnership Board (BEPB) would meet initially on a bi-monthly basis, potentially moving towards a quarterly meeting schedule as appropriate (once Covid-19, Brexit and climate change considerations allowed). It is further proposed that to take into consideration a wide range of stakeholder views and gain the greatest value from the BEPB, it is formed and operated on the principles of co-production:

- Recognising people as assets.
- Building on people's capabilities.
- Developing two-way, reciprocal relationships.
- Encouraging peer support.
- Blurring boundaries between delivering and receiving services.
- Facilitating rather than delivering

This would require representatives of communities to be involved alongside the stakeholder interest groups that are traditionally involved in such bodies.

About this Economic Strategy

This report is an Economic Strategy for the Bridgend County Borough, developed as a collaboration between Perform Green and Bridgend County Borough Council (BCBC) Economic Development Team. This Economic Strategy is based on an analysis of current economic conditions and opportunities, and presents overarching economic development recommendations informed by considerations at a national, regional/subregional, and local level. Aligned to the objectives in the BCBC Corporate Plan, it is intended to provide an analysis and framework to guide economic development interventions across Bridgend County for the next 10 years. During this time, progress executing the strategy will be regularly monitored, and the strategy will be updated as needed to suit the prevailing economic conditions.

For an economic strategy to deliver real and lasting community benefit, it must command widespread business and community support. Consequently, the development of the strategy has been informed by input from the business community, from elected representatives and from key stakeholder organisations across Bridgend County (these are consultations are detailed in a later section). The strategy is also underpinned by evidence from a comprehensive review and assessment of relevant economic data and existing literature.

Delivery of strategic actions informed by this strategy will require a partnership between BCBC and key partners across the foundational economy, the business community, Cardiff Capital Region and the Welsh Government. However, the key focus is on the actions that can be led or initiated at a Bridgend County level.

As we move out of the initial COVID period and from crisis response to recovery, there is an opportunity to take stock and choose a path of sustainable recovery that can yield economic, social, and environmental returns. This strategy sets out the ambitions for a Bridgend County that meets its economic potential by ensuring a highly-skilled workforce, strong connectivity infrastructure and thriving business culture, whilst creating a Bridgend that meets the wider social needs of its people and in a sustainable manner; with no one and no part of the County left behind.

The strategy provides clarity on the sectors and themes where a concerted focus of resources would be most impactful for the Bridgend County economy and details a set of proposed actions for the council to take to achieve these. These actions range from those fully within the control of BCBC to those that require collaboration with regional or national governments.

The strategy describes an approach that couples together both physical regeneration and social dimensions of economic development. These two are closely linked in the Bridgend County context due to the strong connection between the physical geography of Bridgend County and the impact that has on the social outcomes of individuals. This strategy recognises that several 'macro' themes are beyond the control of local government for Bridgend County. However, it is our view that any credible economic strategy requires joined-up working between national, regional/sub-regional and local governance.

This strategy sits alongside and has been informed by the Local Development Plan, the draft Wellbeing Plan, and is aligned with the recently approved Procurement Strategy and the (in development) Net Zero Strategy.

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We believe that Bridgend has the foundations of a thriving economy that can be truly extraordinary with careful strategic oversight in the years ahead - this is what we hope to achieve with this strategy.

Progress executing the strategy will be monitored and Perform Green have been commissioned for two annual reviews of progress. The strategy will be updated as needed to suit the prevailing economic conditions with this update driven by the BCBC Economic Development team.

Ambition for the Bridgend County Economic Strategy

The BCBC Corporate Plan contains three overarching objectives:

- **Objective 1:** Supporting a successful and sustainable economy
- **Objective 2:** Helping people and communities to be healthier and more resilient
- **Objective 3:** Smarter use of resources

The ambitions for Bridgend County economic strategy are that it will provide a reference framework to ensure that the requirements for business and economic growth are balanced with community wellbeing, environmental imperatives and ecological health, whilst ensuring that no one gets left behind.

Specific ambitions include:

- Supporting business growth
- Capacity building across Bridgend-based businesses and the wider the labour force
- Addressing skills shortages
- Stimulating high-skilled jobs in the future economy and boosting regional integration
- Shifting to a low-carbon economy
- Preserving and enhancing ecological/natural capital
- Future-proofing education
- Strengthening the role for the public service and the foundational economy

The objective of this economic strategy is not to provide overly exhaustive coverage across all aspects of economic development in Bridgend County, but, rather provide a strategic approach that outlines the context, weaknesses, and opportunities as a basis for the integration of economic and social objectives, whilst attempting to bridge the divide between strategy and delivery. It is the ambition of this report to present a holistic strategy that can then be used to leverage the economic case for future funding whilst building on a wholly integrated economic agenda, which is paramount to both stimulate and sustain deep economic regeneration.

The economic strategy recognises that there are several major economic development initiatives already planned or underway across Bridgend County (Bridgend Masterplan; Maesteg Town Hall Redevelopment; Porthcawl Waterfront

Regeneration; Employment Land element of the LDP). Each of these will have a significant economic impact in the locations where they are situated and have the potential to bring economic improvements more broadly across Bridgend County.

This economic strategy is about strengthening the underpinning economic, social and environmental landscape that enables these and many other initiatives to truly deliver on their potential, balancing requirements for business growth with community wellbeing, environmental imperatives and ecological health.

This economic strategy has been designed to align to and support the delivery of these ambitions and objectives, across all sectors and all geographies of the Bridgend County economy, addressing currently known issues and creating a robust economy resilient to future external shocks.

Context and Challenges Facing Bridgend County

The County Borough of Bridgend lies at the geographic heart of South Wales, equidistant between Cardiff and Swansea. Bridgend Town owes its origins to its strategic location at the lowest bridging point on the River Ogmore, which led to its initial establishment as a market town that expanded when the coal mining industry flourished to the north. The locality's position within the Cardiff Capital Region, and the historical transport links that facilitate key connections to Cardiff and Swansea, have proved critical to the County Borough's development as a major regional employment hub, with specific strengths in advanced manufacturing. Bridgend Town is in a unique position as the gateway to both the Swansea Bay Region and the Cardiff Capital Region. The interdependencies and relationships between the two regions are of particular importance to Bridgend Town, and indeed, the success of the wider regions more broadly.

There are three main towns within Bridgend County, each has its own community and a strong sense of place. This is also true of the areas outside the three main towns and in particular the valley communities where there is a strong sense of community-based on a shared history and culture. This sense of place and community is an asset of the area and should be built upon to create a healthy, thriving and sustainable borough.

Bridgend County is not without its challenges. The location between the urban hubs, although an asset in many ways, anecdotally may also have helped to mask some of the long-term structural issues plaguing Bridgend County in more recent decades. Bridgend County like many other locations that heavily depend on industry has undergone a relatively rapid process of deindustrialisation over the last three decades. This has had a serious impact on the local economy and the employment prospects of the working-age population. The percentage of the population who are classified as Economically Inactive, meaning they are not working and are not looking for or able to work, is high (almost 30%) and significantly above the averages for Wales and Great Britain. Therefore, there is a large pool of jobless people who are potentially available to work, although a significant proportion of whom are likely to require varying degrees of assistance to re-enter the labour market one of the

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large drivers of the higher economic inactivity rate is a comparatively high number of people who are long-term sick. These issues are often further compounded by the fact that the communities within Bridgend County, where part of this economically inactive population lives, lie in rural areas. This means that they are further marginalised by a lack of connectivity, both physical and digital, that would allow them to engage with the opportunities in the wider borough.

Input from Stakeholders

Economic Challenges highlighted through Stakeholder Engagement

Insights from a range of local and regional stakeholders have pinpointed some specific challenges (including some described above), but also demonstrated the significant strengths and opportunities in Bridgend County Borough. The most common challenges have included:

- A perception of poor marketing and PR for Bridgend County (outside of the county) as a place to live and work
- Lack of, or deficiencies in, public transport infrastructure, especially regarding “last mile” connectivity, especially in the valleys.
- The need to expand active travel infrastructure beyond current plans
- Bridgend Town Centre in particular needs improvement, but all the town centres need attention
- Substantial inequalities between areas
- Significant challenges to households, businesses and the public sector due to climate change, and the imperative to move to a low-carbon economy
- Lack of suitable business premises
- Difficulties to recruit skilled individuals, specifically in hospitality, tourism, care etc., but more widely too

It is acknowledged that there are already programmes in place to address several of these challenges, including the Bridgend Town Master Plan, the Active Travel Expansion Consultation etc.²

Economic Strengths highlighted through Stakeholder Engagement

Nevertheless, these challenges were balanced by some significant strengths in the Bridgend County economy, including:

- Bridgend County has a strong sense of community and is a great place to live and work
- Incredible natural capital – from the mountains to the coast
- Good rail connections to Cardiff, Swansea, Bristol, and London
- Bridgend County is safe, with a relatively low crime rate

² <https://www.bridgend.gov.uk/media/9844/bridgend-town-centre-masterplan-executive-summary.pdf>

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- There is a strong manufacturing base, with good levels of skilled labour
- There is good access to high-quality healthcare
- Housing is more affordable than elsewhere in South Wales

Stakeholder Engagement

Bridgend County Business Community Engagement: Business Survey

Over the spring/early summer of 2021 BCBC undertook an online survey of businesses in the borough to understand the challenges that they are facing and assess the impact on the business environment of both COVID and leaving the European Union. Over 2,000 businesses were invited to participate and the link to the survey was publicly available on the Council website (<https://www.bridgend.gov.uk/news/survey-to-help-shape-future-business-support/>).

In total 349 responses were recorded from a broad cross-section of industries.

Whilst the focus of the survey was to gather data relating to business recovery from the Covid-19 pandemic, the data was useful in informing the development of the economic strategy.

The survey data were used to complement other qualitative stakeholder data (from interviews and workshops), to ensure that the Economic Strategy is addressing the "real world" concerns and input of a wide range of views from across the county and the South Wales region.

Stakeholders Interviews, 1-1 meetings, email correspondence

Due to restrictions caused by the Covid-19 pandemic, it was not possible to hold in-person meetings or stakeholder workshops. However, remote semi-structured interviews, telephone calls and email exchanges have been held with the following organisations:

- Federation of Small Businesses
- Regional Skills Partnership
- Awen Trust
- BAVO
- EMMAUS
- Wales Coop centre
- Business in Focus
- Rockwool
- Bridgend College
- Valleys to Coast
- Cardiff Capital Region (Business Development & Inclusive Growth)
- Cardiff Capital Region Regional Skills Partnership
- Natural Resources Wales
- Southwest Wales Regional Learning & Skills Partnership
- Data Cymru
- Public Health Wales
- Bridgend County Borough Council (various departments)
- Welsh Government (Department for Economy & Transport)

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- PSL
- Carbon Trust
- Visit Wales

Stakeholder Engagement Workshops

There have been a series of stakeholder workshops, both to inform and to seek input from a broad range of interested parties, from within BCBC, and from local and regional bodies.

- Bridgend Council Economic Futures Oversight Group
- Bridgend Public Services Board (x2)
- Bridgend Council Scrutiny Committee

Datasets, Literature and Reports Informing the Economic Strategy

In addition to stakeholder input, the Economic Strategy has been developed following a comprehensive review of literature, reports and datasets relevant to the economic development of Bridgend County.

Details of datasets, literature and reports are provided in Appendix 1

National and Regional Context

Below is the summary of a small number of key reports, strategies and legislation that has guided the creation of this economic strategy. This BCBC economic strategy sits within the context of existing UK, national and regional strategy and it is important to understand the overlaps with the existing strategy. A full list of the reports etc. that fed into the creation of this report can be found in Appendix 1.

Build Back Fairer, The Marmot Review³

The Marmot Review was produced to provide a strategy for a post-COVID economy and society. Primarily a Health Report it encompasses several of the ways that a post-COVID economy has to provide for the wider needs and wellbeing of the population, beyond just providing high-level economic growth. The pandemic provides a unique opportunity in time to re-evaluate the direction of economic strategy and to interrogate the underpinning assumptions of pre-pandemic policy.

The earlier '10 Years On' review released just before the pandemic in February 2020 already highlighted the high levels of inequality and basic failings of the UK health and wellbeing. The Marmot review, therefore, makes the clear point that as we work on economic policy to bring us out of the pandemic a goal of returning to 'normal' as defined by the conditions pre-pandemic is not acceptable. The pandemic must be taken as an opportunity to build a fairer society.

It is noted that this is becoming ever-more increasingly common in local, regional, and national rhetoric across the globe. Indeed, the New Zealand Treasury in its 2019 policy statement put its people's wellbeing at the heart of its government mission and integrated it completely into its economic policy.

The Marmot Review calls for a commitment at all levels (national, regional and local) to social justice and putting equity of health and wellbeing at the centre of policymaking.

Future Wales: National Plan 2040⁴

Future Wales: The National Plan 2040 is the national development framework for Wales as set out by the Welsh Government. The plan sets the direction and strategy for development in Wales up until 2040.

Several key areas are highlighted in the report and commitments are made to ensure progress in these areas in the years up to 2040. Amongst them include a commitment that the cities, towns and villages within Wales will become well-connected places, both physically and digitally; the importance of ensuring job opportunities and community services to rural areas; creating cities and towns that are magnets for jobs and investment; a commitment to low-emission travel; and to use the natural capital of Wales to support a range of sectors.

³ <https://www.health.org.uk/sites/default/files/upload/publications/2020/Build-back-fairer-the-COVID-19-Marmot-review.pdf>

⁴ <https://gov.wales/sites/default/files/publications/2021-02/future-wales-the-national-plan-2040.pdf>

Wales 4.0: Delivering Economic Transformation for a Better Future of Work⁵

Wales 4.0 is a Welsh Government review into the future of work, industry and economy in Wales and the implications and repercussions of that future economy. The result of that review laid out in the report is a national strategy in response to the 'fourth industrial revolution' that calls for the transformation of key industries to build a "productive, sustainable and inclusive society". The strategy is driven by a commitment to the well-being of both today's and future generations.

The report breaks down the areas that Wales needs to develop into seven key items. These include:

- Supporting Business for Better Jobs and Skills
- Delivering Education and Skills for the Future of Work
- Mainstreaming Digital in the Foundational Economy
- Becoming a World Leader on Skills, Work and Industrial Analytics
- Delivering Digital Government and Leadership

These key tenets that the report identifies as key for the future of Wales as it navigates the fourth industrial revolution have informed the content of this economic strategy and the steps that Bridgend County needs to take to ensure that Bridgend County can excel in this new economy.

The Well-Being of Future Generations (Wales) Act (2015)⁶

The Well-Being of Future Generations Act (Wales) 2015 is a piece of Welsh Government legislation that aims to improve the social, economic, environmental, and cultural well-being of people in Wales. One of the key outputs of the legislation is a 'sustainable development principle' it creates for all public bodies to "act in a manner which seeks to ensure that the needs of the present are met without compromising the ability of future generations to meet their own needs".

The Act identifies seven well-being goals that provide a framework for public bodies to make decisions to keep to the Sustainable Development Principle, these are:

- a prosperous Wales
- a resilient Wales
- a healthier Wales
- a more equal Wales
- a Wales of cohesive communities
- a Wales of vibrant culture and thriving Welsh Language
- a globally responsible Wales

⁵ <https://gov.wales/sites/default/files/publications/2019-09/delivering-economic-transformation-for-a-better-future-of-work.pdf>

⁶ <https://www.futuregenerations.wales/about-us/future-generations-act/>

Cardiff Capital Region City Deal, Growth and Competitiveness Commission Report⁷

The Growth and Competitiveness Commission Report from the Cardiff Capital Region City Deal looks at the wider region based around Cardiff including the Bridgend County and assesses its economic prospects and the key to unlocking the best economic outcomes for the area going forward. The report highlights the need for better connectedness between the areas to facilitate economic growth and to use increased connectivity to foster a broad economy with improved productivity and readiness for innovation, and improve the wellbeing of all people in the area.

It also emphasises the importance of investing in education and skills in the area. It calls out the need to increase the share of adults with qualifications at all levels as a specific economic objective due to its connection to improved productivity and to invest in education as a mode to increase opportunity for all of the population.

Prosperity For All: Economic Action Plan⁸

The Prosperity For All: Economic Action Plan sits alongside the broader Prosperity For All strategy and supports it by detailing the economic actions that will be taken to support that delivery.

The Plan creates a new approach summarised by a new 'Economic Contract'. This new contract prioritises a combination of factors for government funding, notably growth potential, Fair Work, Promotion of Health and progress in reducing carbon. Some of the sectors highlighted in the Economic Action Plan are decarbonisation, innovation, high quality employment and skills development. The plan also highlights the importance of the Foundational Economy and calls out Tourism, Food, Retail and Care.

Welsh Government Framework for Regional Investment in Wales⁹

The Regional Investment Framework builds on the work of the Prosperity For All strategy and provides a framework to deliver on that plan and monitor progress over time.

This framework outlines the method and mode of investment opportunities in Wales and emphasises the key areas for investment as outlined in the Prosperity For All strategies. It also creates a governance model for the continued monitoring of this framework to ensure that it meets its stated goals.

⁷ <https://www.cardiffcapitalregion.wales/wp-content/uploads/2021/01/item-6-appendix-c-growth-and-competitiveness-commission-recommendati....pdf>

⁸ <https://gov.wales/sites/default/files/publications/2019-02/prosperity-for-all-economic-action-plan.pdf>

⁹ <https://gov.wales/sites/default/files/publications/2020-11/regional-investment-in-wales-framework.pdf>

Socio-economic Context of Bridgend

The wider picture of the socio-economic profile of Bridgend County and its comparative strengths and weakness, opportunities and threats have been found by combining the views and information from a range of sources; from stakeholders and data to regional and national reports. Below is a summary of the headline findings from each level of information.

	Stakeholder Feedback	Data Gathering	Regional/Cardiff Capital Region	Welsh and UK Government
Strengths	<ul style="list-style-type: none"> • Strong sense of community and is a great place to live and work. • Incredible natural capital – from the mountains to the coast. • Good rail connections to Cardiff, Swansea, Bristol, and London. • Safe, with a relatively low crime rate. • Strong manufacturing base. • Good access to high-quality healthcare. • Housing is more affordable than elsewhere in South Wales. 	<ul style="list-style-type: none"> • Earnings are in line with the Welsh average. • House prices c. 10% lower than the Welsh average. • Bridgend business births are higher over the last 10 years than business deaths. 	<ul style="list-style-type: none"> • Bridgend college’s existing work on decarbonisation and decarbonisation programme. • Strength of public sector with Public Services Board (PSB) member organisations accounting for around a third of working people in Bridgend County. 	<ul style="list-style-type: none"> • 2016 Tourism employed 4.2k jobs and was worth 330mil for the area. • Wales is becoming more diverse as a population whilst the sense of Welsh identity is broadly stable.
Weaknesses	<ul style="list-style-type: none"> • Lack of or deficiencies in public transport infrastructure, especially regarding “last mile” connectivity. • Insufficient support for active travel. 	<ul style="list-style-type: none"> • Economically inactive and long term sick percentage is significantly higher in Bridgend than in Wales and GB. 	<ul style="list-style-type: none"> • Lack of Public Procurement skills. • Bridgend County’s tourism 	<ul style="list-style-type: none"> • Wales’s performance on GVA is less positive than on other measures, reflecting both demographic factors



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	Stakeholder Feedback	Data Gathering	Regional/Cardiff Capital Region	Welsh and UK Government
	<ul style="list-style-type: none"> • Poor marketing and PR for Bridgend County (directed outside of the county) as a place to live and work. • Bridgend Town Centre especially, but all the town centres need attention. • Substantial inequalities between areas. • Significant challenges to households, businesses and the public sector due to climate change, and the imperative to move to a low-carbon economy. • Lack of suitable business premises. • Difficulties to recruit skilled individuals, specifically in hospitality, tourism, care etc., but more widely too. • Bridgend County needs more spaces to meet/co-create/innovate. • Significant issues in the social care industry. 	<ul style="list-style-type: none"> • Bridgend County has a higher percentage of JSA claimants (disproportionately ESA and Incapacity Benefit). • There is a high level of inequality between areas within Bridgend County. The percentage of non-working families is much higher in some areas and school performance varies by geography. • Coming out of the pandemic the young people of Bridgend County have been particularly impacted negatively and more negatively than their national and UK counterparts. • Bridgend County job density is below Wales/Great Britain. This is a historic trend. • Geographical inequality is based on transport links, internet connectedness, school performance and household worklessness. 	<p>is disproportionately weighted towards day trips and visitors from other parts of Wales. Day trips have the least economic value per day to the economy.</p> <ul style="list-style-type: none"> • There appears to be relatively limited accommodation that wouldn't support an expansion of overnight stays in its current form. • High level of young adults Not in Employment, Education or Training (NEET) after year 13 despite good schools. 	<p>(including a higher dependent population relative to other parts of the UK) and the lack of 'economic mass.</p> <ul style="list-style-type: none"> • There is a difference of around 8 years in overall life expectancy between the most and least deprived areas, while the difference in healthy life expectancy is around 18 years. • There has been an increase in the amount of under 18s in persistent poverty over recent years. •

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	Stakeholder Feedback	Data Gathering	Regional/Cardiff Capital Region	Welsh and UK Government
Opportunities	<ul style="list-style-type: none"> • Remote/Flexible working should enable more work to be less dependent on public/private transport, and allow some who would have moved for work to stay in the area. • Net-zero and the green agenda will create opportunities for innovation, jobs and education. • The untapped potential of the night-time economy: coordinated with public transport improvements. • Porthcawl as a tourist centre. • Skills development, especially concerning the transition to a low carbon future, advanced manufacturing, digital etc. • Better promotion of the area is a great place to live and work. • Using the skills of local people and upskilling them to attract new businesses. • Supporting innovation and entrepreneurship. • Making more of the natural beauty of the valleys. • The large public sector – can use its economic clout for good. 	<ul style="list-style-type: none"> • The vast majority (98%) of businesses in Bridgend County are micro or small businesses (0-49 employees) 	<p>Priority sectors for growth:</p> <ul style="list-style-type: none"> • Advanced Materials and Manufacturing • Construction • Creative (especially Film & TV) • Compound Semiconductors • Digital Enabling Technologies (includes cyber security, data - a massive sector, software development, AI) • Human Foundational Economy (Public Services (Childcare, Healthcare, Education, Social Care, Emergency Services)) 	<ul style="list-style-type: none"> • The Welsh public sector is the largest user of goods and services in Wales, spending £6.7 billion per year • Wales has great untapped growth potential to generate energy, including from renewable sources. There is currently significant growth in the community level low carbon energy sector in Wales.



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	Stakeholder Feedback	Data Gathering	Regional/Cardiff Capital Region	Welsh and UK Government Region
			<ul style="list-style-type: none"> • Service Sector (Hospitality, Retail, Tourism) • Lots of new jobs are expected from the Low Carbon economy (e.g. heat pump engineers, offsite retrofit) 	
Threats/Risks	<ul style="list-style-type: none"> • Moving away from EU funding means that it is not clear how much or how funding will be distributed in future. • Being between Cardiff and Swansea: Bridgend County might get forgotten or missed out of conversations and funding. • Long term implication of being unable to recruit staff with the right skills, specifically in digital, marketing, project management, and supporting green technologies. • Not being ambitious enough. • Climate change and transition to a low carbon future. • Digital exclusion. 	<ul style="list-style-type: none"> • Population forecast to grow but almost exclusively through the older population (65+). Therefore, the distribution of the population will skew more towards the older population. 	<ul style="list-style-type: none"> • Financial security is a key pressure for those on low incomes, on low paid temporary contracts, or unemployed. People say they are concerned about the lack of employment opportunities locally for young people. 	<ul style="list-style-type: none"> • Over the next 20 years, the percentage of over 75s in Wales is projected to increase from 9% of the population in 2014 to around 13% in 2030. • Climate hazards are projected to increase both in frequency and severity. Infrastructure such as transport networks, underground infrastructure, energy and digital infrastructure and public water supplies could be impacted.

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	Stakeholder Feedback	Data Gathering	Regional/Cardiff Capital Region	Welsh and UK Government
	<ul style="list-style-type: none"> Ensuring a nuanced approach to the different places within the area. 			<ul style="list-style-type: none"> Emissions fell by 20% in just two years from 2016 to 2018, with the closure of Wales' last coal-fired power station. Despite good progress, Wales is not yet on track to meet its existing, less stringent, 80% emissions target.

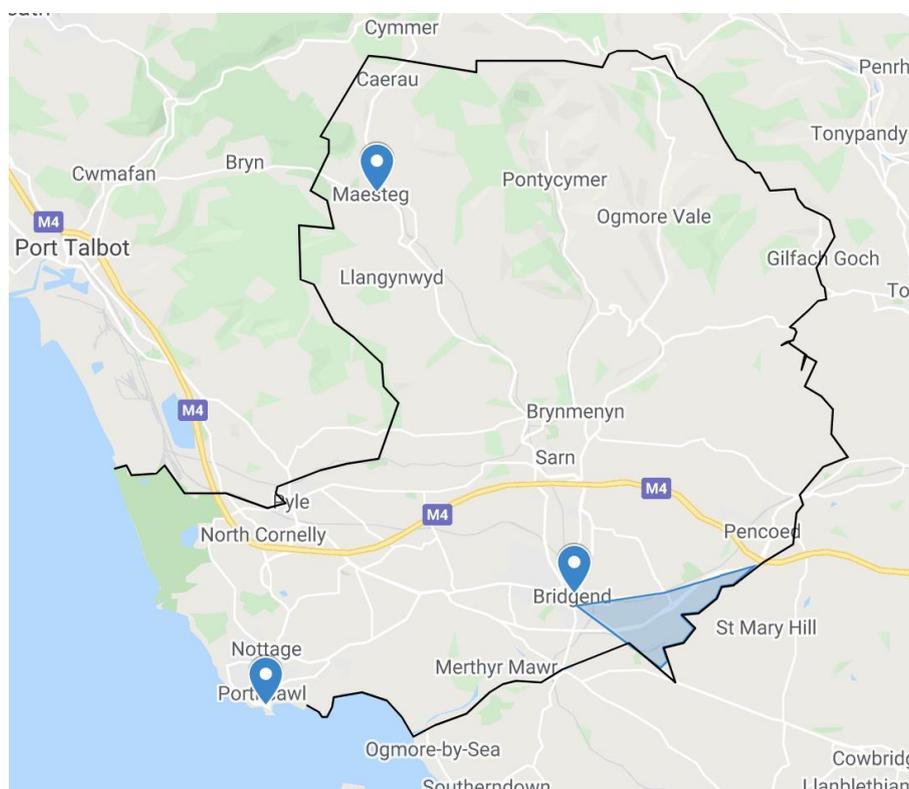
“Big 4” Projects in Progress in Bridgend

This economic strategy recognises that there are several substantial economic development initiatives that are already being progressed in Bridgend County. These significant projects already in place will serve to improve the offering of the area to both residents and visitors. We focus on 4 major projects that are increasing the capacity of the borough in the areas of Retail and Leisure, Community and Foundational Economy, Visitor Economy and Employment Opportunities.

This economic strategy has been developed to complement these major projects and to strengthen and underpin the economic benefits accruing from them. The key strategic recommendations in this report will create an economy with the necessary capacity and infrastructure to make the existing projects a success and provide the rationale for their necessity.

The 4 major projects ongoing in the County Borough are:

- the proposed plan for Bridgend Town Centre in the Bridgend Town Centre Masterplan;¹⁰
- the renovation of the Maesteg Town Hall;
- the development plans for Porthcawl waterfront;
- and the “Employment Land” plans for the County Borough



¹⁰ <https://www.bridgend.gov.uk/media/9844/bridgend-town-centre-masterplan-executive-summary.pdf>

Bridgend Town Centre Masterplan

The Bridgend Town Centre Masterplan has set out its proposal to rejuvenate the Town Centre and surrounding areas to transform it into a cultural and employment hub. Based on the key themes of Growth, Resilience, Well-being and Identity, the Masterplan outlines a vision for the Town Centre and a set of 4 actionable themes to make changes in the area. The themes are:

1. Growth
2. Resilience
3. Well-being
4. Identity

These key themes align closely to the key themes included in this report and hence both reports, the Masterplan and this economic strategy should be read as complementary to one another.

The Masterplan outlines a transformative plan to develop the Railway Station area, the Brackl, Nolton and Oldcastle area, the core retail area around the High Street, the Café and Cultural Quarter, the Northern Gateway, the Riverfront, the Newcastle area, and the Sunnyside area. The Masterplan sets out an ambitious plan to revitalise the retail and leisure offering of the Town Centre. Within these areas are included such plans as the relocation of the Bridgend College campus to the centre of Bridgend town and redevelopment of the Train and Bus stations. This plan to develop the Bridgend Town is fully supported by this Economic Strategy report and the proposals in this report will create a successful background for these developments to impact the Bridgend economy over the long term.

Maesteg Town Hall

The project to redevelop the Town Hall in Maesteg is underway. The Town Hall has a long history of being a cultural centre in the town and the surrounding area. Opening its doors in 1881, over the 140 years since it has been a host to drama, dance, comedy, music, art and more. In addition, it has served as a central location in the community for weddings, conferences and other civic functions.

The renovated Town Hall will form a cultural hub for the local and wider areas and ensure that these cultural events are protected, securing their benefits for future generations. In addition, it is hoped that the development will enhance its existing offering drawing in visitors from in and outside the Borough into Maesteg and acting as a catalyst for the wider regeneration of Maesteg. It is hoped that the project could amplify the Town Hall's benefits two or three times over.¹¹

Porthcawl

Plans for the significant redevelopment of Porthcawl to turn it into a thriving town for locals and visitors are currently in consultation. Bridgend Council recently published their placemaking proposal for the town.¹² This proposal would transform the

¹¹ <https://maestegtownhall.com/>

¹² <https://www.bridgend.gov.uk/news/council-reveals-more-potential-opportunities-for-porthcawl-s-future/>

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waterfront area, develop new leisure and accommodation facilities and improve the transport connectivity and active travel in the town.¹³

These plans are in their early stages and are not finalised or committed to, but they provide a clear strategy to develop Porthcawl into a thriving area by increasing its capacity in fundamental areas (accommodation and connectivity) to take advantage of the existing natural capital advantage and local businesses that provide a quality option for visitors. These fundamental areas of improvement are supported by this Economic Strategy.

Employment Land¹⁴

The final of the big 4 development projects being undertaken is the work on land across the County, referred to as 'Employment Land' in the Local Development Plan. This plan has been designed to attract high-quality businesses and investment into the County Borough to increase job opportunities and strengthen the wider economy of the borough.

The planned work will facilitate growth by directing employment generating development to the most appropriate and sustainable locations, including the Industrial Estates of Brocastle, Waterton and Bridgend and the Pencoed Technology Park and the former Ford site and sites throughout the County in the ownership of BCBC. This will encourage the expansion of existing businesses whilst providing an attractive location for new businesses to the area to locate their premises. The Employment Land strategy will allocate 71.7 hectares of new employment land and accommodate up to an estimated 7,500 jobs.

¹³ <https://www.bridgend.gov.uk/news/update-on-porthcawl-regeneration-plans/>

¹⁴ <https://www.bridgend.gov.uk/media/10937/consultation-document.pdf>

An Economic Strategy for Bridgend County

Several of the main challenges and barriers that Bridgend County faces generally fall into two broad and interrelated economic issues, that combine to limit Bridgend's performance and economic development as a wider area.

The first relates to Bridgend County's capacity to attract and sustain a diversified industry in a highly competitive global environment. To achieve this BCBC should focus on the development of a few key issue areas that once resolved will facilitate growth and increase the attractiveness of the borough as a place to do business.

The first key focus area is around creating the conditions for growing the economy through:

- developing a skilled workforce that meets the needs of the businesses in the area but also positions Bridgend County as a high-skilled hub
- strengthening the transport infrastructure that means businesses can move their resources and their people efficiently
- substantial increase in the number of commercial premises to meet demand and increase capacity
- a supportive, collaborative and business-friendly local authority

The second key focus area relates to challenges that arise from deep-rooted economic and social problems within the areas. This is most clearly recognised in the labour market where there are issues of high economic inactivity and geographical inequality. Addressing the challenge can be achieved through:

- a focus on skills provision both to the individual and to businesses
- ensuring economic development is achieved through the lens of the foundational economy and with equitable outcomes as a goal
- ensuring digital and transport connectivity is to a high level throughout the borough.

This economic strategy sets out 4 key pillars that are central to addressing these structural barriers. The 4 pillars categorisation is the result of hearing from stakeholders across the County, analysing the available datasets and reviewing existing policy and strategy from local, regional and national organisations. The 4 pillars capture the areas that were considered the most significant for the economic prospects of the County and reflect the priorities for the County from all levels.

These 4 pillars encompass the points above, form the backbone of the economic strategy for Bridgend County and provide structure for our strategic recommendations. The 4 pillars are Business and Workforce Support, Connectivity and Infrastructure, Public Sector and Foundational Economy, and Low Carbon Economy. In addressing underlying issues in these 4 areas Bridgend County can create a thriving social and economic ecosystem that is attractive for incumbent and new businesses alike and has a skilled and prosperous workforce.

4 Pillars of the Economic Strategy

Due to its importance in addressing both aforementioned challenges, skills and capacity-building form a key cornerstone of this report.

- **Business Support and Workforce Development**
- **Connectivity and Infrastructure**
- **Public Sector and Foundational Economy**
- **Low Carbon Economy**

These four pillars are the basis for Bridgend County to realise large scale opportunities and the areas of improvement that will have the most significant impact on Bridgend's economy and future economic success. It is essential to note that the above strategic pillars are not mutually exclusive, and are cross-cutting foundations for a healthy and diversified economy.

Pillar 1: Business Support and Workforce Development

Bridgend County has a structural economic constraint of skill shortage which has caused a trend of long-term unemployment. This has meant that over time, families and communities have become embedded in cycles of unemployment, exacerbating already existing issues of deprivation and inequality.

For Bridgend County, capacity building is essential across all levels of the community. This is especially true for the poorest and most disadvantaged of the population, to develop skills and competencies to take greater control of their own lives and contribute to inclusive local development.

Bridgend County's business community has also historically had a few key constraints that have held it back from its true potential. By addressing the issue of a relative lack of commercial property and by working with businesses to increase their capacity to take advantage of the economic opportunity created by the public sector, anchor organisations and their respective supply chains the Bridgend business economy has the potential to thrive.

Pillar 2: Connectivity and Infrastructure

Connectivity is an essential building block to the social and economic fabric of any economic strategy. Good digital connectivity for the entirety of Bridgend County will unlock the potential for all communities to access and engage in the economic opportunities that are present as well as provide a key cornerstone for the green economy as we move towards a future of smart inclusive communities.

Connectivity in this report has two major components: digital and physical (i.e., transport). For both components, there is poor infrastructure in some areas of the borough in Bridgend County, particularly (but not solely) the more deprived communities in the valleys to the north of the county. Bridgend County has a high percentage of people who cannot access sufficient internet in their area. In addition, we heard repeated feedback from stakeholders that the public transport

infrastructure across the borough was lacking and in particular that the valley areas suffer from a lack of public transport connectivity.

Pillar 3: Public Sector and the Foundational Economy

The public sector and foundation economy are key in Bridgend County. Not only as a significant employer in the area but also as a bedrock of the community due to its role in facilitating and enabling the activities of the wider community. In addition, it also provides a lot of key services that are crucial to the Bridgend County experience.

As a major economic contributor in the county borough, both as a spender and an employer, the public sector and foundational economy has a key role to play as a stimulator of economic activity, as a leader in its direction of travel and as a role model for the type of economy Bridgend County wants to create.

Within the type of economy that Bridgend County is creating the theme of Foundational Economy is a fundamental component and as such is a key concept to this economic strategy. All the further work on specific sectors will be undertaken through the lens of the foundational economy and the commitment to creating a sustainable and equitable community for all.

Pillar 4: Low Carbon Economy

The Low Carbon agenda will expand significantly in the coming years and will dominate decision-making for the foreseeable. Over the next 5 years, the rate of growth of the low carbon economy is predicted to increase each year, accelerating the growth of the industry as a whole. As this significant change to our culture and economy comes it will create new industries and opportunities, as well as create new social obligations. It is paramount that the Bridgend County economy is shaped in a way that is environmentally and ecologically sustainable, whilst also taking full advantage of this as a window for positioning itself as a hub for the low carbon economy.

The Strategic Pillars within the context of other sources of information

The table below shows where insights from the different sources of information have overlapped and supported the case for the 4 pillars in this report.

Pillar	Topic	Data	Stakeholders	CCR / Regional	Wales Gov	UK Gov	Other sources
1. Business & Workforce Support	Capacity Building	Y	Y	Y	Y	Y	Y
	Business Support	Y	Y	Y	Y	Y	Y
2. Connectivity & Infrastructure	Digital	Y	Y	Y	Y	Y	Y
	Physical	N	Y	Y	Y	Y	Y
	Public Sector	Y	Y	Y	Y	Y	Y

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Pillar	Topic	Data	Stakeholders	CCR / Regional	Wales Gov	UK Gov	Other sources
3. Foundational Economy & the role of the Public Sector	Foundational Economy	Y	Y	Y	Y	Y	Y
4. Low Carbon Economy	Low Carbon Economy	Y	Y	Y	Y	Y	Y

Economic actions to address the 4 Key Pillars

The 4 Pillars describe the 4 broad areas of focus that were perceived to be the most significant from the stakeholder engagement, analysis of datasets and review of reports and strategies across the different levels of government and public sector organisation. The result is the 4 Pillars as described above. These 4 pillars form the structure for the analysis and recommendations in the rest of this strategy.

In the following section, each of the 4 pillars is explored and expanded upon in turn to understand the importance of each as an economic driver and the relevance that it has in the Bridgend County Borough economy.

Pillar 1: Business Support and Workforce Development

Bridgend County has historically been home to some major high-skill employers largely focused in a small number of industries. Most notably this has been in skilled manufacturing jobs, firstly in car production and more recently in medical device engineering and technology. At the same time in some sectors, Bridgend County has historically suffered from a low skill base, and as a result, Bridgend County has performed below its economic potential.

Workforce capacity building requires a holistic approach encompassing both bottom-up and top-down approaches. Historically, infrastructure spending has tended to dominate economic strategy across the entirety of Bridgend County and the surrounding region. Infrastructure alone does not provide a sufficient basis to nurture and sustain the required skill-base. Low skill levels are seen as major barriers to making the transition to work, with a considerable proportion of those who are economically inactive lacking not only basic skills and specific work-related skills but also more generic skills that are core to a healthy economy.

There is a significant economic opportunity available through supporting smaller local businesses to support the upskilling of their existing workforce and adoption of productivity-improving technologies, particularly in the areas of digital skills (basic skills and advanced skills), and engaging in procurement as part of the supply-chain economy. Equally, there is a need for a deeper solution for acknowledged skills shortages across the Bridgend economy. With no university in the borough, Bridgend College is the key provider of technical (Further Education) and some higher (Higher Education) skills provision through in-work training and apprenticeships. It is key that the local authority works closely with Bridgend College to ensure that they are

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providing the right skills to add value in the workplace and to be prepared for the future economy.

Away from skills at an individual level, there is also an opportunity for businesses to upskill themselves to take advantage of the supply chain network into larger businesses, the third sector and the public sector. These institutions are large consumers of goods and services, but businesses do not always have the necessary skills or knowledge to access this spending.

In this section:

- Capacity Building
- Skills Shortages
- Preparing for Industries of the Future: Advanced Manufacturing
- Preparing for Industries of the Future: Low Carbon Economy
- Business Support
- Business Capacity Building: Supply Chains
- Business Skills
- Commercial Premises

For Bridgend County, capacity building is essential across the community. This is especially true, for the poorest and most disadvantaged of the population, to develop skills and competencies to move individuals closer to employment, take greater control of their own lives and contribute to their own and local economic development.

Capacity Building

Skills Shortages

Capacity-building strategies are the cornerstone of a healthy community. They require a decisive vision for change that takes a longer time horizon to realise the impact. However, they are essential to creating greater social cohesion and resilience, therefore, enabling Bridgend County to be better placed to confront economic and social challenges in the future. To build meaningful and effective workforce capacity across Bridgend County we advocate for both bottom-up (building on existing capacity) and top-down (policies that stimulate and foster skill capacity through national and local government).

Community Capacity Building is a developed concept based on a series of strategies that are aimed at addressing the major social and economic decline in towns, cities and regions that are experiencing significant economic change and the consequences of deep-seated and long term worklessness and benefits dependency.

The priorities at all levels are to build community capacity, to rebuild capacity across the region and particularly across the deprived areas of Bridgend County, and to sustain such activity in difficult economic times. Jobs, entrepreneurship, and

business performance are key tangible areas to which community capacity building can contribute, and this is accompanied by more intangible factors including increased social capital and social cohesion. Strategic policies that embody a multi-faceted approach i.e. core workplace skills for those furthest from the job market, reskilling the existing workforce, taking stock of capacity building across the entire educational system will facilitate short and longer-term growth strategies that will ultimately lead to better jobs, increased levels of entrepreneurship, positive social capital indicators, better business performance and sustainability.

Skills Gaps & Shortages

The entire UK is experiencing a shortage of skills and many industries are finding it increasingly hard to hire a workforce with sufficient skills. Below are some areas that have been highlighted as suffering from difficulty to hire:

- Skilled trade occupations
- Professional and managerial occupations
- Machine and technical operators
- Care and leisure services
- Administrative and secretarial occupations

In addition, the UK workforce lacks both basic and advanced digital skills. This is expected to worsen in the future as demand increases at a rate that is not matched by the supply of these skills.

Preparing for Industries of the Future: Advanced Manufacturing

Advanced Manufacturing already plays a significant role in the local economy, with major manufacturing employers such as Rockwool & Sony and a cluster of medical device manufacturing firms providing high-skilled, well-paid jobs in the borough. It is important to the County to protect these jobs for the future and to ensure the supply of a highly skilled workforce that can meet the future demand for workers in this space from existing businesses as well as encouraging other businesses to move to the area due to the skilled nature of the workforce. Bridgend County is in a strong position already in this space. The key for the council going forward is to nurture the businesses that are already incumbent and build from the current situation to create an even more attractive proposition for new businesses.

The total impact of manufacturing on UK GDP was £446 billion in 2016. For every £1 million that the manufacturing sector contributes to UK GDP itself, a further £1.5 million is supported across the wider economy through indirect and induced multiplier effects. On the same basis, manufacturing supported a total of 7.4 million jobs in 2016. For each job in the manufacturing sector itself, a further 1.8 are supported in other sectors of the UK economy.

Preparing for Industries of the Future: Low Carbon Economy

The development of the low carbon economy and an ever-increasing emphasis on green industries in the future means that Bridgend County can upskill its workforce to take advantage of the economic opportunity that this presents. Work in the industries of the future, and in particular the low carbon economy, will rely on a high level of skills across a wide range of areas but they will hinge to a large extent on high-tech and high-level skills. This will cut across all areas including building on Bridgend County's existing strength in the advanced manufacturing sector.

The demand for low-carbon energy will increase significantly and rapidly over the coming years and with it the corresponding market for employees with the necessary skills. Bridgend already is a leader in this area with leading businesses like engsolve based in the borough. The council have already shown their commitment with their work to support the Bridgend Town Heat Network, an example of innovation in action. There is a strong existing relationship between businesses and the council on this issue which puts Bridgend County in a strong position to take advantage of this expanding market. Bridgend must act now to ensure that its workforce is equally as prepared as its businesses and council to take part in this new economy and share in the value that it will bring. Bridgend College is an invaluable asset in this process and should be encouraged in its direction of increasing its Low Carbon courses.

Equally, skills to improve the sustainability of existing infrastructure are increasingly becoming more in demand with a focus on retrofitting buildings expected shortly. The council is developing a low-carbon strategy and has already launched The Re:fit programme which aims to retrofit schools and other public sector buildings with conservation measures such as LED lighting replacement and solar PV systems. It is also expected that demand for insulation retrofitting will increase. Bridgend County should ensure its workforce can meet this demand so that the direct economic value from these projects remains in the borough.

Business Support

Business Capacity Building: Supply Chains

As with individuals, there is an opportunity for local businesses to upskill and build their capability. One area of potential is for smaller businesses working in the supply chain network into larger businesses, the third sector and public sector. The public sector is the biggest spender in Wales and tapping into this existing spend poses a significant opportunity for local businesses.

Currently, there is a good understanding in the borough and within the council of the power of procurement to create a thriving local economy. The 2021 procurement strategy is a large step towards implementing a progressive procurement strategy that will direct funding towards local businesses where appropriate and foster an economy that supports local businesses by design. However, there are many businesses that for legitimate reasons are unable or unwilling to procure services directly from the public sector. This can be due to size (government tenders being too large), reputational risk or perceived logistical/practical difficulties. These businesses can still benefit indirectly from public spending. There is a large opportunity available to businesses if they can unlock and tap into the supply chain

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benefits from public spending. They may be unable, not have the skills or be unwilling to apply for public sector tenders, but there is huge value, particularly for small businesses, in them being able to provide services to main contractors and in doing so benefit from public spending. The council can support smaller businesses to engage in this process by working alongside small businesses to ensure that they have the requisite skills and information necessary for them to enter at the appropriate stage along the supply chain.

Business Skills

Businesses require a skilled workforce but they also need specific business skills to meet their full potential. The 2021 business survey undertaken by the council indicated that marketing, social media and digital skills (ranging from basic knowledge of Microsoft products to more technical IT knowledge) were deemed particularly important for local businesses. Industry-specific skills such as food hygiene were also indicated as important. The council can support businesses by coordinating and promoting training in key skill areas, which in turn should improve the productivity of businesses and provide the individuals with additional business and digital skillsets.

Bridgend County has a tremendous opportunity to facilitate significant growth across the digital sector. The latest report from the EU Digital Economy and Society Index (DESI) shows that while businesses are digitalising functions and services, only a fraction of SMEs rely on advanced cloud (17%) and big data applications (12%). This needs to change for strong post-pandemic recovery to take place. The use of more advanced digital technologies, such as cloud computing, big data analytics, AI and the Internet of Things will enhance productivity, improve efficiency, and open new opportunities for businesses in all sectors, all of which are crucial for economic recovery.

To support local businesses and to continue the more sustainable behaviours adopted during lockdown, investment will be needed to strengthen the digital foundations of Bridgend County, namely ensuring equitable access to high-speed high-capacity internet for businesses and households, and enhancing the digital skills of its business population.

Commercial Property

A lack of available and suitable business premises prevents the Bridgend County business community from reaching its full potential with businesses required to be put on a waiting list for premises. This issue was a common theme in the feedback from stakeholders. In the latest data on Job Density from the Office of National Statistics, Bridgend falls significantly behind the Welsh and GB averages. As of 2019 in Bridgend County, there were 0.68 jobs per person, compared to 0.77 in Wales and 0.87 across Great Britain. Facilitating the adequate provision of suitable small and large business premises in Bridgend County will enable existing businesses to expand and grow, and provide suitable spaces for inward investing businesses to locate in the county. It is, therefore, important that the council focuses on solving the issue of an insufficient supply of business premises. As a key landlord in Bridgend County, BCBC is well-positioned to lead on this issue.

Opportunities

Capacity Building

- There is significant untapped economic potential to be unlocked by facilitating re-skilling and up-skilling of the existing workforce.
- Continued focus on basic skills is needed to ensure workforce (and potential workforce) with a strong and broad set of basic skills that encourages people into work and ensures they can succeed.
- Bridgend County can capitalise on its strong background in the advanced manufacturing sector, bringing economic advantage as that sector develops and enabling Bridgend County to consolidate its position as a regional hub.
 - The Low Carbon economy is set to expand rapidly and create a wealth of new jobs. Bridgend County can capitalise on this with the right training programmes, aligned to national and local strategies to de-carbonise the economy.

Business Support

- The public sector and anchor organisations are large purchasers of goods and services, but not all businesses are able or willing to procure directly from the council. A programme to help businesses understand how they can, directly and indirectly, benefit from the supply chain could have significant economic benefits.
- Upskilling businesses themselves can increase productivity, unlock new operational possibilities and help expand the reach of their marketing.
- Working to provide adequate commercial premises will remove a barrier to growth.

Strategic Actions

National

- Align local policies and actions to national policies that are aimed at stimulating enterprise, social capital, and community capacity. Broad-based, concurrent strategies that stimulate capacity and activity at the personal and household-level across public, industry and third sectors are essential.

Regional/Sub-regional

- Develop employer-assisted housing that ensures a mix of incomes in the local housing market.
- Partner with CCR as well as other key stakeholders and allow participation and feedback along all stages of the development process.
- Set-aside new commercial space for local businesses to stimulate local job growth through a sub-regional partnership.

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- Increase the 'skills for life' levels of adults through facilitating training programmes in the areas where it is most needed. This may include targeted support for particular age groups.
- Improve access to learning and employment for local people through removing barriers to entry (see connectivity) and raising confidence, basic workplace skills, digital skills and self-esteem.
- Work with local training providers to understand the IT training needs in more detail and consider how to provide an offer that meets these needs.
- Continue to support and build on the work being undertaken to get disabled, people with long term conditions, and long term unemployed into appropriate employment or community engagement.
- Work with Bridgend College to review the advanced manufacturing and low carbon industries and ensure that the required skills for these industries in the future are being provided for by the existing training programmes or create a new programme where gaps are missing. Support recruitment to target programmes through County-wide marketing.
- Update and maintain a database of all Bridgend County-based businesses to enable communication, support and feedback with the business community. This can also be distributed to suppliers when they contract with the council or partner organisations.
- Facilitate a programme to educate businesses on how they can win business with the council and other major procuring organisations, both directly and indirectly.
- Support business activity by providing an adequate level of small and large commercial properties, and flexible working spaces / co-working spaces.
- Work with the business community to identify needs and potential needs, and to identify suitable business locations linked with public transport and active travel plans.
- Support businesses and third-sector organisations that help to facilitate democratic/widespread access to digital and financial literacy that are essential to the fabric of capacity-building.
- Consider how to encourage more young people to stay and establish careers/homes in the area and consider how to encourage people with children to move to the area
- Continue to monitor the ongoing funding of Business Wales to ensure that Bridgend County businesses continue to be adequately supported.

Pillar 2: Connectivity and Infrastructure

Ensuring good digital connectivity for the entirety of Bridgend County will unlock the ability for all communities to access and engage in the economic opportunities that are present as well as provide a key cornerstone that will underpin the green economy as we move towards a future of smart inclusive communities. Furthermore, the economic importance of providing quality physical infrastructure is of vital importance to ensuring sustained social development and inclusive growth. The relationship between digital connectivity and physical infrastructure is mutually interconnected and will play a pivotal role in the future success of Bridgend County.

In this section:

3. Digital Connectivity
 - Internet connectivity: Individuals
 - Internet connectivity: Businesses
4. Physical Connectivity and Infrastructure
 - Travel and Transport connectivity
 - Sustainable Transport

Digital Connectivity

Internet Connectivity: Individuals

To understand the weaknesses and potential opportunities we look to the evidence base on digital connectivity for Bridgend County. At an aggregate level, Bridgend County's download speeds at 52.9 are slightly below the Welsh average of 58.3. However more concerningly, when we interrogate these headline findings 11.4% of Bridgend County's population receives less than 10Mbps; a Universal Service Obligation. The implications of this are stark for that section of the population and this inequality has been exposed and exacerbated by the COVID pandemic. People in areas of poor digital connectivity, or unable to afford high-speed connectivity are unable to access work that requires or allows for home working using the internet as well as being excluded from accessing key online services, decreasing their ability to stay connected to others. There are substantial economic and social benefits to solving this digital connectivity problem for the communities in question, in addition to tackling a root of inequality.

This inequality does present a strong case for Bridgend County to weigh into a wider economic case at a regional and national level to ensure that the poorer connected areas within Bridgend County are not left behind and further disconnected from economic opportunities.

The Centre for Economics and Business Research (CEBR) has identified five key areas in which individuals who acquire basic digital skills can benefit:

earnings benefits: these relate to increased earnings of between 3% and 10% through acquiring digital skills.

employability benefits: this reflects the improved chances of finding work for someone who is unemployed and an increased likelihood that someone inactive will look for work.

retail transaction benefits: shopping online is 13% cheaper on average than shopping in-store.

communication benefits: basic digital skills can enable people to connect and communicate with family, friends, and the community 14% more frequently.

time savings: these relate to the time saved by accessing government services and banking online rather than in person, estimated to be about 30 minutes per transaction.

It is also expected that the digitally excluded will be increasingly at a disadvantage in the employment market over time unless they are specifically catered for. In terms of earnings and employability benefits, the Industrial Strategy identified Artificial Intelligence and Data as an important challenge and opportunity for creating good quality jobs and driving economic growth. In 2016 it was estimated that within the next 10 to 20 years, 90% of jobs will require some sort of digital skills (PDF, 735KB) and in the Lloyds Bank research, half of those online indicated that the internet had helped them find a job (PDF, 3.1 MB), a share that is likely to only increase over time.

What Is Digitalisation?

Digitalisation can be defined as the use of digital technologies to change existing infrastructure. In a business, this can involve the implementation of new systems and tools to increase efficiency and provide the potential for new revenue. At a city – or country–level, the premise is the same, but the scale is much wider.

Internet Connectivity: Businesses

Equitable access to excellent digital connectivity (full-fibre broadband, 5G etc,) is expected to have significant benefits to local businesses. Evidence from the Broadband Stakeholder Group suggests that investment in advanced communications (including full-fibre and 5G) can deliver broad economic benefits, including:

Existing businesses will see an increase in productivity which should result in an expected increase in turnover per worker of up to 3.8% per worker per annum.

- New businesses will be attracted to the area with growth in the total business of at least 0.4%, rising to 3.2% in other areas. This will result in increased tax and business rates for the local authority.
- Both of the above benefits will result in new jobs being created in the local area. Areas can expect to see 0.7-1.7% more jobs.

Physical Connectivity and Infrastructure

Travel & Transport Connectivity

Although major East-West transport links (rail and road) are good, during stakeholder interviews in the borough, the issue regarding the lack of public transport running at times to support people getting to and from their place of work was raised many times. Where there are public transport links such as trains to Maesteg, anecdotal evidence suggests that the frequency and timing of these can severely limit access to employment and access to the night-time economy in other locations. Bus times are not always coordinated with train times. Anecdotal evidence supports poor “last mile” public transport, in issue particularly in the north of the valleys.

The economic potential of Bridgend County, particularly of people in the less well-served areas, is currently restricted by this lack of infrastructure. It causes issues for individuals to access services, socialise and gain or maintain employment. Young people are disadvantaged as car ownership is expensive and rural jobs often have lower rates of pay than in urban areas, in addition, it puts a constraint on pupils taking part in after-school sport and social activities. A progressive, radical, and sustainable travel infrastructure strategy to allow easy, regular and affordable access to all areas of the borough will unlock employment opportunities and economic growth and reduce the existing geographic inequality.

The Bridgend County economy is also being held back by a lack of public transport to support the night-time economy. There is great potential for a thriving night-time economy with cultural venues in the major towns and a host of restaurants and bars. However, access to these by public transport in the evening is difficult or, in some cases, simply not possible. Anecdotally this is impacting the economy with people either having to drive or get a taxi, both of which may pose difficulties. Expanding public transport infrastructure, particularly buses, so that they provide access later into the evening will boost the night-time economy and provide support to those businesses.

Sylvia Barrett, Head of Policy, Research and Projects at Campaign for Better Transport, said:

“It’s hard to overstate the importance of good public transport. Communities that struggle to access jobs, training and essential services have no chance of thriving. The Government must invest in public transport to ensure that no communities are left behind and that we build back better in a way that is fair and sustainable.

Reconnecting lost rail links, reinstating cut bus routes and ensuring local authorities have the funds and skills to provide the public transport local communities need is key to reinvigorating the areas featured in this report and, crucially, ensuring these communities don’t get further left behind.”

Sustainable Transport

Decisions about improving and extending public transport must be done through the lens of creating a sustainable and green travel infrastructure. Inherently the increase in public transport will be positive for the environment by decreasing the use of personal vehicles, however, this is not sufficient to meet the net-zero plans. An increase in public transport use and associated active travel will also contribute to the Health Weight Wales Strategy.

Bridgend County is already leading in this space with several active transport and electric vehicle (EV) charging schemes in place. There are already existing electric vehicle schemes in place that are part of a programme to shift all council vehicles to electric vehicles, testing electric vehicles as taxis and expanding the electric charging infrastructure in the borough. Further to that, BCBC will explore hydrogen use across a number of service areas

Bridgend County already has a network of dedicated traffic-free cycle routes and is in consultation about expanding this network. One example of a desired active travel route development (cited by Rockwool) is a dedicated walk and cycle route from Pencoed station to the Rockwell plant. To support economic growth people need to be able to access work, and to deliver net-zero there has to be a significant move towards active and public transport

Bridgend County should continue to focus on sustainable transport as part of the expansion of public transport.

CASE STUDY: Electric Vehicles on a Global Scale

Transitioning to a more efficient electric vehicle (EV) fleet in cities would require a total incremental investment of \$8.6 trillion.¹⁵ This investment would pay for itself within eight years. By 2030, annual returns would reach \$320 billion. By 2050, that figure would exceed \$1 trillion annually, for a net present value of \$3.7 trillion. These returns largely represent the savings from avoided fuel costs: the economic benefits of lower emissions and pollution would provide even higher returns. This transition to an EV fleet would avoid releasing 0.71 gigatons of GHGs into the atmosphere by 2050 and has the potential to create 3.6 million jobs by 2030.¹⁶

In many cities, EVs represent a small but rapidly growing part of the transport sector. Localities can support this transition through a wide range of measures, including investing in financial and non-financial incentives. Oslo provides a success story that we can learn from. More than half of all new cars sold in Oslo are either fully battery-electric or plug-in hybrid. To enable this shift, national and local governments worked together to introduce a mixture of financial and non-

¹⁵ <https://blogs.worldbank.org/transport/why-sustainable-urban-transport-great-investment#:~:text=Transitioning%20to%20a%20more%20efficient,vehicles%20with%20higher%20fuel%20efficiency>

¹⁶ <https://blogs.worldbank.org/transport/why-sustainable-urban-transport-great-investment#:~:text=Transitioning%20to%20a%20more%20efficient,vehicles%20with%20higher%20fuel%20efficiency>

financial incentives, including zero VAT or import tax on electric vehicles, free parking, access to bus lanes and well-developed public charging infrastructure.¹⁷

CASE STUDY: Cycling infrastructure

Many cities are already investing in cycling infrastructure to reduce congestion, increase the 'walkability' of their cities and reduce pressure on public transport. Investing in improved cycleways can also create significant cumulative savings in public health costs and support job creation.¹⁸

There are multiple economic benefits to investing in cycling infrastructure:

- Public Health and Economic Savings: According to NICE, physical inactivity costs the NHS around £1 billion per year, and wider society £7.4 billion per year.¹⁹
- A recent study of 264,337 people found that cycling to work is linked with a 45% lower risk of developing cancer and a 46% lower risk of cardiovascular disease.²⁰

Opportunities

Digital Connectivity Opportunities

- Expanding good quality digital connection across the whole borough will support individuals in finding and keeping employment, especially in roles where work-from-home is encouraged.
- Expanding good quality digital connection will also help to remove social inequalities, as individuals with a poor internet connection will get left behind in an increasingly digital world.
- Expanding good quality digital connection will also allow easier access to services (e.g. government/banking) which in turn will be time saved (estimated to be about 30 minutes per transaction).
- Strong digital connectivity to business premises will increase business productivity and is necessary to position Bridgend as a good place for businesses to locate to.

Physical Infrastructure Opportunities

- Improving last-mile transport connectivity and the regularity of access to more remote areas will improve the economic and social prospects of people in those areas.
- Expanding public transport services into the evening has the potential to radically improve the nighttime and visitor economy.

¹⁷ <https://urbantransitions.global/urban-opportunity/>

¹⁸ https://www.researchgate.net/publication/304529942_Economic_Benefits_of_Increased_Cycling

¹⁹ <https://www.nice.org.uk/guidance/ng90/chapter/Context>

²⁰ <https://www.cyclinguk.org/article/20-reasons-cycle-work>

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- Electric and hybrid public transport solutions will deliver return on investment through their reduction of emissions.
- Expansion of the already existing sustainable transport projects can position Bridgend County as a leader in this space and create employment in these new sectors.

Strategic Actions

National Level

- Align with the national Levelling-Up Agenda,
 - Lobby the Welsh Government and Network Infrastructure providers for the provision of the Universal Service Obligation (USO)²¹ across the whole borough.
- Tap into National programmes to ensure effective delivery of affordable USO reaches the Bridgend population.
- Take advantage of Pandemic Recovery funds to facilitate the digital connectedness of the borough.

Regional / Sub Regional

- Ensure digital skills training programmes and further education programmes are aligned at the regional level.
- Target investment pots around last-mile transport to connect the strong central travel infrastructure (Cardiff-Swansea rail and M4) with the rest of the borough.
- Ensure that the whole borough has access to adequate public transport. The valley communities suffer from an inability to sufficiently access the rest of the borough through public transport.

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- Work to ensure a delivery plan that the whole borough has a minimum of 10Mbps of affordable broadband coverage as per Universal Service Obligation, and thereafter to much higher connectivity speeds
- Plan for the emergence of 5G implementation and subsequent developments in connectivity.
- Work with transport providers to plan the service of public transport into the evening to support the local night-time economy and last-mile public transport connectivity.
- Ensure new public transport supports the move to a green economy by being designed sustainably.
- Explore options for incentivising Electric Vehicle use in Bridged by providing free parking for Electric Vehicles and other options and expanding public charging infrastructure.

²¹ <https://www.ofcom.org.uk/phones-telecoms-and-internet/advice-for-consumers/broadband-usage-need-to-know>

Pillar 3: Foundational Economy and the role of the Public Sector

The public sector has an important role to play beyond its primary function of delivering services, indeed its impact reaches from reducing carbon emissions, supporting its supply chain, to its position as a significant property owner.

In particular, the Public Sector in Bridgend County is a significant employer across a range of job types and a large consumer of goods and services. Recognising and capitalising on this has the potential to benefit the local economy and work is already underway via the public sector services board to ensure the public sector understands and plays its role as anchor organisation.

Relatedly, the theme of Foundational Economy (that part of the economy that creates and distributes goods and services consumed by all because they support everyday life e.g. healthcare, education, housing, utilities and food) is a fundamental part of this economic strategy. The economic strategy in this report should be viewed through the lens of the Foundational Economy. In discussing the future of Bridgend County, we are envisioning a successful economy that can complement and support a thriving community and culture with a strong Foundational Economy.

In this section:

- Public Sector
 - Procurement and Anchor Organisations
 - Digital Delivery
- Foundational Economy
 - Placemaking
 - Well-being
 - Educational Equality and Online Learning
 - Cultural support

Public Sector

Procurement and Anchor Organisations

The public sector is a major player in the Bridgend County economy and provides significant value as both a consumer and an employer.

As a consumer, the Bridgend Public Sector has a progressive approach to procurement which is reflected in the council's 2021 Socially Responsible Procurement Strategy that encourages generating local value and includes other value-adds alongside value-for-money in its decision criteria. By adopting and following this existing BCBC strategy, the council can increase its support for the local economy. This should be supported by a programme to reduce barriers for local businesses to help them to apply for and win tenders. Such a programme, alongside a supply chain building programme, will provide local businesses with the skills and knowledge to benefit from public sector spending. The long-term ambition is to create a strong ecosystem of local businesses that benefit from regional public sector spending.

As an employer, the Public Sector plays a significant role in the area. The footprint of the public sector is large with significant economic activity being created by the

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Princess of Wales Hospital, the South Wales Police Headquarters, the College and Schools and the Council itself. Not only do these institutions employ many people but they do so across a breadth of job types including high-skilled and well-paid work. Recognising the role these institutions play in the fabric of the community and being conscious of that in their decision-making is crucial.

Anchor institutions like these invest heavily in and have great influence over local real estate and infrastructure development. Where and how institutions choose to build greatly affects the neighbourhoods where they are located. Thoughtful decision making regarding real estate acquisition and development can leverage this institutional power for the benefit of the community in a way that creates healthy places, stimulates economic revitalisation, and supports the local housing market. To reach mutually beneficial goals, anchor institutions should align their real estate plans with broader community goals and partner with residents, city officials and other stakeholders to ensure community participation in the planning, decision-making and development process. Partnering with local community development corporations is one way to build trust and address broader community development needs.

Closely partnering with community groups and stakeholders, and opening the planning and development process to these partners requires anchor institutions to cede a degree of control over physical development projects. This is made easier by leadership that frames the role of the institution as a civic leader and community partner. With a mutually beneficial development agenda, Bridgend institutions would be better able to create vibrant places for community residents and institutions alike.

Digital Delivery

In the UK, as the Government Digital Strategy explains, digitised transactional services present a high potential return on investment. There is a strong body of evidence to support the idea that digital delivery of public services can produce a service at least as strong as that offered through other channels at a lower unit cost. For some government services, the average cost of a digital transaction is almost 20 times lower than the cost of a telephone transaction, about 30 times lower than the cost of a postal transaction and about 50 times lower than a face-to-face transaction.²² A move to digitising certain public services where the efficiency gains are large and the service provision still meets the standard will save the public sector money. However, it must be accompanied with core digital skills programmes to ensure that residents and businesses can access services digitally. In cases where service provision is improved then significant social benefits can be realised through the digitalisation of public services.

Foundational Economy

Wellbeing

Well-being is paramount across all aspects of society and is foundational to any sound economic strategy. This is acknowledged in Bridgend County with a regularly

²² <https://www.gov.uk/government/publications/digital-efficiency-report/digital-efficiency-report#fn:1>

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updated Well-being plan produced by the Public Services Board – the latest of which is expected to be released next year. Wellbeing is a broad term that encompasses a myriad of interconnected aspects of daily life from physical and emotional well-being to our perceptions of our environment both literally and figuratively. To the strength of Bridgend County, Bridgend County boasts a strong sense of place and community which has come across anecdotally from almost all of the stakeholders who have input to this report.

However, there are significant existing health inequalities with temporary and long-term sick comprising 27.4% of claimant counts. In addition, there is a high percentage of non-workers who do not want a job (75.6%). Addressing this structural issue has the dual benefit of improving the welfare of the population and unlocks these people to join the workforce.

Building on The Well-being of Future Generations (Wales) Act 2015, Bridgend revised its Wellbeing objectives for 2020-21;

- 1) Supporting a successful sustainable economy.
- 2) Helping People and Communities to be healthier and more resilient.
- 3) Smarter use of resources.

Health and Social Care

The population of Bridgend County is forecast to grow but primarily through the older population (65+). Therefore, the distribution of the population will skew more towards the older population. Thus, it is of paramount importance to ensure that this economic strategy supports the growing needs of the population through the provisioning of adequate social support, social care and healthcare. There is already a known issue of under-staffing in this sector and the council must work with the college and with existing providers to ensure that a sufficient number of people are being trained with the skills to enter into and progress within this sector.

Over a longer timeframe, digital connectivity has a large role to play in providing access to otherwise hard to reach communities whilst reducing the overall costs of service delivery. Before the Covid-19 pandemic, there was a general reluctance to embrace the potential of digital healthcare appointments. During the pandemic, the need to prevent our surgeries and hospitals from becoming contagion points necessitated the adoption of digital healthcare and revealed its potential. Research shows that digital healthcare is growing rapidly. In the US, for example, demand has increased by over 64 per cent in 2020 and is expected to grow sevenfold by 2025.

The move towards digital healthcare can only be achieved by everyone having access to good connectivity, and the core digital skills to use it. Without this cornerstone being in place, a move to digital healthcare would only serve to exacerbate existing inequalities. This process has begun through the Digital Health and Care Wales.

Case Study: Digital Healthcare

Before the pandemic, the application of telehealth appointments was already starting to show its potential to improve health outcomes and save money for the National Health Service in the UK. Evidence demonstrates that the use of telehealth in care homes resulted in a fall in infections, and subsequent hospitalisations, by 7.7%. This represented an estimated saving to the NHS of £7.5 million. We now have an opportunity to scale this impact. Based on an average of approximately 6 million hospital admissions per year in the UK, if telehealth could reduce the number of admissions by even 5%, the cost-saving to the NHS would be £120 million per year.

Educational Equality and Online Learning

Remote learning was widely employed throughout the UK's lockdown period, from reception aged children up to university-level students. This has served to prove the viability of online learning on a mass scale and has demonstrated that it has the potential to increase access to education and training.

As part of cities' and countries' recovery packages, online learning has the potential to support the re-skilling of the labour force. In June, the International Labour Organisation released figures showing that working hours fell 14 per cent during the second quarter of 2020 – equivalent to the loss of 400 million full-time jobs. Given the steep contraction in global working hours and an increase in the population not working, online learning provides a tangible opportunity for local and regional economic development initiatives.

As with the case of digitally enabled healthcare and social care, a successful online learning programme is predicated on equitable and sufficient connectivity to allow all people to partake in the opportunities it presents (so as not to further entrench existing inequalities). This is particularly relevant in Bridgend County where both educational attainment (at a school level) and connectivity are worse in the north of the borough. Therefore, implementing an online learning programme without first resolving the issues of connectivity would not effectively benefit the north of the borough, where intervention has the potential to be most valuable.

Placemaking

Green Spaces

Good quality, accessible green spaces make towns better places to live and work and for businesses to invest. During lockdown, the importance of accessible green space in residential centres became increasingly important as these spaces became a refuge, a place where people can relax, exercise, and socialise. Green features are a critical part of any town's green infrastructure network and can provide a high return on investment, with potential for significant economic, social, and environmental gains.

Ensuring access to green, walkable streets and spaces can provide several social and health benefits for the people of Bridgend County and associated cost savings for public services. Access to green space has been linked to significant physical and mental health benefits, ranging from reducing levels of blood pressure to decreasing rates of anxiety and depression; supporting greater productivity, wellbeing, and creativity in the workplace; and strengthening social cohesion in communities. Evidence also suggests that the health benefits of living in greener spaces are higher for disadvantaged communities so urban greening is also an important tool to reduce inequality.²³

A study by Public Health England found that if everyone had access to green space, £2.1 billion could be saved in health costs per year.²⁴ At the city level, the study found that in Sheffield, for every £1 spent on maintaining parks, there is a benefit of £34 in health costs saved. Yet the rate of urbanisation, growing need for housing and previous patterns of planning and construction have turned large areas of cities into concrete landscapes with limited access to green spaces. For example, in the UK, 2.6 million people do not live within a 10-minute walk of green space.²⁵

Creating attractive green spaces has been proven to draw investment, jobs and enhance the value of property. For example, the City of Trees Project in Manchester (UK) has resulted in a 15% increase in revenue for local businesses, as well as providing the environmental benefits of improving air quality and reducing surface water flood risk.²⁶

This highlights the importance to Bridgend County of its green spaces and the role they play in the wellbeing of the community. It is important to protect the vast natural capital assets that the borough possesses whilst also ensuring that within the towns and major residential settlements people have access to useable green spaces.

Case Study: Farmers Markets

They are particularly important to lower-income, marginalised and vulnerable people, providing access to good quality, healthy and affordable fresh food, opportunities for social and cultural interaction and relatively low-cost and accessible trading.

²³

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/904439/Improving_access_to Greenspace_2020_review.pdf

²⁴ <https://link.springer.com/article/10.1007/s11252-020-00929-z>

²⁵

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/904439/Improving_access_to Greenspace_2020_review.pdf

²⁶

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/904439/Improving_access_to Greenspace_2020_review.pdf

They are an important source of direct and indirect employment and contribute to local economies. A recent analysis of footfall data nationally by the Institute of Place Management shows markets have a statistically significant impact on footfall in towns and cities. Thus, in the context of a shift towards online retailing, markets can play an important role in the future of the high street.

Bridgend has limited activity in this space, although talks were had to open one in Bridgend town. The council can encourage placemaking and foster the community by supporting the development of Farmers Markets

Case Study: Tourism and the Visitor Economy

Tourism The current economic contribution from tourism is vital to Bridgend County's economy. According to Scarborough Tourism Economic Activity Monitor (STEAM) figures, the sector brought £347m into the county borough in 2018. This supported the equivalent of 4,041 full-time jobs. Tourism not only creates jobs in the tertiary sector but also encourages growth in the primary and secondary sectors of industry.

The tourism sector is hampered by a lack of key infrastructure, most notably insufficient accommodation for people to stay overnight, limited breadth of the type of accommodation available and poor transport connectivity outside of the train into Bridgend County.

There is also a lack of knowledge of the borough as a tourist destination in the rest of Wales and further afield. There is a significant economic benefit to solving these issues and increasing the capacity of the tourism industry in Bridgend County to support more visitors and move away from a predominantly day-visitor economy.

The economic benefit is due to the multiplier effect of spending. Tourism not only creates jobs in the tertiary sector but also encourages growth in the primary and secondary sectors of industry. Deloitte suggests that for £1 increment in GVA at the UK level, there is likely to be an additional £1.20 generated in the UK because of this activity due to the impact of supply chain effects. Type 1 multiplier. The analysis suggests that for a £1 increment in GVA at the UK level, there is likely to be an additional £1.80 generated in the UK because of this activity due to both supply chain and consumer spending effects. Type II multiplier

Supporting Culture and the Creative Industries

Bridgend County has the potential for a flourishing creative and cultural sector. There is already a strong existing sense of community, culture, language, and history in the area that create a backdrop for a successful cultural environment. The work of AWEN Cultural Trust as a centralised hub for cultural events and venues provides strong organisation within the borough. Their work on the refurbished Maesteg Town Hall will provide an opportunity to host cultural events and shows that the outlook is strong.

However, there is more that can be done to support the creative sector across the County. There are a significant number of microbusinesses and freelancers in this

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space. They have been supported through the pandemic by the likes of the Wales Culture Recovery Freelancer Fund, however, they will need further support as we move into the recovery phase of the pandemic. There is also further opportunity to make Bridgend County a place for more and larger cultural events, including building on existing infrastructure such as the Grand Pavilion in Porthcawl to host a higher-level of event and the unique opportunity Bridgend has to host international golf tournaments. A thriving cultural scene will feed into Bridgend County's Foundational Economy and contribute to creating a place for people to thrive.

Social Housing

Social housing in Bridgend County is provided (for the most part) by Valleys to Coast (V2C), the only social housing provider based in Bridgend County. V2C owns or manages circa 8,000 properties, mostly housing, but including some commercial properties and garages. V2C see opportunities to collaborate more closely with the council and other foundational economy and supply chain partners on place-based development activities (for example on Bridgend Town Centre Masterplan) and rapidly progressing plans to transition to a low carbon organisation and economy (working with Bridgend College on retrofit skills, apprenticeships and modern methods of construction/offsite construction, and with the council to align net-zero plans/activities where appropriate).

Opportunities

Public Sector

- Opportunity to increase the value of public sector spending within the borough by implementing the new council procurement strategy and encouraging other public sector partners/anchor institutions to do likewise.
- Understanding the importance of the public sector as an employer and feeding that into decision making.
- Leveraging the influence of anchor institutions in real estate to have a positive impact on the community and place.
- Identifying where digitising government services can bring value to the individuals that use them and cost savings for the council.

Foundational Economy

- Using digital services to help meet the needs of the elderly population and those in need of care.
- Encouraging the use of online learning and democratising access so that all people can benefit from skills and training.
- Ensuring access for all Bridgend County residents to usable green space has the potential to greatly increase their health and wellbeing.
- Provision of property and transport infrastructure as well as improved marketing, could significantly improve the prospects of the tourism industry and unlock economic activity.

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- Building off the work AWEN does in the cultural space to make Bridgend an attractive place to host cultural events.
- Work with V2C and other housing providers to align on place-based activities and low carbon strategies.

Strategic Actions

National Level

- Tap into funding for Pandemic Recovery's hardest-hit sectors i.e. Travel & Tourism, Hospitality, Economic Development funding across Recreation and hoteling
- Encourage the creation of visitor accommodation options that broadly supports the entirety of Bridgend County and surrounding regions to maximise the impact of the visitor economy.
 - Work closely with the Welsh Government as they implement their 'Welcome to Wales: Priorities for the Visitor Economy' strategy.²⁷ Take advantage of any opportunities through commercial partnerships, marketing collaborations etc.

Regional/Subregional

- Establish linkages with tourist and activity developments in neighbouring boroughs to ensure alignment on impact and employment outcomes.
- Support the attractions in the Valleys (e.g., Parc Calon Lân and associated Mountain Bike Trail, Bryngarw Country Park, other Natural Capital assets of the Valleys etc.) by facilitating their marketing, increasing the capacity to support visitors and improve the awareness of these attractions in the borough through reciprocal support.
- Work to improve the signage that directs people to Bridgend County and its visitor attractions.
- Work closely with Cardiff Capital Region to ensure alignment on their programme to support the creative industry.
- Work closely with Cardiff Capital Region to understand the supply chain opportunities available to Bridgend County businesses from their work and that of other regional initiatives.

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- Fully implement the new procurement strategy and use it to maximise value retained in the borough from public sector spending.
- Upskill both businesses and council employees to be able to efficiently use the new procurement strategy.
- Partner with community groups and stakeholders to open up the planning and development process when anchor organisations are making big decisions that could impact the community.

²⁷ <https://gov.wales/sites/default/files/publications/2020-01/welcome-to-wales-priorities-for-the-visitor-economy-2020-to-2025.pdf>

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- Explore the use of digital healthcare and digitally enhanced social care in the borough. Quantify the impact it would have, to whom and in what areas.
- Work with local educational institutions to understand the role that online learning can play in reskilling and training people.
- Increase/improve signposting to aid awareness and visibility of Bridgend cultural and tourism attractions.
- Support the creation of more accommodation options to increase the capacity of the area to support staying-visitors.
- Support organisations to work together and collaborate with regional/national organisations to promote Bridgend as a tourist destination.
 - Improve access to natural capital resources by identifying suitable locations and ensuring there is adequate waymarking for facilities such as toilets, cafes, bike and Stand-Up Paddleboard hire facilities.
 - Consider further development of the land near the surf centre in Porthcawl to offer adventure activity (e.g. indoor rock climbing/playpark) or cultural (e.g. outdoor theatre) to make use of the land in a prime location.
 - Work with the AWEN Trust to identify opportunities to develop cultural activities across the area including enhancing walking trails with art, outdoor theatre, music events, signposting/information boards for cultural/historical assets of interest, pop-up activities.
- Work with V2C to align on place-based activities and low carbon strategies.

Pillar 4: Low Carbon Economy

The development of the low carbon economy and an ever-increasing emphasis on green infrastructure in the future has created an opportunity for Bridgend County to upskill its workforce to take advantage of the economic opportunity that this presents. There are going to be significant economic opportunities to be gained by regions and economies which take a lead in championing and developing expertise in low carbon technologies.

What Is Green Infrastructure?

Green infrastructure refers to physical infrastructure with a low carbon footprint. This can be renewable energy assets; storage (including hydrogen); grid modernisation, carbon capture and storage technology; building efficiency retrofits; natural capital investment for ecosystem resilience and regeneration, including restoration of carbon-rich habitats and climate-friendly agriculture.

Investing in green infrastructure is widely accepted as a critical strategy to lower emissions, improve public health, and fight climate change. However, green infrastructure is also an attractive economic investment and can provide places with the necessary economic engine to spur growth and job creation in the wake of the pandemic. In September 2019, the Coalition for Urban Transitions reported that implementing 16 low-carbon investments and measures in cities, including within the transport, energy, and waste sectors, could provide a collective return on investment

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of \$23.9 trillion – equivalent to nearly one-third of the 2018 global GDP. These measures would also cut global urban emissions by 90% by 2050.

BCBC is leading the way in its response to the challenges of climate change with a target to achieve a position of net-zero carbon as a public body by 2030. Bridgend County needs to add to this by leveraging change across the rest of the public and private sector by focussing on retrofit, energy sourcing and protection of nature.

In this section:

- Low Carbon Economy
- Retrofitting
- Energy
- Travel/Transport
- Natural Capital

Retrofitting

The deployment of energy efficiency measures to buildings is a key pillar of any credible strategy to tackle Green House Gases (GHG) emissions. Investments in energy-efficient upgrades, commonly referred to as retrofits, have the potential to deliver long-term socio-economic returns. As such, these measures should also be a key pillar in post-pandemic recovery strategies. These energy efficiency programmes can include measures for high-efficiency insulation and building fabric, high efficiency, low carbon heating, cooling, hot water, lighting systems, rooftop solar panels and battery storage.²⁸

In addition to the strategic role in reducing GHG emissions, stimulus policies targeting the building and construction sector often have the greatest economic impact. Investments have been shown to effectively inject money into local value chains and labour markets while regenerating the built environment. Building programmes focused on energy efficiency retrofitting are no exception.

Case Study: Retrofit programmes can contribute significantly to job creation. Analysis suggests that approximately 60% of expenditure on energy efficiency upgrades goes towards labour, helping to maintain existing jobs and create new ones. For example, in the United States between 2009-2011, the Government launched a stimulus package of USD 11 billion for building upgrade programmes focused on homes, businesses, government buildings and public facilities. This programme created 20,000 jobs across the country and, for every dollar invested, 2 dollars were generated in energy cost savings.

Increasing the energy efficiency of buildings can also deliver significant benefits to citizens' health and wellbeing. We spend 90% of our time in our homes, workspaces and other buildings. For many, during Covid-19 the proportion of time spent at home increased during periods of extended lockdown. The quality of our indoor environment

²⁸ https://www.irena.org/-/media/Files/IRENA/Agency/Publication/2020/Apr/IRENA_Global_Renewables_Outlook_2020.pdf

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can impact our physical and mental health, wellbeing and economic productivity. For example, cold homes are damaging to both physical and mental health. In London, evidence suggests that for every £1 invested in renovating cold homes, the NHS saves 42 pence in reduced hospital admissions and GP visits.²⁹

There is a large opportunity here for Bridgend County to build on the existing Re:fit programme and extend that to nurture a workforce that can effectively meet the demand for retrofitting homes and position itself as a hub for a skilled workforce in this space. Bridgend College will be a key player in developing the necessary skills, however, there are also other training options being piloted in Manchester where a not-for-profit retrofit service has raised £550,000 in a community share offer to train 3,500 people with the skills to retrofit homes.

Energy

Investing in renewable energy can provide economic stimulus and create jobs. Before Covid-19, many countries and cities were on a trajectory to shift investment from fossil fuels to renewable energy. As governments design their recovery packages, there is a window of opportunity to be more ambitious and scale up these investments.³⁰

Projections indicate that ambitious investment in renewable energy could reap significant economic rewards. A study conducted by The International Renewable Energy Association (IRENA) found that if a transformative energy pathway is taken, based largely on renewable sources of energy and steadily improved efficiency, it would effectively pay for itself, bringing between a \$3-8 dollar return on every \$1 spent. At a global level, taking this transformative approach would cost \$19 trillion more than the current planned energy scenario (based on planned targets and policies as of 2019) but it would bring benefits of at least \$50 trillion by 2050.³¹

Renewable energy projects are also job intensive. Globally, already more than 11 million people work in the renewable energy sector. IRENA's study shows that if a transformative energy pathway is taken 42 million jobs in renewable energy could be created by 2050. At a city scale, taking London as a case study, an investment of £500m in renewable energy has the potential to generate an additional 3,500 jobs. In comparison, analysis shows that fossil fuel-based investment of the same magnitude would only yield 1,987 jobs.

Bridgend County is already making strides in this space with the Heat Network and the council's own plan to reach net-zero emissions by 2030 and the Council should support any Hydrogen initiatives as they emerge. This should be a continued focus moving forward and Bridgend County must take the learnings from these initial pilot programmes and expand them across the rest of the borough. There is a great

²⁹ <https://www.theade.co.uk/resources/energy-efficiency-in-norwich-south>

³⁰ https://www.irena.org/-/media/Files/IRENA/Agency/Publication/2020/Apr/IRENA_Global_Renewables_Outlook_2020.pdf

³¹ https://www.irena.org/-/media/Files/IRENA/Agency/Publication/2020/Apr/IRENA_Global_Renewables_Outlook_2020.pdf

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opportunity here to work collaboratively with other stakeholders e.g. Bridgend College, Valley 2 Coast to align on a strategy to achieve this.

Travel/Transport

Investing in green infrastructure is widely accepted as a critical strategy to lower emissions, improve public health, and fight climate change.

The current infrastructure in Bridgend County inadvertently incentivises car ownership and use, with limited train routes, poor last-mile bus connectivity and limited public transport options in the evening and into the night.

There has been progress towards encouraging more sustainable, active travel with a programme to improve and increase the number of active travel routes in the area which will help individuals to walk or cycle as an alternative in these particular areas. However it does not solve the issue for journeys or individuals where that is not viable, or the active travel network doesn't reach.

There is also progress being made with the Electric Vehicle (EV) infrastructure in the borough. The council has been awarded £762,000 (Welsh Government – Ultra Low Emissions Vehicle Transformation Fund - £462,000; WLGA – Fleet transition and related infrastructure charging - £300,000) to invest in the electric vehicle charging infrastructure in the borough. This complements other developments in this space including moving the council's vehicles to Electric Vehicles powered by solar panels and a pilot programme with the Cardiff Capital Region that has made six Electric Vehicles available for use by taxi operators.

However, the key issues of public transport connectivity, particularly north-to-south connectivity, last-mile connectivity and night-time connectivity remain key issues and incentivise unsustainable transport choices. Tackling this could have a massive impact on reducing car use and encouraging a more sustainable and healthier lifestyle.

Natural Capital and Biodiversity

Bridgend County is blessed with some fantastic natural capital, which is widely regarded as one of the areas' biggest assets. Bridgend County's natural capital, which includes valleys to the north of the borough, through the towns in the centre to the coast at the south, offers a unique opportunity. In particular, there is huge potential for the area to attract visitors from wider Wales and the rest of the UK, but it also places an obligation on the council to protect and manage these assets.

The Council has a programme of protecting and enhancing natural capital already in place. During the autumn of 2021 15,000 trees were planned to be planted in six different parts of the county borough on council-owned land. As part of the initiative and to extend this into a community-owned cultural event a special Green Day event is being planned which will include input from partner organisations, the community and schools.

The council must continue to protect its natural capital, but there is also a lot more that can be done to advertise its attractiveness to a wider audience. Currently, Bridgend County's visitor economy is skewed towards day visitors and commercial visitors. This implies that the natural capital of the area is less-known outside of the borough and less known when compared to neighbouring areas. There is more that

can be done to market the area as a place to visit to support the local economy, whilst protecting the natural assets.

Opportunities

- Investing in green infrastructure will have significant economic benefits alongside taking steps to reduce emissions and the carbon footprint of the borough.
- Appreciating the magnitude of the economic opportunity that the Low Carbon economy will present in the future and taking steps now to prepare the workforce for that can set Bridgend County up to be a leader in the future.
- Expanding on existing programmes in Retrofitting and Alternative Energies will position Bridgend County as a leader in this space and create jobs.
- Expanding active travel routes and public transport connectivity will incentivise more sustainable travel methods.
- Using the natural capital of the borough to encourage increased visitor activity and healthy interaction with nature.

Strategic Actions

National

- Align actions with national reports including the Climate Change Committee 'The Path to a net-zero report' and the Welsh Government's 'Low Carbon Delivery Plan'
- Collaborate on a national scale to ensure efficient use of resources and find synergies between areas that are trying to achieve the same goal.

Regional/Subregional

- Collaborate with Cardiff Capital Region to ensure that the development work in infrastructure, innovation and skills continues to be achieved sustainably.

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- Identify properties requiring retrofit.
- Work closely with the college and other partner organisations to create a shared long-term strategy for rolling out retrofitting solutions to the wider borough including a process to ensure the required level of skills is available in the workforce.
- Nurture a strategic renewable energy programme that is cross-cutting across industry, public and private settings.
- Expand the Re:fit Programme to a wider range of buildings.
- Identify suitable Hydrogen initiatives as they emerge.
- Coordinate net-zero strategies across the borough – including with partner organisations and non-public sector
- Understand the environmental impact of the council (and partner) supply chain in the push for net-zero.
- Encourage movement to zero single-use plastics and increase recycling with an advocacy campaign.
- Accelerate the build-out of active transport routes/infrastructure in the borough to incentivise physical exercise, and undertake publicity campaigns to encourage the use of them as alternatives to the car. Investigate opportunities to promote e-bikes and cargo e-bikes through loan schemes or similar.

Potential Sources of Funding

Bridgend County like many other local authorities will now have to decide which financing sources and mechanisms to use to fund their strategic recovery and economic development programmes. There are various forms of financing available for local and national governments to leverage. Public finance institutions, banks, institutional investors, corporations, and capital markets all have a crucial role to play. If local authorities can use this financing to power a sustainable economic recovery, there is potential to deliver a return on investment that far exceeds the initial capital outlay, both in the short and long term.

Broad Financing Options

Sustainability Bonds

National governments, and some sub-national governments, can issue green bonds and social/sustainable bonds to fund projects that have social and/or environmental benefits. These can be leveraged to finance a broad range of projects from green infrastructure, renewable energy, green buildings, neighbourhood and public space development, and affordable housing.

Sustainability-linked bonds are an important avenue of financing that governments should consider as a means to support a sustainable economic recovery. There has been rapid growth in the supply of sustainability-linked bonds in recent years to fund green and social projects in urban areas, be it renewable energy, local carbon transport, neighbourhood regeneration or social housing. In 2019, over \$200 billion worth of green bonds were issued worldwide, setting a new global milestone.

As of 2020, a new breed of sustainability bonds - coronavirus bonds – have also entered the market to finance Covid-19 response and recovery projects. To date, well over \$60 billion Covid-19 bonds have been issued **worldwide**, and estimates indicate that this figure could reach \$100 billion by the end of 2021.

Case Study: Some UK cities and local authorities are already taking advantage of sustainability-linked bonds to respond to the Covid-19 pandemic. For example, West Berkshire Council issued the UK's first local government green bond, raising £1 million to fund solar power projects, urban tree planting and nature conservation projects. A group of 30 local councils are planning to follow suit and aim to issue three collective bonds through the UK Municipal Bonds Agency, with a total projected value of at least £750 million.³²

Public Sector Financing

Public sector financing includes UK and Welsh national government support, including intergovernmental transfers in the form of direct grants, subsidies, low-interest loans, and/or various forms of credit enhancements. When available,

³² <https://www.iisd.org/sustainable-recovery/news/financing-a-sustainable-recovery-uks-first-local-government-green-bond/>

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governments should also exploit existing financial instruments put in place in cases of crisis, including contingency funds/ reserves and lines of credit. This will include the funding sources in the Levelling up White Paper published in February 2022.

Private Sector Financing

Private sector financing is generally perceived to be more expensive because it almost always involves at-risk equity capital. Also, unlike public sector financing, the risks underlying the investments are fully manifested as risk premiums in the financing costs of both the equity and debt capital.

Public-Private Partnerships

Public-Private partnerships are generally long-term contracts created between governments and the private sector for the provision or construction of a public asset or service. The private party generally bears significant risk and management responsibility and remuneration is linked to performance.

International Financial Institutions

Public sector development banks and development finance institutions that are owned by one or more national governments can provide lower interest loans and grants. IFIs have become important sources of large-scale investment, particularly for green and social impact investing. This year, the Council of Europe Development Bank set up a new facility – the Green Social Investment Fund – to finance projects which demonstrate a positive social impact and a contribution to climate action.

Brownfield Recycling

Brownfield recycling involves leveraging existing public infrastructure or land assets by leasing or selling them to the private sector and using the proceeds to fund new infrastructure projects. This could provide significant revenue to fund new green infrastructure projects, free from repayment obligations.

Credit Enhancements and other Leveraging Tools

Most of these tools are intended to decrease the risk and increase the liquidity of overall investments. Low-interest subordinated loans and standby contingent credits are often provided by national governments or by IFIs to help reduce risks to investors and allow cities to borrow at lower interest rates.

Examples include:

- Taxes and user charges.
- Certificates of Potential Additional Construction (CEPAC) bonds, which can leverage private investment in neighbourhood upgrading through a process of rezoning and construction permit auctions.
- Crowdfunding for small projects.
- Local Government Funding Agencies as a multi-city pooled approach.

Crowdfunding

Crowdfunding is a great tool for empowering communities to propose ideas and projects that can create change on a local level, raise awareness of social

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challenges and inspire communities to participate and engage with local projects and get involved!

It can provide a mechanism for communities to be public decision-makers and engage with citizen-led change; to take the lead on implementing ideas or projects that could benefit local communities and build communities that they and other people want to live in and be a part of.

Financing Examples

Grants

- The Local Digital Fund aims to help local authorities implement the Local Digital Declaration by funding digital skills training and projects that address common local service challenges in common, reusable ways.
- Enabling Natural Resources and Well-being Fund. ENRaW supports the development and delivery of projects that make clear links between improving the resilience of our natural resources and well-being. The well-being benefits span economic, social, environmental, and cultural well-being. The grant supports projects that involve cross-sector cooperation and collaboration in their delivery.
- Innovation Funds & Vouchers e.g. from Business Wales, UK Government and UK Research and Innovation.

Community-based Crowdfunding Platforms

- Spacehive is a civic-crowdfunding platform and is the UK's dedicated platform for 'places' specifically focusing on supporting projects that make local places better. Spacehive links projects to local councils, businesses and grantmakers willing to fund them. Spacehive operates an 'all-or-nothing' model, meaning that if a financial target is not hit, none of the pledges from the crowd are collected.
- Crowdfunder is the UK's No. 1 rewards-based platform convening personal, community, business and commercial projects in one place. Extra funding can be accessed from their creative and culture, community and social enterprise, innovation, business and local authority partners. Crowdfunder offers two options; all or nothing or keep what you have raised.

Example Crowdfunding Projects

- Exeter Bike Workshop: A team of bike mechanics and employment specialists in 2017, successfully crowdfunded to enable homeless and excluded individuals back into work.
- Pop-Up Compost successfully raised funds in their local community to help raise more awareness about the benefits of composting food waste on their estate thus reducing the amount going into landfills, offering a community composting space and providing nutrient-rich soil to local urban gardeners.
- Mill Hill East Community crowdfunded for a community garden, their aim to bring the community together in a shared, open, nature-filled space.

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- Outdoor Learning through Greenwood Construction was backed by the crowd to support the young people, not fitting into a traditional educational system, to gain practical skills to use hand tools, woodwork and learn about teamwork.
- Street-Factory United fundraised to open a community venue for all young people to attend dance programmes to ‘feel physically, mentally and spiritually safe – & free to express, respect and learn together’.

Financing Recommendations

Whilst all funding options should be considered, the following are suggested as priority areas to seek funding:

- The recent Levelling Up White Paper and the subsequent confirmation of funding details, we expect that the UK Shared Prosperity Fund will be a major source of funding for Bridgend County’s ambitions to improve communities and place, people and skills, and support local business.
- Bridgend Council should seek to access Levelling Up funds, in collaboration with the Welsh Government and Cardiff Capital Region.
- National/regional funds from the Welsh Government and Cardiff Capital Region may provide funding for specific projects, including digital infrastructure; innovation; protecting natural capital etc.
- The increase in the prevalence of Sustainability Bonds in recent years provides a real opportunity for Bridgend Council to access funding, particularly as they look to expand on their existing projects in retrofitting, electric vehicles and alternative energies. Similarly, the new UK Infrastructure Bank is a timely source of funding as Bridgend Council looks to expand its public transport infrastructure throughout the borough.
- On a micro-scale, the example of projects such as the Bike Workshop in Exeter serves to show the value that innovative solutions backed by the community (crowdfunding) can bring to solving real social problems.

Governance Model

An economic strategy Governance Model needs to balance democratic accountability with agility and good process, whilst ensuring that appropriate stakeholder input is sought and heard. Success in this vital element of strategy execution will ensure that delivery of the economic strategy commands widespread business and community support, and balances requirements for business growth with community wellbeing, environmental imperatives and ecological health.

Current Situation

There is already a Bridgend Economic Recovery Taskforce, established in June 2020 to advise the council on economic actions to address economic challenges related to the Covid-19 pandemic³³.

Bridgend Economic Recovery Taskforce

Designed to help the local economy recover following several months of Covid-19 lockdown and deliver long-term benefits, the plans are based on the Welsh Government's 'Unlocking Our Society And Economy' framework and are firmly focused on the core themes of business and the economy, transport, digitalisation and the public realm and natural environment.

With significant input from the Cardiff Capital Region City Deal, they set out structured options for helping the county borough emerge from the current restrictions, with a new economic engagement programme and a specific ring-fenced budget, the Economic Futures Fund, in place to support the task force's activities and aims.³⁴

There is also the wider-ranging Bridgend Public Services Board, comprised of Bridgend County a group of public sector and not for profit organisations who work together to create a better Bridgend County Borough (membership of the PSB³⁵).

Whilst the PSB could become the vehicle for a new economic strategy governance model (perhaps via a sub-committee), it is felt that the infrequency of the meeting could slow down decisions on economic development, and the lack of broad business sector representation could lead to a disconnect between the business sector and public sector elements of the economy. Nevertheless, given its broad remit, it will be important for the PSB to be regularly updated/consulted and have an opportunity to input to the governance of the economic strategy.

However, there is an opportunity for the Bridgend Economic Recovery Taskforce to evolve into a broader Economic Partnership Board. The membership of this panel (currently only BCBC Councillor / Officer panel) would be significantly broadened to

³³ <https://democratic.bridgend.gov.uk/documents/s21826/Recovery%20Planning%20from%20Covid-19%20Cabinet%20Report%20June%202020.pdf>

³⁴ <https://www.bridgend.gov.uk/news/plans-for-new-economic-task-force-approved/>

³⁵ <https://www.bridgend.gov.uk/my-council/working-together/bridgend-public-services-board/>

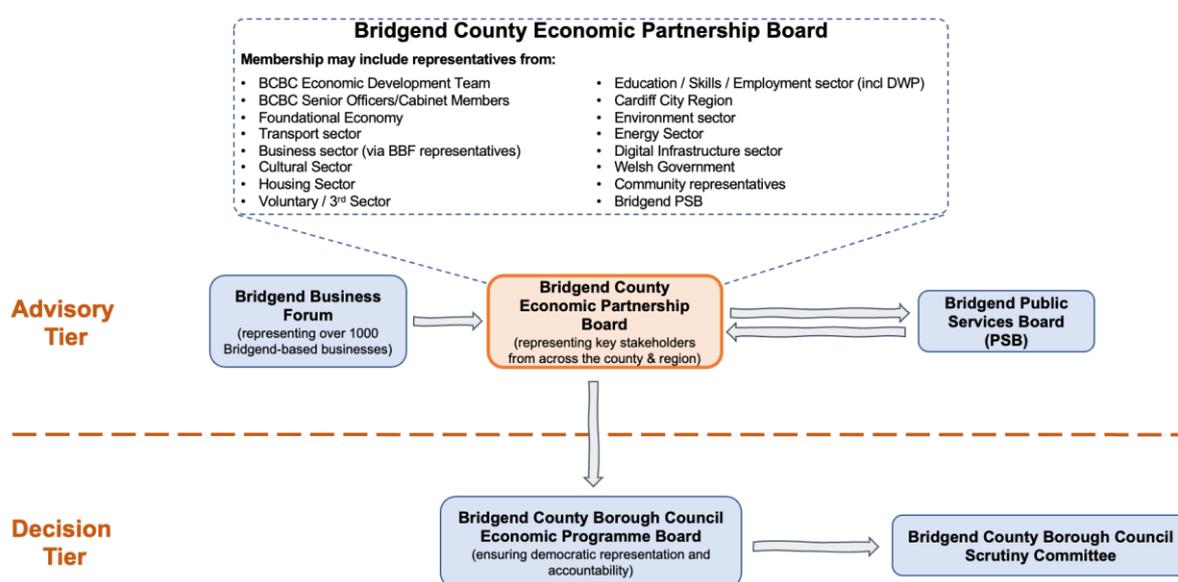
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include representatives of the business community and other key stakeholders in the ongoing evolution of the Bridgend County economy.

There also already exists a vibrant business community body, namely the Bridgend Business Forum, which has a membership of over 1000 small and large businesses from across Bridgend. It is suggested that the BBF should be invited to participate in the governance of the execution of the Bridgend County Economic Strategy, to ensure the ongoing representation of local businesses.

Proposed Economic Strategy Governance Model

A two-tier governance model is proposed, with one tier being advisory, and one as the decision tier, as represented in the following diagram:



It is proposed that to enable timely responses to the rapidly changing external economy and economic pressures/shocks, the Bridgend Economic Partnership Board (BEPB) would meet initially on a bi-monthly basis, potentially moving towards a quarterly meeting schedule as appropriate (once Covid-19, Brexit and climate change considerations allowed). It is further proposed that to take into consideration a wide range of stakeholder views and gain the greatest value from the BEPB, it is formed and operated on the principles of co-production:

- Recognising people as assets.
- Building on people's capabilities.
- Developing two-way, reciprocal relationships.
- Encouraging peer support.
- Blurring boundaries between delivering and receiving services.
- Facilitating rather than delivering

This would require representatives of communities to be involved alongside the stakeholder interest groups that are traditionally involved in such bodies.

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To deliver (and maintain over time) a co-production approach, it is suggested that the BEPB is facilitated by someone skilled in co-production techniques. A broader source of expertise in this area is the Co-production Network for Wales³⁶.

The remit of the BEPB would be explicitly focussed on balancing requirements for business recovery/growth with community wellbeing, environmental imperatives and ecological health, and recommending short-, medium- and longer-term actions to address these.

The council already has well-established governance models for programme execution in the existing Programme Board model. It is proposed that this model, along with the existing council Scrutiny Committee be employed to ensure democratic oversight, decision making and accountability for decisions that will affect the communities, businesses and the natural environment for many years hence. Typically, council programme boards are comprised of representatives from key council departments, are chaired by the relevant council cabinet member or director, and report into the council cabinet and corporate management board (CMB).

³⁶ <https://copronet.wales>

Summary of Strategic Actions for Bridgend County Borough Council and Partners

This economic strategy has set out evidence-based analysis of the economy of Bridgend County Borough, along with strategic actions that BCBC and partners can take to deliver structural improvements to the economy.

These actions will address underpinning weaknesses and challenges in the local economy, and optimise the positive outcomes for businesses, communities and the natural environment from existing, planned and potential future economic development initiatives.

This section presents a summary of the key actions, along with KPIs and data that will enable progress to be measured.

Governance and Oversight of the Economic strategy

It is strongly recommended that, at the earliest possible stage, a suitable governance model is confirmed, and the necessary structures put in place that will enable broad stakeholder involvement delivering ongoing economic development initiatives, and ensure appropriate democratic oversight by elected representatives.

A recommended model for the governance approach is included in this strategy which will need to be confirmed by the council. This entails establishing a Bridgend Economic Partnership Board (BEPB).

One of the first tasks of the BEPB will be to prioritise strategic actions to provide direction and focus on the implementation of the economic strategy.

Economic data

This strategy and the accompanying data report identify key data sets that will be useful for monitoring economic progress in Bridgend County Borough.

It is recommended that the BCBC Economic Development Team put in place the appropriate processes to collect and analyse these data, establishing new data sources where needed. This will enable tracking and reporting on progress across the range of recommended economic initiatives.

Pillar 1: Capacity Building and Workforce Development

What is the challenge for Bridgend County and the BCBC?

The challenge facing Bridgend County and the BCBC is the need to ensure that the workforce of the County has the skills and training to tackle the existing issues in the labour market and prepare the workforce for the future as the demand for skills changes.

The parallel challenge for BCBC is to ensure that the business environment and infrastructure is created and maintained at a high level so that Bridgend Borough businesses can thrive and the County is an attractive place for people to set up and relocate businesses.

Why is this of importance?

This is important for the economy of the County as it addresses a structural weakness in the economy bringing more people into employment and creating a skilled workforce that will be able to find employment, both now and in the future, and therefore increase their levels of personal prosperity and also that of the County at large. A thriving business environment will provide the employment backdrop for this to take place.

What action should be taken to tackle this?

The actions that should be taken are summarised in the table below. The key actions revolve around the need to identify the key skill gaps in the workforce, both now and future gaps, and ensure that the infrastructure is in place for people to access relevant training; creating strong business infrastructure through a supply of commercial properties, high-quality digital connectivity and transport infrastructure; and utilising the size and spend of the Public Sector to support the local supply chain economy.

Which partners are required to do this?

There are several key partners that BCBC will need to work with to achieve these goals. Most important amongst them will be the existing business community within the County to understand and support businesses appropriately and the college and training/apprenticeship providers to ensure that the workforce has adequate opportunities to get the necessary skills.

What data needs collecting?

The key datasets to record are summarised below. A combination of survey and quantitative data will be required to fully understand the impact of actions. Notable datasets to track include the business death/birth numbers and rate, changes to business sizes by turnover/employee numbers and the inactivity rate amongst the Bridgend County workforce,

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Pillar 1: Business Support and Workforce Development Summary Table

Area of importance	Challenge/Opportunity	Action	KPI and Data	Dataset	With Whom?
Business and employment growth	Attracting new business into the area	Create thriving digital, physical and commercial infrastructure with a skilled workforce to make Bridgend County an attractive place to do business.	New business registrations by industry	Business Demography, Office for National Statistics	Transport providers, network operators, CCR and Welsh Government
Resilience to external shocks	Preventing serious damage to businesses from the pandemic	Continue to support businesses financially through Grants/Funding as they deal with the impact of the pandemic	Business closures by industry	Business Demography, Office for National Statistics	The Welsh government, UK government
Business and employment growth	Encourage growth of businesses	Engage with the business community on an ongoing basis to identify barriers to growth and opportunities for expansion	Business Turnover	Inter-Departmental Business Register	Bridgend County business community
Business and employment growth	Ensure that business success is translating to employment opportunities for local people	Encourage the business community to employ local and to buy local	Number of Employees	Inter-Departmental Business Register	Bridgend County business community
Capacity building	Lack of commercial properties for businesses	Build off the work of the LDP and the Masterplan to facilitate the growth of commercial premises across the borough	Business premises by business rate bands	Business Rates database	Developers (including BCBC), Housing Associations
Capacity building	Lack of working spaces for flexible working	The developments ongoing across the borough must include provisions for flexible working space. Assess the existing council property stock for appropriateness as a co-working space.	The number of new commercial mixed-use properties + that also support flexible workspace i.e. hot desks	New - commercial property database	Developers (including BCBC), Housing Associations

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Area of importance	Challenge/Opportunity	Action	KPI and Data	Dataset	With Whom?
Job growth associated with Low-Carbon	The low-carbon economy will create a massive employment opportunity	Partner with the college and key partners in industry to facilitate the expansion of training courses and apprenticeships in key low carbon industries	Training programmes in the low-carbon sector - number and uptake	New - training programme database	Bridgend College, Bridgend County Business Community
Supporting Supply Chain Businesses	Public sector spending is not efficiently retained in the local area	Improve the Council's knowledge of the businesses in the borough for use in upskilling/training them in working with the council and being able to reach out to them/provide names to a subcontractor on new projects.	List of businesses in the borough and keep updated	New - borough business register	N/A
Supporting Supply Chain Businesses	Public sector spending is not efficiently retained in the local area	Keep records of % spending retained in the borough to measure improvement over time	Record the % of public spending being retained by Bridgend businesses	New - public Sector spending tracker database	N/A
Capacity building and employment growth	Ensure people in the area have the skills to meet the jobs	Act as facilitator and disseminator of information to partners on the preparedness of the Bridgend population for the work available.	Job Vacancies and the unemployment rate	Labour Force Survey, Office for National Statistics	Bridgend County Business Community and Foundational Economy Partners
Capacity building and employment growth	Ensure that the County stays on top of emerging in-demand skills and that the college and employers are providing training for these skills	Work with key partners to ensure that the training and skills programmes remain up to date with the latest changes to skills demand	Survey of most In-Demand Skills from Bridgend Businesses. Annual review of changes in skills demand nationally.	New - in-demand skills survey data	Bridgend County Business Community and Foundational Economy Partners
Capacity building and employment growth	Skills shortages in key areas	Working with key partners including the college and in industry to use the identified in-demand skills to inform training programmes and apprenticeships etc.	The number of businesses offering reskilling/upskilling/apprenticeships	New - business survey data	Bridgend College, Bridgend County Business Community
Capacity building and employment growth	Long-term out-of-work and a lack of basic employment skills	Work with stakeholders to increase the 'skills for life' levels of adults through facilitating training programmes	Economically inactive rate	Office for National Statistics	Bridgend College, DWP, Training Providers

Pillar 2: Digital and Physical Connectivity

What is the challenge for Bridgend County and the BCBC?

The challenge is that the County suffers from a lack of both digital and physical connectivity infrastructure. There is still a significant portion of the County that does not have access to broadband speeds that meet the Universal Service Obligation. The public transport in the County does not provide adequate service to the communities in the valleys nor does it support the night-time economy by running services into the evening to key towns.

Why is this of importance?

This is important for businesses in the area, to enable communities to thrive and for the wellbeing of the population. Businesses in areas that are poorly connected or that are industries within the evening/night-time economy are having demand for their business restricted as people are not able to confidently access it by public transport.

Further, both poor digital and physical connectivity increase the isolation of individuals/communities. This impacts both their ability to access employment and their wider wellbeing and involvement in the wider community of the region.

What action should be taken to tackle this?

The key actions are to work with partners to deliver a high-quality digital service to the whole borough and to extend public transport services both to geographies where they currently underserve and to later times to support business.

Which partners are required to do this?

A collaborative approach with CCR, national government and network providers is required to have the digital needs of Bridgend County prioritised. The key partners to increase the public transport provision are the transport providers active in the areas, particularly the bus companies.

What data needs collecting?

BCBC needs to track the quality of connectivity to the borough both on an overall level and by sub-region within the borough. To understand the success of an extension of public sector transport, usage of new services data should be coupled with both anecdotal or quantitative data on the uplift to businesses in areas that are made accessible through the extended provisions and by survey data of the communities that were isolated previously to understand the wellbeing improvement from the additional services.

Pillar 2: Connectivity and Infrastructure Summary Table

Area of importance	Challenge/Opportunity	Action	KPI and Data	Dataset	With Whom?
Business and employment growth	11.4% of the borough still receives under 10Mbps which is below the USO	Work with CCR, national government and network providers to ensure that the people of Bridgend County have their USO met.	Number of households who receive a minimum threshold of 10Mbps	Connectivity Data, House of Commons Library	CCR, Welsh Government, Network Providers
Business and employment growth	Digital connectivity inequality across the borough exacerbates economic inequality	Work with CCR, national government and network providers to ensure that the people of Bridgend County have their USO met.	Track the level of digital connectivity against the Indices of Multiple Deprivation	New - geographical connectivity (House of Commons Library) and Index of Multiple Deprivation (UK Gov)	CCR, Welsh Government, Network Providers
Business and employment growth	Poor digital infrastructure holds back business performance	Work with CCR and national government to ensure a forward-looking view that encompasses 5G and Full Fibre rollout to economic centres	Measure the progress of 5G and full-fibre roll-out to key economic centres in the borough (Employment Land, Bridgend Town, Maesteg Town)	Connectivity Data, House of Commons Library	CCR, Welsh Government, Network Providers
Business and employment growth	Poor support of the night-time economy	Work with transport partners to extend train/bus times into the evening	The number of extended train/bus times and the general uptake of fairs Increase in footfall/restaurant bookings etc. in towns with extended bus connection	New - public transport and usage data (transport providers) New - business survey data	Transport providers, CCR
Business and employment growth	Poor bus connectivity to the valleys	Work with transport partners to extend bus journeys and frequency into less connected areas.	The number of buses and the usage numbers. Survey locals to understand the impact that this has on them.	New - public transport and usage data (transport providers) New - business survey data	Transport providers, CCR
Accelerating the shift to low carbon personal transport	Prepare for the electrification of personal vehicles	Continue the rollout of EV charging infrastructure across the borough	EV charging ports usage over time	New - Electric Vehicle Infrastructure rollout (EV Installers)	Electric Vehicle Charging Point Installers

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Area of importance	Challenge/Opportunity	Action	KPI and Data	Dataset	With Whom?
Accelerating the shift to low carbon personal transport	Improve County's support for active travel	Continue the rollout of active travel routes. Work with business partners to understand use cases e.g. Rockwool	Cycling – anecdotally, what does commuting by bike look like in terms of take-up?	New - wellbeing survey data	Infrastructure developers, property developers
Accelerating the shift to low carbon personal transport	Electrification of the travel infrastructure	Work with transport partners to ensure plans to move to an electric/renewable fleet	Monitor the share of journeys/vehicles of public transport that are electric	New - electrification of public transport database (transport providers)	Transport providers, Vehicle Providers

Pillar 3: The Foundational Economy and the Role of the Public Sector

What is the challenge for Bridgend County and the BCBC?

To ensure that the spending from the Council, partners and anchor organisations is being optimised to impact the local economy and businesses as best as possible.

The challenge for the Council is also to ensure that the wellbeing of the population is a factor and a priority in decision-making and that economic decision-making is appropriately influenced by the need to provide a healthy and thriving community and environment.

Why is this of importance?

The size, scale and reach of both the Public Sector and the Foundational Economy in the County Borough are large. Due to this, they play a significant role in the lives of residents, both as major employers but also as providers of services that are fundamental to the lives of citizens. The Public Sector and Foundational Economy are therefore both important in that they reach the lives of everyone in the County and are key to their wellbeing, as well as having significant economic importance.

What action should be taken to tackle this?

A programme should be run to educate businesses on the size and merit of the opportunity of working with the Public Sector. As part of this businesses should be trained in the best practice involved in working with the Public Sector and the Council. This should be done alongside collecting an updated list of businesses that can be provided to contractors who can then employ Bridgend Businesses in their supply chain.

The Council should also investigate the potential to move both council and social care services online to improve the efficiency of their delivery.

There should also be a concerted effort to focus on the cultural offering of the area, encouraging cultural events, use of the natural capital and wider community activities and to market this broader image of Bridgend County to encourage longer-stay visitors.

Which partners are required to do this?

This can be achieved through working with businesses and contractors to improve the amount of council and wider public sector spending that is retained in the borough. Further work with social care providers, Awen and other cultural event providers and the visitor/marketing sector will be necessary to encourage cultural activity and improve the marketing of the County.

What data needs collecting?

A record of the Council/wider public sector contracting spend and the percentage of that which is retained in the borough will help identify progress over time. BCBC should also track the regularity and uptake of cultural events as well as use STEAM data to track the share of visitors to the area for overnight stays.

Pillar 3: The Foundational Economy and the Role of the Public Sector Summary Table

Area of importance	Challenge/Opportunity	Action	KPI	Dataset	With Whom?
Supporting Supply Chain Businesses	Ensure Public Sector procurement benefits the local economy and communities	Fully implement the BCBC 2021 Socially Responsible Procurement Strategy	Record the % of public spending being retained by Bridgend County businesses	New - Public Spending database	N/A
Community and individual wellbeing	Leverage the influence that the anchor organisations have to improve the well-being of the population	Include a community feedback element in any major decisions by anchor institutions especially concerning location	N/A	N/A	Communities
The efficiency of public service delivery	Digitising government services	Assess the extent of existing digitised council services Identify the most appropriate areas of the council's functions for digitalisation. Assess each area of council operations and identify the possibility of digitisation.	Internal review of existing council services Survey uptake of different government services if they were digitised	New - share of council services digitised New - wellbeing survey data	Communities
The efficiency of public service delivery	Digitising social care	Assess the extent of existing digitised social care services Identify the most appropriate areas of social care functions for digitalisation. Assess each area of social care operations and identify the possibility of digitisation. Assess the connectivity levels of the locations where social care is delivered	Review of existing social care service provision Survey uptake of digital social care services/survey social care providers on preference for digitising some services Connectivity assessment of locations within the borough	New - share of care services digitised (care providers) New - wellbeing survey data Connectivity Data, House of Commons Library	Social care providers, communities



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Area of importance	Challenge/Opportunity	Action	KPI	Dataset	With Whom?
Capacity building and employment growth	Online training programmes	Work with College and other education partners to facilitate courses being available online Identify gaps in connectivity or device ownership that might be barriers to online learning amongst prospective users	% of training programmes that are available online (either as digital-first or recordings of in-person training) Connectivity assessment of locations within the borough Survey of the learner population	New - share of training programmes available online (College and training providers) New - wellbeing survey data Connectivity Data, House of Commons Library	Bridgend College, Bridgend County Business Community, Training Providers
Community and individual wellbeing	Greenspace	Prioritise green space in urban planning decisions	% of Bridgend population that consider that they have good access to green space / % who use green space regularly	New - wellbeing survey data	Developers, Natural Resources Wales
Community and individual wellbeing	Cultural events	Monitor access to and attendance at cultural events	Record the number of events/tickets sold in the borough over time to see the impact that redevelopment of Maesteg Town Hall/Porthcawl plus the increase in transport connectivity has on the cultural wellbeing of the population	New - event data (event providers)	Event providers and venues, Awen
Business and employment growth	Tourism is over-reliant on day visitors	Encourage more longer-term visitors by improving connectivity, encouraging accommodation through redevelopment and marketing the area better	Measure the % of visitors that are day visitors over time and % of visitors that stay overnight	STEAM data	Developers, Transport Providers, Network Providers, CCR
Business and employment growth	Bridgend County is perceived to be poorly advertised outside of the County	Review the reach and effectiveness of marketing of the area outside of the County. Establish an approach for improving external marketing.	Measure the % of visitors that are day visitors over time. Measure reach and effectiveness of marketing campaigns outside the County	STEAM data and marketing reach data	Marketing Agencies

Pillar 4: The Low Carbon Economy and the Natural Environment

What is the challenge for Bridgend County and the BCBC?

The Low-Carbon economy is forecast to expand significantly in the future. This will provide a large employment opportunity for the borough and the workforce. To take advantage of this economic opportunity the workforce will be required to be highly skilled in key skill areas.

Further, there is a wider obligation for BCBC (on behalf of all residents, businesses and visitors) to encourage sustainable practices amongst its population and to protect the environment and natural capital that falls under its jurisdiction.

Why is this of importance?

BCBC already has a strong commitment to reducing carbon emissions and the County is a leader in several aspects of renewable energy and other low carbon sectors.

The additional economic importance is that this sector is poised to expand significantly as the urgent need to tackle these issues proliferates to the highest levels of government. There will therefore be huge job opportunities and large amounts of spending available for those who are poised to be able to complete this work.

What action should be taken to tackle this?

BCBC should work closely with the college to identify the key sectors that are likely to expand in the near future e.g. retrofitting insulation, boilers/energy sources and ensure that the correct training and provisions are available for the Bridgend County population to become skilled in these areas.

BCBC also need to work with stakeholders such as Natural Resources Wales to ensure that the correct decisions are being made to protect the Natural Capital across the County.

Which partners are required to do this?

Key partners to deliver these actions will be the college, industry partners, training providers and specialist organisations such as Natural Resources Wales with expertise in environment and biodiversity.

What data needs collecting?

BCBC will need to track the properties in the County that require retrofitting to facilitate the process for both the environmental and employment benefit.

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Area of importance	Challenge/Opportunity	Action	KPI	Dataset	With Whom?
Reducing carbon emissions	Properties will be required to be retrofitted with insulation	Identify properties requiring retrofit. Work with the college and key stakeholders e.g. V2C to ensure sufficient people are being trained in these skills	% of identified properties with retrofitted insulation over time	New - property database	Bridgend College, Bridgend County Business Community, Housing Associations
Reducing carbon emissions	Properties will be required to be retrofitted with renewable energy sources	Identify properties requiring retrofit. Work with the college and key stakeholders e.g. V2C to ensure sufficient people are being trained in these skills	% of identified properties with renewable energy sources over time	New - property database	Bridgend College, Bridgend County Business Community, Housing Associations
Reducing carbon emissions	Encourage more sustainable travel habits	Continue to expand active travel, work with the transport companies to improve frequency and inter-connectivity of public transport modes and continue the rollout of EV charging infrastructure across the borough	Measure the proportion of the population regularly using public transport, active travel routes and electric vehicles	New - Public transport use database (transport providers), wellbeing survey data	Transport providers, CCR
Business and employment growth	Bridgend County is not widely recognised for its natural capital compared to similar local areas	Improve the marketing of the area's natural capital	Survey - share of visitors who include natural capital as a reason for the visit	New - marketing reach and tourism survey data	Marketing Agencies
Improvements in environment and biodiversity	Protect and enhance the natural environment	Build on the existing programme to protect and enhance the natural capital in the borough			Natural resources Wales and other environmental partners

Concluding Remarks

Bridgend County Borough has many assets that make it an attractive place to live, work and do business. Its strong sense of community and identity, coupled with a fantastic range of natural resources, provide the background for a thriving community and a strong sense of wellbeing.

However, as discussed throughout, there are key points where Bridgend County falls below its economic potential. This strategy has attempted to identify these key points by providing a background into the issues that are apparent in the area and a rationale on how those issues are holding back the economic potential of Bridgend County. It has then endeavoured to address these and proposed recommendations on how to approach tackling these issues.

In summary, actions should be focussed on 4 key areas:

- Business Support and Workforce Development
- Connectivity and Infrastructure
- Public Sector and the Foundational Economy
- The Low Carbon Economy.

These 4 pillars for economic development have been identified as the areas that could have the biggest impact on the Bridgend County economy and which target the key barriers and economic challenges that are currently holding it back.

By addressing each of these 4 areas, Bridgend County can build on the existing economic strengths to develop a sustainable future economy for the county borough, with a population that is thriving and businesses that have the infrastructure and support to succeed.

Appendix 1

Key datasets

Theme	Source
Population and Age	Welsh Government and Office for National Statistics
Demographics	Office for National Statistics
Migration Flows	Office for National Statistics
Economic Activity (Overall)	Office for National Statistics
Economic Activity by Age	Local Labour Force Survey
Economic Inactivity (Breakdown)	Office for National Statistics
Industry Type	Annual Population Survey
Job Type (Breakdown)	Business Register and Employment Survey
Occupation Type (Gender Split)	Labour Force Survey
Job Density	Office for National Statistics
Business Turnover	Office for National Statistics
Business Size (Employees)	Inter-Departmental Business Register
Business Size (Turnover)	Inter-Departmental Business Register
ILO Unemployment Rate	Labour Force Survey
Long Term Sick	Office for National Statistics
JSA	Office for National Statistics
Claimants by Age	Office for National Statistics
Claimants by Type	Department for Work and Pensions
Workless Households	Annual Population Survey
Workless Households by area	Department for Work and Pensions
50+ Working Population	Labour Force Survey
Earnings Annual	Office for National Statistics
Earnings Weekly	Office for National Statistics
Hours Worked	Office for National Statistics
Education	Welsh Examination Database and Pupil Level Annual School Census
Qualifications	Annual Population Survey
Year 11 Leavers	Careers Wales
GCSE A-Level	Annual Population Survey
Schools	Pupil Level Annual School Census
Wellbeing Measure	Welsh Index of Multiple Deprivation
Health and Social Care	Office for National Statistics
Commuting	Annual Population Survey

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Theme	Source
Commuting (detail)	Annual Population Survey
Travel and Access	WIMD travel indicators
Digital	Parliament Commons Library
House Prices	Office for National Statistics
Household Tenure	Office for National Statistics
Household Composition	Office for National Statistics
Property Construction	Welsh Government
Renewable Energy Sites	Department for Business, Energy, and Industrial Strategy
Renewable Energy Capacity	Department for Business, Energy, and Industrial Strategy
Renewable Energy Generation	Department for Business, Energy, and Industrial Strategy
Risks and Priorities	Climate Change Committee Risk Assessment
Recycling	Info Base Cymru
Carbon Emissions	Info Base Cymru

Reports and Literature Informing the Economic Strategy

Theme	Report
Broad Sources – UK Government	Grand Challenges: Policy Paper
	Industrial Clusters Challenge
	Build Back Fairer
Broad Sources – Welsh Government	Future Wales National Plan 2020
	The Well-being of Future Generations Act 2015
	Evaluation of the SE Wales Community Economic Development Programme
	Wales 4.0 Delivering Economic Transformation for a Better Future of Work
	Cardiff City Region
	Swansea City Region Deal
Broad Sources - Bridgend County Borough	BCBC Annual Report
	Bridgend Local development plan
	Bridgend Country Borough Profile 2017, 2018 and 2019
	Better Bridgend Purpose, Vision and Priorities 2021
	Bridgend Corporate Plan reviewed for 2021 and 1-page summary
	Strategic Equalities Plan
Economic background	BCBC Economic Evidence Base Study 2019
	BCBC Economic Evidence Base Update 2021
	Unemployment etc

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Theme	Report
	Skills survey results 2019
	Advanced skill shortages
	Advanced skill shortages
	Employment
	Commuting stats
	Nomis Unemployment Data
	Employability/Economic Outcome Data
	Welsh European Funding Office Framework for Regional Investment in Wales Report 2020 - Economic Analysis Appendix
	Chief Economists Report 2020
	PSL Presentation (internal-use only)
	Economic Intelligence Wales Quarterly Report - September 2020
	KPMG UK Economic Outlook Report June 2020
	Atlas of Deprivation
	Prosperity and Placemaking Report, No Place Left Behind
	Dasgupta Review on Economics of Biodiversity
	Wellbeing
Impoverished community rank	
Bridgend County Wellbeing Plan	
BCBC Well-being of Future Generations	
Communities Dashboards	
Wales Centre for Public Policy Briefing on Wellbeing (COVID and Brexit)	
Wales Centre for Public Policy Briefing on Wellbeing (Cultural)	
ONS Wellbeing Data	
Bridgend Public Services Board Wellbeing Assessment Report 2017	
WELLBY Report	
More In Common Report	
Future Trends Report	
Ageing well in Bridgend	
Sustainability	
	A systems approach for delivering net-zero
	Welsh Government Prosperity for all: a low carbon Wales
	Carbon Trust BCBC Carbon Footprint Report (internal-use only)

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Theme	Report
	Dasgupta Review on Economics of Biodiversity
	Decarbonising Welsh Homes Report 2018
	Kmatrix, Low Carbon Status Report
	Biodiversity and Ecosystem Resilience
	Climate Change Committee - Wales National Summary
	Climate Change Committee - The Path to a Net Zero Wales
Business Support	ONS businesses size and type
	Economic Services for Businesses
	Business Survey - Initial Results
Public Sector	Bridgend Procurement Strategy and Delivery Plan
	Welsh Government Ethical Supply Chains
	Welsh Procurement Community Benefits Policy
	Welsh Procurement Community Benefits Policy Report
	Welsh Government New Procurement Landscape
	Welsh Government Supplier Guidance
	Welsh Government Social Value Paper
	Procurement Benefits Measurement Tool - Core
	Procurement Benefits Measurement Tool - Non-Core
Natural Capital and Placemaking	Bridgend Local Development Plan
	Bridgend Local Development Plan Proposal Map
	Bridgend Local Development Plan Consultation Document
	Bridgend Town Centre Masterplan
	Bridgend Council Vision Brainstorm results
	SoNaRR Report 2020
	Welsh Government Building Better Places
	Prosperity and Placemaking Report, No Place Left Behind
	Natural Resources Wales, South Central Wales Area
	Our Valleys, Our Future Delivery Plan 2019
	Spirit of Llynfi Woodland
Visitor Economy	Bridgend Destination Management Plan and Action Plan 2018 and Evidence Base Review 2018
	Tourism profile of South-East Wales
	Wales Transport Strategy 2017 and 2021
	Beaufort Research Report on Visitor Survey 2019
	Beaufort Bedstock Audit 2021
	Steam Visitor Summary Reports

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Theme	Report
	Outdoor Pursuits Report 2010
	Rural Tourism Report 2009
	Welsh Government Tourism profile reports on South East Wales and by Local Authority
	Afan Valley Outdoor Resort Application 2018
	Map of Accommodation in Bridgend County
	Visit Bridgend website and other
Active Travel and Transport	Wales Transport Strategy
	National Assembly Wales Future Development of Transport for Wales 2019
	South Wales Metro
Property	South Wales RSL Partnership Affordable Housing Report 2019
	Welsh Government Reimagining Social Housing in Wales 2020
	Decarbonising Welsh Homes Report 2018
	Housing Market Assessment, 2009
	Housing Summary Measures Analysis 2016
	Local Housing Strategy 2016-18
	Bridgend County Borough Council Local Housing Market Assessment Update 2021
	Bridgend Social Housing Stock in 2015
	Bridgend Rents
	Bridgend Common Housing Register as at 04-11-15
Digital	BCBC Digital Strategy
	Connectivity
	OfCom Connectivity Report:
	Bridgend Broadband availability profile ppt
	Broadband Communications in Wales Briefing Paper
	Connected Nations Report 2019 and 2020
	Digital Communications Infrastructure Wales Report 2020
	Openreach planned rollout
	Q1 2021 Update on Wales BT Broadband Rollout
	National Assembly Wales Digital Infrastructure in Wales 2017
	National Infrastructure Commission for Wales Digital Communications Infrastructure in Wales 2020