



Llywodraeth Cymru
Welsh Government

REPORT, DOCUMENT

International strategy

The strategy sets out our approach to international engagement.

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Minister for International Relations & Welsh Language Foreword

I could not have been more proud to have been appointed Wales' first Minister for International Relations. My mission is to build on what has been achieved over the first 20 years of devolution and to help position Wales for the challenges of the future.

I believe it is important that the ambition to raise Wales' international profile is not seen solely as the responsibility of the Welsh Government. I want this strategy to be recognised as providing the strategic direction for everyone who is engaged in the international space, bringing everyone together, ensuring that we are all pulling in the same direction and working together to maximise our efforts. Throughout its development, I have been keen to engage with stakeholders as widely as possible, especially outside of government and across all sectors, to ensure that the ambitions outlined in this document reflect Wales as a whole.

The world changes constantly and Wales changes with it. Our prosperity has long depended on trade and inward investment with exciting opportunities opening up around the world and here at home. The collective challenge for us in Wales is to identify those opportunities and equip ourselves to take fullest advantage of them. To this end we will use our assets to work in partnership with others to promote Welsh interests.

Wales is much more than its economy; it's a place of people, culture and history. All of these are assets which can be deployed to our advantage globally. The best and most effective promoters of Wales abroad are its people. Our sportsmen and women, along with creative artists and performers, are particularly important ambassadors. Often they are the Welsh people most visible and most "present" internationally. Our anthem speaks of a land of song and poetry and we promote our 2 languages as vital components of our identity.

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We are also a land of surprises, of modernity and technology, and we offer challenge to out-dated stereotypes of Wales.

With limited resources we need to focus on specific areas of ambition. This strategy sets out our priorities in a rapidly changing world whilst we retain our need to be flexible to respond to new circumstances and opportunities and is truly cross governmental in its reach.

The Well-being of Future Generations Act informs all that we do and as a creative, next generation nation, we are committed to delivering the 3 pillars of Creativity, Sustainability and Technology. Working collaboratively cross governmentally and with the wider Welsh community we can raise the profile of Wales internationally and help to deliver prosperity for the people of Wales.

Eluned Morgan AM

Context and vision

This strategy sets out our 3 core ambitions and our vision for the next 5 years:

- We will raise Wales' profile on the international stage
- We will grow the economy by increasing exports and attracting inward investment
- We will establish Wales as a globally responsible nation.

Wales is a small country but we have big ambitions.

We are a confident, forward-looking European nation, with long-standing and

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deep-seated relationships with our closest neighbours. Our greatest assets are our people – the 3 million-plus people who live in Wales, including many from the EU and further afield, who have chosen to make Wales their home. Ours is a country full of inquisitive, skilled, creative and loyal people, working in a diverse economy stretching from the Atlantic coastline to the English border.

A strong international presence has never been more relevant. Following the EU referendum in 2016 and the ongoing uncertainty surrounding the UK's future relationship with Europe, Wales will pursue its place on the international stage with renewed vigour.

The 2019 Rugby World Cup in Japan was a great example of Wales on the world stage – who could have imagined a stadium of 15,000 Japanese rugby fans singing the Welsh national anthem at a training session in Kitakyushu, as Welsh businesses met Japanese investors nearby?

We will build on this momentum. This strategy will set out our priorities for international relationships and economic partnerships in the context of our lasting commitments to sustainable development and responsibility for safeguarding the environment for future generations. Wales is the only nation in the world – so far – to have translated the UN Sustainability Goals into law. Our ground-breaking Well-being of Future Generations Act is at the heart of this strategy – and every aspect of Welsh Government policy and we endeavour to leave a lasting positive legacy for our children and grandchildren.

Wales has undergone a rapid change in its recent history, moving from an economy based around heavy industry and the coal industry to a diverse, high-tech, high-value modern economy.

The majority of our trade is with Europe. Our human, social and environmental rights have developed in tandem with the European Union. Our commitment to Europe and our European partners remains strong and unchanged, despite the UK leaving the European Union.

Hundreds of foreign-owned companies have chosen Wales as their UK base. Companies from the US, Germany, France, Spain, Japan, Canada and India have invested throughout Wales and, in turn, Welsh companies are exporting around the world. As a government, we want to help home-grown companies to export more and to show that Wales continues to be open for business.

Executive summary and priorities

Our 3 core ambitions are to:

- Raise Wales' profile internationally – we will build on our nation's reputation as a place buzzing with creativity where people are free to innovate and experiment.
- Grow our economy by increasing exports and attracting inward investment, creating new jobs and opportunities for people in Wales. We are committed to embracing and developing new technology to deliver prosperity.
- Establish Wales as a globally responsible nation. Our ground-breaking Well-being of Future Generations Act underlines our commitment to sustainability.

In 2015, the Welsh Government published the framework *Wales in the World*. In just 4 short years, the international landscape has changed dramatically.

This, our first international strategy, sets out how we will deliver our 3 key ambitions, which will in turn benefit the Welsh economy; helping to create and sustain skilled and fair work for people living throughout Wales and contribute to the Welsh Government's overarching goal of creating a more equal, more prosperous and greener Wales.

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The main purpose of our International Strategy will be to deliver international collaboration and to project Wales as a globally responsible nation, both of which will help to make us more competitive and well known on the global stage. This will be of benefit to the people of Wales economically, socially and environmentally.

We will work with our partners – at home and abroad – to amplify our strategy to raise our profile overseas. This strategy sets out the values, which underpin our approach; our priorities for the next 5 years; our key messages, as well as highlighting some of the successful work already being carried out around the world.

We will drive forward the way in which we project ourselves on the world through key values as featured in the made in Wales world-pioneering law: the Well-being of Future Generations Act. It requires us to think sustainably and long-term about all our policy decisions, and to ensure coherence between policies and to be engaged with our citizens. We will highlight our long and proud history of being a welcoming nation to people from all cultures and countries and our firm commitment to the UN Sustainable Development Goals and to human rights.

Our priorities

For a small, smart nation, Wales enjoys a reputation which stretches far beyond its borders. This has been crafted as much from our sporting prowess as from our natural beauty and our unique language, culture and heritage and the rich variety of the multitude of interactions in communities and businesses which stretch from the snow-capped peaks of Snowdonia to the rugged beauty of Rhossili Bay.

We will build on this to raise our reputation and profile internationally and seek to establish and maintain the many and varied links we have throughout the world

with our diaspora, with students and alumni and with our partners to deliver our priorities and be recognised internationally as a nation committed to creativity, sustainability and technology.

Over the next 5 years, to raise our profile internationally, we will:

- Increase our presence in EU member states and work to ensure that the European Union remains our strongest partner with whom we share many values and policy ambitions, and with whom we wish to continue to trade as efficiently as possible in the future.
- Work with Welsh, global diaspora and alumni and significantly increase the number we reach to 500,000 connections, focusing our activity on the key themes in this strategy.
- Coordinate our international activities and empower key Welsh organisations, including sport and culture, help open doors and enter new, difficult-to access markets to amplify the Welsh voice abroad.
- Work with the UK government, particularly with the Foreign and Commonwealth Office, Department for International Trade, the British Council and BBC World Service to increase their profiling of Wales.
- Build on existing Memoranda of Understanding, by working with governments in our key partner countries and regions to develop relationships whereby Wales can benefit economically, culturally and socially.

Wales was once the powerhouse of the industrial world – coal dug from the South Wales Valleys powered the industrial revolution. Today, the Welsh economy has been transformed and Wales is at the forefront of the green energy revolution - we have the winds, the waves and the water to power the energy needs of the next generations. We are poised to embrace and exploit the opportunities which increasing digitisation, automation and the use of artificial intelligence bring.

The Welsh economy is complex and diverse. While we continue to be a nation of makers, Wales is developing a reputation for excellence in the fields of high-tech advanced manufacturing; in research and development; in data and fintech.

In developing this strategy, we have chosen to showcase three distinct industries in which Wales excels and which demonstrate how Wales is a nation committed to creativity, technology and sustainability – cyber security; compound-semiconductors and the creative industries.

Over the next 5 years, we will grow our economy by:

- Growing the contribution that exports make to the Welsh economy by 5%.
- Ensuring Wales is recognised internationally in specific economic sectors where we are global leaders.
- Promoting “magnet” projects, which will direct investment to specific parts of Wales.
- Ensuring Wales is recognised for the impact of its research excellence and for being the best place in the UK for the number of graduate start-ups.

We are very proud of the work we are doing to meet our commitment to be a globally responsible nation – from planting trees at home and in Uganda to help tackle climate change to improving domestic recycling rates to become a world leader. We are committed to the UN sustainability goals, which have been enshrined in law through the Well-being of Future Generations Act.

We will continue our work in Africa, through the successful Wales for Africa programme, which benefits both the countries we work in and Wales.

Over the next 5 years, to establish Wales as a globally responsible nation, we will:

- Become known internationally as the first country to put the UN sustainability goals into law by promoting the Well-being of Future Generations Act.
- Offer support to countries that can learn from our experience of increasing the number of people who speak an indigenous language, which was previously under threat.
- Be known as a world-leading nation for recycling.
- Establish our reputation for sustainable adventure tourism.
- Plant a further 15 million trees in the Mbale region of Uganda by 2025 – in addition to the 10 million already planted in the region. We have already helped to protect an area of rainforest twice the size of Wales.
- Cement our reputation as a Fair Nation – a nation committed to Fair Trade, Fair Work and Fair Play, especially through our work on equality.
- Establish our reputation as a Nation of Sanctuary committed to human rights and promoting peace.
- Teach students in Welsh schools to be ethical, informed citizens dedicated to promoting global citizenship, as part of the new national curriculum. Promote Wales as the country that inspired the NHS and holds onto its core values through being the first country in the world to have statutory health impact assessments.

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How will we deliver this strategy?

For the first time in its history, Wales has a minister with responsibility for international relations, but many of the levers for international relations and trade lie beyond the Welsh Government and sit with the UK government.

Almost all departments in the Welsh Government include international engagement as part of their work. This strategy will shape that work and focus government efforts to ensure there is a common and consistent message to deliver our core aim. The messages we give internationally must be consistent with what we deliver at home.

The Welsh Government has a network of 21 overseas offices in 12 countries, which will play a key role in delivering this strategy. We will publish a remit for our offices and ensure objectives are built into business plans to proactively respond to global issues. We will reinforce our international operation on the west coast of America to focus on the priority areas of excellence.

Realising the ambitions of this strategy will mean working with our partners – with the public, private and third sector organisations in Wales; with civic society; with national and international businesses working in Wales and beyond; with non-governmental organisations around the world and with the UK and other national and international governments and organisations, including the UN. We will increase our activity with the members of the British and Irish Council and the Commonwealth and we will provide resources to the National Assembly and its members involved in established overseas networks to promote Wales and our interests abroad.

A central point of our strategy will be to maintain, and increase, our strong links with Europe and the European Union – this will be key to the success of this strategy. We are committed to maintaining and developing the strong Welsh Government office in Brussels, as part of a wider Wales House with other partners, building on the long-established and effective presence we have had for decades. Our role there will evolve as our relationship with the EU institutions and Member States changes. We will continue to work with them and other partners, including other European regional offices and networks in Brussels. We will work to understand the impact that the EU will continue to have on Wales, to influence it wherever possible, and to explain how Wales remains committed to the values and policies that are at the heart of the EU.

We will work with the UK government – and its agencies – to ensure our strategy and our distinct Welsh messaging is delivered and aligned, where possible, with UK government policies and strategies. We will work with individual UK government departments wherever possible and we will ensure we receive our fair share of UK government representation.

The intergovernmental relations review will help us to establish formal arrangements to ensure better engagement about international matters, particularly trade. We will also work with other devolved administrations wherever possible to ensure Wales is properly represented in discussions and negotiations about foreign affairs and trade. We will also increase our activity in

London to establish links with the existing embassy network of overseas nations.

This is Wales

We will work with our partners in Wales and across the world to build on our established and successful brand for Wales as a place to invest, work, live, visit and study.

Our award-winning Cymru Wales brand will be used to promote Wales to the world – across all sectors and markets – as a creative, contemporary and high-quality country, proud of who we are and evolving for the future.

This is Wales is a statement of intent; an invitation to discover our country and a challenge to rethink what you thought you knew about Wales. With a focus on telling the story of Wales through the real people, businesses and organisations of our country, the brand is creative, authentic and alive with new opportunities, ideas and experiences.

The brand will drive Visit Wales' celebrated thematic approach to marketing. It will be used for all trade and invest marketing work, by Food and Drink Wales, by the successful Train Work Live campaign to recruit NHS staff and to promote Wales by the higher education sector as a place to study.

We will:

- Harness digital and social media to create and share stories from Wales with audiences around the world.
- Enable people, businesses and organisations in Wales to share and use the brand and marketing materials.
- Encourage UK agencies and international partner brands to work with us to extend the brand's global reach and impact through innovative co-

campaigns and partnerships.

- Continue to deliver brand-defining campaigns, programmes and projects to help Wales stand out on the world stage, in the model of the themed-years to date in tourism.
- Develop a digital communications plan to support the international strategy.

How will we monitor our international activity?

We will hold 2 meetings a year to ensure we are coordinating our activities across Welsh Government and with other organisations working abroad, including local government, civil society, sports and cultural organisations to ensure, where possible and appropriate, we can coordinate our work and build on each other's experience and international platforms.

This is Wales: People

Our 3 core ambitions are to:

- Raise Wales' profile internationally – we will build on our nation's reputation as a place buzzing with creativity where people are free to innovate and experiment.
- Grow our economy by increasing exports and attracting inward investment, creating new jobs and opportunities for people in Wales. We are committed to embracing and developing new technology to deliver prosperity.
- Establish Wales as a globally responsible nation. Our ground-breaking Well-being of Future Generations Act underlines our commitment to sustainability.

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Wales is a small but confident, forward and outward-looking nation. Our greatest asset and our strength is our people – the 3 million-plus people who live in Wales and the many hundreds of thousands more who decided to make their home all over the world.

We will build on the strength of our people to promote Wales as a nation full of inquisitive, skilled, creative and loyal people working in a diverse economy, stretching from the Atlantic coastline to the English border.

It is this strength as talented and creative individuals – working on our own and collectively – which will help us to achieve the 3 core aims of this strategy. We are a country of makers and creators; of businessmen and women; of entrepreneurs and leaders, with a wealth of ideas and dreams.

Ours is a nation built on a foundation of strong communities, where people know and respect each other. This sense of community and connection, while not unique to Wales, is particularly strong and is an important strength and value, which should not be underestimated in this age of globalisation.

This is a country with a strong record of social partnership, where everyone's voices are heard – and are counted – and where people are treated fairly in work.

We will promote Wales as a location just 2 hours from London by train – Cardiff is the closest European capital to London and is the fastest growing capital city. The nation is well connected and linked to rest of the world by road, rail and air – Wales is served by multiple airports – in Wales and England – including the fast-growing Cardiff Airport, with regular flights to Doha and to European cities.

We will promote Wales as a nation which has extensive broadband connectivity and the internet exchange point at Cardiff is one of only 3 landing points in the UK, which enables future technologies to be developed and has allowed Wales to be home to Europe's largest data centre.

Wales values its people, their health and well-being. This is the birthplace of the National Health Service and Wales remains true to the founding values of the NHS – providing high-quality healthcare free at the point of need for all. We are keen to share these values and our expertise with others, including through our successful Wales for Africa programme.

Wales is a nation that values its people and their health and well-being. We will promote Wales as the birthplace of the National Health Service – a health service that remains free at the point of delivery. The founder, Aneurin Bevan, was Welsh and we are keen to continue his world leading approach to health by being the first country in the world to have statutory health impact assessments.

Wales is a truly bilingual nation – English and Welsh have equal status in law – and the number of Welsh speakers is growing. From a position where the Welsh language was under threat, we have an ambition to reach a million Welsh speakers by 2050, which means Wales is perfectly placed to support and share its learning with other regions and countries – in Europe and beyond – with dual or minority languages.

We will become known as a nation at the forefront of minority language technology and we will encourage people to use Welsh when they perform on the international stage, ensuring Wales stands out from the crowd.

Cultural diplomacy – or soft power – will be key to raising our international profile. We will use all our cultural assets to maximum effect – our sport; our music; our art; our creative arts; our heritage and history but also the phenomenal diversity of people living and studying here.

Wales has a rich and distinctive culture, which is celebrated annually in such landmark and internationally-renowned events as the Llangollen International Musical Eisteddfod, Hay Literary Festival, the Urdd Eisteddfod and Eisteddfod Genedlaethol. These showpiece festivals will be at the heart of our strategy for encouraging international influencers to experience the warm Welsh welcome

and to sample our culture first hand.

Wales is known the world over for its passion for culture, creativity, music and sport. The BBC National Orchestra of Wales and the Welsh National Opera fly the flag wherever they perform, as do our talented elite sports stars, who have achieved stunning individual and team success in recent years – in rugby, football, taekwondo, cycling and swimming – helping boost our international standing and reputation.

Our reputation on the sporting field and our passion for sport is already well known the world over – thanks in large part to the Wales rugby and football teams' respective performances at successive Rugby World Cups, Six Nations tournaments and European Championships. We will build on such major sporting events to maximise Wales' cultural diplomacy opportunities abroad and we will use them as platforms for the benefit of Wales.

The recent Rugby World Cup in Japan was not just about sport – a large and successful trade mission, including 17 businesses from Wales' technology and digital, creative, healthcare and advanced manufacturing sectors went to Japan during the tournament to strengthen economic ties. The Welsh Government also hosted a programme of events in Tokyo, including Tŷ Cymru, the Wales Experience Dome, showcasing Wales' diverse culture.

These factors will be crucial to raising Wales' profile as a small, creative nation, brimming with talented and friendly people on the world stage. We will coordinate the activity of other Welsh overseas actors to amplify our voice abroad.

Wales has a long and proud history of welcoming people from all over the world to live and work here. Many of our communities and businesses have flourished thanks to people coming to Wales from overseas and we want that to continue.

The long uncertainty about the UK's future relationship with the EU following the

EU referendum in 2016 has naturally caused anxiety for the tens of thousands of EU citizens who have come to live and work in Wales. We are immensely grateful for the contribution EU citizens have – and continue – to make to Wales and we will do all we can to support EU nationals in Wales.

There is a warm welcome in Wales for people from all over the world – this has been true in the past and continues to this day. People coming to Wales from overseas make an important contribution to the Welsh economy and Welsh life. But those who have decided to move away are just as important to Wales – our diaspora and alumni.

People from Wales have emigrated all over the world – from the Mimosa journey, which established a Welsh-speaking settlement in Patagonia more than 150 years ago, to the 1.8 million people of Welsh descent in the US today. People from Wales have had a profound impact wherever they have settled – on their adopted nation's culture and politics – 5 people of Welsh descent signed the Declaration of Independence and at least 8 US Presidents have had Welsh ancestry.

The Welsh diaspora is large and varied and are a priceless asset in international relations and promoting Wales to the world. Today, there are at least 33 diaspora organisations in Wales representing more than 20,000 people.

Our universities provide an opportunity to strengthen and extend Wales' international presence and impact – they are important and globally-connected institutions, with research links stretching across the world and able to attract students from all corners of the globe. We will encourage alumni from Welsh universities and colleges to spread the message on their return home about their experiences in Wales.

We will strengthen links with the Welsh diaspora. We want to engage with 500,000 of the Welsh diaspora, alumni and friends of Wales around the world, using the wealth of knowledge they possess and their links to raise Wales'

profile globally. We will develop a comprehensive new diaspora approach, working with established diaspora networks, such as Global Welsh, Wales Week in London and others.

Case study: Seren and Stripes for youngsters through Welsh Government Ivy League scheme

More students from Wales are enrolled at Yale University's Yale Young Global Scholars programme than from any other nation or region outside the US.

Building on the Seren Network's success in increasing the number of applications and acceptances for state-school Welsh pupils at Oxford and Cambridge, the network has partnered with the United States' top universities, such as Yale and Harvard.

In summer 2019, a record number of students – 53 – took part in a US summer school, and spent a fortnight at either Yale or Harvard University to get a taste of US university life.

The young ambassadors for Wales enjoyed a transformational life experience and helped to promote Wales and their own quality education to peers and academics from around the world while at the Ivy League institutions.

Students who have participated in the summer schools have gone on to gain undergraduate places at Yale, Harvard and Stanford, and maintain links with Wales through the Seren Network.

Wales recently became only the 17th country to take part in the Massachusetts Institute of Technology's (MIT) Global Teaching Labs programme. This programme supports MIT science students to spend time in Wales supporting science teachers and pupils in schools.

The success of these student and academic exchanges has led to ground-breaking USWales education partnerships with the Fulbright Commission and Gilman International Scholarship Program, ensuring more US students will come to Wales, securing promotion of Wales as a study destination across the US, and establishing new research relationships for Welsh universities.

We will as a priority:

- Raise Wales' profile by working with Welsh diaspora, alumni and partner organisations, focusing in the first year on the USA and Japan and identifying influential Welsh people around the world. We will do this by mapping alumni and diaspora, as well as activity related to Wales taking place around the world, to create a comprehensive database of Welsh links with an aim to create 500,000 contacts in 5 years.
- Raise Wales' profile by coordinating our international activity with key cultural and sporting organisations to help open doors and enter new, difficult-to-access markets to amplify the Welsh voice abroad.
- Demonstrate global responsibility by promoting Wales as a welcoming nation, in line with our aspiration to become a Nation of Sanctuary committed to human rights and promoting peace. We will deliver an annual event recognising the contributions made by our migrant communities who have made Wales their home and to celebrate the links between Wales and their homelands.
- Demonstrate global responsibility through the study of sustainable development and ethical global citizenship as part of the Welsh Baccalaureate. This will ensure Welsh students are informed citizens.
- Demonstrate global responsibility by promoting Wales as the country that inspired the NHS and holds onto its core values through being the first country in the world to have statutory health impact assessments.

We will also:

- Raise Wales' profile by promoting Wales internationally as a place to train, work and live for healthcare workers.
- Demonstrate global responsibility by increasing global awareness of Wales as a bilingual nation. We will build on the work undertaken during the UNESCO Year of Indigenous Languages to show how we will increase the numbers and use of Welsh speakers and ensure a legacy develops as a result. We will share our success with other countries in a world where a language dies every other week.
- Demonstrate global responsibility by building our participation in the Health Behaviour in School-Aged Children study.
- Demonstrate global responsibility by using Curriculum for Wales 2022 so students can carry on the creative tradition of our nation and are equipped with the skills to compete in the global economy, including modern languages.
- Grow our economy by working with education institutions to increase the number of international students studying in Wales and we will push for continued participation in Erasmus+ and Horizon 2020 (and any successor programmes).
- Raise Wales' profile, by exploring the feasibility of teaching Mandarin in secondary schools as part of a long-term vision to establish Wales as a visitor destination for the Chinese market.
- Demonstrate global responsibility by continuing our work with Vietnam to develop its educational infrastructure through training opportunities, research, collaboration and academic exchanges. We will expand this programme with other partner countries.

Case study: TrainWorkLive

TrainWorkLive is the Welsh Government's flagship campaign to support the recruitment of healthcare professionals in NHS Wales. It promotes the worldclass training and work environments the NHS in Wales has to offer and the quality of life available in Wales.

The campaign has been used to promote the benefits of training and working as a healthcare professional in Wales more globally, with each professional phase of the campaign targeting different countries.

The medical campaign has targeted medical students, trainees, recently-qualified GPs, and GPs nearing retirement working in the UK, India, Australia, New Zealand, and Canada to persuade them to come and complete their training in Wales; to work in Wales and live in Wales, respectively, using real life case studies and stories.

Over the course of the last 2 years, a targeted campaign has run in the same international countries to recruit core psychiatry trainees with significant results.

The nursing campaign has been running since 2017 and initially targeted nurses in primary and secondary care in the UK, India, Canada, Romania, New Zealand and Australia. The next phase of the international campaign launched in January 2020, to coincide with health boards' international recruitment activity and Year of the Nurse.

This is Wales: Products

Our 3 core ambitions are to:

- Raise Wales' profile internationally – we will build on our nation's reputation as a place buzzing with creativity where people are free to innovate and experiment.
- Grow our economy by increasing exports and attracting inward investment, creating new jobs and opportunities for people in Wales. We are committed to embracing and developing new technology to deliver prosperity.
- Establish Wales as a globally responsible nation. Our ground-breaking Well-being of Future Generations Act underlines our commitment to sustainability.

Wales is an ambitious, globally-trading nation, open for business.

We will promote Wales as the most stable place in the UK to invest. Our economy is growing; is vibrant and diverse and offers great opportunities for trade and investment. Wales is home to world-leading technology companies, excellent research and development facilities, a highly-skilled and dedicated workforce and a wealth of natural resources.

The Welsh economy is highly integrated with the UK economy but we sell our high-quality and award-winning products all around the world. Our international trade contributes significantly to the Welsh economy – one of the key aims of this strategy is to grow our economy by increasing exports and encouraging greater levels of inward investment, supporting the Welsh economy and creating more job opportunities in Wales.

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Our stable devolved government, our vision for growth, fair work and sustainable living, coupled with our strong links to the rest of the UK; the quality of life; lower cost of living relative to other parts of the UK and the wellqualified and skilled workforce, will help to continue to attract inward and foreign direct investment.

We are a globally responsible nation, acutely aware of the role we have in tackling climate change and helping to influence others to take action to address the climate emergency. Wales can be at the forefront of the green energy revolution – developing new sources of renewable energy from our seas – just as we are at the forefront of global efforts to increase recycling rates and move to a low carbon, circular economy.

We want to develop our reputation internationally as a Fair Nation, where we are known for our strong commitments to fair trade, fair work and fair play. This is embodied in our **Code of Practice on Ethical Employment in Supply Chains** which has been adopted by more than 200 public and private sector organisations.

Exports

At a time of considerable change and uncertainty throughout the world, Welsh businesses continue to trade with countries in all the major international markets. The majority of our overseas exports are to EU countries, which makes the future relationship with the European Union vitally important. In a post-Brexit world, if the UK chooses to pursue free trade agreements with non-EU countries, the ebb and flow of world trade relationships will become even more important to the Welsh economy.

- The value of exports for Wales for the year ending March 2019 was £17.2 billion. More than 60% of these overseas exports were to EU countries.
- In 2018, of the 259,200 active enterprises operating in Wales, 103,530 were headquartered in Wales – the highest level since records began.

- Almost 1,250 foreign-owned companies call Wales their home, employing more than 160,000 people. Wales' success in attracting foreign direct investment over many decades is largely based on access to the EU market of more than 500 million customers.
- In 2018, the value of overseas tourism to the Welsh economy was £405 million.
- Overseas students in Welsh universities contribute more than £600 million in export earnings to the Welsh economy as well as enriching our cultural diversity and spreading a positive message about Wales on their return home.

Where does Wales export? Top 10 export destinations

1. Germany
2. France
3. USA
4. Ireland
5. Netherlands
6. Belgium
7. United Arab Emirates
8. Spain
9. China
10. Canada

What does Wales export?

(Note: these are official HMRC export classification categories, however, Wales does not export live animals.)

Welsh exports by product (percentage shares)

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Machinery and transport equipment	49.55
Minerals, fuels, lubricants, etc.	13.44
Manufactured goods	12.58
Chemicals and related products	11.36
Miscellaneous manufactured goods	7.92
Food and live animals	2.97
Crude materials, inedible excl. fuels	1.47
Commodities not classified elsewhere	0.55
Beverages and tobacco	0.15
Animal and vegetable oils, etc.	0.02

Leaving the EU represents the greatest challenge to our international trade status for generations. Whatever the future holds – and whatever the UK’s future relationship with the EU – we are clear that leaving the EU does not mean turning our backs on Europe. The decisions taken as the UK develops future trading relationships with the EU and the rest of the world will define Wales’ economic interests for years to come. Equally, we will embrace the new impetus for trading opportunities around the world to maximise the opportunities to grow our economy.

Our main trading partners are EU countries (see chart) and North America. We

are entering new markets in Asia – China lifted the ban on British beef at the end of 2019, paving the way for PGI Welsh beef to achieve a foothold in the Chinese market and Japan has opened up the market for Welsh lamb. Currently, more than a third of Welsh red meat is exported outside the UK, predominantly to the EU, worth around £200 million a year. China is one of the UK's largest food and drink export markets. Welsh beef exports to China could be worth around £25 million a year for the Welsh red meat sector.

Exports to the Middle East, particularly in the food and drink sector, have created new opportunities for Welsh companies – there is a growing consumer market in this part of the world, interested in high-quality Welsh products, with food exports to Qatar alone increasing seven-fold since 2016. The Gulf region could be a viable alternative market for exporters normally reliant on Europe.

We have opened new government offices in Montreal and Doha, in recognition of our links with North America and the Middle East (see annex C for details).

The global economic shift from west to east and the rise of the Asian economy cannot be ignored. An ageing population and declining domestic market in Japan has led to Japanese companies looking abroad to support their expansion plans. South East Asia continues to offer new opportunities for Welsh exporters, as students from across the sub-continent seek to study in Wales.

We strongly believe that Wales' best economic interests are served by maintaining a close relationship with Europe and the European Union. We will press the UK government to negotiate an effective trading relationship, and expect to be an active part of the negotiating process for this.

Our office in Brussels will continue to be essential to promote Wales in Europe. It will serve as a platform for our engagement with the EU institutions, and its member states, nations and regions. In 2018, we opened offices in Berlin, Dusseldorf and Paris. These reflect the importance of France and Germany as trading partners and the need to work with and maintain our relationships with

valued European partners.

Building new relationships takes a long time, which is why it is important to maintain and nurture existing ones – we will build a closer relationship with Germany as Wales' largest trading partner and a significant investment partner. We will celebrate this with a Wales-in-Germany themed year in 2021. We will forge stronger bonds with France – an important partner for trade, tourism, education and culture. German and Irish nationals living in Wales make up 2 of our largest international communities.

We will increase our presence in EU member states and work to ensure the European Union and its member states remain our strongest partners.

Ireland is our closest European neighbour. For several years, we have maintained an office in Dublin in recognition of the importance of this special relationship. We were very pleased to see the Irish Consulate reopen its office in Wales in May 2019 and we will encourage other nations to follow this lead. We will set out a clear programme for future cooperation with Ireland.

Since devolution, we have formalised government-to-government relationships with several regions and have signed Memoranda of Understanding (MoU) with a number of European regions, including Brittany, the Basque Country and Galicia. We also have a strong, long-standing cooperation with Flanders, Baden-Württemberg and North Rhine-Westphalia and have signed a Declaration of Friendship and Solidarity with the Dutch Province of North Holland, which encompasses Amsterdam. All of these are important existing trading partners but our relationships stretch beyond trade alone (see annex B for more details).

We will increase cross government working with our key partner countries and regions where Wales benefits economically, culturally and socially.

We – and many more organisations in Wales – are members of numerous international networks. We will assess with which organisations Welsh

Government will continue relationships as the UK's future relationship with the EU develops. These decisions will be based on the extent to which the networks fit with this strategy and wider governmental priorities and how they can help to influence and effect international policy.

We also greatly value the work of the honorary consuls based in Wales and will encourage more countries to adopt this approach to strengthen these links.

Trade policy

Wales' trade policy is underpinned by our wider commitments to sustainability and to act as a responsible nation on the global stage; to respect and protect human rights; to take action to respond to the global climate emergency and to safeguard our valued public services.

We fervently believe the UK government should involve Wales in the development of trade policy for the UK.

The UK government should:

- Deliver a trade policy that works for all parts of the UK.
- Consult and seek the consent of the devolved governments in the development of UK trade policy.
- Work with the devolved governments on a concordat for trade.
- Consult with the devolved governments during the prenegotiations phase, ensuring the devolved administrations have a genuine opportunity to feed in to the policy development process before final decisions are taken and negotiations with the EU or a third country start.
- The UK government should not normally proceed with negotiating positions which directly relate to devolved policies (for example, environmental standards, agriculture and fisheries, the delivery of public services such as

- education and health) without the agreement of the devolved governments.
- Engage with the devolved governments throughout the negotiations — and involve devolved government officials in negotiating teams where negotiations affect devolved competence or issues of particular relevance to Wales or other devolved nations.
 - Formally consult with the devolved institutions when negotiations are complete but before agreements are signed.

In return, we will:

- Be a constructive partner.
- Share knowledge and analysis.
- Work with UK government to provide leadership for relevant stakeholders.
- Reflect agreed UK negotiating positions when participating in negotiating teams.
- Work constructively using our overseas networks to promote and protect the interests of Wales and the wider UK.

Foreign direct investment

Wales has welcomed and supported businesses from all over the world, helping them to develop, grow and realise their full potential.

Top 10 FDI donor markets

1. USA
2. Germany
3. Japan
4. Canada
5. Ireland

6. France
7. India
8. Italy
9. Spain
10. Switzerland

(Source: Welsh Government. Inward Investment aggregated performance 2013-14 to 2017-18)

The US and Canada are important investors in Wales. Of the 1,245 foreign-owned companies operating in Wales, almost 25% are from North America and account for a third of employees in Wales who are employed by foreign owned companies. The scale of the US and Canadian economies are such that opportunities can emerge from almost any sector and in any region.

We believe that investment decisions are not just about economic benefits – societal, environmental and cultural factors play an increasing role in investment decisions. Our Economic Contract places investment with a social purpose at its core.

We will continue our focus on creating and promoting world-class facilities for business growth in Wales, using “magnet projects” as opportunities for businesses and as a means to elevate Wales’ reputation for our assets, skills and research and development capability.

Magnet projects will be used as catalysts to attract further investment to specific parts of Wales. They will complement our City and Growth Deal approach and UK Government initiatives such as Northern Powerhouse and the South-West Alliance, and will promote Wales as a test bed for research and development as well as future cutting-edge technologies (examples of magnet projects in Annex E). Clwstwr Creadigol supports and develops research and development in the games and interactive media industry, showcasing Wales’ talent in the creative industries. A consortium of Cardiff University, the University of South Wales and

Cardiff Met, it supports products from concept to development.

Marine Energy Wales is another magnet which brings together technology developers, the supply chain, academia and the public sector to establish Wales as a global leader in sustainable marine energy generation. The Marine Energy Engineering Centre of Excellence in Pembrokeshire and the Marine Energy Test Area allow global developers to test their products in Wales, harnessing the raw power lying off the coast of Wales.

The £20 million Advanced Manufacturing Research Centre Cymru was officially opened in North Wales in November 2019. It will enable businesses to access advanced technologies, helping them to drive improvements in productivity, performance and quality. Based in the heart of the Deeside Enterprise Zone, it will focus on advanced manufacturing sectors, including aerospace, automotive, nuclear and food.

As we move away from a reliance on heavy industry, Wales needs to present a new face to the world – one which is modern, vibrant and contemporary and ready to address and embrace a future of increasing digitisation, automation and artificial intelligence. We will highlight 3 distinct and growing sectors in which Wales has expertise, experience and ambition – cyber security, compound-semiconductors and film and television production. These 3 sectors will help to showcase the wide range of opportunities Wales has to offer.

We will continue to welcome investment in, and from, all sectors of the economy. We have chosen these 3 particular areas to demonstrate just how diversified Wales' economy has become in a relatively short space of time and how, with focused support, we have been able to develop clusters of expertise in these areas. They have also developed – and thrived – in the face of Brexit uncertainty and a difficult financial climate following the last UK recession. As we move forward, we will develop further centres of excellence, alongside those that are already underway, for which Wales can be known which are in keeping with our vision to promote Wales as a country known for creativity, technology and

sustainability.

Developing centres of excellence

As part of this strategy, we will showcase 3 distinct sectors in which Wales excels, demonstrating how we have become home to centres of excellence in these fields. This approach has been used in Wales' food and drink sector where there is a proven model of business clustering and support delivered through Food Innovation Wales.

By highlighting the investment opportunities in these areas, we will create new and greater opportunities for people and employment in Wales, and encourage research and development and innovation to sustain present and future generations in Wales, ensuring Wales is poised to address and embrace a future of increasing digitisation, automation and artificial intelligence.

These sectors have been chosen for their:

- Global recognition as areas of excellence
- Resilience following Brexit
- Conformity with the priorities set out in the Economic Action Plan
- Support from UK government as centres of excellence
- Substantial potential for growth
- Ability to promote Wales as a country committed to creativity, technology and sustainability

These sectors will help us highlight to the wider world the skills on offer in Wales and the diversity of our manufacturing and creative sectors.

The areas we have chosen to highlight as centres of excellence are:

- Cyber security

- Compound-semiconductors
- Creative industries – television and film

Expertise in each of these 3 areas already exists in abundance in Wales – companies are at the forefront of production and development in each of these 3 sectors, providing an established and solid base on which we can build in the face of the ongoing challenges posed by Brexit.

Cyber security

Wales is a part of the top European centre in cyber security with more than 500 members in the cyber security ecosystem. This growing cluster benefits from close proximity to GCHQ and expertise in South West England.

In 2017, in recognition of our reputation and growing expertise in this technology, Wales was invited to join the Global Ecosystem of Ecosystems Partnership in Innovation and Cybersecurity (Global EPIC), which was founded to build a global community of expertise to support the development and sharing of new knowledge in the field of cyber security innovation. Global EPIC currently comprises 25 global ecosystems from 10 different countries across 3 continents.

Wales' tech sector is worth an estimated £8.5 billion and growing. More than 40,000 people are actively employed within the digital economy with main hubs focused around Cardiff and Newport in the south, Swansea in the west and Wrexham in the north.

Wales is home to more than 3,000 home-grown and multi-national technology operations, including some of the biggest tech companies, such as BT, Thales, Qinetiq, Airbus Defence and Space and General Dynamics.

Compound-semiconductors

Compound-semiconductors are at the heart of many devices we use today, from smart phones to tablets and satellite communication systems. We believe that 60% of mobile phones in the world include a microchip – made in Wales – so there is a little piece of Wales in most people’s pocket. This is a story we want to tell the world. They are central to the development of the 5G network; at the forefront of energy saving products, which underline our commitment to sustainability, such as new high-efficiency lighting and the next generation of electric vehicles and new imaging techniques for a variety of uses from security to health diagnostics. The global market for compound-semiconductors could be £125 billion by 2020.

Wales is home to the UK Catapult Centre for compoundsemiconductors and the compound-semiconductor wafer facility in Newport was supported by the Cardiff Capital Region City Deal. It will become the hub of the regional technology cluster CSconnected.

Creative industries: television and film

Creative industries are one of Wales’ fastest growing sectors, with an annual turnover of almost £2 billion, employing more than 58,000 people. Wales already has an international reputation as a centre of excellence for production and high-end television drama, in particular, with major US studios such as Fox, NBC Universal, Netflix and HBO using Wales as a production location.

Wales also has established a strong cultural identity, which has been portrayed in such productions as *Hinterland*, *Keeping Faith* and *Hidden*, and in internationally-renowned television shows, including *His Dark Materials*, *Doctor Who* and *Sherlock*.

This is a platform on which to build further success, but also an opportunity to showcase Wales' creativity and talent to the world, promoting the Welsh language and providing UK and overseas tourism opportunities.

The growth of our creative industries will be strengthened by the launch of Creative Wales at the start of 2020 – an internal agency within Welsh Government, mirrored on the Cadw and Visit Wales models, with an external board with membership drawn from industry and trade to provide expertise and advice. An extra £5 million capital funding will support Creative Wales priorities in 2020-21.

Creative Wales will simplify funding mechanisms; take a lead role in marketing and promoting the creative industries in Wales to the world; help to develop the skills and talent base in Wales; raise standards in the workplace and promote diversity and equality across the sector.

It is important we do not lose sight of our overarching commitment to sustainability as we work to grow our economy – sustainable economic growth is at the heart of our approach. Our approach to developing offshore renewable energy, including marine, exemplifies this.

Developers from around the world are keen to invest in Wales; to take forward projects in Welsh waters, as we have one of the best marine energy resources and support structures to be found anywhere in the world. We are taking a cross-government approach to encourage and support the development of the wave and tidal sector in Wales. We have excellent supply chain businesses and facilities in Wales, which are poised to take advantage of opportunities in the sector. The marine energy sector is supporting supply chain diversity, resilience and clustering, providing new, low carbon jobs and playing an important role in supporting local economies and creating new opportunities for communities in the marine energy hubs in Pembrokeshire and Anglesey.

It is our ambition for Wales to become established as a global centre of

excellence for marine energy, including for its ongoing research and development. We will work with companies to create the conditions to test new technology and to grow the industry; to establish marine energy as a foundation of the Welsh economy and to export its potential beyond our shores.

We will as a priority:

- Raise Wales' profile by increasing our presence in EU member states and work to ensure that the European Union remains our strongest partner.
- Raise Wales' profile by working with the Foreign and Commonwealth Office, the Department of International Trade, other UK Government departments, the British Council and BBC World Service to increase visibility of Wales.
- Raise Wales' profile by building on existing Memoranda of Understanding, by working with governments in our key partner countries and regions to develop relationships whereby Wales can benefit economically, socially and culturally.
- Grow our economy by increasing the contribution that exports make to the Welsh economy by 5%.
- Grow our economy by ensuring Wales is recognised internationally in specific economic sectors where we are global leaders.
- Grow our economy by promoting 'magnet' projects which will direct investment to specific parts of Wales.
- Grow our economy by encouraging international collaboration in research globally, where appropriate, and recognising the significant impact that Welsh research is having relative to other nations and regions and underlining our pride in being the best place in the UK for the number of graduate start-ups.

We will also:

- Grow our economy by increasing the numbers of Welsh businesses

exporting internationally and we will continue to support and attract inward investment to Wales.

- Grow our economy by increasing exports supported by the Welsh Government. Our most important partner will continue to be the European Union. We will support new and existing exporters as they explore new markets, whether as part of business-as-usual activity or in response to post-Brexit arrangements.
- Grow our economy by delivering quality foreign direct investment across Wales in line with the principles of the Economic Action Plan and through our regional teams, and other organisations across Wales including promoting our magnet projects, to deliver a clear and compelling proposition to investors.
- Grow our economy by working with organisations, such as M-SParc, to encourage entrepreneurs, using links with Harvard University.
- Raise Wales' profile by continuing to prioritise markets in Germany, France, Ireland and North America and develop new opportunities in Asia and the Middle East.
- Raise Wales' profile by developing an action plan to embed relationships with our priority European partners of Brittany, Flanders and the Basque Country (see annex B).

Case study: Welsh food and drink

The **Welsh food and drink sector** has a long standing reputation for its quality and for its diversity, which is contributing to strong international recognition. In July 2019, the Welsh Government consulted on a new food and drink strategy which emphasised how the sector can further raise Wales' profile and reputation as a food nation. The industry is also well known for its commitment to meeting and maintaining the highest environmental and welfare standards, lowering its carbon footprint and reducing waste. Recognition of this commitment to sustainability and highlighting this on a global scale will raise Wales' profile.

Images of Welsh lamb have been used consistently alongside images of the Welsh landscape to convey a brand that is rooted in positive perceptions of Welsh agriculture as being low-intensity, highwelfare and in tune with the natural environment.

- The value of Welsh food and drink exports in 2018 was £539 million, up 2% (£10 million) compared to 2017.
- The value of food and drink exports in Wales has increased by 32% since 2014.
- The value of Welsh food and drink exports to non-EU countries increased by £25 million in 2018.
- £145 million of exports went to non-EU countries in 2018.
- Welsh food and drink exports to the EU fell by £14 million in 2018 – £395 million of Welsh food and drink exports went to the European Union in 2018.
- Exports to EU countries represent 73% of all Welsh food and drink exports.
- The food and farming priority sector was worth £6.8 billion in 2018, close to meeting the turnover target of £7 billion early before 2020.
- There are 16 Protected Food Names, ranging from Welsh Lamb and Beef to Conwy Mussels and 169 Great Taste Winners (2018).
- Food and drink supply chain has a £19.1 billion turnover, with 240,200 employed across catering, retail and wholesale, agriculture and manufacturing.
- Supply chain has £4.5 billion CVA.
- Food and drink manufacturing has £4.8 billion turnover and employs 20,400.

Blas Cymru is Wales' largest international food and drink trade event, bringing together producers, buyers and food industry professionals. The 2019 event attracted almost 200 buyers, including international buyers from Germany, France, UAE, Qatar and Japan.

This is Wales: Place

Our 3 core ambitions are to:

- Raise Wales' profile internationally – we will build on our nation's reputation as a place buzzing with creativity where people are free to innovate and experiment.
- Grow our economy by increasing exports and attracting inward investment, creating new jobs and opportunities for people in Wales. We are committed to embracing and developing new technology to deliver prosperity.
- Establish Wales as a globally responsible nation. Our ground-breaking Well-being of Future Generations Act underlines our commitment to sustainability.

Wales is a small, smart and confident nation, steeped in culture and history.

We will build on our strengths and promote Wales on the world stage as a land of song, steeped in ancient myth, stone castles and Celtic mystery. But we will also look to the future too – Wales is a modern country, at the heart of the rise in e-gaming and e-sports; of talented and creative designers, artists and sports stars; of biologists and engineers at the forefront of marine energy and climate science.

Top 10 visitor markets

- Ireland
- France

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- Germany
- USA
- Netherlands
- Australia
- Spain
- Poland
- Italy
- Canada

(Source: Welsh Government. Inbound Visits to Wales 2015-18)

The natural beauty of Wales has fascinated people for centuries – today it is captivating new global audiences as the awe-inspiring landscapes provide the backdrops for compelling dramas and complicated plot twists in international film and television, shot on location in Wales.

Wales' new international profile on the silver – and small – screen will help to increase our international reputation and attract people to Wales. And our growing reputation for world-leading research is helping fuel our knowledge economy and the reputations of our learned universities.

Our distinctive and powerful art and culture – from the traditional to the multi-media breaking new ground at the Venice Biennale – acts as a passport for Wales to new audiences in countries in all corners of the world. We must continue to use our cultural relations and diplomacy to full effect; from showcasing our world-class cultural organisations overseas to welcoming international organisations to Wales.

We will continue to promote domestic and international tourism – this is a growing and important market for the Welsh economy; in 2018, we attracted almost 950,000 overseas visitors worth around £405m to the Welsh economy.

Wales is home to three national parks and Britain's first Area of Outstanding

Natural Beauty; we have some of the cleanest rivers and beaches in the UK and are the first country in the world to develop a dedicated footpath around the whole coastline. Wales has three UNESCO World Heritage Sites and a fourth – the Welsh slate industry – is in development, representing centuries of heritage and helping to position Wales in a global context. Around a third of Wales is protected landscape – an important fact, which will help to bring visitors to Wales.

The quality and provenance of Wales' food and drink has improved markedly in recent years – with parts of Wales developing a reputation as the UK's leading food tourism destinations. Promoting our food and drink on the international stage showcases our top quality products and sound production methods as well as a sense of place. We will improve on the offer of Welsh food at visitor attractions, and greater penetration into the food service sector to enhance this reputation.

We want Wales to be known as a world leader in sustainable adventure tourism. New investment and innovation in mountain bike centres, hiking paths, inland surf lagoons and zip-lines have reinvigorated our international reputation to new younger visitors.

Future visitors will increasingly seek out authentic, sustainable and unique experiences and Wales' approach to environmental and cultural sustainability gives us a competitive advantage. This supports our commitment to decarbonisation and our ambitions for Cardiff Airport to become a UK centre for low carbon aviation.

Wales' reputation for sustainability and care for the next generation is a key feature that distinguishes us from other countries, inspiring a new generation of responsible international visitors. The ongoing themed years of tourism have provided focus and promoted the message that Wales is a destination for sustainable adventure tourism. 2019 was the Year of Discovery highlighting coastering in Pembrokeshire and zip-lines in Gwynedd whilst celebrating the

biodiversity of the Welsh landscape.

Wales has earned a reputation for hosting major global events, from the 2010 Ryder Cup, the NATO Wales Summit 2014, the UEFA Champions League Final 2017, the Volvo Ocean Race 2018 and, most recently, Cricket World Cup matches.

Investment in Venue Cymru and the opening of the International Convention Centre Cymru Wales in 2019, have provided new opportunities to attract new business events and leaders to Wales. North Wales was selected as “One of the best regions in the world to visit in 2017” by Lonely Planet and a “Rising Star of 2019” by The Sunday Times Travel.

We will review our major events approach to attract events which are in keeping with this strategy.

Our culture, landscape and language are thriving – creating an authentic cultural scene for future visitors to discover.

At a time of increasing globalisation and automation – when advances in communications mean we can speak to almost anyone anywhere on our planet – we are living increasingly fractured lives. Technology, which has done so much to make the world a smaller place, is isolating us behind tablet and phone screens. We will promote Wales as a place of close-knit communities, where people know and respect their neighbours and have strong ties to their country.

We have an opportunity to capture and build on this sense of community, which lies at the heart of Wales; this deep relationship between people and environment – known as cynefin. Capturing this essence of Wales will help us realise our twin aims of raising our profile on a crowded global stage and demonstrating our commitment to our global and environmental responsibilities.

The sense of community is rooted in our language. In 5 years’ time, we want

Wales to be known as the go-to nation for language development using our experiences in this area to work with other countries and minority languages. We feel we have much to offer the world in this space where a language dies in the world every other week.

Our work to protect and embed the Welsh language in everyday life – and our current strategy to meet our ambitious goal of a million Welsh speakers by 2050 – not only supports the development of Welsh in Wales and the creation of a truly bilingual Wales, but has the potential to support other bilingual and multilingual countries around the world.

We believe our experience in developing and promoting Welsh can be used to help other countries in 3 main ways:

- Development of language technologies, such as machine translation, speech recognition and artificial intelligence for minority languages.
- Our approach to late language immersion – the creation of centres which allow children who have been taught through the medium of English to transfer into Welsh medium education part-way through their school careers.
- Promoting the use of minority languages by artists when they perform on the international stage. PYST is a global distribution and promotion service for Welsh artists and their labels. It has set and repeatedly broken records for the online streaming of music made in Wales, including Welsh language music, on digital platforms.

One of the 3 core commitments in this strategy is to establish Wales as a globally responsible nation. Nowhere is that more evident than in the work underway across Wales to respond to the climate emergency, demonstrating Wales takes its global responsibilities seriously and is determined to reduce its impact on the planet. Wales was a founding signatory of the Under2 Coalition, a global community of state and regional governments committed to ambitious climate action in line with the Paris Agreement. The coalition brings together more than 220 governments, representing more than 1.3 billion people and 43%

of the global economy.

The Welsh Government was the first in the UK to declare a climate emergency and it has ambitious plans to move to a low carbon society; improve air quality and reduce waste. It is in the latter where significant progress has been achieved in a relatively short space of time – from the advent of devolution Wales has moved from the bottom of the global domestic recycling league to the third best in the world. Policies introduced by the Welsh Government, coupled with a target for zero waste by 2050 have helped to move Wales up this league table. We are keen to share our commitment to recycling and our experience of improvement with other nations.

Case study: Sêr Cymru programme

In a world of increasing globalisation, a country's research and innovative vitality is one of its most valuable intellectual assets and can act as an important marker of intrinsic quality and future innovation potential for international engagement, the development of global relationships and inward investment.

There is a strong correlation between a nation's reputation for research and innovation and people's willingness to visit, work, study, invest and buy products and services from it.

The Sêr Cymru programme was set up by the Welsh Government to grow research excellence and capability in Wales. By 2018, it had appointed 12 new research chairs and more than 100 fellows. Competitive fellowships have been awarded to researchers from 28 countries, including Australia, Canada, China, Denmark, France, Germany, India, Ireland, Italy, Mexico, New Zealand, the Netherlands, Spain, Sweden, and the USA.

As a key contributor to Wales' impressive research performance over the past decade, the Sêr Cymru programme has grown Welsh research capacity and

international collaboration. Between 1997 and 2001, about 25% of Wales' research was conducted internationally. By 2016, Wales secured the highest international collaboration share across all UK constituent countries with nearly 70% of its publications involving co-authors outside Wales.

In 2016, the world's leading science journal, *Science*, noted: "Like other countries that see knowledge-growth as a pillar of their economies, Wales has created a science agenda that aims not only to expand academic science but to translate science and technology into applications that lead to economic growth".

Despite comprising only 4% of the total UK submissions, Wales' Research Excellence Framework (REF) impact results showed that almost half of the research submitted was evaluated as world leading with Wales securing the highest proportion of 4-star impact for any of the UK countries.

Wales for Africa

For more than a decade, Wales has been developing and deepening community-based links and partnerships with countries in sub-Saharan Africa through the successful Wales for Africa programme.

This mutually-beneficial programme has supported a distinctively Welsh approach to sustainable international development and solidarity, of which we can be justifiably proud.

Every one of the Wales for Africa partnerships characterise the Welsh approach to international development, where experiences and knowledge are shared in a spirit of mutual respect and reciprocity.

This vibrant, civil-society-based approach has seen friendships formed across Wales and Africa, as people work together practically, purposefully and meaningfully towards achieving the UN's Sustainable Development Goals

(SDGs).

The African diaspora in Wales plays an important role in building and sustaining these relationships. The vision of the SDGs is that of a shared, sustainably developed world, in which no one is left behind. With our support, the Disasters and Emergency Committee Cymru is able to raise more money, more quickly and efficiently, demonstrating the generous spirit of the people of Wales at times of international crisis.

Today, every Welsh health board has an active health link in Africa and significant numbers of people across Wales have been engaged with the 900-plus organisations in Wales working in Africa on international development and solidarity issues or through their support for Fair Trade.

In June 2008, Wales was the first nation in the world to earn the title Fair Trade Nation and we were the first to enshrine the SDGs into domestic law through the Well-being of Future Generations Act.

We will expand and rename the Wales for Africa programme as Wales and Africa, better acknowledging the mutually beneficial partnership between the two. We will take action on gender and equality in Uganda and Lesotho.

We will continue to fund the provision of advice, training, networking and support to the sector. We will provide small grants to Welsh organisations to increase their impact with four broad themes – climate emergency; lifelong learning; health and sustainable livelihoods – and encourage a focus on gender issues and improved monitoring and evaluation.

We will grow our successful International Learning Opportunities programme, which has seen nearly 200 people take part in eight-week placements in support of the SDGs.

We will build on environmental projects in Africa – Wales has already helped to

protect an area of tropical rainforest twice the size of Wales – and we will work with our partners to plant a tree in sub-Saharan Africa for every person in Wales every year in response to the climate emergency.

We will work more closely with the UK Department for International Development and seek to ensure that more of its funds are spent in Wales and through Welsh organisations and companies.

We will as a priority:

- Demonstrate global responsibility by becoming known as the first country to put the UN Sustainable Development Goals (SDGs) into law by promoting the Well-being of Future Generations Act.
- Demonstrate global responsibility by becoming known as a world-leading nation for recycling.
- Demonstrate global responsibility by planting a further 15 million trees in the Mbale region of Uganda by 2025, in addition to the 10 million that we have already planted.
- Demonstrate global responsibility by offering support to countries who want to learn from our experiences of increasing the number of people to speak an indigenous language, which was previously under threat.
- Demonstrate global responsibility by cementing our reputation as a Fair Nation – committed to Fair Trade, Fair Work, Fair Play, especially with regards to equality.
- Raise Wales' profile by promoting Wales as a centre for adventure tourism and sustainable tourism and increase visitor numbers.

We will also:

- Raise Wales' profile by respecting the potential of tourism to act as a flag-carrier for Wales on the world stage – acting as a means of introducing new

audiences to Wales, of creating a sense of welcome, and of creating lifelong relations with future partners the world over.

- Raise Wales' profile by increasing our investment in international-quality products, securing major events and in marketing Wales as a world-class tourism destination. We will do this in collaboration with the sector and using insight to inform decision-making.
- Raise Wales' profile by developing the Visit Wales offer to promote the unique Wales Coast Path and use Welsh culture and the Welsh language as a differentiating positive factor to promote sustainable tourism to international audiences.
- Raise Wales' profile by promoting Wales' cultural excellence and sporting reputation around the world using major events such as the Rugby World Cup in Japan as a platform to build a legacy for the future.
- Demonstrate global responsibility by rebranding and expanding the successful Wales for Africa programme to become the Wales and Africa programme with a focus on sustainability.
- Demonstrate global responsibility by sharing with others our experiences of addressing climate change, and learning from theirs.
- Demonstrate global responsibility by building on our reputation as a feminist government and develop mutually-beneficial opportunities for women with our partners in Uganda and Lesotho
- Raise Wales' profile by using our experience with the promotion of the Welsh language to work with other countries and become the global leader in this area.

Case study: Size of Wales

Tree-planting in Mbale, Uganda.

10 million trees have been planted in the Mbale region of Uganda by the Size of Wales project.

Our ambition in the next 5 years is to plant 25 million trees.

Uganda's forests are under severe threat. They are being lost at a rate of 1.8% per year. Between 1990 and 2010, Uganda lost 31% of its forest cover – a decline from 5 million hectares to 3.6 million hectares.

Size of Wales is funded by the Welsh Government to help reverse that deforestation in the Mount Elgon area of Mbale, in Uganda. The 10 millionth tree was planted in October 2019 – marked by a ceremonial tree planting in Mbale and in Cardiff.

The project has 3 main aims:

1. Poverty alleviation: To contribute to the delivery of the UN Sustainable Development Goals by improving and protecting crop yields and food security, leading to more sustainable livelihoods.
2. Climate change adaptation: To help the region develop its capacity to adapt to climate change. The project will address the adverse effects of deforestation, over-cultivation, soil erosion and landslides by bringing about attitudinal and cultural change in relation to tree planting and conservation of the environment through increasing knowledge and understanding of climate change.
3. Climate change mitigation: Trees planted near the Equator can absorb up to ten times as much carbon as those planted in temperate climates. The project reduces the reliance on fuel, e.g. wood and charcoal, by distributing fuel efficient cooking stoves, and is exploring opportunities for sequestering carbon and the use of voluntary carbon market to bring additional income to farmers.

This project is also linked to the Welsh Government's Plant! scheme which is now in its 10th year. Plant! celebrates the birth of every child born or adopted in Wales by planting 2 trees. One is planted in new Welsh woodland ensuring trees for our future generations, while also nurturing a close personal relationship with

nature from an early age. The other is a fruit tree planted in Mbale.

Conclusion

The value of international relations to the Welsh economy is immense. Billions of pounds worth of trade, tens of thousands of jobs, massive investments, technology exchange, research partnerships, thousands of student places, global connectivity – all rooted in Wales' engagement with the wider world.

The world in which we live and conduct our business is volatile, fast changing and ultra-competitive. If Wales is not active and dynamic on the world stage, the jobs, investment and opportunities will go to our competitors. We must keep up or lose out.

Now is the time to raise our ambition. We must do more, not less. We must think bigger, not smaller. We must work in partnership to multiply our efforts. Wales achieves most when we work together as a team.

Our country has contributed so much to the world. Our global businesses and entrepreneurs, our performers and artists have worldwide reputations; the NHS was the result of Welsh inspiration and dedication; our Nobel Prize winners and researchers, our brilliant sportsmen and women, our aid workers and civil society all work to make Wales and the world a better place to live. Wales has values and a determination to share in the global community.

We are proud of our history but it is the future, which motivates us. Everything we do builds for future generations. We look to the jobs of tomorrow and we equip our children to do them. We are building clean and green energy infrastructure and connectivity. We engage with climate change and the environment because we care about our children and grandchildren. We want to learn from the best and promote what Wales does well.

Our world is interdependent and our interests are shared. Wales is a European nation and we cherish our relationships with our neighbours. We make each other more prosperous, healthier and better educated.

The world is wide and constantly changing. Wales must change with it. Our businesses will seek new markets in growing economies. We must meet and embrace the challenges of tomorrow. That is what this strategy aims to promote.

Annex A: International networks and agreements

The Welsh Government, and other Welsh organisations, have affiliation to the following organisations. Affiliation varies from full membership to occasional participation. This list is non-exhaustive and will be reviewed and prioritised as the UK's relationship with the European Union is finalised. The Welsh Government will prioritise those networks where we can be sure that we can influence internationally in areas that are core to the International Strategy.

- Brussels UK Offices Network
- Cine Regio
- Climate Group
- Commonwealth Local Government Forum
- Conference of Peripheral Maritime Regions
- Conference on European Regional Legislative Assemblies
- Council of European Municipalities and Regions
- Culture Action Europe
- ERRIN: European Regions Research and Innovation Network
- Eurochild
- EUROCITIES
- Eurogroup for Animal
- European Association of Regions and Local Authorities for Lifelong Learning
- European Cyber Security Organisation

- European Health Telematics Association (EHTEL)
- European Innovation Partnership on Active and Healthy Ageing
- European Local Authority Network (ELAN)
- European Network of National Civil Society Associations
- European Nostra (cultural heritage network)
- European Public Private Partnership Expertise Centre
- European Regional and Local Health Authorities
- European Route of Industrial Heritage
- European Territorial Cooperation
- European Women's Lobby
- EURORAI: European Organisation of Regional External Public Finance Audit Institutions
- Four Motors
- GMO free network
- IETM (Informal European Theatre Meeting)
- Industry Transition Platform
- Institute of European Environmental Policy
- International Union for the Conservation of Nature
- Network to Promote Linguistic Diversity
- Ocean Energy Europe
- OECD Network on Fiscal Relations
- Reference Site Collaborative Network (RSCN)
- REGAL Network ('Innovative and entrepreneurial European regions for territorial development in food and well-being')
- Regional Platform for Biodiversity learning
- Regions for Sustainable Development (international)
- Regions with Legislative Powers (REGLEG)
- UN Convention on Biodiversity
- Under2 Coalition
- United Cities and Local Governments (UCLG)
- Vanguard Initiative
- World Health Organisation Regions for Health Network (WHO RHN)

Memoranda of Understanding

In addition to these organisations, Wales has signed Memoranda of Understanding to formalise relationships with the following regions and countries:

- Basque Country
- Brittany
- Catalonia
- China (Culture and Education)
- Chubut
- Galicia
- Latvia
- Lesotho
- Mbale CAP, Bududa and Manafwa District (Wales for Africa)
- Neijing People's Government (Education)
- Quebec (Aerospace)
- Spain (Education)

Consular Association of Wales

A number of countries use honorary consuls to develop relationships with Wales. The Consular Association is a voluntary grouping of honorary consuls in Wales. Honorary consuls are appointed by, and are responsible to, the government for the country they represent.

A list of honorary consuls in Wales is below. The US has a Welsh Affairs Officer but no honorary consul. We will encourage more embassies to appoint honorary consuls in Wales and ideally to open a consulate.

- Belarus

- Belgium
- Brazil
- Canada
- Denmark
- Estonia
- Finland
- France
- Germany
- Hungary
- Iceland
- India
- Israel
- Italy
- Japan
- Jordan
- Kazakhstan
- Latvia
- Lesotho
- Mexico
- Namibia
- Netherlands
- Norway
- Romania
- Slovakia
- Sweden
- Switzerland
- Thailand
- Tunisia

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Annex B: Our priority international relationships

Since devolution, we have formalised government-to-government relationships with several regions and have signed Memoranda of Understanding (MoU) with a number of European regions (see annex A).

We also have a strong, long-standing cooperation with Flanders, Baden-Württemberg and North Rhine-Westphalia and have signed a Declaration of Friendship and Solidarity with the Dutch Province of North Holland, which encompasses Amsterdam.

Our relationship with both Ireland and Germany is particularly strong. German and Irish nationals living in Wales make up two of our largest international communities. Both feature amongst the top 5 markets in terms of exports, inward investment and international visitor numbers.

All these relationships with countries and regions are a priority because of common cultural and linguistic heritage, shared values and common economic and social interests and should constitute a focus for our cooperation activities in terms of governmental activity and partners for collaborative projects. The limited number of priority regions is intentional – a larger number would lead to dispersed effort and make meaningful outcomes more difficult to achieve.

Each of these relationships is different, and our approach and activities will reflect this diversity. We will also continue working with other European regions as the best performer in any given area of activity, or the most promising commercial opportunities, may not necessarily be located in our partner regions.

Country relationships

Germany is Wales' largest trading partner and a significant investment partner;

France is an important partner for trade, tourism, education and culture and Ireland continues to be our closest European neighbour. German and Irish nationals living in Wales make up two of our largest international communities. All are important existing trading partners with whom we have long-standing and established relationships, which stretch beyond trade alone.

The US and Canada, are important investors in Wales. Of the 1,245 foreign-owned companies operating in Wales, almost a quarter originate in North America. The scale of the US and Canadian economies are such that opportunities can emerge from almost any sector and in any region. In recognition of the synergies in policy objectives and approaches between the Welsh Government and the City of Philadelphia Government, we have also established a government interchange programme to further develop relations through the exchange of knowledge and experience at an official level.

Regional relationships

Basque Country

Wales and the Basque Country have historical connections based on industrial heritage, longstanding and extensive links at governmental and institutional level and there are clear economic, learning, health, and cultural opportunities for Wales from joint co-operation.

The Basque model of innovation-driven social and economic development is considered exemplar and the region has a lot to offer in terms of its experience in language planning, fiscal policy, agri-food and social enterprise. By choosing Wales as the only new priority region in its Internationalisation Strategy (2018-20) demonstrates the appetite in the Basque Country for a closer working relationship with Wales, the alignment of interests and is evidence of the growth of our international activity and profile. The signing of a MoU in 2018

consolidated the relationship between the two nations.

Brittany

This is a robust and energetic European bilateral relationship with both our governments committed to further deepening our relations. The relationship is rooted in our shared cultural and linguistic heritage and culture and language play an important part as demonstrated by our commitment to the Lorient Festival, the partnership between our orchestras, artists and arts promotion agencies. However, the relationship is one of breadth and we have identified agri-food, marine energy and the cyber sector as potentially fruitful areas of economic collaboration as well as exploring a long-term student exchange programme.

Flanders

We have an historic relationship with Flanders and the Flemish Government, which has been consolidated over the last four years as a result of activity to commemorate the First World War and the building of the new Welsh memorial. There are multiple links connecting our governments, organisations and people across health, culture, business and higher education with the strategic partnership between Cardiff and Leuven universities. We are building connections with Flanders Trade and Invest and Flemish business clusters to build on the MoU signed between the B-Hive cluster in Flanders and Cyber Wales.

Annex C: Welsh Government overseas offices

Asia

China

Beijing: +86 10 5811 1811

Chongqing: +86 23 6369 1400

Shanghai: +86 21 6229 0655

India

Bangalore: +91 95 3851 1126

Mumbai (India HQ): +91 22 6650 2222

New Delhi: +91 11 2419 2398

Japan

Tokyo: +81 3 5211 1247

Europe

Belgium

Brussels: +32 (0) 473 865 658

France

Paris: +33 1 44 51 31 36

Germany

Berlin (Germany HQ): +49 3020 457135

Düsseldorf: +49 (0) 211 9448-215

Ireland

Dublin: +353 12053795

UK

London: +44 (0) 300 025 6789

Middle East

State of Qatar

Doha: +974 4496 2009

United Arab Emirates

Dubai (Middle East HQ): +971 (4) 309 4201

North America

Canada

Montreal: +1 514 291 1094

United States of America

Atlanta: +1 (404) 954 7741

Chicago: +1 (312) 970 3802

New York: +1 (212) 745 0415

San Francisco: +1 (415) 617 1355

Washington DC (North America HQ): +1 (202) 588 6623

Annex D: Our values

This strategy is underpinned by our values and principles, which are set out in the following pieces of legislation, key documents and action plans.

Well-being of Future Generations Act

Wales is the only country in the world to have translated the UN Sustainable Development Goals (SDGs) into law through the Well-being of Future Generations Act. The 7 well-being goals are set out below.

The Well-being of Future Generations Act is unique to Wales – it affects everything a public body does. All public organisations must take into account

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the long-term effects of any decision they make and the knock-on impact it may have, in terms of the prosperity of people in Wales, its environment, culture and communities.

The Act aims for Wales to develop long-term solutions to issues like poverty, ill health, poor air quality, low-quality jobs.

The 7 well-being goals are:

- A prosperous Wales – an innovative, productive and low carbon society which recognises the limits of the global environment and therefore uses resources efficiently and proportionately (including acting on climate change); and which develops a skilled and well-educated population in an economy which generates wealth and provides employment opportunities, allowing people to take advantage of the wealth generated through securing decent work.
- A resilient Wales – a nation which maintains and enhances a biodiverse natural environment with healthy functioning ecosystems that support social, economic and ecological resilience and the capacity to adapt to change (for example climate change).
- A healthier Wales – a society in which people’s physical and mental well-being is maximised and in which choices and behaviours that benefit future health are understood.
- A more equal Wales – a society which enables people to fulfil their potential no matter what their background or circumstances (including their socio-economic background and circumstances).
- A Wales of cohesive communities – attractive, viable, safe and well-connected communities.
- A Wales of vibrant culture and thriving Welsh language – a society that promotes and protects culture, heritage and the Welsh language, and which encourages people to participate in the arts, and sports and recreation.
- A globally responsible Wales – a nation which, when doing anything to improve the economic, social, environmental and cultural well-being of

Wales, takes account of whether doing such a thing may make a positive contribution to global well-being.

Human rights

We have recently celebrated the 70th anniversary of the Universal Declaration of Human Rights and we are approaching the coming of age of the Human Rights Act in the UK – both are foundations for the protection and safeguarding of individual rights both here in Wales and internationally.

Since devolution, Wales has been profoundly influenced by these 2 documents and has taken a rights-based approach to policy-making and legislation. Wales was the first country in the UK to incorporate the UN Convention on the Rights of the Child into domestic law, placing a due regard on Welsh Ministers.

Economic Action Plan

The Economic Action Plan sets out our approach to supporting the economy in a way, which increases both our wealth and our well-being through inclusive growth – the fairer distribution of the benefits of economic growth at an individual level and between different parts of Wales.

We want a strong, resilient and diverse economy that delivers for the people of Wales – enabling people to realise their ambitions, businesses to prosper and communities to thrive.

We regard growth and fairness as mutually reinforcing, not mutually exclusive. We pursue growth because it can promote fairness and we should strive for a fairer Wales, because doing so will improve our growth potential. There is an economic as well as moral imperative to the pursuit of inclusive growth. Evidence tells us that inequalities reduce prospects for growth – affecting the

likelihood of individuals investing in their education and training leading to poorer health outcomes that carry an economic cost and social dislocation that in turn influences economic outcomes.

Understanding the nature of the economic strengths and challenges we face helps us to frame our response. The actions we will take aim to ensure that we address the issues of today and provide strong foundations for the future, a positive legacy built on a set of clear principles.

Our Economic Contract sits at the heart of the plan – it is a new relationship between business and government. It asks businesses receiving direct financial support from the Welsh Government to demonstrate growth potential; Fair Work; the promotion of health, including a special emphasis on mental health, skills and learning in the workplace and progress in reducing their carbon footprint.

More information is available at [Prosperity for All: economic action plan](#).

Fair work

We believe that fair work can help achieve a stronger, modernised, more inclusive economy. Fair work accords with long-established cultural traditions in Wales of social solidarity and community cohesion. It can help address inequality, reduce poverty and promote well-being. Fair work contributes to national growth and prosperity.

The Fair Work Commission in Wales has defined fair work as:

“Where workers are fairly rewarded, heard and represented, secure and able to progress in a healthy, inclusive environment where rights are respected.

“ “Characteristics within the definition: Fair reward; employee voice and collective representation; security and flexibility; opportunity for access, growth and progression; safe, healthy and inclusive working environment, legal rights respected and given substantive effect.

“ “The promotion of equality and inclusion is integral to all six characteristics.” ”

Social partnership

We believe in a social partnership approach – working with and listening to public sector staff and their representatives – to create better services for people in Wales and protect jobs of public service workers.

We recognise the dedication and excellence of the public service workforce is instrumental to transformation. Our vision is for a workforce that is at the heart of citizen-centred public service delivery.

The majority of people working in Welsh public services are also citizens of Wales and use public services, offering a dual benefit in workforce and citizen engagement and the richest possible way to understand what needs to be done.

We want our public service workforce to have a voice, which is listened to, trusted and acted on because it has authentic first-hand experience. Trust is crucial to high performing public services. For services to be the very best both the workforce and citizens need to be fully engaged in a continual loop of feedback and improvement.

We also want a fair deal for our public service workforce. A deal that respects the rights and responsibilities of staff and employers together with the vital role of the trade unions in making a difference and shaping a successful future for

Wales.

Code of Practice: Ethical Employment in Supply Chains

The code was published by the Welsh Government to support the development of more ethical supply chains to deliver contracts for the Welsh public sector and third sector organisations in receipt of public funds.

Evidence illustrates that unethical employment practices are taking place in supply chains throughout Wales and beyond.

This code is designed to ensure workers in public sector supply chains are employed ethically and in compliance with both the letter and spirit of UK, EU and international laws. It covers a range of employment issues, including:

- modern slavery and human rights abuses
- blacklisting
- false self-employment
- the unfair use of umbrella schemes
- zero hours contracts
- the living wage

More than 200 public and private organisations working in Wales have signed up to the code, which is available at [Ethical employment in supply chains: code of practice](#).

Welsh language

The Welsh language is one of the treasures of Wales. It is part of what defines us as people and as a nation.

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Our ambition as Welsh Government is to see the number of people able to enjoy speaking and using Welsh reach a million by 2050. This is certainly a challenging ambition, but a challenge we believe is worthwhile and necessary if we are to secure the vitality of the language for future generations. The first Welsh Language Act was passed in 1967. The status of Welsh is enshrined in legislation, which is made in Wales – the language has equal status with English in Wales.

More information about our plans to increase the number of Welsh speakers in Wales are set out in [Cymraeg 2050: Welsh language strategy](#).

Decarbonisation

Climate change is the globally defining challenge of our time. The Paris Agreement set the direction for the international community to come together to take action and the latest Inter-governmental Panel on the Climate Change report was a stark reminder of the urgency that is required across the international community.

Climate change is a matter which transcends political and social boundaries and it is often the most vulnerable in our communities who are impacted the most.

Decarbonisation offers enormous opportunities to create a vibrant and socially just economy.

We have set out an approach to cut emissions and increase efficiency in a way that maximises wider benefits for Wales, ensuring a fairer and healthier society. Our Low Carbon Delivery Plan sets out 100 policies and proposals, which directly reduce emissions and support the growth of the low carbon economy.

The Low Carbon Delivery Plan is available at [Prosperity for all: a low carbon Wales](#).

Annex E: Magnet projects

Mid and South West Wales

- Aberystwyth Innovation & Enterprise Campus – AIEC
- Beacon+
- Centre of Excellence for Next Generation Services Project Helix
- Deep water ports
- Factory of the Future
- Haverfordwest Food Park
- Health innovation - A Regional Collaboration for Health (ARCH)
- Homes as Power Stations - Active Building Centre
- IBERS – Aberystwyth
- Life Science and Well-being Village and campus
- Wales Unmanned Aircraft Systems - Aberporth
- Pembroke Dock Marine
- Radio Spectrum UK Centre of excellence - Aberystwyth
- Swansea Central Digital Square
- Swansea City and Waterfront Digital District
- Vethub1
- Yr Egin - Carmarthen

South East Wales

- Aerospace and Defence Sector cluster
- Cardiff Capital City Region
- Cyber Cluster
- Fintech cluster
- International Conference Centre Cymru Wales
- Life Sciences/Medical Diagnostics and Tools

- National Data Exploitation Centre (NDEC)
- UK Catapult: Compound-semiconductor cluster

North Wales

- Advanced Manufacturing Research Centre Cymru Wales, Deeside
- Menai Science Park Ltd (M-SParc)
- National Research Network: Low Carbon, Energy and Environment (NRN-LCEE)
- North Wales Growth Deal
- Nuclear cluster
- OpTIC Technology Centre

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