

Trinity College Carmarthen: *Working for Wales*

March 2006

A report by

bute

Bute Communications
Crichton House
Mount Stuart Square
Cardiff Bay
CF10 5EE

In association with

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LEADERSHIP ENTERPRISE
ECONOMIC DEVELOPMENT

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Foreword

Since the establishment of the Welsh Assembly Government, and the development of clearly articulated policies which directly affect the people of Wales, Universities and Colleges of Higher Education have had to review their strategic objectives. With the publication of *Reaching Higher* in March 2002, the Welsh Assembly Government outlined their policy directive for the sector for the next ten years.

As head of an academic institution located within a geographical area which has been defined as multi deprivational, it is appropriate to stand back and evaluate the contribution the institution makes to the strategic priorities of the Welsh Assembly Government. As the only University sector college in Carmarthen, I believe Trinity College has a key role to play in the economic, social and cultural development of the region in what has been a period of rapid change affecting our national consciousness.

Our challenge for the future is to build upon the long standing tradition which is associated with this Church College and embrace innovation. Within a period of major change in higher education in Wales, Universities and Colleges are faced with re-evaluating their missions and core activity. Trinity College is one of the smallest institutions within the sector. In commissioning this report the College seeks to evaluate the contribution it actually makes to the implementation of policy in Wales and to the local economy. It has always been my view that specialised institutions like Trinity can play a key role in delivering priority objectives for the Assembly Government, and help to shape the future prosperity of Wales.

As a higher education institution in the Objective 1 region of Wales, we cannot simply focus on our academic achievements. At a time when the Welsh Assembly Government is putting increasing emphasis on "joined up" delivery and integration through the *Reaching Higher* agenda for Higher Education and the challenges of both the *Spatial Plan* and the *Making the Connections* agenda across the public sector, it is essential that Higher Education institutions avoid a silo mentality and review their vision and planning against a myriad of public sector strategies and interventions.

The College's aim in commissioning this report is to seek an external view on what is the added value of the institution to the local and regional economy. It is vital that the institution reviews and evaluates its contribution not only to learning, but to economic development, social inclusion, and cultural regeneration as well as the fundamental difference that it makes to extending the equality of opportunity and overcoming social disadvantage.

Much of our work is achieved in partnership with others, and this document is a means of communicating that contribution to our stakeholders: to local businesses, the voluntary sector, our elected politicians at all levels, government ministers, the civil service, our staff, and not least, our students. Only by communicating can we ensure the dialogue that will be necessary to ensure that Trinity College's contribution to the wider area is not just recognised, but developed and strengthened to ensure a better future for us all.

Our corporate mission is "*To advance Trinity College, a Church in Wales Community University, as a provider of quality bilingual education and training that makes an effective contribution to the economic, social and cultural prosperity of Wales.*"

Whilst the College's mission remains current, the College has identified the importance of conveying the 'uniqueness' of the College in delivering on its social, economic and cultural agendas. The College has made significant progress in these areas and will continue to strive for further progress in the future.

Dr Medwin Hughes
Principal
Trinity College Carmarthenshire
March 2006

Introduction

Bute Communications were commissioned by Trinity College to undertake an independent evaluation of the strategic role of the institution in the light of the various policy initiatives established by the Welsh Assembly Government. We were charged with undertaking an assessment of the economic impact of the institution on local economy of South West Wales.

Trinity College is the only denominational institution of higher education in Wales having been founded in 1848. There is clear evidence to support the claim that it contributes to a strong vibrant national identity and is recognised as an academic institution that services the needs of Wales. The College has undergone major management and structural changes since 2000 and has successfully developed a new academic portfolio which reinforces its distinctive contribution as a Community University which is proactive, innovative and respondent to change. The strong bilingual ethos of the institution makes it one of Wales's leading academic institutions in the active promotion of the languages and cultures of Wales.

Trinity College services the specific training needs of students from Wales. The findings of the second Rees Report confirmed that of all the institutions in Wales, Trinity had the highest percentage of Welsh domiciled students. In academic year 2002/03 the vast majority of students attending Trinity College [92.4%] were from Wales. The research also shows that the College had the highest percentage of students aged 18-20 who came from Wales [85%].

The significance of such a statistic should be carefully considered when evaluating the direct impact that Welsh Assembly funding is having upon the future workforce development of young people who will remain economically active within Wales, and therefore make a positive contribution to the priorities of the Welsh Assembly Government.

From our research we were able to pinpoint evidence that demonstrates the College's added value in contributing to social inclusion, community development and broader economic development in addition to its academic remit. This contributes to the development of human capital within an Objective 1 area and to the future competitiveness of the sub-region in the context of the Wales Spatial Plan.

Nick Bennett
Director
Bute Communications

2. Investing in a Knowledge Based Economy and Developing Creative Human Capital

2.1 Strategic Context

The repositioning of the College over the last five years has placed it in a key position to take forward major initiatives which will support the enhancement of skills in the development of a knowledge base economy in South West Wales. Its contribution is seen as complementary to the research led mission of the University of Swansea as it drives forward innovation and enterprise. Trinity College contributes to the development of the workforce skill base which will be required to underpin the high level economic activity developed by the University. It is clear from the College's strategic plan that the institution is committed to the sustainable economic development of communities in the region through the proactive enhancement of innovation for local competitiveness and wealth creation.

The institution supports the aims and objectives of the Welsh Assembly Government's National Economic Development Strategy *A Winning Wales, the Objective 1 programme for West Wales and the Valleys* and the recent *Creative Success Strategy for the Creative Industries in Wales*, as well as realising the role that Higher Education can play in its "third mission" of support for local and regional development.

The College's strategy is consistent with the Welsh Assembly Government's new consultation document for national economic development; *Wales: a Vibrant Economy (WAVE)* supporting the key drivers to business growth: innovation, entrepreneurship, skills, investment and trade.

2.2 Delivery

With an overall annual budget in excess of £11.1m in 2005/6 Trinity College has a massive impact upon the local economy. Supporting a total of 299 direct and indirect jobs and injecting a total of £17million into the local economy.

As well as its role as a local employer, purchaser of goods and services and provider of education, the College plays a key role in delivering economic development projects which include:

- Developing a Knowledge-based Economy
- Developing Creative Human Capital
- Supporting Internationalisation and Developing Tourism

2.2.1 Developing a Knowledge Based Economy

The College is committed to developing a series of undergraduate and postgraduate courses which will contribute to the economic development of the region. Given that such a high percentage of students are from West Wales, the impact on local human capital is considerable. Graduates are likely to remain within the area and to make a substantial contribution to the labour market.

A number of key initiatives have been developed since 2000 which contribute towards the development of a more dynamic and creative business base for sub-regional innovation. They offer high quality training opportunities for a number of potential cluster developments.

The College currently supports four businesses through the Knowledge Exploitation Fund including one spinout. Approximately twenty Knowledge

Over the last five years the College has positioned itself to take forward major initiatives which will support the enhancement of skills in the development of a knowledge base economy.

Trinity College provides an injection of £17million to the local economy

Trinity College supports 225 direct and 74 indirect jobs in the local economy

The high percentage of students from West Wales means the impact on local human capital is considerable

Exploitation Fund Scholarships and Spinouts will come on line during 2006. It is clear that this is an area that the College community has embraced and the potential for further development is considerable. A total of fifty-four Small and Medium sized Enterprises have been assisted through either the Knowledge Exploitation Fund, Knowledge Transfer Partnerships or other college projects since 2000. Seventy-three members of staff have also received training as trainers for project support.

54 local SMEs have been supported in exploiting knowledge

Trinity's focused developments in e-Learning and business support sets a future agenda for institutional development that has a potential major impact on the local and sub-regional economy, helping to retain a skilled young workforce in South West Wales.

The new Cultural Enterprise and Innovation Centre will support cluster growth

The South West Wales e-Training Network supports the development and piloting of on-line materials that will contribute to improving the higher skill base of employers. A new e-learning foundation degree has enabled the college to respond to employer demand and offer more flexible routes to University education. The potential of developing further e-commerce applications through SME website development is identified as one of the priority areas in the medium term plan.

The provision of a Procurement Toolkit (*TenderWise*) as part of a £450,000 INTERREG project in partnership with University College Dublin, has delivered a DVD multi-media package to 25,000 SMEs in the region to support their capability to bid for major tenders. The College is also working closely with Carmarthenshire County Council to develop and deliver on-going support to SMEs to develop bids for major contracts.

A positive impact on tackling economic inactivity demonstrated by very high numbers of students aged 26-65, the high level of disabled students and the increasing proportion from Communities First Communities.

2.2.2 Developing Creative Human Capital

There is clear evidence to support the claim that the institution has made a substantial contribution within West Wales to increasing the skill and knowledge base of graduates who have entered full time employment within the sub-region. Given that the College recruits such a high percentage of students from a local radius the economic impact of the training is likely to make a real difference to the longer term development of the local workforce. The institution is having a positive impact on tackling economic inactivity and developing new improved opportunities for informal and flexible learning pathways, which are demonstrated by very high numbers of students aged 26-65, the high level of disabled students and the increasing proportion from Communities First Communities. The economic and social impact of community regeneration will also be assisted by the development of a Community University which seeks to increase the skills and knowledge base of the region and foster a spirit of entrepreneurship in its graduates. Every pound from WAG invested in Trinity College provides a high return and value for money across WAG broad strategic objectives.

A number of innovative training schemes have been developed during the last five years which have had a wider economic effect. The BAIT project has delivered bilingual accredited IT training to over 600 people in Carmarthenshire. The beneficiaries were drawn from the community and from local SME base. Beneficiaries were able to study at home or in the workplace, making use of multi media CD ROMs backed by tutor support. The project recruited 623 beneficiaries, and assisted 61 SME's in the process. Three new regional European Computer Driving Licence Centres were established as part of the project.

Every pound from WAG invested in Trinity College provides a high return and value for money across WAG broad strategic objectives.

The establishment of a £1.9M Cultural Enterprise and Innovation Centre with a planned completion at the end of next year will reinforce the College's role as a learning centre which facilitates and supports innovation and knowledge transfer

within creative and media related clusters. The Innovation Centre will offer employment to fifty staff, and will provide a rehearsal and administrative base for Theatr Genedlaethol Cymru. It will also have units for young graduates to establish new businesses and small media companies, enabling them to innovate and develop within a cluster of complementary businesses linked to the creative arts industries. The School of Creative Arts and Humanities has developed a Knowledge Transfer Partnership programme in media and art with a view to exploring a range of commercial links and spin-out opportunities.

Since 2000, the College has implemented a series of Structural Fund supported projects, supporting the development of SME's, the creation of a knowledge based economy and supporting the development of human resources. This has received grant support from the Objective 1 and INTERREG Structural Fund Programmes in excess of £1.267m, assisting over 1,850 beneficiaries.

To date, the main gap in Trinity's provision has been work related; the opportunity now presents itself to address this through targeted links with the following priority Skill Sector Councils: Creative and Cultural; Government Skills; Lantra; People 1st; Skills for Care and Development; Skills for Health; Skills for Justice; Skills Active; Skills Set.

Trinity College is committed to the concept and delivery of lifelong learning and has delivered proactive local labour market improvements. Between a half and two thirds of recent alumni have been mature students, aged between 26-65, compared to a level of 45 percent in Higher Education Institutions across Wales. Over 95 percent of graduates are in full time employment or are engaged in further study within a period of six months after leaving the institution. The College contributes to the development of the regional economy and reinforces the significance of Carmarthenshire as a regional centre for the development of higher learning opportunities that could support economic and social innovation between the Swansea Bay/ Western Valleys and Pembrokeshire regions. The College has developed a clear role for itself as a 'knowledge hub' which supports a number of priority areas identified by the Assembly Government. This is in line with the recommendations of the Wales Spatial Plan.

2.2.3 Supporting Internationalisation and Developing Tourism

The College offers a distinctive University education. It is acknowledged as a truly bilingual Community University and is the only denominational University institution in Wales. This has had an influence upon its international profile. The majority of international students tend to come from high growth economies, the US, the Republic of Ireland, the rest of the EU and the emergent Asian economies. The economic impact assessment indicates that the international market makes a sizeable contribution to the sub-region. The college now has formal partnerships projects in place with several US and Japanese academic institutions. The recent establishment of the Welsh American Academy is seen as an innovative development which builds upon Assembly Government priorities in maximising the cultural and economic benefits of international links for Wales. The spinout opportunities of this project could be extensive.

The Wales Spatial Plan identifies the development of tourism as a key economic activity within South West Wales. The College supports the development of tourism in West Wales through providing support for human resource development projects with the Tourism Training Forum for Wales; this support has included:

- The development of a Human Resource Management Toolkit for Tourism operators in the sub-region with over 5000 CD ROMs disseminated.

Over 90% of graduates are in full time employment or are engaged in further study within a period of six months after leaving the institution .

The College has delivered structural fund projects worth over £1.267m

The College has developed a clear role for itself as a 'knowledge hub' which supports a number of priority areas identified by the Assembly Government .

Over the past four years the College has attracted students from 38 countries

- The development and delivery of an Exemplar Training Programme with two Higher Education accredited modules (Excellence in Employment and Business Mentoring) to help disseminate good employment practices across the industry. Four candidates completed both modules during 2004/05, an additional four are participating this year.
- The delivery of a series of workshops on human resource management in tourism during 2003/04.

3. Supporting Social Inclusion and Public Service Delivery

3.1 Strategic Context

The College is committed to widening access to Higher Education ensuring a significant contribution to the social regeneration of communities in South West Wales. Its current strategic plan clearly shows a firm commitment to supporting social enterprise and community empowerment. It also supports the professional skills development agenda across the public service sector and makes a national contribution within the professional training of the current and future teachers of Wales.

This approach complements and supports the Welsh Assembly Government's Communities First flagship programme for community led regeneration, the creation of a Social Justice and Regeneration Ministry together with the emphasis on widening access and the wider vision of *Reaching Higher - the Learning Country* with its emphasis on:

- Attracting more students from disadvantaged communities
- Meeting workforce development needs in health and other services that matter most to people's lives in Wales.

3.2 Delivery

3.2.1 Social Inclusion

The College makes a genuine and socially progressive contribution to supporting social inclusion. It has the highest proportion of students from Wales of any Higher Education Institution in Wales. Over 78 percent of the College's students come from West Wales and the Valleys a significant contribution when one considers that 57 percent of students in HEIs across Wales are from Wales.¹

In 2005/06 4.9% of students came from Communities First wards. This proportion has increased by 25 percent since 2002/03. Approximately 40 percent of students are from C2DE social backgrounds. The College intends to build on this achievement by ensuring strong community provision and access programmes in Communities First areas. The College will actively support community regeneration by creating a new federated structure between providers of informal and formal learning. It has developed several community partnerships with voluntary groups across the region and is piloting flexible training schemes for community leaders. The current initiatives established by the institution reinforce its strategic position in delivering bilingual educational courses across rural West Wales. The College's intention to deliver new courses jointly with the University of Wales Swansea to Communities First areas in South West Wales has substantial potential for achieving further social inclusion. The vision of creating a single Institute for Lifelong Learning for the sub-region would greatly support the educational agenda for change.

In reviewing the college's commitment to social inclusion and empowerment, the institution is pioneering radical new models for promoting higher education for disabled students. In partnership with key agencies the College is developing a Centre for Independent Living (CIL) in Carmarthenshire that would provide support and services that enable and encourage people with disabilities to fully participate in their own community. The College will be a major part of that community in offering an educational focus. The CIL will provide a unique barrier free environment and become a beacon of good practice and equality of

The College is committed to widening access to Higher Education in South West Wales

The College makes a national contribution to teacher training in Wales

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The institution is pioneering radical new models for promoting higher education for disabled students.

¹ HEFCW 2002/3

opportunities for all. This is the first example in Wales of delivering integrated educational training and support within a University context. It will act as a centre of excellence for inclusion in West Wales that would deliver a Disabled Students' Programme, enabling students with disabilities to have access to Higher Education opportunities with the provision of a range of services from accommodation, assistive technology and auxiliary services, including communication assistance and sign language interpretation.

The Centre will also provide the wider population of disabled people in the county with an opportunity to set up and deliver their own self help Peer Support groups, access Information, Advice and Advocacy services, and Accessible Transport and Employment opportunities. This centre of excellence will be able to offer training programmes to organisations, agencies and businesses in Disability Awareness. Modules offered by the College's Social Inclusion programme would include foci on Disability and Inclusion as well as Disability and Gender. There is the potential for the Social Inclusion programme to develop a West Wales Centre for Disability Studies by involving those with special needs in the delivery of educational programmes.

In encouraging young people with specific needs to access higher education the College is addressing the Widening Access agenda in a bold manner. The commitment to widening participation is clearly attested within the institution's strategic plan. We consider the College's activities in this particular policy area as being substantial. No other higher education institution in Wales has embraced this agenda with such commitment. The College is delivering an educational agenda that will empower disabled students in Wales to have access to independent living opportunities and promote equal opportunities for all.

The Widening Access initiatives developed by the College foster strong and relevant links with marginalised areas, and deliver robust programmes of study through collaborative work with schools, local authorities and other outside organisations.

In order to strengthen these activities, the College has developed a programme of study which offers a Higher Education Certificate in Community Support to those organisations who work with groups and individuals in the Community. There are benefits both for those organisations and for College students who take opportunities for placement and placement activities within those organisations. The College provides training across Carmarthen, Pembrokeshire and Ceredigion in social inclusion. The College's BA in Social Inclusion and Education Studies had approximately 150 students in 2005/06, an increase of 250 percent on 2002/03. The evidence base activity presented by the College reaffirms the claim that the institution has a strategic role to play in the delivery of bilingual University courses which support community capacity and inclusion in South West Wales. This activity is central to the core mission of the College as a Community University.

3.2.2 Public Service Delivery

We are aware of the increased importance placed by the Assembly Government on improving the public service delivery agenda and of identifying opportunities for making the connections between public bodies. We noted in the current Ministerial Remit letter an intention to further collaborative activities in this area. With regard to leadership and management training we have noted the College's intention of working with the local Authority in developing joint training programmes. These programmes will also address a number of generic issues identified by the Sector Skill Council for Wales.

The College is delivering an educational agenda that will empower disabled students in Wales to have access to independent living opportunities and promote equal opportunities for all.

40 percent of students are from C2DE backgrounds and the numbers from Community First wards has increased by 25% over the past 3 years.

The College's aspirations of developing a West Wales Skills Academy which would address some of these issues is worthy of note. The potential of this development is substantial and addresses key Assembly priorities in relation to management and leadership training. The College's plan to develop a range of training schemes from Foundation degrees to professional courses for the Skills for Justice Sector is an important development and reinforces the role of the institution in the context of social inclusion and community empowerment. For the College to achieve this goal, it is imperative that detailed discussions take place between the Assembly Government and the institution in order to identify a mechanism to take this forward.

The College is also recognised as a national centre of excellence for education. It delivers quality programmes for the initial and continual professional training of teachers and is the main deliverer of Welsh medium educational courses in South Wales. We are of the view that the recent strategic developments taken forward at the College in the field of education over the last five years places the institution in a strategic position to offer innovative training and support in line with the requirements identified within *The Learning Country*. The development of a West Wales School of Education will support the training needs of schools in the sub-region.

It is clear from Assembly policy that a clear commitment has been made to the enhancement and promotion of early years education provision across Wales. The political impact of investment in this area is a crucial investment in the future of Wales. This is clearly attested in the Wales Spatial Plan. The role of the College during the last five years in influencing policy development in this area has been significant. The development of bilingual early years provision, and the formation of flexible learning schemes for nursery workers, have had a great impact.

The College is developing a new centre for Professional Development with Carmarthenshire County Council to collaborate in leadership and management in education.

The College is represented and contributes to the Carmarthenshire Community Consortium for Education (CCET) in implementing actions to support progression to and from post 16 education to local Higher Education improving lifelong learning provision, increasing the level of bilingual and increasing e-Learning provision and is represented on the Carmarthenshire Community Planning Group.

The College is also recognised as a national centre of excellence for education .

4. Enabling Cultural Expression

4.1 Strategic Context

The College is committed to making a national contribution to the enhancement of the performing and cultural arts in Wales and to the development of quality Welsh medium and bilingual training programmes which support the creative industries. This fully supports the Welsh Assembly Government Strategies for Culture: *Cymru Creadigol*.

By 2010 Wales will be, and be known to be, a nation whose culture

- *is indivisible from the rest of its living*
- *is rich, distinctive, and creative*
- *is both diverse and shared*
- *treasures its bilingualism as a growing reality*
- *nurtures and cherishes imagination, innovation and excellence*
- *nurtures imaginatively the talents of the young*
- *enables the arts, sport and creative industries to thrive at every level*
- *ensures a ready outlet for the creativity of us all, individuals and communities*
- *ensures equality of access for all to participate*
- *is the springboard for both individual fulfilment and collective prosperity*

4.2 Delivery

4.2.1 Culture

Trinity College has historically been considered as one of the main providers of Welsh medium training for the performing and creative arts in Wales. It continues to play a formative role in enhancing the cultural life of the nation. The Schools of Creative Arts & Humanities, Theatre & Performance and Theatr, Cerdd a'r Cyfryngau within the Faculty of Arts and Social Studies are leaders in providing outstanding training and cultural events in both Welsh and English. The strategic development of the College in this context has been strongly influenced by both the Welsh Assembly Government's *Creative Wales* initiative and the *Reaching Higher* agenda.

Over the years the institution has developed into a distinct centre of excellence for the critical, creative and performing arts in Wales. It plays a strategic role in the bilingual and Welsh medium delivery of performing art courses. It is the only institution of higher education in Wales which offers full Welsh language undergraduate courses in the performing arts. We are aware that performance training is arguably very different from the training offered in less specialised departments within other Universities and that the nature of the performance culture is vastly different. It is clear that a number of training schemes offered at the College are practical in nature, similar to conservatoire based training. The decision to locate Theatr Genedlaethol Cymru at the College has reinforced the institution's position as a national centre of excellence for the performing arts in Wales. The College offers a wide range of practical courses in the Performance Arts which are similar in nature to those offered at any other College of Music and Drama in England and Wales. In Trinity's case, the institution also makes a unique contribution to the enhancement of bilingual delivery of the performing arts, which will support the bilingual professional needs of Welsh artists and industries. Given the clear strategic priorities of *Cymru Creadigol* and the importance of the College in delivering those objectives, there is a case to be made that the Assembly Government and its relevant sponsored body should review the current position whereby the College does not receive the appropriate

Trinity College plays a key role in the cultural life of Carmarthenshire and the whole of Wales.

The College does not receive the appropriate level of funding for delivering conservatoire type courses through the medium of Welsh.

Trinity College has historically been considered as one of the main providers of Welsh medium training for the performing and creative arts in Wales.

The strategic development of the College in this context has been strongly influenced by both the Welsh Assembly Government's *Creative Wales* initiative.

level of funding for delivering conservatoire type courses through the medium of Welsh.

The College places great importance on the role of the performing arts within community regeneration. We identified a range of undergraduate and postgraduate degrees which had a clear community focus, and supported the development of community artists and managers. Specific examples of degrees which have a distinctly community focus included BA Theatr, Cerdd a'r Cyfryngau, BA Acting, BA Creative Writing, BA Film & Media Studies and BA Fine Art. Many of the degrees had an integrated approach to the arts and therefore graduates were able to work across a range of creative media. At postgraduate level the MA degrees in Creative Writing, Educational Drama and the MBA in Arts Management had a clear cultural and community focus, whilst the College's proposed degrees in Creative Arts and Community Theatre will further develop this direction.

Innovative partnership developments have been taken forward by the College linked with various Arts organisations, of particular note is the Library of Wales project co-ordinated by Parthian Books and funded by the Welsh Assembly Government. Evidence was also identified of strong and effective partnerships and alliances with professional arts organisations; media and communication companies; broadcasters and heritage and cultural sector organisations which includes an educational partnership with Chamber Orchestra of Wales, community delivery of the arts in association with arts centres across south Wales, the development of a new Arts Festival in Carmarthenshire and the joint planning of delivery of the arts with Carmarthenshire County Council.

The College has developed links with Parthian Books, the Library of Wales, Tinopolis, Accent Press and Honno.

4.2.2 Health and Sport

The College is committed to supporting the objectives of the Assembly government as defined in *Sport and Active Recreation in Wales*. The Sports Strategy *Climbing Higher* calls for:

"An active, healthy and inclusive Wales, where sport, active recreation and physical activity provide a common platform for participation, fun and achievement, which binds communities and the nation and where the outstanding environment of Wales is used sustainably to enhance confidence in ourselves and our place in the world."

The College has been proactive in developing a range of new academic courses which seeks to address some of the key issues related to health and social care. An increased awareness of the need of sufficient training programmes which will address health issues has led to the validation of innovative undergraduate schemes in health and exercise specific contexts. A new Sports Centre offers the largest multi-purpose sports hall in West Wales, as well as a Health and Fitness Suite with the latest training equipment, which is available for use by the public. The potential for new community initiatives within the Centre could include sports therapies and health referrals. Links with external agencies in all programme areas allows for vocational experiences to support academic theory, for example Carmarthenshire County Council – GP Referral training.

The College has been proactive in developing a range of new academic courses which seeks to address some of the key issues related to health and social care.

The community health focus of the Health & Exercise degree responds to the current national health agenda and staff at the college have a collective expertise in Physical Education which is recognised at a national level. Two out of the five national consultants for the Assembly 'Physical Education and School Sport' initiative are from the College. The potential for further developing training schemes in this area are extensive, given that Swansea University also offer health courses on the campus linked to nursing education. Both institutions

working collaboratively could make a substantial contribution to the continuing professional development of NHS staff within the sub-region.

One of the key aims of the School of Sport, Health & Outdoor Education is to further develop its provision of community and commercial activities in line with Welsh Assembly Government and institutional priorities. There is an increasing presence of former students in sport and exercise related employment within the region. During 2004-05 the School gained funding from 'Reaching Wider' for project work linked with the local authority Youth Service which is to be further developed to target Communities First youth groups.

In reviewing the College's involvement with Carmarthenshire County Council's draft Leisure Strategy for 2005-2010 we identified that the institution was seen as a key partner. We have identified areas within the strategy that complement and relate to the institution's own objectives and interests, including:

- the creation of 100 new leisure related jobs across the County;
- employment of a 'Walking your way to Health' officer, linked to the Urban Walks network;
- a study to assess the impact of Carmarthenshire Strategic Trails;
- introduction of initiatives to increase the number of Carmarthenshire adults who are physically active from 24% to 35%;
- becoming the first local authority in Wales to introduce a minimum of 30 minutes of physical activity per day to primary aged school children;
- identifying the location of an indoor climbing wall within the County;
- Support site development plans for Pontweli (Llandysul) International Canoe Centre.

We noted that the College is proposing to establish a Centre for Outdoor Education Studies and the West Wales Centre for Exercise and Wellbeing in order to respond more effectively to the future agenda and to ensure that the institution will serve as a point of reference for outside organisations.

The community health focus of the Health & Exercise degree in particular responds to much of the current national health agenda

College staff has a collective expertise in Physical Education which is recognised at a national level

5. Supporting the Welsh Language and Developing Bilingualism

5.1 Strategic Context

The Assembly Government's language strategy *Iaith Pawb*, which supports a bilingual Wales, calls for:

"A country where people can choose to live their lives through the medium of either or both Welsh or English and where the presence of the two languages is a source of pride and strength to us all."

"By 2011 the percentage of people in Wales able to speak Welsh will have increased by 5 percentage points from the figure which emerges from the census of 2001."

The Assembly Government attaches great importance to developing Welsh language provision for the early years. There is a priority on training practitioners and raising quality standards to allow increased access to Welsh medium early years provision and to achieve a progressive increase in the proportion of children within Welsh medium or bilingual settings. The promotion of the use of Welsh in the private and voluntary sectors is also actively promoted.

5.2 Delivery

Trinity College has a long and proud record of providing Welsh medium education within Higher Education, and is the only Higher Education Institution in Wales to include within its mission statement a clear reference to a bilingual teaching environment. The College's developing Welsh medium portfolio is closely linked to the Welsh Assembly Government's *Iaith Pawb* strategy through:

- **Early Years Education** (BA Early Years Education, MA Early Years Education, PG Dip. Foundation Phase Practice, HE Cert. in Nursery Management, HE Cert. in Welsh and Bilingual Practice in the Early Years)
- **Youth Work** (BA Youth and Community Work)
- **Teacher Training** (BA Primary Education, PGCE Primary, PGCE Secondary in Religious Education, Graduate Cert. Diploma in Professional Development, BA Welsh with QTS)
- **The Unit for the Promotion of Bilingualism** (A range of programmes/modules at both undergraduate and postgraduate levels within the area of Welsh in the Workplace, MA Bilingual Studies, Welsh for Adults)
- **Creative Arts** (BA Theatre, Music and Media, MA Media Studies, MA The Actor and his Stage, MA Creative Writing, Ysgol Berfformio Dyffryn Tywi)

Trinity College has the largest percentage of its students (16 percent) of all the Higher Education Institutions in Wales studying through the medium of Welsh.

The institution is recognised as the lead provider of Welsh medium education in a number of key academic disciplines such as the training of primary school teachers, early years education, youth and community work and theatre, music and media. This emphasis on work-related undergraduate and postgraduate programmes has led to a dramatic increase in the number of students studying through the medium of Welsh during the 2004/05 academic year. With the number of FTEs increasing from 231 in 2003/04 to 301 in 2004/05 and with over

Trinity College has the largest percentage of its students (16 percent) of all the Higher Education Institutions in Wales studying through the medium of Welsh.

The institution is recognised as the lead provider of Welsh medium education in a number of key academic disciplines

half its teaching staff able to teach through the medium of Welsh, Trinity College can rightly claim to be a centre of excellence for Welsh medium training within Higher Education.

This 30% increase in student numbers clearly suggests that the College's Welsh Medium Teaching Strategic Plan – as approved by the HEFCW – has identified a range of academic disciplines that meets the needs of both students and employers in Wales. We consider the College's decision to invest in furthering bilingual training at undergraduate level to be innovative and effective. The clear results indicate the added value of such intervention. We have noted the institution's intentions of developing a digital resource centre which would further this activity. This is a key initiative which could have a substantial effect across both further and higher education in Wales. We would urge the College to develop this further and enter discussions with the Welsh Assembly Government in order to maximize learning opportunities.

Trinity College's contribution to the Welsh Assembly's priority areas in its support of the Welsh language is both timely and critical. There is a genuine commitment from the institution not only to further expand its Welsh medium provision but also to greatly increase its bilingual teaching in three further academic disciplines, namely Tourism and Business, Education Studies and Social Inclusion. It is hoped that by offering bilingual provision in these areas that more and more students will gain enough confidence in their use of the language to study certain modules through the medium of Welsh. This mode of delivery has already proved to be successful within both undergraduate and postgraduate programmes linked to Early Years Education.

The College clearly identifies within its academic strategy a commitment to continued growth within its Welsh medium and bilingual provision in the short and medium term. It will continue to support the delivery of a distinctive portfolio of higher education programmes linked to the WAG's key policy initiatives in terms of developing the Welsh language. Its future aspirations include (i) the establishment of an integrated Education Training Centre on the campus in collaboration with the Local Education Authority which will deliver a range of initial and continuing professional development programmes for teachers, early years practitioners, youth workers and those involved in special educational needs and (ii) a close working relationship with the National Welsh Language Theatre company which will be based on the College campus.

It is clear that Trinity College's contribution to the development of Welsh language provision within Higher Education is critical if the Welsh Assembly Government is to reach its ambitious target of having 7% of the student population of Wales undertaking part of their education through the medium of Welsh by 2010/2011. With over 200,000 Welsh speakers living within an hour's drive from the College, the provision of a range of undergraduate and postgraduate programmes that will be of strategic importance to the development of a bilingual Wales will continue to be at the heart of its existence.

The 30% increase in student numbers clearly suggests that the College's Welsh Medium Teaching Strategic Plan has identified a range of academic disciplines that meets the needs of both students and employers in Wales.

Trinity College's contribution to the Welsh Assembly's priority areas in its support of the Welsh language is both timely and critical.

The College's contribution will be critical if the Welsh Assembly Government is to reach its target of having 7% of the student population of Wales undertaking part of their education through the medium of Welsh by 2010/2011.

6. Working Partnerships in Action

6.1 Strategic Context

The vision of the Welsh Assembly Government as outlined in *Reaching Higher* supports an educational agenda which provides opportunities for all through lifelong learning. The policy clearly states that Higher Education makes a major all-encompassing contribution to the Assembly's key goals such as extending social inclusion, raising GDP, lifting skill levels, nurturing cultural self confidence, tackling the needs of rural Wales and promoting enterprise and creativity. *Reaching Higher* clearly identifies that each institution must be clear as to its role and mission.

The strategic direction outlined in the policy document states that by 2010 higher education in Wales will be defined less by institutions but rather by networks of excellence. The focus is on developing a diverse sector of varied missions which takes its rightful place in the delivery of the Assembly's wider priorities, including those of sustainability, social inclusion and the development of bilingualism. To achieve such an aim, re-configuration and collaboration should be at the heart of the strategy. It is clear from such policy directives that the future emphasis will be on joint delivery, partnership, efficiency savings and greater integration.

6.2 Delivery

There is clear evidence that the College welcomes this approach and has already developed a range of partnerships with external organizations that include:

6.2.1 Sub-regional and local level

- ❑ The College is collaborating with Carmarthenshire County Council in developing provision in Communities First areas. Cultural collaboration will also be undertaken with the County Council, the Urdd and Theatr Genedlaethol.
- ❑ The Faculty of Education and Training provides continuing partnerships with 250 primary and 30 secondary schools in South and Mid Wales and is the administrative centre for the Mid and West Wales Children's University.
- ❑ The college is collaborating with Pembrokeshire County Council in youth and community provision, which will be extended to Carmarthenshire, Pembrokeshire, Ceredigion and Gwent.
- ❑ Through participation in the South West Wales Spatial Plan Consortium the College is determined to ensure it plays a full role in supporting the spatial development of Carmarthenshire, the realization of the Haven concept in Pembrokeshire and supporting broader growth around Swansea Bay.
- ❑ The South West Wales e-Training Network supports the development and piloting of on line materials that will contribute to the project outcomes of the e-Training Network.

6.2.2 National level

- ❑ In support of Reconfiguration and Collaboration the College has developed an outline proposal identifying areas of potential collaboration

The College has established partnerships at international, national and local levels.

The Faculty of Education and Training provides continuing partnerships with 250 primary and 30 secondary schools in South and Mid Wales.

The College is determined to support the spatial development of Carmarthenshire, the realization of the Haven concept in Pembrokeshire and supporting broader growth around Swansea Bay.

with University of Wales Swansea and Swansea Institute covering management information systems student services, human resources, procurement and academic collaboration. It is the intention of all three institutions to deliver the virtual university of South West Wales.

- ❑ WAG and EU support has seen the delivery of Knowledge Exploitation Fund projects assisting 61 SMEs and over 359 beneficiaries.
- ❑ New Private Sector/ Educational Partnership to develop the use of digital technology
- ❑ Partnership with HEFCW has led to over 612 beneficiaries receiving graduate employment opportunities in the region through the GO Wales programme.
- ❑ The Geo-environmental Project Collaboration with University of Wales Cardiff has led to further partnerships with the private sector.

6.2.3 International level

- ❑ The college now has formal partnerships projects in place with several US and Japanese academic institutions.
- ❑ Through the INTERREG Community Initiative the College has developed partnerships and networks in Wexford, Carlow, Pembrokeshire and Carmarthenshire supporting tourism development and assist public procurement by SMEs.
- ❑ The College has formed The Welsh American Academy – a separate not for profit company with the aim of furthering cultural and educational links between Wales and Welsh Americans.

The College is working towards the creation of a virtual university of South West Wales.

WAG and EU support has seen the delivery of Knowledge Exploitation Fund projects assisting 61 SMEs and over 359 beneficiaries

7. Contribution to the National Assembly's Cross Cutting Themes

7.1 Strategic Context

Reaching Higher makes it clear that the Welsh Assembly Government expects Higher education to play its part in delivering the Assembly's wider priorities and principles, including those of sustainability, social inclusion, equal opportunities and the development of bilingualism.

7.2 Delivery

7.2.1 Bilingualism

- Trinity College has the largest percentage of its students (16 percent) of all the Higher Education Institutions in Wales studying through the medium of Welsh.
- The College saw a 30 percent increase in the number of students following Welsh/bilingual courses during academic year 2004/05.

7.2.2 Tackling Social Disadvantage

- Over 78 percent of students come from West Wales and the Valleys, a significant contribution when one considers that 57 percent of students in Higher Education Institutions across Wales are from Wales.²
- In 2005/06 4.9 percent of students came from Communities First wards, this proportion have increased by 25 percent since 2002/03.
- Approximately 40 percent of UCAS applicants are from C2DE social backgrounds

7.2.3 Equal Opportunities

- Approximately 75 percent of students are female, compared to 56 percent of students at Welsh Higher Education Institutions.³
- 3-3.5% of students are from an ethnic minority, compared to 9 percent in all Welsh Higher Education Institutions.⁴
- 10 percent of students are disabled, compared to 6 percent in all Welsh Higher Education Institutions⁵.

7.2.4 Sustainable Development

- The College is also exploring the development of a Sustainable and Ethical Business Centre in partnership with Swansea University.
- The College also supported the Education for Sustainability project that was designed as a positive response to the expectations placed on higher education establishments to play a significant role in promoting environmental awareness, understanding and competence. The project provided the skills and knowledge necessary to take forward sustainable development as a key

² HEFCW 2002/3

³ *Ibid*

⁴ *Ibid*

⁵ *Ibid*

College has the largest percentage of its students (16 percent) of all the Higher Education Institutions in Wales studying through the medium of Welsh .

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strategy in the future economic, social and environmental development of Wales and has assisted 165 beneficiaries since October 2000.

- The Heritage Tourism Training project provides postgraduate course in heritage tourism. It was developed as a sustainable approach to heritage tourism that provides students with an understanding of the diverse nature of 'heritage' and its interpretation for tourism. The course provided students with an understanding of issues relevant to Wales and in the wider context and has assisted 76 beneficiaries since October 2000.
- The College's representation on the South West Wales Spatial Plan Consortium allows the College to ensure it plays a full role in supporting the spatial development of Carmarthenshire playing, the realization of the Haven concept in Pembrokeshire and supporting broader growth around Swansea Bay. The College will seek to build sustainable communities, contribute to strong early years provision and access programmes in Communities First areas.
- The College is working on a geo-environmental research project led by Cardiff University and supported by major employers in South Wales to increase environmental sustainability through a range of focused activities.

10 percent of students are disabled, compared to 6 percent in all Welsh Higher Education Institutions

8. Conclusions

In undertaking a review of the institution we have considered the substantial policy changes that Universities and Colleges have faced over the last five years. In particular, the *Reaching Higher* agenda offers challenging planning assumptions to the sector. Trinity College has undertaken a realistic evaluation of its potential and capacity and has acted strategically in relation to these recommendations. The repositioning of the College since 2000 has enabled it to develop a position which is central to its delivery of WAG objectives.

The College offers a very distinctive brand of higher education in Wales. That brand is not available in any other Higher Education institution in Wales. Its commitment to lifelong learning is evidently clear. The College has identified its niche and has focused on providing added value within a number of key policy priorities of the WAG. There is clear evidence to support the claim that the new training schemes offered by the College since 2000 have had a positive impact. The vision of the College and the management drive to create a central learning hub for the region which delivers tangible outcomes in relation to the future needs of Wales is convincing. The clarity of the management action since 2000 in driving forward this agenda places the institution in a strong position.

We are of the view that the Welsh Assembly Government can build upon this distinctive contribution and further its educational and training priorities in a number of policy areas. Further investment is required to develop some of these initiatives. With the establishment of the new Department of Education and Lifelong Learning within the Assembly Government and the opportunities of developing integrated training proposals which address cross cutting themes we would recommend that further discussions be taken forward between the Assembly and the College.

Given the fact that Trinity offers University education to Welsh domiciled students, the strategic implications for the Assembly in considering value for money principles are significant. The value of the investment of Welsh taxpayers' money in this context is clear. The investment in higher education at Trinity College makes a difference not only to the individual students, but to the development of the regional knowledge base and the social and cultural regeneration of Wales; boosting community regeneration and improving the competitiveness of the economic base.

The investment in higher education at Trinity College makes a difference... to the development of the regional knowledge base and the social and cultural regeneration of Wales .

Annex 1

Trinity College, as an important HE institution in the Objective 1 Area, has a significant and beneficial impact on the local economy of Carmarthenshire and adjacent counties of West Wales. The stimulus it gives to the local economy comes largely through its expenditure outlays and the effect this has on local employment patterns. To ascertain the full economic benefits of Trinity's activities the College has commissioned an economic impact study.

The impact assessment has been undertaken using proven economic techniques to assess the degree to which the primary expenditure by Trinity College will spread out into the local and regional economy. This wider economic influence occurs as follows:

- Trinity spends directly on staffing and goods and services at its sites and elsewhere in the local area and sub-region;
- This expenditure creates further expenditure from initial recipients who spend a proportion of their income in the local economy and also amongst suppliers;
- A proportion of the goods and services bought by businesses and those employed by those businesses are sourced within the local area, inducing further income and employment as the direct and indirect expenditures work their way through the economy.

This process is known as the multiplier effect and has been extensively researched, modelled and refined over the years. The Wales input-output tables have been regionalised for this study to take account of the specific characteristics of the local economy.

Taking an average of Trinity's income and expenditure over the three years 2005 to 2007, it is anticipated that, at current values, the college will generate annual direct expenditure, both capital and revenue of approximately £12.5 million. When indirect and induced expenditures stimulated by this initial expenditure are taken into account, the financial impact on the local economy rises to just under £17.0 million per annum.

This is predicted to translate into 225 directly-created FTE (full time equivalent) jobs, rising to 299 FTEs in the local economy as a whole as indirect effects are taken into account.

This impact will be enhanced if linkages between the education sector and the regional economy (and in particular between Trinity College and the local business community), are augmented in ways that translate into the expansion of existing businesses.

Assessing the Economic Impact

On average over the period 2005-07 total income for Trinity College will be £11.1m. The main components of this income are HEFCW grants (£5.7m) and Other Operating Income (£3.2m) - this represents income from residences and catering. Tuition fees largely make up the rest of total income. The college spends most of this income on staff and learning resources. Total expenditure is around £10.9m and over 60% of spending is on staff (£6.7m) with the majority of the remaining spend being on operating expenses (£3.7m).

It is useful to break down the total economic impact into its direct and indirect components. In terms of economic impact, the total income received by Trinity and the related expenditure can be taken to represent the direct effect of the college on the local economy. Direct effects refer to the contribution the college itself makes via its spending on staff and goods and services. Further down the 'supply chain' the percentage of those employed by local suppliers that are directly affected by Trinity expenditure will also be 'induced' to spend a certain proportion locally. These direct effects on output and employment will have additional impacts as the wage income of staff and the receipts of suppliers are spent.

The total multiplier effects of this spending can be interpreted as 'induced-income' effects which are likely to be significant because most Trinity staff are resident in the county. The total impact of these 'supplier' effects will depend on the level of local sourcing.

We can use the total of direct expenditure to calculate some of the indirect economic effects of Trinity on local incomes and employment. To estimate the effect of the indirect expenditure generated by the college we will need to gauge the extent to which this spending is outlaid on local goods and services. For example, in relation to the total direct expenditure of Trinity (£10.9million) a certain proportion of this (around 40%) will be spent on goods and services (i.e. non staff expenditures). However, because of leakages from the local economy, the local effects are likely to amount to only 25% (just over £1m) of this total. This will be augmented to the extent that the staff spend a proportion of their incomes locally. A large element of this total expenditure is likely to be on locally provided public and professional services.

Undertaking a full analysis of these economic inter-relationships and spending patterns would typically require quite extensive survey work but a useful estimate of these direct, indirect and induced impacts on the regional economy of Carmarthen can be obtained by regionalising the Input-Output tables of the Welsh Economy developed by Cardiff Business School. These tables have been developed from survey work and other inter-sectoral research and they provide robust estimates of the interactions between different sectors of the local economy.

The tables suggest that the indirect effects of an institution such as Trinity are likely to be significant as the College is a significant local employer, and most expenditure is focused on the local economy. The total impact of Trinity will then be determined by the size of the multiplier effects that this expenditure succeeds in generating in the local economy. Multiplier effects are influenced by the extent to which Trinity expenditure is focused on local activities in the region and thereby generates spin-off benefits to existing businesses, or, where there is a gap in supply, to new businesses. Examples include construction and maintenance services, hotels, restaurants, retailing, arts and crafts, sporting activities, and so on. These local linkages are important to enhance the impact of the College on the local economy.

In addition to the expenditure profile, wider economic benefits can flow from the enhancement of the regional image, and the increased international awareness that can follow from well-marketed programmes by key HE institutions. By building on the distinctiveness of its educational offering Trinity will potentially have a much wider impact on the regional economy to the extent that it generates higher visitor numbers and spend in the area. In addition there are other more subtle contributions of Trinity to the local economy, mostly through its involvement in local networks – particularly in raising the skill levels of local managers in SMEs and developing an entrepreneurial culture. However, these

less tangible benefits in terms of image and awareness (and related networking and business linkages) are very difficult to forecast accurately, and therefore they have not been included in the impact assessment.

One additional effect that we have estimated is the extent to which international student expenditure has an additional impact on the economy: i.e. expenditure from Trinity's international students and to some extent students from other parts of the UK. This spending can be interpreted as a contribution to local exports. However, the majority of this spend is in the form of tuition fees and this has already been taken into account in the expenditure profile described above. Only additional spending by international students on **local** goods and services can be added to total spend to increase the total impact. The additional spending of these students is likely to be in the order of approximately £1m. However, this has to be adjusted (downwards) for the amount these students spend on **non-local** goods and, with multipliers effects, this local expenditure is then estimated to have a small additional impact of £0.4m.

Assessing the Impact of Project Trinity College – Jobs and Incomes

The projections, estimates and measurements of economic impact developed in the report are based on the detailed financial data and forecasts supplied by Trinity College and on the latest economic models and methodology. The financial plan identifies both infrastructure expenditure and ongoing revenue expenditure. The sectoral distribution of jobs and related measurements have used the NOMIS database and ONS data. Through the use of these data sets, and the application of the Wales input-output model, the report establishes cautious projections for the impact of Trinity College on the regional economy.

Trinity College Financial Projections: Average Annual Spend 2005-07

	Av 2005-07
Income	
Hefcw Grants	5,647
Tuition Fees	1,893
Other operating Income	3,408
Investment Income	112
	11,060
Expenditure	
Payroll	6,696
Other operating Costs	3,663
Depreciation	400
Interest Payable	123
	10,883
Capital Spend	
Buildings	1,271
Equipment	94
Motor Vehicles	
	1,365
Capital Receipts	
Buildings	349
Equipment	29
	378

The comprehensive financial profile, in terms of both revenue and capital spend, and detailed analysis of staff and student numbers were made fully available to Bute to undertake this economic impact assessment.

The £1.4m of capital expenditure and the £11m of annual ongoing revenue expenditure represent the key inputs into the local and regional economy. The average annual income and spend for the period 2005 to 2007 have been calculated and taken as the main driver of the input-output model.

Both the capital expenditure and revenue expenditure will create new jobs. It is assumed that on average approximately £38k of spend generates one job in the construction sector and £34k generates one job in the public sector. However, these expenditure figures do not imply that new employees receive these amounts in wages but rather that this amount of expenditure is required to induce the public and business sectors to offer additional employment.

Translating financial data into economic impact forecasts

Using the base line 'input' data provided by the financial projections in Table 1 and integrating these into the input-output tables detailed in Tables 4 and 5, it is possible to estimate the likely total impact on the regional economy of the financial expenditure profiles, along with the income and employment multipliers.

The revenue expenditure in Table 1 indicates that £11 million will be spent on staff and purchasing other goods and services directly related to the functioning of Trinity College. The final impact in terms of income and jobs is highlighted in Tables 2 and 4. These tables highlight the linkages whereby the initial revenue expenditure of £11m creates additional indirect expenditures leading to an overall increase of £15.4m. We can then add the expenditure effect of international students to bring the total to £15.9m.

Capital expenditure for the period is £1.4m. Not all of the initial capital expenditure is likely to be spent within the local economy. Inevitably, some construction payments will be used to purchase goods and services from outside the region. It is not always possible to purchase some components locally because there may be no company within the area that can supply the goods or service required. For this reason, and based on estimates from the input-output tables, we have assumed that up to 40% of capital expenditure will be spent on resources that come from outside the local economy. Therefore the capital expenditure that will impact on the (broader) Carmarthenshire area is 60% of £1.4million (or £0.8m). The capital expenditure of £0.8m creates knock-on effects on other sectors that will result in total expenditures eventually rising by approximately £1m with associated income flows.

The overall impact on the local economy of both revenue spend (£15.4m), capital expenditure (£1m) and international student spending (£0.4m) will total around £16.8million.

The average revenue expenditure directly creates 225 FTE (full time equivalent) jobs over the period and a further 74 indirect jobs, leading to a total employment creation of 299 FTEs and the likely sectoral breakdown of these jobs is also set out in the Tables. Similarly, the direct and indirect capital expenditure will generate employment along with the spending by international students. It is estimated that these additional expenditures will support around 25 jobs. The overall total will be approximately 324 jobs sustained by the activities of Trinity.

Employment supported by Trinity College.

Relating this expenditure to employment directly and indirectly supported by Trinity College the Table shows that the College employs 225 FTEs. The output indirectly generated by this spending supports a further 74 FTE jobs. Put another way each FTE in Trinity supports a further 0.33 of a job elsewhere in the regional economy (i.e. an employment multiplier of 1.33).

The Table shows that 78% of these additional jobs will be created in the service sector : 28% in public services and 24% in distribution, hotels and transport and 26% are in other private services. Because the university sector is fairly labour intensive the employment multiplier effects, although significant, are not as large as more capital intensive sectors of the economy.

Table 2

Impact of Trinity on Jobs	FTEs
Direct Expenditure	225
Additional jobs generated in:	
Agric, Food and Paper	2
Other Manufacturing sectors	5
Energy and construction	10
Distribution, Hotels and transport	18
Private services	18
Public and other services	21
Total	299

In terms of the amount of direct and indirect employment supported per £1m of direct spend: an estimated 27.5 FTE jobs in the regional economy. (Or £36,800 of spend generates 1 job.) It is also possible to look at the expenditure effects in terms of each £1 million of spend. On average, the expenditure will generate the following multiplier effects:

Table 3 Multiplier Effects: Each £1 million of Expenditure

	Initial	First round	Indirect	Induced	Total
Increase in Expenditure per £1m spend	£1.00m	£0.22m	£0.06m	£0.12m	£1.40m
Increase in Jobs per £1m spend	20.5	4.2	0.8	2.5	27.5

Table 3 shows the additional income and employment that will be generated on average in the (broadly defined) Carmarthen area from an initial £1 million of expenditure. The multiplier process will initially generate an additional £0.22 million increase in income which will induce further expenditure. When the total multiplier effect is added to the initial expenditure this gives a total increase in expenditure of £1.40 million from both indirect and induced effects. Not all of this expenditure and related income will remain in the regional economy but the impacts are larger for revenue than for capital because there are fewer leakages from the local economy. The input-output tables give an indication of the leakages that are likely to take place.

Multipliers

The tables below show how expenditure works its way through various sectors of the economy. Tables 4 and 5 show the effect of revenue expenditure.

Table 4

Revenue Expenditure in 6 sectors					
21 Sectors	Initial	First round	Indirect	Induced	Total
Agri. food, paper	...	0.0057	0.0019	0.0048	0.0126
	...				
Other Manufacturing	...	0.0211	0.0028	0.0028	0.0269
	...				
Energy, Construction		0.0159	0.0054	0.0141	0.0353
Distribution Hotels, Transport etc	...	0.0203	0.0090	0.0469	0.0758
	...				
Banks and Bus Services	...	0.0817	0.0224	0.0327	0.1368
Public Services	...	0.0770	0.0152	0.0229	0.1152
Total					
Income Multiplier				0.4025	0.4026

Impact of Trinity	
Direct Expenditure	
Additional indirect outputs generated in:	
Agric, Food and Paper	£0.14
Other Manufacturing sectors	£0.29
Energy and construction,	£0.38
Distribution, Hotels and transport	£0.83
Private services	£1.49
Public and other services	£1.26
Total	£4.39

Based on detailed table over

Table 5 Trinity multipliers adjusted					
Revenue Expenditure averaged over 3 years					
21 Sectors	Initial	First round	Indirect	Induced	Total
Agriculture	...	0.0002	0.0000	0.0000	0.0003
Food	...	0.0002	0.0001	0.0030	0.0033
Textiles	...	0.0000	0.0000	0.0001	0.0001
Wood etc	...	0.0031	0.0004	0.0004	0.0040
Paper & Print	...	0.0021	0.0014	0.0013	0.0049
Chemicals	...	0.0002	0.0000	0.0002	0.0005
Rubber	...	0.0001	0.0000	0.0000	0.0002
Ceramics etc	...	0.0147	0.0017	0.0002	0.0166
Metals	...	0.0009	0.0001	0.0004	0.0016
Engineering	...	0.0024	0.0005	0.0009	0.0037
Electronics	...	0.0004	0.0001	0.0003	0.0007
Vehicle	...	0.0003	0.0001	0.0003	0.0007
Manufactures	...	0.0021	0.0003	0.0005	0.0029
Energy/Water	...	0.0079	0.0025	0.0121	0.0224
Construction		0.0079	0.0029	0.0020	0.0128
Distrib/Retail	...	0.0136	0.0026	0.0355	0.0517
Hotels etc		0.0009	0.0005	0.0021	0.0034
Transport etc	...	0.0057	0.0059	0.0093	0.0206
Banks etc	...	0.0453	0.0136	0.0088	0.0677
Bus Services	...	0.0364	0.0088	0.0238	0.0690
Education/Public	£10.90	0.0752	0.0141	0.0094	1.0988
Health	...	0.0005	0.0002	0.0023	0.0030
Recreation etc	...	0.0006	0.0006	0.0077	0.0089
Other service	...	0.0007	0.0002	0.0035	0.0045
Total		0.2217	0.0567	0.1241	1.4026
Income Multiplier				0.4025	1.4026

Annex 2: Equal Opportunities and Social Disadvantage

Year	02/03	03/04	04/05	05/06
Percentage from Objective 1 Area	85	82	81	78
Percentage from Communities First Area	3.7	4.2	4.1	4.9
Percentage Female	73	74	77	75
Percentage Ethnic Minority	3	3	3.5	3.5
UCAS Percentage C2/D/E Social Class	40	40	41	39
Percentage receiving qualifications Aged 26-65	73	57	47	
Percentage going on to FTE	58	60*		
Percentage Disabled	8.5	9.1	10	10.7

Annex 3: International Student Numbers

Year	02/03	03/04	04/05	05/06
% International Students	6	6	6.5	7
Number	188	163	171	159
No of Countries of Origin	20	17	24	24
US	73	63	61	64
Republic of Ireland	69	59	57	46
Rest of EU	32	33	33	28
Asia	5	2	7	6