## City and County of Swansea

## Notice of Meeting

You are invited to attend a Meeting of the

# Scrutiny Performance Panel – Development & Regeneration

**At:** **Remotely via Microsoft Teams**

**On:** **Tuesday, 8 March 2022**

**Time:** **10.00 am**

**Convenor:** **Councillor Jeff Jones**

**Membership:**
Councillors: P M Black, P Downing, E W Fitzgerald, S J Gallagher, D W Helliwell, T J Hennegan, C A Holley, P R Hood-Williams, L James, M H Jones, P K Jones, S M Jones, W G Thomas and T M White

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## Agenda

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| 1 | **Apologies for Absence** | |
| 2 | **Disclosure of Personal and Prejudicial Interests**<br>www.swansea.gov.uk/disclosuresofinterests | |
| 3 | **Prohibition of Whipped Votes and Declaration of Party Whips** | |
| 4 | **Minutes of Previous Meeting(s)**<br>To receive the minutes of the previous meeting(s) and agree as an accurate record. | 1 - 3 |
| 5 | **Public Questions**<br>Questions must be submitted in writing, no later than noon on the working day prior to the meeting. Questions must relate to items on the agenda. Questions will be dealt with in a 10-minute period. | |
| 6 | **South West Wales Regional Economic Delivery Plan**<br>Cllr Rob Stewart – Cabinet Member for Economy, Finance & Strategy<br>Cllr Robert Francis-Davies – Cabinet Member for Investment, Regeneration & Tourism<br>Phil Holmes - Head of Planning and City Regeneration<br>Clare James – Economic Development Manager | 4 - 65 |

Huw Evans

**Huw Evans**
**Head of Democratic Services**
**Tuesday, 1 March 2022**

**Contact: Scrutiny Officer - 01792 637257**

Cyngor **Abertawe**
**Swansea** Council

**City and County of Swansea**

# Minutes of the Scrutiny Performance Panel – Development & Regeneration

**Remotely via Microsoft Teams**

**Tuesday, 25 January 2022 at 11.00 am**

**Present**: Councillor J W Jones (Chair) Presided

| **Councillor(s)** | **Councillor(s)** | **Councillor(s)** |
|---|---|---|
| P Downing | E W Fitzgerald | S J Gallagher |
| D W Helliwell | T J Hennegan | C A Holley |
| P R Hood-Williams | L James | M H Jones |
| P K Jones | S M Jones | T M White |

**Cabinet Members**

| | |
|---|---|
| Robert Francis-Davies | Cabinet Member for Investment, Regeneration & Tourism |
| David Hopkins | Cabinet Member for Delivery and Operations |
| Rob Stewart | Cabinet Member for Economy Strategy and Finance |

**Others**

| | |
|---|---|
| Geoff Bacon | Head of Property Services |
| Emily Davies | Scrutiny Officer |
| Andy Pearson | Communications and Marketing Officer |
| Russell Greenslade | Chief Executive, Swansea BID |

**Apologies for Absence**
Councillor(s): P M Black and W G Thomas

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## 33 Disclosure of Personal and Prejudicial Interests

No interests were disclosed

## 34 Prohibition of Whipped Votes and Declaration of Party Whips

No declarations were made

## 35 Minutes of Previous Meeting(s)

The Panel considered minutes from previous meetings and agreed the minutes of the meeting on 2 November 2021 as an accurate record of the meeting.

## 36 Public Questions

No questions were submitted by members of the public

## 37 Swansea Business Improvement District (BID) - Overview

The Panel received an overview presentation, submitted by Russell Greenslade, Chief Executive of Swansea BID. Discussions focused on the following points:

- *Swansea BID* is one of the original BIDs in the UK and the first in Wales. It was established in August 2006, after being given a positive mandate by a ballot of businesses/organisations in the designated BID area.
- *Swansea BID* operates within the top 20% of BIDs in UK based on it's performance and management.
- Members queried how this performance is measured. The Panel heard that this is calculated by an independent body of national stakeholders.
- It was explained that *Swansea BID* is a not-for-profit private sector company with its own board of Directors made up of Private, Public and Third sector representatives that financially contribute towards the BID company.
- It was highlighted to the Panel that the Local Authority is a key strategic partner.
- Members asked if any businesses have now withdrawn or chosen not to contribute to the BID levy. The Panel heard that all businesses contribute, equating to about 813 within the *Swansea BID* area.
- Members queried the exact area covered by Swansea BID.
- Members heard that many new shops that have opened are independent retailers, demonstrating an increase in uptake in vintage clothing and ethical retailing, linking into the student market.
- National traders have also opened as well as independent traders, helping to drive footfall.
- Members queried whether any other areas outside of the central BID area could be included. The Panel heard that, Mumbles, for example had begun to look into setting up a separate BID prior to the pandemic.
- From the BIDs view point, the Panel heard that the City Centre developments have created a new upbeat positivity about the area and are welcomed and supported by the City Centre business community.
- Members commented on previous work of *Swansea BID* and the valuable nature of the work undertaken.
- The Panel remarked on the challenges faced by city centres across the country.
- The Panel heard that Swansea's regeneration projects have been remarked upon by the *London BID*, in relation to the progress and speed of projects.
- It was highlighted that businesses are adapting to an increase in people living in the City Centre, and a need to promote the night time economy.
- Members queried the impact of the closures of large retailers on the city centre trade and how this empty space will be promoted.
- The Panel heard that Swansea was the first place in the UK to install designated click and collect parking spaces in the City Centre.
- Members commented positively on the idea of displays in vacant shop windows, rather than leaving shop windows empty.

- The Panel raised queries over whether the Marks & Spencer food store in Mumbles had made an impact on the City Centre. It was explained that Marks & Spencer had expected an impact and had factored this into their product lines and operations.

## 38 Foreshore Developments - Verbal Update

The Panel heard a limited overview of the current position, in relation to the existing Swansea Bay Strategy. It was agreed that the Panel write to the Cabinet Member outlining specific areas of interest, a response to which could then be submitted to the Panel *in camera* if appropriate.

## 39 Project Update Report

The Panel noted the report, for information.

## 40 Work Programme

The Panel noted the work programme

## 41 Letters

The meeting ended at 12.00 pm

Agenda Item 6

Cyngor Abertawe
Swansea Council

**Report of the Cabinet Member for Economy, Finance & Strategy**

**Development & Regeneration Scrutiny Performance Panel – 8 March 2022**

# South West Wales Regional Economic Delivery Plan

| | |
|---|---|
| **Purpose:** | To brief the Scrutiny Panel on the Regional Economic Delivery Plan for South West Wales |
| **Content:** | A briefing on the new South West Wales Regional Economic Delivery Plan that will replace the 2013 Swansea Bay City Region Economic Regeneration Strategy as the council's economic regeneration policy. |
| **Councillors are being asked to:** | Consider the information provided and give views |
| **Lead Councillor:** | Councillor Rob Stewart, Cabinet Member for Economy, Finance & Strategy |
| **Lead Officer & Report Author:** | Phil Holmes<br>Tel: 01792 636979<br>E-mail: phillip.holmes@swansea.gov.uk |

## 1. Introduction

1.1 It has been eight years since the publication of the Swansea Bay City Region Economic Regeneration Strategy in 2013, and the economic and policy context has changed considerably at the Welsh and UK level since then, particularly in light of the UK's decision to leave the European Union and the impact of the covid-19 pandemic. In addition, the regional landscape is changing with the advent of the new Corporate Joint Committees, and the preparation of new Regional Economic Frameworks by Welsh Government that set out visions and high level priorities for each region in Wales.

1.2 To respond to changing circumstances, the four local authorities in South West Wales, in partnership with Welsh Government, commissioned SQW to produce a new Regional Economic Delivery Plan (REDP). This will replace the previous Swansea Bay City Region Economic Regeneration Strategy.

1.3 The REDP commission included:

- A thorough analysis of the evidence base on the region's economy, labour market and infrastructure to determine its strengths, weaknesses, opportunities and threats
- Interpretation of the strategic policy context at local, regional and national level
- Development of detailed strategic aims and objectives that respond to the economic opportunities for the region and complement the shared regional vision as articulated in the Regional Economic Framework
- Preparation of Regional Economic Delivery Plan that includes actions that need to be taken to achieve the vision and objectives

1.4 The Regional Economic Delivery Plan is attached at Appendix A

1.5 The REDP complements the new Welsh Government Regional Economic Framework (REF) and provides a further layer of detail below the REF, outlining the objectives and actions that will deliver against the high level vision in the REF.

1.6 The REDP sets out an ambitious 'route map' for the development of the region's economy over the next ten years, identifying priorities for intervention and setting out how business, government, education, voluntary/ community organisations, social enterprises and other partners can work together to bring them forward.

## 2. South West Wales Regional Economic Delivery Plan

2.1 The REDP identifies that South West Wales has a diverse economy and a unique set of natural and cultural assets, underpinned by the quality of its coastal and rural environment, industrial heritage and university presence.

2.2 The economic analysis shows:

- In the years leading up to the Covid-19 pandemic, the South West Wales economy performed strongly in generating new jobs: by 2019, there were 322,000 jobs in the region, an impressive increase of 20,000 on the 2013 figure.
- The productivity gap with the rest of the UK has narrowed slightly over time but is still substantial, with regional productivity (GVA per filled job) standing at 80% of the UK level in 2018.
- Economic activity rates in South West Wales have improved at a faster pace than the rest of the UK over the past 15 years, but the rate continues to fall behind the UK average: the economic activity rate in South West Wales was 73.8% in 2018, compared with 78.9% across the UK.
- There has been a steady improvement in qualification levels with 35% of the working age population qualified to NVQ level 4+ (degree level) compared to 22% in 2004, and the proportion with no qualifications has halved over the same period, but in relative terms there is a still a gap with the rest of the UK

- The business base grew in the years leading up to the pandemic but the number of enterprises relative to the working age population (enterprise density) and start up rates remain lower than the rest of the UK.
- There is a widely recognised gap between demand and supply for industrial premises, with low rental levels affecting the viability of private sector led developments.
- Across the region concentrations of disadvantage are significant, principally in the urban centres of Swansea, Llanelli, Neath, Port Talbot, Pembroke Dock and upper Western Valleys.

2.3 Overall, the review of economic performance suggests good progress over recent years, especially in terms of job creation, but there is a persistent gap in outcomes between the region and the rest of the UK. This reflects the 'structural' nature of many of the region's challenges linked to the long-term processes of industrial change (which in some respects are still ongoing), and are shared with other regions in Wales and the UK.

2.4 The review has also identified a series of distinctive strengths and opportunities in South West Wales, especially linked with the region's energy potential (particularly green energy and the net zero opportunity), university-industrial links, strong cultural identity, environmental assets and quality of life offer. The REDP aims to build on these distinctive regional strengths and opportunities to develop a more prosperous and resilient South West Wales economy.

2.5 Unlike the previous Economic Regeneration Strategy, which was predominantly focused on improving productivity, the REDP recognises that 'Transformational' growth opportunities need to be balanced with the conditions for incremental improvements in resilience, capacity and capability across the whole of the economy. This was a key theme that emerged from consultation with regional partners during the preparation of the Plan. While there are distinctive opportunities to pursue at the 'leading edge', long-term employment resilience and wage growth is going to depend on the sustainability, productivity and expansion of the wider stock of regional businesses.

2.6 To help plan for the future, the REDP sets out three 'Ambitions' which set out the nature of the South West Wales economy that we want to work towards. These are:

- Resilient and sustainable
- Enterprising and ambitious
- Balanced and inclusive

2.7 The ambitions are supported by three complementary Missions, which will guide activity over the next ten years:

- Mission 1 – Establishing South West Wales as a UK leader in renewable energy and the development of a net zero economy: Taking forward the region's major energy related projects and driving the benefits through the region (via industrial decarbonisation, supply chain opportunities, university-linked innovation, etc.).
- Mission 2 – Building a strong, resilient and embedded business base: Understanding and growing the business stock, supporting widespread social and commercial entrepreneurship, creating stronger supply chain and innovation networks, making public sector support sustainable; driving forward technology adoption and diffusion.
- Mission 3 – Growing and sustaining the 'experience' offer: Linking environmental quality, quality of life and community character to create a region that retains and attracts talent and investment, and to promote this consistently and powerfully to the outside world

2.8 The REDP sets out some initial key action areas to deliver against the ambitions and missions. These actions will form the basis of a 'living' action plan document that will be regularly reviewed by regional partners and will evolve to embrace new investment proposals as they emerge.

2.9 The REDP was approved by Cabinet on January 20th and will become the Council's over-arching economic regeneration policy document to replace the 2013 Swansea Bay City Region Economic Regeneration Strategy. The REDP is also going through the approvals process in the other local authorities in South West Wales.

2.10 The new Regional Economic Delivery Plan will be owned and overseen by the new South West Wales Corporate Joint Committee (CJC). Once the CJC is formally constituted, it is proposed that the REDP will be presented for adoption as the regional strategy for economic wellbeing. Supporting the CJC, the Regional Regeneration Directors will keep track of progress and will be responsible for developing business cases, securing investment and ensuring delivery on the CJC's behalf.

## 3. Integrated Assessment Implications

3.1 The Council is subject to the Equality Act (Public Sector Equality Duty and the socio-economic duty), the Well-being of Future Generations (Wales) Act 2015 and the Welsh Language (Wales) Measure, and must in the exercise of their functions, have due regard to the need to:

- Eliminate unlawful discrimination, harassment and victimisation and other conduct prohibited by the Acts.
- Advance equality of opportunity between people who share a protected characteristic and those who do not.
- Foster good relations between people who share a protected characteristic and those who do not.
- Deliver better outcomes for those people who experience socio-economic disadvantage

- Consider opportunities for people to use the Welsh language
- Treat the Welsh language no less favourably than English.
- Ensure that the needs of the present are met without compromising the ability of future generations to meet their own needs.

3.2 The Well-being of Future Generations (Wales) Act 2015 mandates that public bodies in Wales must carry out sustainable development. Sustainable development means the process of improving the economic, social, environmental and cultural well-being of Wales by taking action, in accordance with the sustainable development principle, aimed at achieving the 'well-being goals'.

3.3 Our Integrated Impact Assessment (IIA) process ensures we have paid due regard to the above. It also takes into account other key issues and priorities, such as poverty and social exclusion, community cohesion, carers, the United Nations Convention on the Rights of the Child (UNCRC) and Welsh language.

3.4 An Integrated Impact Assessment (IIA) screening has been completed and is attached at Appendix B. This tool confirms that a full IIA is not required on the Regional Economic Delivery Plan.

3.5 The REDP sets the strategic direction for economic regeneration regionally and locally over the next ten years. The REDP aims to create an economy that is resilient and sustainable; enterprising and ambitious; and balance and inclusive. It is expected to have a positive impact on people and communities in Swansea by improving economic performance and creating sustainable employment opportunities.

3.6 In line with the Equality Act 2010 and Public Sector Equality Duty, due regard will be given to the impact on protected groups in the development and delivery of all the actions that flow from the REDP. All actions will be screened and full IIAs will be undertaken if appropriate in the future as the actions progress.

## 4. Financial Implications

4.1 There are no immediate and direct implications arising from this report. Any actions stemming from the Regional Economic Delivery plan will need to identify the nature, timing and design of any programmes or projects and the resulting costs and funding prior to any investment decisions being made.

4.2 Council specific future costs will continue to fall to each Council to consider and fund as part of the usual budget management and investment decision making process. Aspects of the wider regional work and some of the future potential funding solutions will fall to the CJC which has revenue levying powers on the constituent Councils of the CJC and thus ultimately still become an individual charge on Council budgets.

## 5. Legal Implications

5.1 There are no specific legal implications at this stage.

**Background Papers:**

Swansea Bay City Region Economic Regeneration Strategy
Welsh Government South West Wales Regional Economic Framework: South-west Wales regional economic framework (gov.wales)

**Appendices:**

| | |
|---|---|
| Appendix A | South West Wales Regional Economic Delivery Plan |
| Appendix B | Integrated Impact Assessment Screening Form |

September 2021

# South West Wales Regional Economic Delivery Plan

SQW

Cyngor Sir Gâr Carmarthenshire County Council

Neath Port Talbot County Borough • Bwrdeistref Sirol Castell-nedd Port Talbot

Cyngor Sir Penfro - Pembrokeshire County Council

Cyngor Abertawe Swansea Council

# Contents

# Executive Summary

## Background

1. South West Wales has a diverse economy and a unique set of natural and cultural assets, underpinned by the quality of its coastal and rural environment, industrial heritage and capacity and university presence. In 2014, partners in South West Wales jointly published an Economic Regeneration Strategy, setting the strategic groundwork for the Swansea Bay City Deal, a £1.3 billion investment package supported by the UK and Welsh Governments.

2. Seven years on, much has been achieved. However, there is more to be done to unlock the region's potential and to ensure that growth is resilient, sustainable and inclusive. In December 2020, the South West Wales local authorities, working closely with the Welsh Government, commissioned a new **Regional Economic Delivery Plan**. Looking ahead to the next ten years, this sets out an ambitious 'route map' for the development of the region's economy, identifying priorities for intervention and articulating how business, government, education, voluntary, community and social enterprise organisations and other partners should work together to bring them forward.

## The economic and policy context

3. In the years leading up to the Covid-19 pandemic, the South West Wales economy performed strongly in generating new jobs: By 2019, there were some 322,000 jobs in the region, an impressive increase of 20,000 on the 2013 figure. However, there is still a large and persistent productivity gap with the rest of the UK.

4. Analysis of the region's economy highlights that:

- **The region's economic weaknesses are largely structural**, linked with long-term processes of industrial change (which in some respects are still ongoing), and are shared with other regions in Wales and the UK.
- **However, the region has a series of distinctive strengths and opportunities.** These are especially linked with the region's energy potential, university-industrial links, strong cultural identity, environmental assets and quality of life offer..
- **There is a 'window of opportunity' to build on and capture some of these,** especially in relation to the green energy and net zero opportunity, where the region has specific advantages, but where other parts of the UK (and beyond) also have ambitious plans and technology and the dynamics of investment are changing rapidly. **Having the capacity to exploit these opportunities will be important and the timing of this matters greatly**.
- **The region contains much diversity**, especially within the rural/ urban dimension. Despite diversity across the region, there is substantial commonality, and some of the big opportunities have a region-wide footprint. However, some of them extend beyond the

region itself, and 'out-of-region' links (for example, the South Wales Industrial Cluster and the links through to Cardiff Capital Region) will be of relevance.

- **'Transformational' growth opportunities need to be balanced with the conditions for incremental improvements in resilience, capacity and capability across the economy.** This was a key theme emerging from consultation as part of this Plan. There are distinctive opportunities at the 'leading edge' – but long-term employment resilience and wage growth will depend on the sustainability, productivity and expansion of the wider stock of regional SMEs.

5. The Plan has also been developed against the backdrop of a rapidly evolving policy context, as the region recovers from the Covid-19 pandemic and adjusts to a new trading and funding landscape following Brexit. However, looking to the next ten years, the climate emergency, the pace of (and adaption to) technology change and the need to ensure that the benefits are captured locally and are widely distributed will be central to economic strategy.

## Our Ambitions and Missions for the next ten years

6. Over the next ten years, we will build on our distinctive strengths and opportunities summarised above to develop a more prosperous and resilient South West Wales economy.

7. To help plan for the future, we have identified three **Ambitions** (statements about the nature of the South West Wales economy that we want to work towards), supporting three complementary **Missions**:

**Figure 1: Our strategic framework**


*Source: SQW 2021*

8. Our three 'Missions' will guide future activity over the next ten years and beyond. They are designed to give a clear direction of travel, while remaining sufficiently broad to accommodate a wide range of potential investments that will come forward over time. The three high-level Missions are as follows:

- **Establishing South West Wales as a UK leader in renewable energy and the development of a net zero economy:** Taking forward the region's major energy related projects and driving the benefits through the region (via industrial decarbonisation, supply chain opportunities, university-linked innovation, etc.).
- **Building a strong, resilient and embedded business base:** Understanding and growing the business stock, supporting widespread social and commercial entrepreneurship, creating stronger supply chain and innovation networks, making public sector support sustainable; driving forward technology adoption and diffusion.
- **Growing and sustaining the 'experience' offer:** Linking environmental quality, quality of life and community character to create a region that retains and attracts talent and investment, and to promote this consistently and powerfully to the outside world.

## Delivering the Plan

9. To translate our Missions into practical interventions, we have prepared a **project pipeline**. This sets out a schedule of interventions, describing how they contribute to our Ambitions and Missions, their current development status and the actions that need to be taken to bring them forward. This will be kept 'live': it will regularly be reviewed by regional partners and will evolve to embrace new investment proposals as they emerge.

10. Currently, the projects within the pipeline have a combined value of around £3 billion. While some are at an early stage of development, and costs will be determined through the business case process, this gives an indication of the scale of the opportunity ahead. Building on the success of the current Swansea Bay City Deal, we will pursue the creation of a further, flexible **Investment Fund** to co-invest alongside the private sector in projects that will deliver our Missions, where business cases are robust.

11. To oversee the strategic direction of the Plan, a new **South West Wales Corporate Joint Committee (CJC)** has been established, enabling the four local authorities to work closely together alongside the Welsh Government and to share resources. Building on our recent success, and alive to the immediacy of our current challenges and opportunities, the CJC will drive forward our Delivery Plan – building a South West Wales that is *"resilient and sustainable; enterprising and ambitious; and balanced and inclusive".*

# 1. Introduction

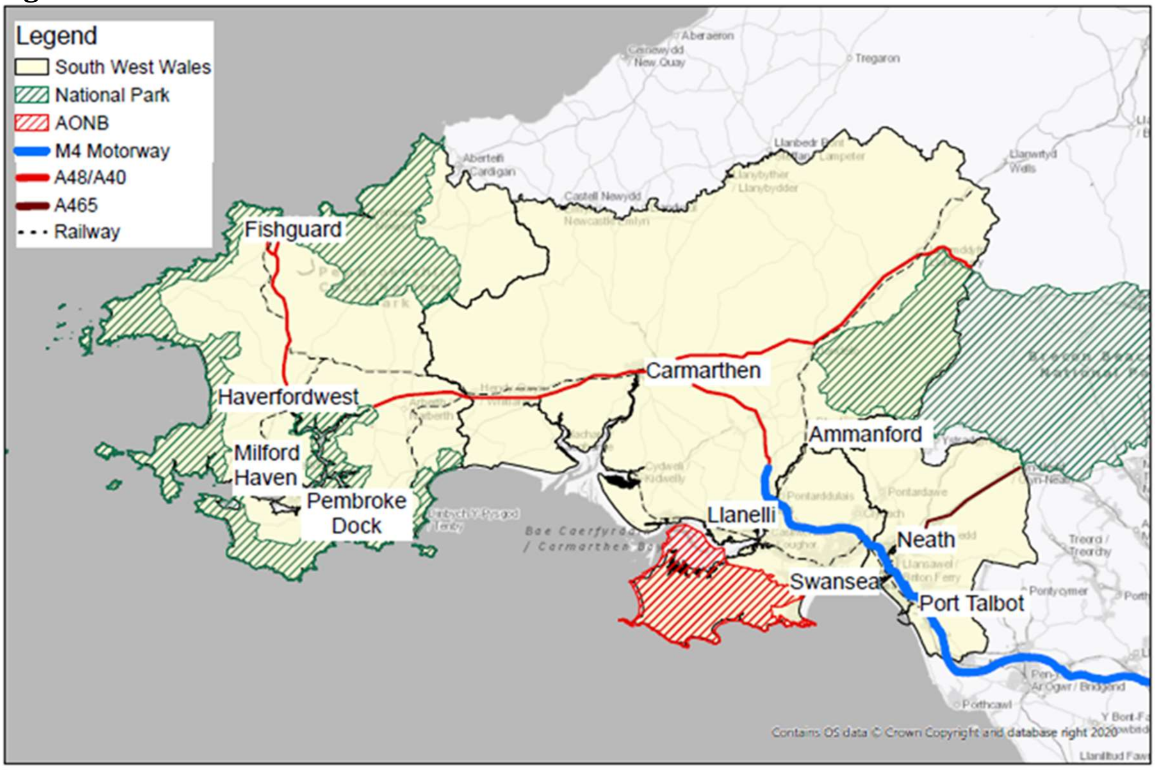
*Welcome to the* ***Regional Economic Delivery Plan*** *for South West Wales. Looking ahead to 2030, this Plan sets out our ambitions for a resilient, broad-based and sustainable economy – and outlines where we will focus our efforts in the next few years to realise them.*

## Introducing South West Wales

1.1 Extending from Neath Port Talbot in the east to Pembrokeshire in the west, via Swansea and Carmarthenshire, South West Wales has a diverse economy and a unique set of natural and cultural assets.

1.2 Economically, our industrial heritage combines with some of the UK's most significant marine energy potential, driving major opportunities for decarbonisation and the growth of the UK's Green Economy. Environmentally, the coastline and countryside – including the Pembrokeshire Coast and Brecon Beacons National Parks and the Gower Area of Outstanding Natural Beauty – contribute to a superb visitor offer and quality of life. Culturally, the region encompasses the dynamic, growing university city of Swansea, a diverse and distinctive network of rural towns and an increasingly vibrant Welsh language.

**Figure 1-1: South West Wales in context**




*Source: Produced by SQW 2021. Licence 100030994. Contains OS data © Crown copyright [and database right] (2020)*

## A bold and inclusive new economic delivery plan

**1.3** In 2014, partners in South West Wales jointly published an **Economic Regeneration Strategy**, setting the strategic groundwork for the Swansea Bay City Deal, a £1.3 billion investment package supported by the UK and Welsh Governments.

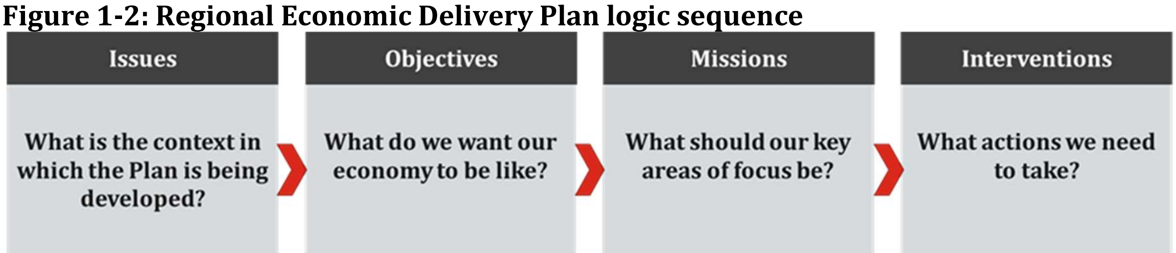
**1.4** Seven years on, much has been achieved. The region's knowledge and research capacity has been supported through the delivery of major facilities such as the Swansea Bay Campus and continued investment in industry-academic links. The economic opportunities associated with the growth of the health economy have been reinforced through the development of the new Institute of Life Sciences and the start of work on the Pentre Awel health and wellbeing campus in Llanelli. S4C's new headquarters has opened in Carmarthen, accompanied by a concentration of creative media businesses; substantial investment has continued to flow into Pembrokeshire's offshore renewable opportunities; and Swansea city centre's ambitious regeneration programme is well underway. There has been major investment in our digital connectivity, with exciting plans for a more sustainable regional transport system through Swansea Bay and South West Wales Metro.

**1.5** This provides a strong platform for future growth. However, as the analysis in Chapter 2 makes clear, there is more to be done to unlock the region's potential and to ensure that growth is resilient, sustainable and inclusive. Looking to the next ten years and beyond, the South West Wales local authorities, working closely with the Welsh Government, have prepared this **Regional Economic Delivery Plan** to ensure that we make the most of the exciting growth opportunities that are ahead of us.

## Combining strategic clarity with delivery flexibility

**1.6** In developing the Plan, we have followed a sequential approach. First, we started with a fresh view of the **evidence**, considering the 'state of the region' and the outlook for the future. This informed our high-level **objectives**, setting out *"what we want our economy to be (more) like"*. These provided a framework for a series of clearly-defined **missions**: key areas of focus for the next ten years, and the **interventions**, or project activities, needed to achieve them:

**Figure 1-2: Regional Economic Delivery Plan logic sequence**




*Source: SQW*

**1.7** However, we live an uncertain and dynamic world, and over the lifetime of this Plan, we will need to respond to new challenges and opportunities (and new ideas and investments that are yet unforeseen). **A resilient plan is a flexible and agile plan:** while this document provides strategic clarity and focus on our priorities, we anticipate that project actions and investments will evolve over time.

## Navigating the changing strategic context

1.8 This Plan is developed in the context of (and contributes to) a range of plans and strategies developed at local, national and UK level. Looking across the strategic landscape, a number of themes are especially relevant to this Plan:

- First, the **Well-being of Future Generations Act 2015** requires public bodies in Wales to consider the long-term impact of their decisions across all aspects of wellbeing. The Act outlines seven 'wellbeing goals' – and public policy should contribute to all of them, not just one or two. For an economic plan, that means that in delivering "a prosperous region", we should also contribute to a region that is more resilient, equal, healthy, cohesive and globally responsible, and which enjoys a vibrant culture and Welsh language[1]. The principles of the Act are explicitly embedded in the Welsh Government's *Economic Resilience and Reconstruction Mission*[2] (and its principles of "Prosperous, Green and Equal") and are central to this Delivery Plan.
- Second, there is an overarching and firm **commitment to decarbonisation and the achievement of 'net zero' by 2050.** The UK and Welsh Government is legally committed to net zero carbon emissions (over a 1990 baseline) by 2050, a process that will involve far-reaching changes in industrial processes, transport networks and heating systems. The Welsh Government's *Programme for Government* commits to "acting decisively to tackle the nature and climate emergency"[3], and this is reinforced in the establishment of the Minister of Climate Change portfolio and (for example) in the clear prioritisation of sustainable and active travel within *Llwybr Newydd*, the new transport strategy. From an economic strategy perspective, the decarbonisation imperative creates opportunities for innovation and technology development, as well as an urgent need for adaptation to support industrial resilience.
- Third, a broader policy focus on the **opportunities and challenges presented by technological and demographic change** featured in the UK Government's former *Industrial Strategy* and remains prominent in its successor, the *Plan for Growth.* A series of reports to the Welsh Government have also set out approaches to digitalisation[4] and the adoption of an innovation strategy focused around meeting societal need[5].
- Fourth, **the response to the UK's exit from the European Union.** Over the coming years, we will need to adapt to changing patterns of trade. The impact of this is not yet fully

[1] Future Generations Commissioner for Wales, *Well-being of Future Generations Act (Wales) 2015*
[2] Welsh Government (February 2021), *Our Economic Resilience and Reconstruction Mission*
[3] Welsh Government (June 2021), *Programme for Government*, p.3
[4] Welsh Government (September 2019), *Wales 4.0: Delivering economic transformation for a better future of work*
[5] Rick Delbridge, Dylan Henderson and Kevin Morgan (May 2021), *Scoping the future of innovation policy in Wales*

apparent, although for some sectors will be far-reaching (for example, the adaption of agriculture to the new Environmental Land Management system). Brexit also means a significant change for South West Wales in terms of the public investment available for economic development: historically, the region has been one of the UK's largest beneficiaries from EU funding. Looking to the future, it is likely that we will need a new, perhaps more 'investment and return' based approach.

- Finally, this Plan is developed in the context of a wider approach to **regional economic development** in Wales, with South West Wales forming one of the regional 'building blocks' of *Future Wales*, the new national spatial development plan[6]. Plans have also been advanced for new approaches to regional governance and delivery (described in Chapter 5), as well as the Regional Economic Framework, which has been developed by the Welsh Government in conjunction with the local authorities alongside this Plan.

## Plan structure

1.9 The remainder of this Plan is structured in six chapters:

- Chapter 2 sets out the **economic landscape** within which the Plan has been developed, outlining the strengths, weaknesses, opportunities and threats facing the regional economy and the key issues that need to be addressed.
- Chapter 3 introduces our **strategic framework**, setting out our ambitions for the future and the type of economy that we want to help develop.
- Building on this, Chapters 4-6 explain our three **key 'missions'**: the specific goals that we want to achieve over the next decade.
- Finally, Chapter 7 sets out **how we will deliver the Plan**, including the role of the Corporate Joint Committee and options for future implementation arrangements.

1.10 In addition, **Annex A** provides a summary SWOT analysis. **Annex B** provides an assessment of this Plan against the Wellbeing of Future Generations Act (Wales) 2015. **Annex C** explains the process of developing the Plan, and how partners were engaged and priorities identified.

1.11 Two supplementary documents support the Plan:

- First, an **Evidence and Policy Landscape Review** provides further detail in support of the narrative in Chapter 2

  Second, while this Plan takes a long-term view, specific actions will evolve over time as business cases are progressed and new investment opportunities come forward. Alongside the Plan, we have prepared a **supplementary Project Pipeline document**, setting out known and emerging interventions and the next steps involved in taking them forward.

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[6] Welsh Government (February 2021), *Future Wales: The National Plan 2040*

# 2. South West Wales: The economic landscape

*South West Wales has performed strongly in recent years in generating new jobs and driving forward priority investments. Despite continuing productivity challenges, there are major opportunities ahead for sustainable growth, linked with our energy, innovation, business and community assets. This chapter sketches a picture of the region's economy, outlining recent economic performance, key strengths and assets, and the major 'transformational' trends that will impact on future growth.*

## Places and connections: The region's economic geography

### A distinctive heritage and a diverse economy…

2.1 With a population of around 705,000 across four counties, South West Wales is a diverse region. Historically, much of the area was an industrial pioneer, driven initially by the coal and metals industries and later by petrochemicals and manufacturing. Over the past 40 years, economic change has meant a challenging period of readjustment, which is to some extent still underway. But our industrial heritage has bequeathed an important legacy, including some of our leading research and innovation capabilities, our large advanced manufacturing sector and the character and form of our towns and cities.

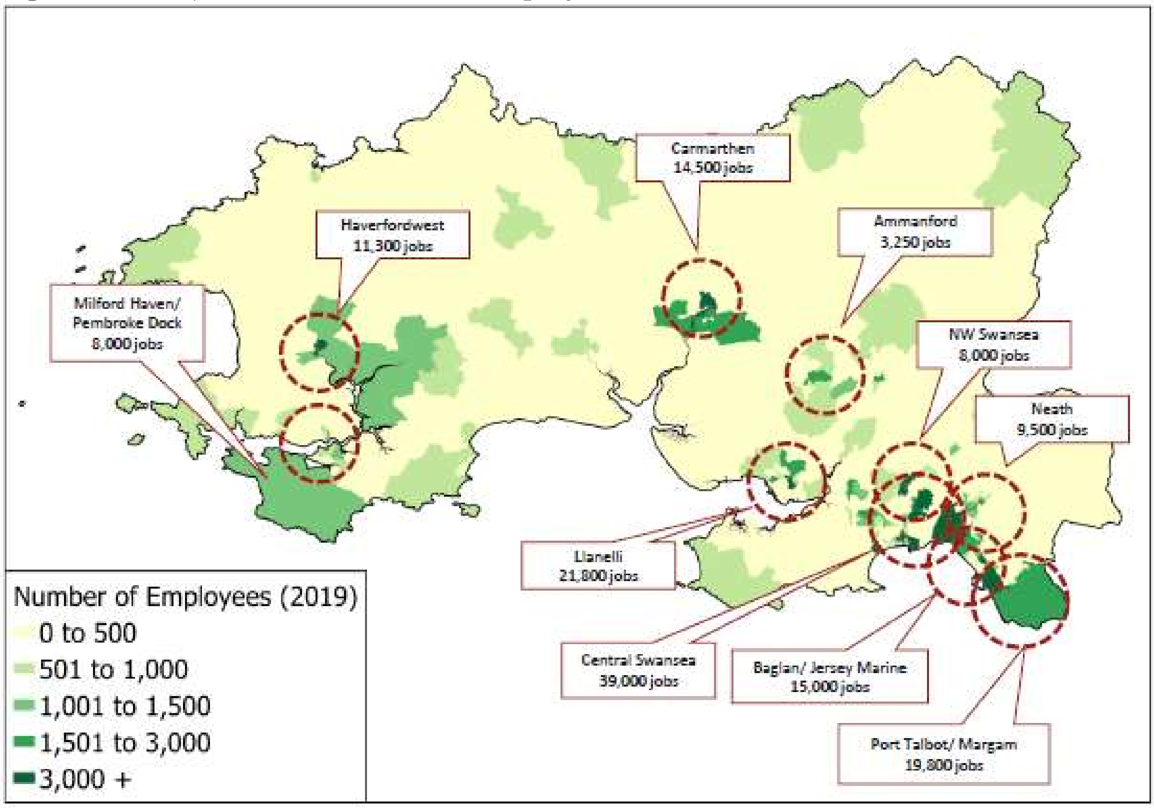
2.2 Reflecting the region's population distribution and historic industrial development, the largest concentrations of employment are in the east, around Swansea Bay, as Figure 2-1 illustrates. Swansea itself accounts for around 40% of jobs in South West Wales (and is its main commuter destination), and the area around Swansea Bay and Llanelli is defined in *Future Wales* as a 'National Growth Area' for new jobs and housing[7]. The east of the region also contains a distinctive and extensive concentration of manufacturing activity at Port Talbot, including the UK's largest steel plant and the Port Talbot Waterway Enterprise Zone.

2.3 Further west, around 20% of national energy supplies enter Britain via Pembrokeshire, with the Haven Waterway a major centre for existing energy infrastructure and the exploitation of new opportunities. More broadly, Carmarthen and Haverfordwest have important roles as regional centres, supporting an extensive rural economy and food production industry. Reflecting the environmental quality highlighted in Chapter 1, the region enjoys extensive environmental designations, including the two National Parks and AONB and special protections along much of the coast. This environmental quality supports a large, important

[7] Welsh Government (February 2021), *Future Wales: The National Plan 2040*, Policy 28. Policy 29 defines Carmarthen and the Haven Towns (Haverfordwest, Milford Haven, Pembroke and Pembroke Dock) as 'Regional Growth Areas'

and growing visitor economy as well as delivering significant wellbeing benefits to our local residents.

**Figure 2-1: Major concentrations of employment**




*Source: Produced by SQW 2021. Licence 100030994 Contains OS data © Crown copyright [and database right] [2020]*

**2.4** Across the region, around 208,000 people speak Welsh – about 31% of the total population, and an increase of around 23% in the decade to 2020[8]. The Welsh Government's *Cymraeg 2050* strategy sets out a positive strategy to develop "a thriving, sustainable economy in rural areas" and to promote the Welsh language through the media and the growth of the cultural sector – a goal recently reinforced by investment in S4C's headquarters presence in Carmarthen.

### … with important links beyond the region

**2.5** Connections beyond the region are important too. The ports at Fishguard and Pembroke Dock provide the main gateway between the south of the UK and Ireland. Looking east, there are strong links (and important commuter flows) between the manufacturing clusters at Port Talbot and neighbouring Bridgend; shared issues across the Western and Central Valleys and the South Wales industrial base; and relatively easy access to opportunities in Cardiff and beyond. While our Plan focuses on what is needed *for* the region and *within* the region,

[8] Reflecting the region's diversity, the proportion of Welsh speakers is substantially higher in Carmarthenshire, at over 50% of the population.

economic boundaries are fluid: the key point is that South West Wales is not self-contained and homogeneous; it is outward facing and diverse, and it makes sense to work together.

## The medium-term economic outlook

**2.6** This Plan has been developed following the substantial economic shock precipitated by the Covid-19 pandemic. The UK economy contracted by 9.9% in 2020 – an unprecedented fall in annual output in modern times – as public health restrictions effectively closed some sectors (notably hospitality, a key industry in South West Wales). Across the region, the claimant count was 74% higher in December 2020 than it had been at the start of the year, with the full employment impact mitigated by the furlough scheme and the extensive series of business grant, loan and rates relief measures brought in by the Welsh and UK Governments.

**2.7** At the time of writing, **the outlook for economic recovery from the pandemic is positive**. In July 2021, independent forecasters anticipated UK GDP growth of 6.9% in 2021 and 5.5% in 2022, sufficient to restore the economy to its pre-pandemic size[9]. In South West Wales, the percentage of employments furloughed fell from 12.5% in December 2020 to around 5% in June 2021[10], the claimant count had started to fall, and many employers were reporting staff shortages.

**2.8** However, the pandemic has accelerated disruptive trends that are likely to have longer-term impacts. Structural changes in the retail sector have impacted on town and city centre uses. Remote working has expanded and is likely to become more permanent – presenting opportunities for people to access a wider range of jobs, but also potentially creating additional housing and service delivery pressures in rural and coastal areas. At the time of writing, the Covid crisis has not come to a conclusion and its consequences are still not yet fully known – but they are likely to have a longer-term influence over the period of this Plan.

## The state of the region: Recent economic performance

**2.9** Looking back over a longer period, the regional economy has grown since the previous Economic Regeneration Strategy was prepared. But on many indicators, there is still a significant gap between outcomes in South West Wales and the rest of the UK. The *Economic and Strategic Landscape Review* which accompanies this Plan explores our recent economic performance in more detail: the following paragraphs provide a snapshot of the 'state of the region'.

### We have seen growth in jobs and economic activity, but there is capacity for more

**2.10** The 2014 Strategy anticipated a relatively slow recovery in employment terms from the recession following the 2008/09 financial crisis. However, **performance has been much**

[9] HM Treasury (July 2021), *Forecasts for the UK Economy: A comparison of independent forecasts*
[10] Slightly below the Wales and UK averages, and accounting for around 14,400 employments furloughed.

**stronger than anticipated**. By 2019, there were some 322,000 jobs in the region, an increase of 20,000 on the 2013 figure. Despite some net job losses in 2016, growth until the start of the pandemic was stronger than in the rest of Wales.

2.11 **However, there is still 'spare capacity' in the labour market.** Although the 'jobs density' (the number of jobs per working age resident) has grown steadily, it is still lower than the UK and Wales averages[11]. Notably, despite Swansea's importance as a regional centre and inbound commuter destination, the city's jobs density is low relative to Cardiff and Newport[12].

2.12 There have been steady improvements in the economic activity rate over the past 15 years – at a faster pace than in the rest of the UK. However, **South West Wales' economic activity rate continues to fall behind the UK average** (and slightly behind the Wales average). If the gap between the 2019 regional economic activity rate (73.8%) and the UK rate (78.9%) could be bridged, it would bring an additional 21,000 people back into the labour market.

### Economic output has grown, within the context of structural change

2.13 **Economic output (measured in gross value added) was around £13 billion in 2018** – equivalent to 21% of total Welsh output. The region's GVA increased by around £630 million in 2013-18 (representing growth of about 5% over the period). Within this overall expansion, some sectors grew strongly: combined, wholesale and retail; warehousing; real estate; information and communications; and health and care contributed an additional £689 million to GVA. But some sectors contracted over the period, with the metals, electrical products and machinery sector reducing its output by around £322 million.

2.14 This suggests a continuing process of adjustment within the economy, which is also reflected in employment growth (and a strengthening share of employment) in hospitality, health, distribution and administrative activities. Nevertheless, manufacturing is of fundamental importance to the regional economy, accounting for 13.6% of total output (and over 25% of output in Neath Port Talbot).

### There is still a large productivity gap, which impacts on local prosperity

2.15 Productivity (the amount of GVA generated for every filled job) was around £45,100 in South West Wales in 2018. The gap with the rest of the UK has narrowed slightly over time. But it is still substantial: in 2018, productivity was around 80% of the UK level.

2.16 Our analysis of productivity in South West Wales leads to three observations, which are critical to the strategy advanced within this Plan:

- **Productivity growth isn't 'everything'…. But it is *necessary* for long-term economic wellbeing, even if it isn't *sufficient*.** More 'productive' activities ought to lead to higher

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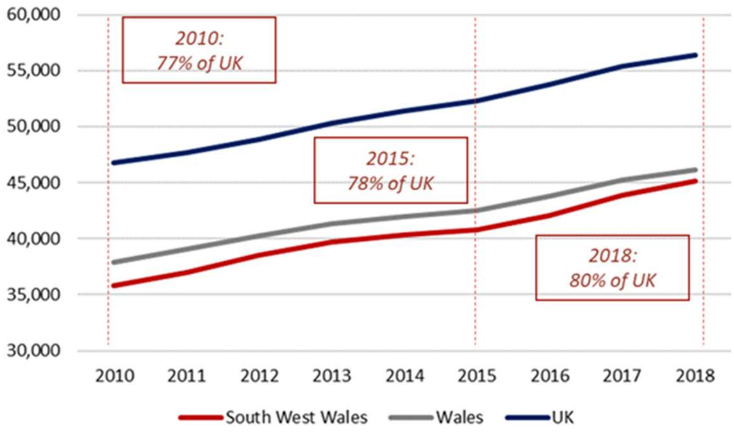
[11] 0.75 jobs per resident aged 16-64 in South West Wales in 2019 (compared with 0.77 in Wales overall and 0.86 in the UK).
[12] Swansea's jobs density was 0.8 in 2019, compared with 0.98 in Cardiff and 0.91 in Newport.

average pay[13] and more opportunities for people to build careers and businesses in the region. But productivity can be seen as a somewhat abstract measure: a highly 'productive' economy might not necessarily be a sustainable or equitable one, and not everything that society values generates high levels of monetised output. So, as well as generating higher output per worker, **the key challenge is ensuring that the productivity gain is captured locally in pay, conditions and business opportunities.**

**Figure 2-2: Productivity: GVA per filled job (£), 2010-18**




*ONS, Subregional productivity: labour productivity by local authority district and labour productivity by UK NUTS2 and NUTS3 subregions, 2010-18*

- **Productivity growth is not *just* about growing 'more productive' sectors, or those firms at the leading edge.** The structural shift in South West Wales from relatively high value-added manufacturing to lower value services has presented a long-term challenge. Part of the gap is also explained by the type of activities that take place in different locations within the same industry – with headquarters activities, research and development and so on typically contributing to higher value output per worker[14]. But recent research also highlights the gains that can be made in all sectors (including those within the 'foundational economy' as well as within 'export'-like industries) through investment in management capacity, technology adoption, supply chain capabilities, skills development and so on[15]. This is likely to be especially important in South West Wales: in a region with relatively few large firms, **a broad-based approach that supports SME growth and entrepreneurship across the board and increases the local 'stickiness' of investment is likely to be important.**
- **Productivity growth is likely to be gradual over time.** It may be accelerated by major transformational investments – but 'narrowing the gap', and ensuring the gain is captured regionally in higher pay and local business growth, is a long-term endeavour, demanding sustained investment across the economy[16].

[13] Currently, gross median pay in the South West Wales local authority areas ranges between 86% and 92% of the UK average.
[14] Welsh Government (2018), *Welsh Budget 2018: Chief Economist's Report*, p.12
[15] Jurgen Maier (2017), *Made Smarter Review: Report to the UK Government;* Institute for Government (2021), *Productivity: Firing on all cylinders – why restoring growth is a matter for every UK sector*
[16] Note also the challenges in 'narrowing the gap': other regions will also grow at the same time, and some (principally London and the Greater South East) will have more favourable starting-points.

### The evidence reveals mixed progress against wider drivers of productivity

**2.17** Linked with the region's overall productivity performance, there has been mixed progress in relation to wider 'drivers of productivity':

#### In relation to skills…

**2.18** Recent years have seen a strong emphasis on strengthening links between providers and employers, with the Regional Learning and Skills Partnership playing an increasingly important role in brokering relationships, identifying employer need and providing better labour market intelligence[17].

**2.19** **Over time, there has been a steady improvement in qualification levels**: in 2019, 35% of the working age population was qualified to NVQ4+, compared with 22% in 2004, and the proportion with no qualifications halved over the same period (partly as new entrants to the labour market gradually replace those who leave). But in *relative* terms, there is still a gap with the rest of the UK[18]**,** and substantial variation across the region[19].

#### In relation to connectivity…

**2.20** **There has been transformational progress in the delivery of digital connectivity** since the 2014 Regeneration Strategy. Commercial investment and public support through Superfast Cymru and successor programmes have increased access to superfast broadband to over 90% of premises. However, beyond superfast, there is still a still a significant rural/ urban digital divide, with ultrafast penetration in Pembrokeshire among the lowest in the UK[20]. The Digital Infrastructure programme across South West Wales aims to address this – but applications for new technology continue to advance rapidly: staying ahead of the curve will be important as digital technology transforms working practices and business models.

**2.21** The picture is perhaps less positive in relation to **transport connectivity**. There has been some disappointment in the scaling back of plans to electrify the South Wales Mainline to Swansea. However, proposals are being advanced to take forward the **Swansea Bay and South Wales Metro** as the core of a better-integrated regional transport system (highlighted further in Chapter 4); Transport for Wales plans to increase services between Swansea and Manchester from 2022; and work progresses in taking forward active travel measures across the region. While the future policy presumption is against new strategic road schemes, investment has started on much-needed improvements to the A40 in Pembrokeshire and

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[17] See South West Wales RLSP (2019), *Regional Employment and Skills Plan 2019*
[18] Between 2004 and 2019, the gap between South West Wales and the UK actually widened, from 3.6pp to 4.8pp.,
[19] For example, in 2019, only 29% of the Neath Port Talbot 16-64 population was qualified to NVQ4+, compared with 37% in Swansea.
[20] In September 2020, around 77% and 58% of premises in Swansea and Neath Port Talbot respectively were able to access 'ultrafast' download speeds of up to 300 Mbps, although this is largely confined to urban areas where it is commercially viable.

beyond the region, major improvements on the A465 Heads of the Valleys road are improving connectivity with the English Midlands.

In relation to the business stock…

2.22 **The size of the region's business base grew in the years leading up to the start of the pandemic.** In 2020, there were around 23,800 active enterprises in South West Wales, a number that had steadily increased over the preceding five years – and survival rates keep pace with the rest of Wales and the UK. But the region's 'enterprise density' (the number of enterprises relative to the working age population) and the start-up rate remain lower than in the rest of the UK[21]. Recent research has highlighted that while overall entrepreneurial activity in Wales is broadly in line with the rest of the UK, there is a shortfall in perceptions of the availability of good start-up opportunities[22].

In relation to sites and premises for business growth…

2.23 South West Wales benefits from some substantial sites for industrial expansion, including the large strategic site at Baglan Energy Park, future phases of the Cross Hands development in Carmarthenshire, and key sites at Felindre and Fabian Way in Swansea and the Haven Waterway. However, **there is a widely-recognised gap between demand and supply for industrial sites and premises**, as low rents (and in some cases high remediation and infrastructure costs on ex-industrial land) make viability challenging, especially west of Swansea. The evidence is that this acts as a brake on business expansion, both to new investors and to existing local businesses seeking 'grow-on' space[23].

### Inequalities remain significant

2.24 Despite jobs growth over time and improvements in economic activity, recent research highlights the extent to which rising living costs (especially housing costs) have impacted on the real incomes of the lowest paid, a situation which has accelerated during the pandemic[24].

2.25 Across the region, concentrations of disadvantage are significant, principally in the main urban centres of Swansea, Llanelli, Neath, Port Talbot and Pembroke Dock, and in the upper Western Valleys. Many of these concentrations are persistent over time and reflect the long-term impact of industrial change: while they highlight the importance of 'supply-side' measures to reduce economic inactivity and bring people back into the labour market, most

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[21] In 2020, there were 11 business starts to every 100 active enterprises, compared with 14 in the UK overall.
[22] Karen Bonner *et al* (2018), *Global Entrepreneurship Monitor UK: Wales report 2018*
[23] SQW/ Welsh Government (March 2020), *Commercial Property: Market analysis and potential interventions*
[24] Bevan Foundation (June 2021), *A snapshot of poverty in spring 2021*

households on low incomes are already in work[25]. For a regional economic strategy, **driving demand and creating "better jobs, closer to home" is a key goal and challenge**[26].

## Building on strengths: Key assets

**2.26** Overall, the review of economic performance over recent years suggests good progress, especially in terms of job creation. But there is a persistent gap in outcomes between the region and the rest of the UK. This is partly because most change is incremental: the investment secured through City Deal (for example) will not yet have translated into improvements in the economic data. It also reflects the 'structural' nature of many of the region's challenges, some of which (including the productivity deficit) are shared with other parts of Wales and the North of England.

**2.27** However, South West Wales contains some **distinctive economic strengths and opportunities** which provide a good platform for future growth. Realising each of these presents a challenge for future strategy, which we have set out below.

### We have nationally and internationally significant university research assets

**2.28** There is a strong higher education presence in the region, anchored by Swansea University and University of Wales Trinity St David's campuses in Carmarthen and Swansea[27]. Both universities have expanded in recent years, have made an important contribution to the region's physical regeneration (e.g., through the Swansea Bay campus and the SA1 development in Swansea city centre) and are key economic 'drivers' in their own right.

**2.29** Beyond this, Swansea University's research is ranked as 'world leading' in several (mostly STEM-related) subjects[28]. Across both universities, key research capabilities relate to:

- **Advanced data science,** where Swansea's assets include the Computational Foundry (bringing together computer science and mathematical expertise, and working with industry) and the CHERISH-DE Digital Economy Centre.
- **Health and medicine**, with a strong focus on the application of data science in health, linked with wider computer science expertise, and including one of six Health Data Research UK (HDR-UK) sites nationally.
- **Engineering and manufacturing**, especially in materials research, and with relevance to the energy and decarbonisation opportunities discussed further below.

[25] Joseph Rowntree Foundation (November 2020), *Briefing: Poverty in Wales 2020* (Annex A)
[26] "Better jobs, closer to home" is a stated Welsh Government objective, as set out in the *Economic Action Plan* and the Valleys Task Force strategy *Our Valleys, Our Future.*
[27] In addition to a smaller University of South Wales presence at the Hydrogen Centre in Baglan.
[28] Swansea University is assessed as 'world-leading' in 14 units of assessment within the 2014 Research Excellence Framework.

2.30 **There is a long history of collaboration between both universities and local industry**, especially in the manufacturing sector. Examples of recent programmes include ASTUTE 2020, supporting industrial research, development and innovation in manufacturing businesses; and UWTSD's Manufacturing for Advanced Design Engineering (MADE) programme, designed to support collaboration with SMEs. Many industrial collaboration initiatives have been supported with European funding: as this draws to a close, **it will be important to maintain the momentum and capacity that has been built up in recent years, while expanding opportunities for collaboration across the wider regional SME base.**

2.31 The commercial research base is somewhat smaller. But there has been investment in recent years (for example, TWI's Technology Centre Wales and Advanced Engineering Materials Research Institute at Baglan), adding value to the university-based presence.

### Our energy infrastructure is extensive, and we have some of the UK's greatest low carbon energy generation potential

2.32 South West Wales has long had an important energy sector, especially associated with Pembrokeshire's oil and gas industry. The infrastructure and skills associated with this will be important in taking advantage of the region's vast potential in renewable energy. Several opportunities are currently being developed through the emerging South West Wales Regional Energy Strategy. These include:

- **Wave and marine energy off the Pembrokeshire coast**, with a series of commercial and pre-commercial projects underway and in the pipeline
- **The proposed Dragon Energy Island** scheme in Swansea Bay, offering scope for tidal, wave and potentially solar energy generation
- **Onshore capacity**, including the UK's largest onshore wind farm at Pen-y-Cymoedd and a range of opportunities in wind, biomass and waste-to-energy.

2.33 There is also substantial research and development capacity to support the region's renewable energy potential. The Offshore Renewable Energy (ORE) Catapult has a presence at Pembroke Dock and, with several other universities, is engaged in progressing new opportunities off the Pembrokeshire Coast. Swansea University's SPECIFIC Innovation and Knowledge Centre has expertise in the capture and storage of solar energy, while the University of South Wales' Hydrogen Centre at Baglan is supporting the experimental production of hydrogen energy storage systems.

2.34 Our energy potential is therefore a key asset to exploit – both for South West Wales and indeed the rest of Wales and the UK. **The challenge over the next few years will be in realising the opportunity, recognising that some technologies remain relatively nascent – and in ensuring that the benefits can be captured locally.** A long-term perspective will also be important in developing business cases for some of the region's major energy projects –

recognising that while they have the potential to be transformational, the full benefits may take several years to be realised

### Our business community offers scope for growth

**2.35** We noted earlier the region's relatively low levels of enterprise density and its relatively low start-up rate. But **business is central to future economic strategy** – put simply, employment is either created by existing businesses expanding, new businesses starting up, or businesses from elsewhere deciding to locate in the region.

**2.36** Recent years have seen the loss of some larger, externally-based firms (note, for example, recent job losses in some of the region's automotive supply chain). We retain relative strengths in manufacturing, food production and hospitality, with evidence of start-up and inward investment activity linked with the data science strengths highlighted above[29]. However, the region's business stock is broadly-based: 'high growth' SMEs are quite widely distributed across sectors (and across the region)[30]; ownership models are diverse[31]; and there are opportunities for productivity growth across the sectoral landscape[32]. Following our analysis of the 'productivity deficit' above, **the challenge is to strengthen the 'breadth and depth' of the business base, recognising scope for growth across the economy, including *(but not just)* in those activities at the 'leading edge' of technology and innovation.**

### Environmental quality and 'sense of place' are key assets

**2.37** South West Wales' combination of 'place-based' assets is distinctive and rich, including the National Parks, the coastline, the sport and leisure offer and a university city offering both 'compactness' and a wide range of metropolitan amenities.

**2.38** Beyond this range of functions and amenities, **the region's distinctive identity forms an important part of the offer**. There are two aspects to this:

- First, **'quality of life' offer clearly forms part of the proposition to visitors, investors and potential new residents**, and one which plays a key economic role. There is an important balance to be struck between environmental quality and community and environmental sustainability.

  Second, **the region's identity relates to the importance of 'community', the associations that businesses and other institutions have with the places in which they are based**, and the stake that they have locally. This is harder to pin down in conventional economic terms, but relates to the extent to which value and ownership can

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[29] See the *Evidence and Strategic Landscape Review* for further examples.
[30] SQW analysis of regional distribution of FastGrowth 50 award winners, 2009-20; Beauhurst records of 'fast growth' firms in South West Wales
[31] Consultation as part of the development of this Plan. See also Co-operatives Wales
[32] Institute for Government (2021), *Productivity: Firing on all cylinders – why restoring growth is a matter for every UK sector*

be captured or embedded locally and the challenges in growing the business and employment base highlighted above[33].

## Looking to the future: Key transformational trends

**2.39** Future strategy will also be influenced by wider 'transformational' factors that will impact all aspects of economic life. While these apply to all advanced economies, the way in which they are addressed and how they interact with our existing economic structure and strengths will be fundamental. Three 'macro trends' are especially important, relating to **decarbonisation, digitalisation** and **demographic change**. We consider each in turn below.

### Decarbonising South West Wales

**2.40** As we highlighted in the earlier overview of the policy context, the UK and Welsh Governments' commitment to net zero by 2050 will have an impact on all aspects of policy.

**2.41** In headline terms, Wales has been successful in reducing carbon emissions while maintaining economic growth: between 1990 and 2018, total CO2 emissions fell by 20%, and the country was on track to meet its 2020 carbon reduction targets[34]. However, around 85% of the cut in emissions came from the power sector[35]. While most other sectors also achieved reductions (especially manufacturing), these were substantially smaller, and the surface transport sector actually generated a net increase. Looking to the future and the net zero commitment, the Climate Change Committee recommended a *"leadership driven pathway"* requiring far-reaching action over the next thirty years[36].

> **The actions required to achieve the targets – including full decarbonisation of the power sector, full switchover to electric vehicle sales, installation of low-carbon heating, and decarbonisation of manufacturing – go beyond those required from the world on average, in line with Wales' responsibility as a richer nation with larger historical emissions.**
>
> **Climate Change Committee**

**2.42** This presents South West Wales with some distinct challenges. Currently, **regional carbon emissions are much higher than the Wales and UK average.** These mostly reflect the role of the huge Tata works at Port Talbot, an industrial installation of national significance that remains reliant on coal inputs. **The challenge for future strategy is enabling the transition of the region's industrial base, while ensuring wider action to decarbonise the transport, housing and manufacturing systems** – and making sure that South West Wales

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[33]33 This is also at the centre of discussions about the concept and role of the foundational economy. See Joe Earle *et al* (2017), *What Wales Can Do: Asset-based policies and the foundational economy* (CREW/ Foundational Economy)

[34] Climate Change Committee (December 2020), *Progress Report: Reducing emissions in Wales*

[35] Principally through the decommissioning of the Aberthaw coal-fired power station

[36] Climate Change Committee (December 2020), *Advice Report: The path to a net zero Wales*

remains competitive with other regions. Our renewable energy potential will play an important role in this, which we explain further in Chapter 4.

### Digital transformation

2.43 **'Digitalisation'** refers to the transformation of the economy through massively increased use of data and the development of digital technologies such as artificial intelligence, machine learning and robotics. Digitalisation isn't about change within a single industry; rather, it is about the use of 'general purpose' technologies with a wide range of applications across industries.

2.44 Digital transformation is not new: the period since the publication of the last Swansea Bay Economic Regeneration Strategy has seen a transformation in the everyday use of new digital technologies, and it has been recognised as a key driver of economic strategy for some time. Three aspects of the transformational impacts of digitalisation are especially relevant:

- **Disruptive effects on industry:** Use of digital technology leads to greater efficiency, with firms that have the capacity and capability to invest and adopt more likely to benefit from productivity gains and improved competitiveness. But its 'transformative' power is in the convergence of technologies to drive entirely new industries (wearable devices or gaming, for example), which in turn drive applications elsewhere. A consequence is the breakdown of traditional industry sectors and markets, leading to a recognition of digitalisation as the 'fourth industrial revolution'.
- **Impacts on the labour market:** Estimates of the potential impact of automation on jobs vary greatly, although most studies suggest that while new technologies will substitute for labour in some sectors, this is likely to be more than offset by job creation[37]. However, technology is changing the *way* in which work is done, with the potential for positive and negative impacts on working conditions; the need and opportunity for job changes over the course of the working life; changing demand for skills; and the ability to work remotely.
- **Impacts on services**, potentially helping to overcome relative remoteness, and including the development of new ways of accessing health and care, which in turn impact on the development of new goods and services and demand for jobs.

2.45 Across all of these, the message for future strategy is that responding to digitalisation is not just about ensuring the 'supply' of new technology and connectivity (although that is important). It is also about **driving economic *demand* for new skills and technologies** – both at the 'leading edge' of innovation and throughout the economy.

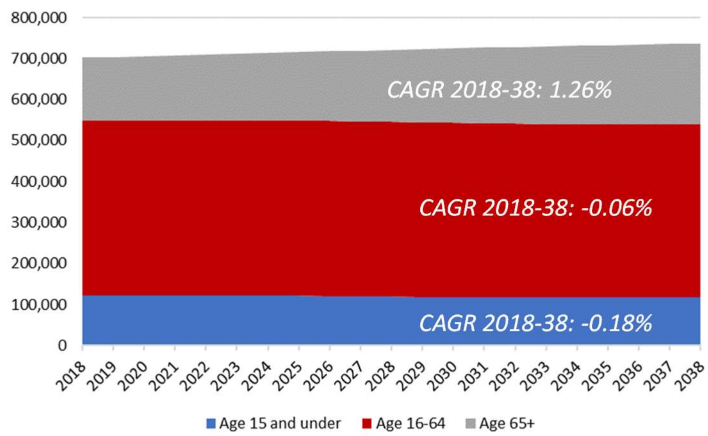
[37] Welsh Government (September 2019), *Wales 4.0: Delivering economic transformation for as better future of work* (Professor Philip Brown's review of digital innovation for the economy and the future of work in Wales), pp.22-26

### Responding to demographic change

**2.46** South West Wales has a growing population. However, the 'working age' population has fallen slightly over the past decade. Over the next 20 years, the 'working age' population is expected to fall by around 1%, representing a net loss of around 4,700 people aged 16-64 over the period[38].

**2.47** The gradual ageing of the population is a long-term trend. Key implications for future economic strategy include:

**Figure 2-3: Population change (compound annual growth rates) by age group, 2018-38**




*Source: StatsWales, 2018-based population projections*

- **Changing working lives:** The concept of 'working age' is becoming increasingly fluid, as people work for longer, and more flexibly (although individuals' ability to work for longer will depend on job type and conditions and the ability to adapt to new roles and technologies over time).
- **Changes in service demand:** As the analysis of recent economic performance demonstrates, there has been strong growth in employment and output associated with health and social care, as demand increases from an ageing population. Changing demographics will support changes in wider demand for goods and services as well.
- **Rising dependency ratios:** While changing demographics are driven by life expectancies and birth rates, they also partly reflect the balance of migration, with gradually falling populations in some post-industrial and rural communities, and in-migration, especially from older people, along parts of the coast[39]. This is a gradual process – but retaining and attracting younger people also helps to support community resilience and sustainability, and itself depends on generating local economic activity and demand.

## Bringing it together: key issues for the Delivery Plan

**2.48** Summarising the 'state of the region', our key assets and the long-term 'macro' trends that will impact across the economy, we can see that:

[38] Although note that the picture varies across the region, with a sharp projected fall in the working age population in Pembrokeshire, but continued growth in Swansea.
[39] Gerald Holtham (June 2021)), *Rejuvenating Wales* (Hodge Foundation/ CLEC)

- **The region's weaknesses are largely 'structural'**. They are linked with processes of long-term industrial change, are shared with many other parts of the UK, and map onto the region's relatively low productivity.
- Set against this, **there has been strong progress in recent years,** especially in creating new jobs and in driving forward transformational projects. This provides a strong foundation on which to build.
- **South West Wales enjoys some distinctive strengths and opportunities** – especially linked with the region's renewable energy potential, university - industrial links and its quality of life offer. These also have the potential to make a positive impact in relation to the long-term environmental, technological and demographic trends.
- **There is a 'window of opportunity' to build on and capture some of these strengths**. Some are still at a relatively early stage (for example, elements of the renewable energy opportunity and the potential for industrial decarbonisation), but the technology is developing fast, and some other regions will offer fierce competition for investment.
- **We are a very diverse region**, with a distinctive balance of urban, rural, national park, coastal and industrial assets. But there is substantial commonality across South West Wales, and some of our big opportunities have a region-wide footprint. Some also extend beyond the region itself, and outward-facing links will be important.
- **'Transformational' growth opportunities need to be balanced with the conditions for incremental improvements in business resilience and capacity** across the regional economy. There are some distinctive opportunities at the 'leading edge' – but long-term employment resilience and wage growth will depend on the sustainability, productivity and expansion of the wider stock of regional SMEs – not just the 'pioneer' firms.

2.49 Based on this understanding of our economy and its potential, the next chapter introduces our strategic framework, to guide our actions over the next decade.

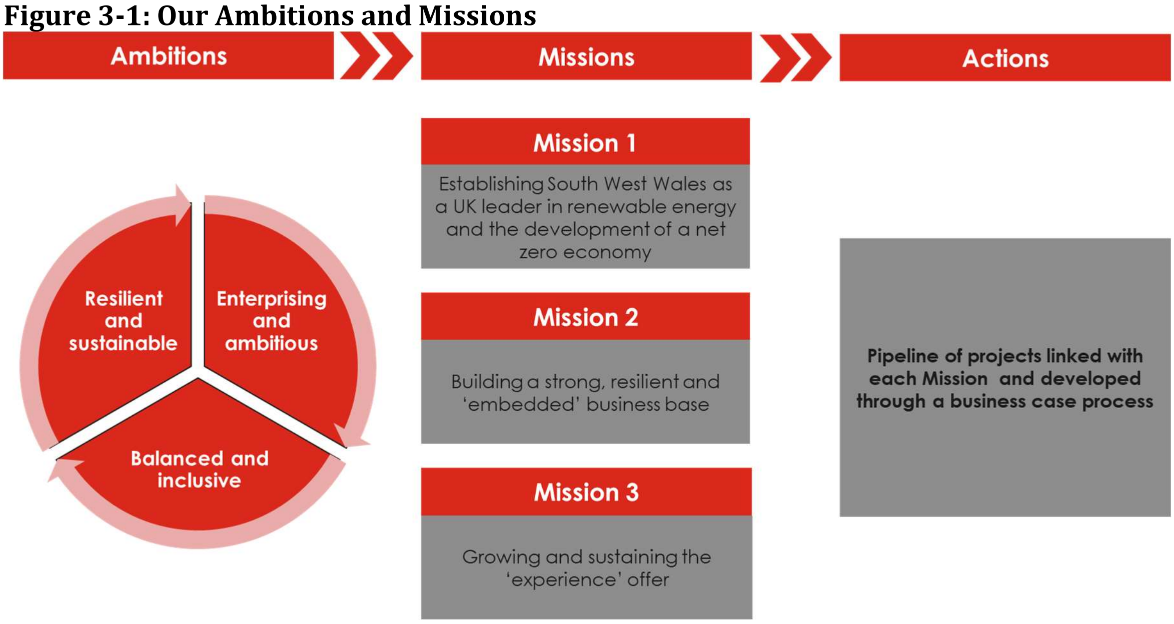
# 3. Our ambitions to 2030

*Building on the evidence base, this chapter introduces our ambitions for the South West Wales economy. It explains the changes that we want to see over the next decade and introduces the three 'Missions' that will guide our shared activity.*

## From the evidence to a strategic framework…

3.1 Over the next ten years, we seek to build on the distinctive strengths and opportunities identified in the previous chapter to develop a more prosperous and resilient economy. To help plan for the future, we have identified three **Ambitions** (statements about the nature of the South West Wales economy that we want to work towards), supporting three **Missions** (priority areas on which our shared **Delivery Plan actions** will be focused):

**Figure 3-1: Our Ambitions and Missions**




*Source: SQW 2021*

## Unpacking our Ambitions

3.2 Our three Ambitions are broadly cast. They recognise that achieving sustainable, long-term prosperity and the "South West Wales we want" is about more than the pursuit of economic growth as a goal for its own sake – and that prosperity will itself be enabled by progress across a number of fronts.

3.3 Our Ambitions seek an economy that is, over the long term, more resilient and sustainable; enterprising and ambitious; and balanced and inclusive.

**Table 3-1: Unpacking our Ambitions: The economy we want**

## Resilient and sustainable

- **Resilient to technology change and the impacts of digitalisation:**
  - Supporting firms in adopting and adapting to new technology
  - Building labour market resilience through the skills system from schools through to adult learning
- **Resilient to climate change and decarbonisation:**
  - Increasing the resilience of the region's manufacturing base (including in its (currently) relatively carbon-intensive foundation industries)
  - Supporting adaption and adoption throughout the economy (across sectors and through the building stock and transport system)
  - Delivering robust digital connectivity to support changing working practices and better access to employment.
- **Supporting resilient and more 'embedded' firms and supply chains**
  - Developing the local business base through access to support, finance, networks and procurement
  - Embedding best practice and resilience throughout the supply chain
  - Continuously building management capacity and capability.

## Enterprising and ambitious

**Enterprising and ambitious**

- **Ambitious in relation to our long-term energy opportunity**
  - Ensuring capacity to drive forward our potential
  - Integrating our natural renewable energy advantages with our university and industrial strengths
- **Enterprising in relation to changing market conditions, technology and opportunities**
  - Investing in the skills system across the economy and driving demand for higher level and technical skills, as well as influencing supply
  - Investing in the commercial property stock – for local businesses scaling up as well as new investors
- **Driving new investment, innovation and funding models**
  - Developing sustainable alternatives to European funding
  - Promoting the region as a location to invest, work and visit

## Balanced and inclusive

**Balanced and inclusive**

- **Balanced between innovation at the leading edge and sustainable growth across the economy**
  - Developing opportunities for 'new to the firm' innovation, as well as R&D and new technology and product development
  - Recognising the opportunity for a diverse range of business and ownership models
- **Balanced spatially, across the region**
  - Celebrating regional diversity and a wide distribution of opportunity
- **Creating long-term growth, while sustaining and enhancing core environmental and community assets**
  - Recognising and enhancing the inherent value of the environment to the quality of life and quality of place proposition
  - Supporting community ownership of economic assets, where this can support local opportunity and generate a sustainable return.

## Realising our Ambitions

3.4 The Ambitions set out above are extensive, and are consistent with the Wellbeing of Future Generations Act. They are also all interlinked: they are not so much 'themes' as a vision of how we want the economy to evolve. Over the next ten years, **all the actions that the South West Wales local authorities take in support of regeneration and economic development will contribute to achieving them** – whether they are delivered at regional scale, or are more locally focused.

3.5 But to deliver our overall goal of a more "resilient and sustainable; enterprising and ambitious; and balanced and inclusive" economy, there are clear actions on which we will need to focus over the next decade. We have called these our three **Missions**, which we will use to guide delivery. These are:

- Establishing South West Wales as a UK leader in renewable energy and the development of a net zero economy
- Building a strong, resilient and 'embedded' business base
- Growing and sustaining the experience offer.

3.6 The following chapters explain each Mission, setting out what we seek to achieve, the opportunities, challenges and risks that we need to address, and the solutions and projects that we aim to progress. Although we explain each Mission in turn, they should be seen as integrated: establishing South West Wales as a UK leader in renewable energy and a net zero economy is, for example, a key aspect of the other two Missions.

# 4. Mission 1: A UK leader in renewable energy and the net zero economy

*Looking to 2030, we aim to make South West Wales a UK leader in renewable energy. That means taking advantage of our natural assets and our industrial and R&D capabilities to build an internationally-significant presence in future fuel technologies and to drive the decarbonisation of our industrial base and the wider economy.*

**Figure 4-1: Summary of assets, opportunities, challenges and actions**

| Current assets | Next opportunities | Key challenges | Key actions |
|---|---|---|---|
| Concentration of onshore and offshore opportunities at different stages of market readiness<br>Emerging Regional Energy Strategy and Welsh Government support<br>University R&D assets and growing corporate capacity for industrial decarbonisatioin | Linking energy generation with industrial decarbonisation<br>Making the most of opportunities presented by the existing knowledge/ research base<br>Translating early stage projects into investable propositions | Countervailing pressure of existing high carbon intensity industry<br>Securing/ maintaining capacity to drive the strategic agenda, and major projects forward<br>Competition from (and establishing collaborations with) other regions<br>Securing Government support | Additional capacity to drive forward the agenda<br>Progressing the region's major renewable energy generation projects<br>Attracting and driving forward new industrial investment<br>Decarbonising transport and the housing stock |

## Understanding the case for the Mission: the core rationale

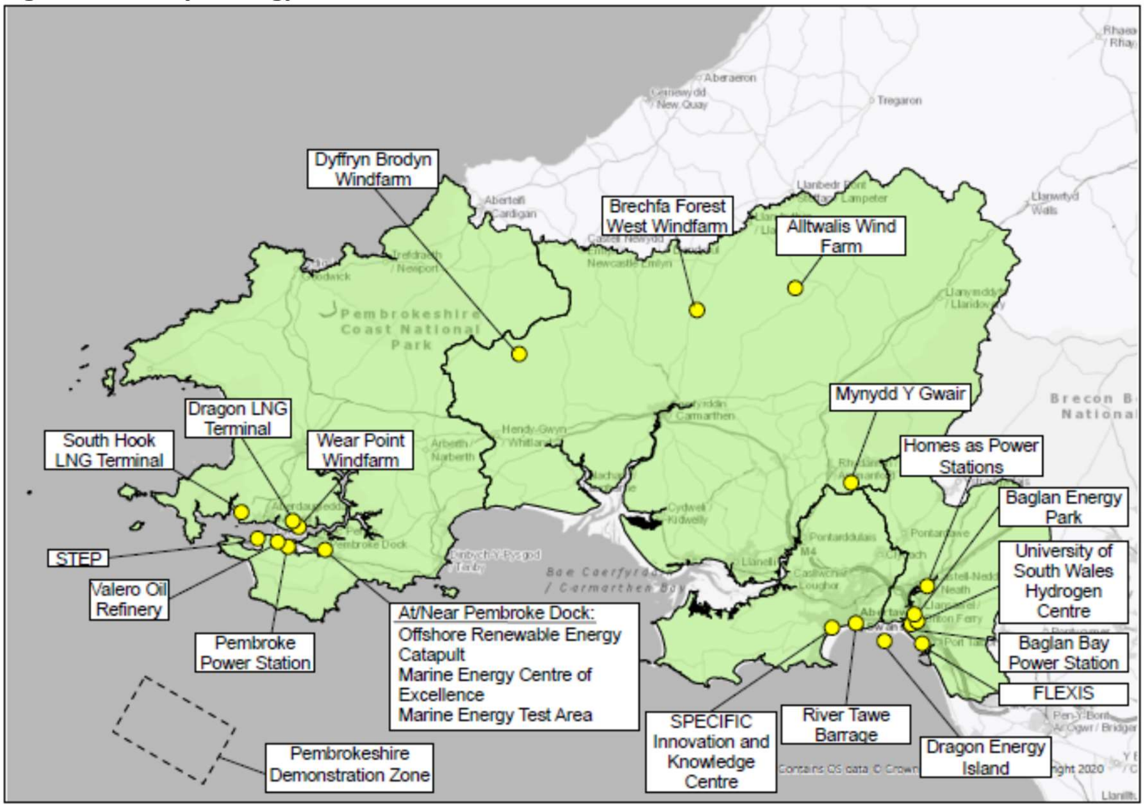
**4.1** As set out in the evidence base the decarbonisation imperative is global, and in Wales is mandated by the UK and Welsh Governments' net zero commitments and the need to take urgent action now. There is a clear overall policy direction, which has been reinforced by the emerging suite of strategies at UK Government level ahead of COP26 in autumn 2021[40] and by the renewed and re-emphasised climate change focus of the Welsh Government. With a clear and compelling direction of travel, there is an opportunity for South West Wales to capitalise on its renewable energy assets and ensure that it is on the 'front foot' in adapting to change.

## Delivering the region's low-carbon energy projects at scale

**4.2** In South West Wales, our potential is clearly articulated, and is linked with both our natural environmental assets and infrastructure and skills base resulting from our long history in energy-related activity. The range of existing and emerging projects and assets is extensive, as illustrated in Figure 4-2:

[40] For example, the new UK Hydrogen Strategy (August 2021)

**Figure 4-2: Key energy assets**




*Source: Produced by SQW 2021. Licence 100030994 Contains OS data © Crown copyright [and database right] [2020]*

**4.3** Key renewable energy assets include the combination of marine energy activity associated with **Pembroke Dock Marine** and the proposed tidal, wind and potentially solar energy scheme at **Dragon Energy Island** in Swansea Bay**.** They also include a range of onshore wind and waste-from-energy schemes across the region, and a potential nuclear fusion prototype scheme in Pembrokeshire. The **Hydrogen Centre** at Baglan focuses on experimental development of renewable hydrogen production and storage, as well as R&D in hydrogen vehicles, fuel cell applications and energy systems. The **Flexible Integrated Energy Systems (FLEXIS)** project is delivering a smart energy demonstration zone in Port Talbot, focused on local energy systems, heat recovery and the adoption of low emission vehicles.

**4.4** However, while the scale of activity is substantial, there is a risk that the potential may not be fully realised, for three reasons:

- **Technologies are, in some cases, at a relatively early stage**. They are also complex, and in many cases will require long-term funding, commercially or from Government. Some of this will need to come forward in conditions of some uncertainty: for example, the Welsh Government's *Hydrogen Pathway* notes that *"there is uncertainty regarding the exact role hydrogen will have in supporting decarbonisation in Wales.... [but despite this], there is still an urgent need to take the first steps to develop the skills, expertise and supply chain for hydrogen scale-up in Wales"*[41].

[41] Welsh Government (January 2021), *Hydrogen in Wales: A pathway and next steps for developing the hydrogen energy sector in Wales,* (consultation document), p,11

- **Competing areas and technologies may move faster** within this dynamic technology environment. South West Wales has distinctive assets – but if additional capacity and investment is directed elsewhere, some of these advantages could diminish.
- **Local benefits are not *automatically* captured through the energy generation process.** The good news is that there is a solid R&D base in South West Wales to capitalise on the opportunity (see, for example, the Hydrogen Centre referred to above; Swansea University's SPECIFIC Centre), as well as schemes (such as the Marine Energy Engineering Centre for Excellence project at Pembroke Dock) to build supply chain opportunities with SMEs. It will be important that these are driven hard, to ensure that the region benefits from the added value of renewable energy investment.

**4.5** Delivering the region's renewable energy opportunities at scale – and ensuring that they are integrated with wider policy and maximise local benefits for local businesses and communities will be central to regional strategy over the coming years:

**Key action areas**

- **We will build capacity and expertise to maximise South West Wales' renewable energy and net zero potential.**

There are several public bodies with knowledge and expertise, including (for example) the Welsh Government Energy Service and Marine Energy Wales, as well as UK Government agencies such as the ORE Catapult. But the agenda is complex: establishing a regional 'decarbonisation system' could help to address region-wide goals (including in relation to skills and infrastructure) and coordinate investment priorities beyond the delivery of specific initiatives.

- **We will seek to secure new investment in renewable energy infrastructure**

Linked with the capacity building described above, we will work with the Welsh and UK Governments and with the private sector to make the case for investment in 'nationally significant' schemes such as Dragon Energy Island and the Pembrokeshire marine proposition, as well as smaller-scale schemes, including on public land.

- **We will work to deliver the Regional Energy Strategy**

The Regional Energy Strategy has been developed in parallel with this Plan and will be published in 2021. We will work to take forward pilot and successor Local Energy System projects (such as the pilot currently underway at Milford Haven Energy Kingdom), and we will seek to link the energy system objectives of the Energy Strategy with opportunities for local business engagement and supply chain development.

## Decarbonising our industrial base

4.6 The high carbon intensity of some of South West Wales' industrial activity is a vulnerability: while the region's relatively high carbon emissions in the data is largely caused by the steel industry, oil and gas are also important to the region, as well as our large manufacturing base.

4.7 Work is currently underway to develop a programme for industrial decarbonisation through the **South Wales Industrial Cluster (SWIC)** initiative, funded by UK Research and Innovation and including several energy and heavy industrial firms in South West Wales (including Tata, Valero and RWE, the operator of the Pembroke refinery)[42]. The focus of the programme is on the production and use of hydrogen and on mechanisms to secure large-scale industrial decarbonisation through 'fuel switching': as with some of the initiatives discussed above, the proposition is in its relatively early days, although achieving large-scale change will be important for the region's future competitiveness. More broadly, there is an opportunity to attract additional investment into the region, beyond the decarbonisation of the existing stock: 'transformational' projects such as the forthcoming **Global Centre for Rail Excellence** provide examples of investments supported with public funds, but the existing combination of energy-related activity will be an important factor in attracting new business locations.

4.8 Building on the region's growing presence in renewable energy and the current focus on industrial decarbonisation:

### Key action areas

- **We will progress the opportunity presented by SWIC and seek to secure future investment to support the region's future industrial competitiveness**

  As with other aspects of the low carbon agenda, technology is developing rapidly and the scale of investment in demonstration projects and initiatives such as SWIC is substantial. Through our increased capacity to drive forward the decarbonisation agenda, we will seek to secure sequential investment, working with the UK and Welsh Governments as appropriate.

- **We will grow the wider low carbon industrial base and promote the region's potential to new investors**

  Linked with actions to promote the region as an investment destination, we will highlight our potential to new investors (including our university presence, skills base and access to sites and premises) and will press forward major proposed investments such as the GCRE.

[42] https://www.swic.cymru/news

## Decarbonising the wider economy

**4.9** Decarbonisation will extend beyond the industrial base, and will impact on housing and domestic heating, non-domestic properties and the transport network. Much is already underway:

- In relation to the **housing stock**, Pobl Housing is leading one of the UK's largest community-based retrofit, energy generation and smart energy management projects at Penderry, Swansea, the outcomes of which will inform the larger, City Deal-funded Homes as Power Stations scheme.
- In relation to **transport,** all the local authorities are engaged in programmes of fleet decarbonisation, and the **Swansea Bay and South West Wales Metro** will be at the core of the region's lower carbon, more sustainable transport system.
- In relation to **re-using and preventing waste**, Wales already has some of the world's highest municipal recycling rates – with all South West Wales authorities (and Wales as a whole) experiencing a rapid increase in recycling rates over the past twenty years[43].

**4.10** Linked with the Regional Energy Strategy, over the coming years:

### Key action areas

- **Building on existing schemes, we will progress the decarbonisation of the housing and business stock**

  From an economic development perspective – and our wider ambitions to secure a more 'embedded and resilient' business base, this should provide opportunities for local supply chain development and community-based employment solutions (as well as, in some cases, local community ownership).

- **We will press forward the development of Swansea Bay and South West Wales Metro**

  As well as the Metro itself, this will lead to a better integrated and more sustainable transport network through the incorporation of bus and active travel services and the development of opportunities to work and access services closer to home.

- **We will work to achieve a circular economy**

  Building on our performance in reducing waste and transforming recycling rates, there are opportunities to increase re-use of goods and materials offering potential for community-based solutions to increase repair and the use of technology to increase the scope for re-use of materials and reduced food waste.

[43] Welsh Government (2019), *Beyond Recycling: A strategy to make the circular economy in Wales a reality*; StatsWales (2021), Combined municipal re-use, recycling and composting rates

# 5. Mission 2: Building a strong, resilient and embedded business base

*Business is at the centre of our strategy to 2030: it will be through the expansion of existing firms and the start up and attraction of new ones that new employment will be generated and productivity growth secured. That means supporting sustainable business growth– both at the 'leading edge' of technology and innovation and across the economy.*

**Figure 5-1: Summary of assets, opportunities, challenges and actions**

| Current assets | Next opportunities | Key challenges | Key actions |
|---|---|---|---|
| Strong university-industrial links<br>Local business networks, emerging clusters and some anchor businesses<br>Growing policy interest in encouraging locally 'embedded' businesses and local supply chains<br>Wales-wide institutions (e.g., Development Bank) | Supporting dynamism (through entrepreneurship and early-stage expansion)<br>Supporting resilience (through technology adoption, management capacity and succession)<br>Supporting local supply chain development<br>Building an effective (and broad) innovation 'ecosystem' | Weak 'infrastructure' offer (e.g., commercial property, impeding start-up and expansion)<br>Skills and capacity challenges<br>Limited private sector support base<br>Access to growth finance<br>Barriers to commercialisation<br>Limited business density and 'leakage' out of region | Accelerated adoption and innovation support (linked with recommendations of Wales 4.0 in relation to business, skills and innovation support)<br>'Progressive procurement' within a local business and supply chain development system |

## Understanding the case for the Mission: the core rationale

**5.1** The review of the evidence in Chapter 2 highlighted positive employment outcomes in recent years, growth in the business stock, and a strong record in translational research activities between the university knowledge base and industry.

**5.2** However, the economy remains to some extent in a process of 'restructuring', away from traditional strengths in parts of the manufacturing sector and towards growth in areas such as information and communications and health care (as well as in activities linked with the growing energy sector highlighted in Mission 1). Changing trading relationships also present challenges (notably, but not only, in agriculture and food production), some of which have yet to fully work through)[44].

**5.3** This transition will bring opportunities within those sectors that are growing – and as highlighted earlier, opportunities for growth and productivity gain are cross-sectoral. However:

[44] Janet Dwyer (2018), *The implications of Brexit for agriculture, land use and rural areas in Wales* (Wales Centre for Public Policy)

- Even where job losses in one industry are replaced with jobs in another, there is the risk that they may not generate the same level of output (and therefore command the same pay).
- The wider economy of South West Wales has a *relatively* narrow business base: business density is relatively low, and there are few indigenous large or larger medium-sized businesses. However, the prospect of inward investment at scale has reduced over the past twenty years. The risk is that as the economy evolves, losses may not be fully offset by gains, and the 'productivity gap' remains or widens.

**5.4** In response, our Mission to create a **"strong, resilient and embedded business base"** seeks to encourage a continued focus on innovation and the growth of capabilities at the 'leading edge', balanced with an approach aimed at achieving greater resilience, growth potential and capacity for sustained employment across the region's wider business base, linked with the decarbonisation imperative in Mission 1.

## Growing the innovative edge and accelerating diffusion

**5.5** Innovation policy in Wales is at a point of transition, as the European funding that has sustained several major programmes (including the 'core' SMART programmes delivered via the Welsh Government[45] and the wide range of sector or thematic schemes (such as, in South West Wales, ASTUTE and RICE[46]) come to an end; and the range of actors involved in innovation policy (including, potentially, a more active role for UK Government), increases.

**5.6** At the same time, there is a consensus, highlighted in a recent review for the Welsh Government, that the role of innovation policy has evolved, to be less narrowly focused on technology, and more embracing of actions focused on addressing social challenges (perhaps especially important given the growth of the health and care sector and the long-term demographic challenges highlighted in Chapter 2) and the impact of climate change[47]. The review also emphasises a need to further develop translational research activities and to link innovation support activity more clearly with the range of finance, advisory, networking and other programmes that contribute to a successful innovation 'ecosystem'.

> **"Today, innovation is about so much more than science and technology"**
>
> **Future of Innovation Policy report**

[45] SMART Innovation (advice and support to business); SMART Cymru (financial assistance to business); and SMART Expertise (financial support to higher education).
[46] Reducing Industrial Carbon Emissions (RICE) is led by University of South Wales and Swansea University and works with Welsh supply chain companies to test how CO2 produced from heavy industrial processes can be used to make high value products and industrial chemicals.
[47] See Kevin Morgan, Dylan Henderson and Rick Delbridge (May 2021), *Scoping the future of innovation policy in Wales* (Cardiff University, Centre for Innovation Policy Research)

**5.7** It will be important that regional activity in South West Wales adds value to and aligns with evolving Welsh national policy (and the wide range of programmes and institutions at UK level). Over the next few years:

**Key action areas**

- **We will explore a better-integrated regional innovation offer, in the form of a 'virtual Research and Technology Organisation' for South West Wales**

  The universities are key regional assets and have a strong history of translational research with industry. However, the wider landscape is somewhat fragmented, and may become increasingly so as current programmes come to an end. We aim to achieve a model where there is "no wrong door", making the most of our university capabilities and enabling them to meet industry need. This could extend across a range of sectors and technologies, linked with (for example) future plans for the development of the research and development offer linked with Pentre Awel at Llanelli, and the close involvement of University of Wales Trinity St David and the development of Yr Egin and its associated creative cluster. It may also embrace wider innovation capabilities, including support in management skills and capacity and (linked with our wider approach to regional skills development) access to talent to enable innovative SMEs to reach their potential.

  There may be several options in taking this proposal forward – but the key point is that we maximise the value of our shared assets to deliver a joined-up service across government, higher education and the private sector.

## Growing productivity and resilience across the economy

**5.8** Across the wider business stock, there have been changes in the support landscape since the last Regeneration Strategy was produced. Nationally, Business Wales provides a central gateway to a range of support products, and since 2017, the Development Bank of Wales has consolidated publicly-backed loan and equity support into an 'arms-length' and widely-recognised vehicle. In addition, the Welsh Government provides some direct investment (generally in relation to larger, often manufacturing firms), and all the South West Wales local authorities offer support services (in addition to the often university-linked innovation services highlighted above).

**5.9** A recent review of the Welsh business support landscape highlighted three challenges, which are relevant to the strategy set out in this Plan[48]:

- First, Wales' **relative vulnerability to economic shocks:** a function of the continuing process of restructuring highlighted in the evidence base. This has contributed to the

[48] Jack Watkin (February 2021), *A Better Balance: Business support policy for the foundational economy* (CREW/ Institute of Welsh Affairs)

more recent policy focus on indigenous business growth. However, while economic 'shocks' are often seen through large 'one-off' events (plant closures, redundancy programmes, and so on), economy-wide technology-driven transformation is larger in its overall impact, and the ability to adapt and respond will be important across firm sizes and sectors.

- Second, the **scale** of the support offer, and the relatively small number of firms that it reaches (the inference being that there is a much wider range of SMEs that could benefit from interaction with the support system, were the reach to be greater).
- Third, **dissemination of benefits**, in particular the extent to which gains in business performance are captured in wages and tax and in which benefits to the supply chain accrue regionally. The Welsh Government has placed a greater emphasis on this in recent years, through the development of the 'economic contract' proposed in the *Economic Action Plan*

**5.10** Over the coming years, we want to create a better integrated system across local and national government, within which a strengthened 'support' offer is linked with the supply of skills and premises, the role of the public sector as a purchaser and commissioner within the local economy and in ensuring that there is widespread access to fair and sustainable work:

### Key action areas

- **We will seek a better co-ordinated support package for business**

  The scope of this, and the interaction between delivery at different geographical levels, will need to be explored. But the proposition is that there is a need to drive business density, start-up rates and entrepreneurship, and resilience and 'adaptability' to change across the SME base – recognising that 'enterprise' embraces a range of organisational types and ownership models[49].

- **We will link this with public sector purchasing power**

  Recently, there has been a focus on the role that public procurement can play in supporting local economic growth. This has been reflected in the Welsh Government's review of procurement, which has explored the concepts of 'community wealth-building and the 'anchor institutions' in the procurement process[50], and the South West Wales local authorities are all committed to the proactive and progressive use of procurement. The aim here is to ensure that local SMEs are able to successfully tender for work (linked with the business support offer above), and to use this as a springboard for future growth.

[49] Including social enterprises, employee-owned businesses, and so on.
[50] Welsh Government (2020), *Progress towards the development of a new procurement landscape in Wales*

## Key action areas

- **We will invest in bringing forward access to sites and premises**

  The evidence shows that there is a persistent market failure in the delivery of commercial property. This has the effect of blocking the expansion of local SMEs (as well as presenting a barrier to attracting larger investors). Across the local authorities and Welsh Government, we will seek to bring forward development on the region's key strategic sites at Baglan, Port Talbot Waterfront, Fabian Way, Felindre, Cross Hands and the Haven Waterway, as well as within the wide range of smaller sites that will help to support distributed growth across the region, consistent with our wider decarbonisation objectives. We will also work to bring forward new city centre office accommodation in Swansea city centre, building on recent investment and continuing the city's transformation.

- **We will actively promote South West Wales as an investment location**

  While the focus of this Mission is on growing our locally-based business stock, inward investment has historically been important in South West Wales, and it remains a key driver of skills and employment and a source of demand for local suppliers. We welcome new investment: we will actively promote the region's assets (linked with its quality of life and visitor economy offer described in Mission 3) and we will work with investors to ensure access to skills and supply chain links, embedding them further in the local economy.

- **We will continue to invest in the region's skills capacity**

  Recent years have seen an improvement in the region's skills profile, and we have a strong track record in building an understanding of employer demand and linking it clearly with provision. Alongside the measures within this Plan to increase skills demand and employer engagement, we will continue to invest in strengthening supply at all levels, through specialist infrastructure, investment in access to employment and a continued focus (building on the region's Skills and Talent Programme) on responding to local economic demand and opportunity.

- **Across all our actions, we will improve access to fair and secure employment**

  Despite the region's success in creating jobs, economic inactivity remains higher than in the rest of the UK. While in-work poverty is a significant issue - and one which our focus on productivity and resilience across all sectors seeks to tackle – there is strong evidence that being in work supports positive outcomes across a range of measures[51]. Building on our experience of successful programmes such as Workways+, we will ensure a range of support to enable people to enter and progress in the labour market.

[51] Welsh Government (2019), *Employability Plan*, p,9

# 6. Mission 3: Growing and sustaining the South West Wales 'experience' offer

*South West Wales enjoys a superb environment and a unique 'quality of life' offer. This is a key asset for the region, and one which we must protect and enhance. We will make South West Wales known for the quality and breadth of its 'experience offer', bringing together urban and rural environmental quality, 'quality of life' and culture. This will support a high-value visitor economy – but it will also be locally owned and a central part of our investment proposition.*

**Figure 6-1: Summary of assets, opportunities, challenges and actions**

| Current assets | Next opportunities | Key challenges | Key actions |
|---|---|---|---|
| Unique combination of assets (natural environment; sport and leisure opportunities, urban and rural mix; unique cultural and heritage character)<br>Important existing tourism offer, closely linked with environmental quality | Securing increased value from the 'South West Wales experience', in the context of increasing demand for quality and sustainability and growing opportunities for dispersed and remote working<br>Building and raising awareness of the local 'brand' | Balancing economic, environmental and community sustainability considerations.<br><br>Countervailing pressures on town and city centres as they need to repurpose in the light of structural change | Targeted and coordinated capital investment, including in town and city centres<br><br>Balance of initiatives at regional, local and community-driven scale |

## Understanding the case for the Mission: the core rationale

**6.1** South West Wales' 'experience offer' is a key strength. It is also multifaceted and interlinked: while it includes the region's substantial visitor economy, it recognises that the visitor economy is itself dependent on the quality of the region's cultural and environmental offer. At a national level, this is reflected with the statement of 'Wales' core offer' within the Welsh Government's *Priorities for the Visitor economy* (set out in Figure 6-2). This highlights the importance of 'sense of place' within the Welsh offer, with the visitor economy helping to act as a showcase for local food and drink and celebrating the Welsh language as a central part of local and national identity[52].

**6.2** In South West Wales, the range of experiences the region has to offer is diverse and impressive. It is this diversity that provides much of the region's distinctiveness: the proximity of the university city of Swansea to the beaches of the Gower for instance, or the region's range of landscape types (including the Pembrokeshire Coast and Brecon Beacons National Parks) and network of smaller rural towns. This also makes the region attractive as a place to live, and ought to be a central part of the region's investment proposition. This

[52] Welsh Government (January 2020), *Welcome to Wales: Priorities for the visitor economy, 2020-25*, p.9.

Mission focuses on **investment** in the 'experience economy' and how we can **promote** it to new and diverse audiences.

**Figure 6-2: The Welsh 'core offer' to visitors**


*Source: Welsh Government (2020), Welcome to Wales: Priorities for the visitor economy, 2020-25*

## Investing in our experience economy

**6.3** The 'good news' is that several visitor economy trends coincide with some of South West Wales' inherent strengths: in particular, the increased interest in sustainability, green tourism and nature and a desire for 'authentic' experiences. These, and the inherent value of local communities and identity, form part of the wellbeing 'offer' to residents as well. However, with the exception of Swansea, all parts of the region are forecast to see falling working age populations over the next twenty years. New employment opportunities should help to reverse this – but there is also an opportunity through the acceleration of remote working and increasing flexibility to retain more of our young people and university graduates, and to attract a wider demographic to the region.

**6.4** Over the next decade, this will mean investment focused both on the quality of the visitor offer and the appeal of South West Wales as a place to live and work – recognising that these are inherently interconnected:

### Key action areas

- **We will invest in the region's 'experience infrastructure'**

  We will seek to broaden the range of attractions and opportunities across the region, especially where they contribute to an increasingly sustainable offer, linked with the region's heritage (including in relation to local food and drink produce), culture and natural environment. This will include ensuring that the delivery of key national

**Key action areas**

initiatives (such as the proposed National Forest) contribute to our wider economic ambitions.

- **We will invest in our city, town and community centres**

  Our towns and cities are the gateways to our region, and the focal points for community, commercial and civic life. Much investment has taken place and much is underway – with (for example) the Swansea Arena and its bridge link to the city centre opening in 2021, creating a further milestone in the city's regeneration. However, there is more to do: across the region, many of our town and community centres have been impacted by structural change in the retail sector – with the process of repurposing requiring complex action on a number of fronts.

  Building on our experience of working together across the region, and in the spirit of the Welsh Government's Transforming Towns initiative, we will prioritise further investment in our town and city centres, ensuring that they are sustainable focal points for the long term.

- **We will make the 'experience economy' work for everyone**

  Not all parts of the region benefit from the excellent quality of life that the region has to offer – and in some places, our ability to retain and attract younger people is impacted by deteriorating housing affordability (an issue which has the potential to worsen further in an economy increasingly characterised by remote working). Linked with our decarbonisation and net zero objectives, we will continue to invest in affordable housing solutions and long-term community renewal.

## Promoting the region

6.5 The quality of South West Wales' assets present an opportunity to better promote the region – to visitors and investors and to raise the region's profile on the wider stage. This should extend to encompass the renewable energy potential and industrial opportunities highlighted earlier: the region's future in a greener economy (and the opportunities that presents) combining with its cultural and environmental quality:

**Key action areas**

- **We will take a more coordinated approach to promoting the South West Wales opportunity**

  Recognising that each part of the region has a distinct identity and 'brand', we will work to ensure coordination across the visitor, education, local produce and investor

**Key action areas**

marketing channels to ensure that South West Wales has a clearer 'external' profile and a complementary offer.

- **We will invest in quality**

  *Welcome to Wales*, the Welsh Government's strategy for the visitor economy, places a strong emphasis on *quality* of the whole experience offer – accommodation, food and drink, the public realm, environment, and so on – as the route to a higher-value, more sustainable economic base. Across all of the actions above, we will invest – with business – in quality and excellence.

# 7. Moving forward: Delivering the Plan

*This Plan provides a framework for taking forward the priorities that we have identified in our Ambitions and Missions over the long term. Delivery will depend on a range of investment sources and the coordination over time of specific projects which combine to deliver our objectives. This chapter explains our approach to funding and delivery, and how we will prioritise and monitor our progress.*

## From a framework to a pipeline of complementary projects…

7.1 This Plan takes a long-term view. Recognising that new opportunities will emerge over time, it is intended to be flexible, with specific actions described at a relatively high level.

7.2 To convert these into practical interventions, we have prepared a **project pipeline**. This sets out a schedule of interventions, describing how they contribute to our Ambitions and Missions, their current development status and the actions that need to be taken to bring them forward. This will be kept 'live' and will be regularly reviewed by regional partners. This will enable new interventions to come forward where opportunities arise (for example, commercial proposals may lead to propositions that have not yet been identified), and for project information to be updated as schemes progress.

7.3 The projects within the pipeline are at different stages of development. Consistent with the approach used by HM Treasury and the Welsh Government (and adopted by the City Deal), projects will be brought forward through the business case process set out in the 'Green Book' appraisal guide. In summary, this means that projects will be considered against the following headings:

**Table 7-1: Project business case considerations**

| Consideration | Description |
|---|---|
| Strategic fit | • How strong is the evidence of economic demand or need?<br>• Does the project add 'net regional value' (i.e., is it additional to activity already taking place in the region, and if there is any duplication, is this mitigated?)<br>• Does the project contribute to the overall strategic framework (i.e., will it support delivery of an economy that is *"resilient and sustainable; balanced and inclusive; and enterprising and ambitious"*? |
| Options appraisal | • Have a range of options been considered, and is there a clear case for the preferred option? |
| Value for money | • Does the project represent good value, in terms of the outputs and outcomes it will achieve, relative to anticipated public costs? |

| Consideration | Description |
|---|---|
| Affordability | • Does funding for the project exist, and/ or is there a clear route to funding?<br>• Is the funding model compliant with Subsidy Control and other regulations? |
| Deliverability | • Have procurement options been considered and is there a clear route to successful procurement?<br>• Are governance and management arrangements in place, and is there sufficient delivery capacity? |

*Source: SQW*

It will be important that the action plan is seen as a dynamic document and that it is regularly updated by partners. In broad terms, projects include:

- **Region-wide initiatives to build capacity to take advantage of the opportunities identified in the Plan.** These are highlighted within each Mission, and include:
  - Building capacity and expertise to maximise South West Wales' 'net zero' potential
  - The creation of a 'virtual innovation agency' to coordinate and galvanise links between industry and the knowledge base, especially as European funding comes to an end
  - Support at scale for enterprise and entrepreneurship
  - Public investment in the commercial property offer, to enable investment, business growth and greater environmental sustainability
  - Delivering a coordinated approach to investment marketing and support, linked with the 'experience' economy.
- **High profile strategic capital investments**, such as the Swansea Bay and South West Metro

7.4 **Major local projects** contributing to the overall objectives and Missions. Not all will *directly* benefit all parts of the region. However, in aggregate they will offer substantial regional benefit.

## Funding the Plan: A longer-term investment fund

7.5 Funding to take forward the Regional Economic Delivery Plan and its component projects will come from multiple sources, and some individual funding packages are likely to be complex. At the time of writing, there is some uncertainty regarding future funding, as European sources (historically an important part of the funding mix in South West Wales) draw to a close. However, potential sources may include:

- Private investment, especially in bringing forward some of the energy related investments set out in relation to Mission 1, and in respect of major regeneration and development schemes

- The proposed Shared Prosperity Fund (or alternative successors to the European Structural Funds)
- Joint investment across the local authorities, or between the local authorities and the Welsh Government
- UK Government funds (such as the Strength in Places Fund and the Levelling Up Fund).

**Key action areas**

- **We will seek to secure a devolved regional Investment Fund**

  The nature of the funding sources identified above will change over time. However, given the scale of the opportunity (and the regional challenge) in South West Wales, we will seek to secure a devolved **regional investment fund**, which would offer the region the ability to lever in additional funding and bring projects forward on a flexible basis. Such a fund could be structured to give a partial financial return on investment, as well as an economic and social return, depending on the nature of the project. This would require investment expertise and capacity, but could lead to the development of a regional portfolio of projects, derived from the emerging project pipeline and building on the successful implementation of the existing City Deal. Currently, the projects within the pipeline have a total value of around £3 billion over the coming decade: while costs will be determined through the business case process, this provides an indication of the scale of the challenge and opportunity ahead.

## Monitoring progress

7.6 Our proposed projects are all currently at different stages of development. Through the business case process, we will set out a series of performance indicators against which progress can be monitored. These are likely to include:

**Table 7-2: Indicative performance measures**

| Indicator | Description |
|---|---|
| Private investment | Additional private investment secured in the region as a result of public support through the REDP |
| Gross value added | Estimated additional GVA generated as a result of investment |
| Firm creation and survival | New business starts as a result of REDP-backed activity and survival rates over time |
| Jobs | Jobs created and safeguarded as a result of investment. The REDP emphasises the quality of jobs (in line with the Economic Contract) and this should be reflected in the performance measure (e.g., employment at or above Real Living Wage and sustained over time). |

| Indicator | Description |
|---|---|
| Access to employment | People entering employment (or increasing hours) as a result of intervention |
| Innovation | Research and development into new products, goods and services as a result of intervention.<br>Adoption of 'new to the firm' products or processes as a result of intervention |
| Carbon reductions | CO2 savings as a result of investment |
| Modal shift | Increased journeys on public transport/ increased use of active travel as a result of investment. |
| Visitor spend | Increased visitor spend as a result of investment |

*Source: SQW*

## Governance

**7.7** The Regional Economic Delivery Plan will be 'owned' and overseen by the **South West Wales Corporate Joint Committee** (CJC). This will be one of four CJCs established in Wales under new legislation, enabling the constituent local authorities to exercise joint functions relating to strategic planning, transport and measures that will improve the economic wellbeing of their regions.

**7.8** Supporting the CJC, the Regional Regeneration Directors will keep track of progress and will be responsible for developing business cases, securing investment and ensuring delivery on the CJC's behalf. It will be important to secure sufficient capacity – within individual partner authorities and jointly – to do this, given the scale of the opportunities and challenges. The CJC will also establish mechanisms for a strong non-government voice (e.g., from business and the third sector) in influencing priorities and maintaining oversight.

# Annex A: Summary SWOT analysis

A.1 The Evidence and Strategic Landscape Review prepared to inform this Plan contained an analysis of the region's strengths, weaknesses, opportunities and threats. This formed the basis for the analysis within Chapter 2 of the Plan, and is summarised below:

**Table A-1: Summary SWOT analysis**

| Strengths | Weaknesses |
|---|---|
| • Nationally and internationally significant university research assets, with a strong record of industrial collaboration in the region and recent and planned investment in new university facilities<br>• Outstanding natural environment, supporting quality of life and a distinctive location proposition for visitors and investors<br>• Relatively strong record in job generation and in increasing economic activity<br>• Some established sectoral strengths (e.g., engineering and advanced manufacturing; food production)<br>• Some major site development opportunities<br>• Growing and diverse SME base<br>• Community strengths and capacity and strong sense of identity | • Projected decline in working age population and rising dependency ratio<br>• Relatively low productivity, reflected in relatively low wages<br>• Relative peripherality, leading to weak transport and digital connections in some places, and viability constraints on physical developments<br>• Few large firms and company headquarters<br>• Some constraints on firm expansion, linked with workforce skills shortfalls (although qualifications levels are rising) and limited commercial property options<br>• Market change impacting on viability and vitality of town and city centres<br>• Persistent concentrations of disadvantage |
| **Opportunities** | **Threats** |
| • Talent pool generated by the region's universities and further education system; opportunity to retain and grow the skilled workforce and business stock<br>• Opportunities for growth in areas of activity relevant to the region's historic strengths (e.g., advanced manufacturing) and in current research and technology capabilities<br>• Opportunity for location-specific growth in the energy sector and in decarbonisation more broadly<br>• Distance might become less important as remote working becomes 'normal' (potentially increasing the appeal of SW Wales' quality of life offer and helping to change perceptions<br>• Closeness to the natural environment and ability to offer unique sporting, cultural and environmental offer – helping to retain and attract young and talented people | • High carbon intensity of part of the industrial base<br>• Risk of loss of major employers, with potentially significant labour and spatial impacts<br>• Risk of outflow of talent and of younger workers, if there are insufficient opportunities locally<br>• Wider Brexit-related uncertainties relating to export markets, port-related activity and future farm payments<br>• Impacts of the Covid-19 pandemic, including higher unemployment as mitigation measures wind down and accelerate changes in the role of High Street/ town centre functions<br>• Risk that existing inequalities could be exacerbated. |

| Strengths | Weaknesses |
|---|---|
| • Opportunities to build on a track record of collaboration between the public sector, academia and industry<br>• Potentially significant infrastructure investments (e.g., Swansea Bay Metro)<br>• Economic policy innovation in Welsh policy context<br>• Major site opportunities (e.g., Baglan Energy Park) and ambitious plans for investment and development, including as part of Swansea Bay City Deal<br>• Opportunities for business innovation | |

*Source: SQW*

# Annex B: Well-being of Future Generations Act assessment

## Contribution to the Well-being Goals

**B.1** The Wellbeing of Future Generations (Wales) Act 2015 (WFGA) identifies seven Well-being Goals: a Prosperous Wales; a Resilient Wales; a Healthier Wales; a More Equal Wales; a Wales of Cohesive Communities; a Wales of vibrant culture and thriving Welsh language; and a Globally Responsible Wales. Guidance on the application of the WFGA states that policy should seek to contribute to all seven Well-being Goals, not just the one that most closely approximates to the central purpose of the initiative.

**B.2** The table below summaries how this Plan contributes to the Well-being Goals:

**Table B-1: Contribution of the REDP to the Well-being Goals**

| Goal | Contribution |
|---|---|
| A Prosperous Wales | **Direct contribution**<br>The Plan contributes to increasing productivity and economic growth, to support the creation and safeguarding of more, better paid jobs, opportunities for business starts and growth, and further links between the knowledge base and industry. |
| A Resilient Wales | **Direct contribution**<br>The Plan places an increased emphasis on economic sustainability through focus on the need to decarbonise the economy; resilience to future technology change through emphasis on responding to and harnessing digitalisation |
| A Healthier Wales | **Indirect contribution**<br>The Plan is not directly concerned with health matters. However, greater prosperity (especially where more equally distributed) leads to better health outcomes. The Plan also notes the importance of the health and care sector and the opportunity to link it with economic growth. |
| A More Equal Wales | **Direct contribution**<br>The Plan recognises the need to build an 'inclusive growth' model into the strategy, via efforts to support skills outcomes, resilience to automation, or mechanisms to support greater wealth retention within the community |
| A Wales of Cohesive Communities | **Indirect contribution**<br>Better economic inclusion outcomes should improve cohesion, where linked with programmes and mechanisms that focus on local community involvement and engagement. |
| A Wales of Vibrant Culture and Thriving Welsh Language | **Indirect contribution**<br>Measures to support the growth of the creative economy (including associated with the Welsh language) should directly support, and could be an important part of the SW Wales investment proposition. More |

| Goal | Contribution |
|---|---|
| | broadly, the Plan seeks to support the economic vibrancy of the region, including principally Welsh-speaking communities. |
| A Globally Responsible Wales | **Indirect contribution**<br>Achieving over time a decarbonised growth model will contribute to this The Plan also highlights openness to new ideas (and investment) from elsewhere |

## Delivering against the National Well-being Indicators

B.3 The Welsh Government has adopted 46 **National Indicators**, against which progress against the goals of the Well-being of Future Generations Act can be measured. As set out in the core of the REDP, while increasing productivity (gross value added per filled job, or hour worked) is an important measure, success will be measured against a number of other indicators as well. The key relevant indicators are listed below (with the number against each one corresponding to the indicator number published in the Welsh Government list), along with a description of how the Ambitions and Missions in the Plan are likely to contribute to their achievement:

**Table B-2: Assessment of contribution to meeting the National Well-being Indicators**

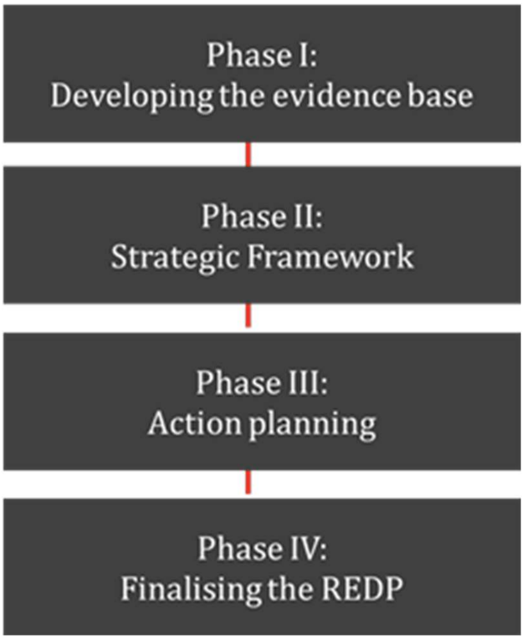
| Indicator | Route to impact: Enabled through… |
|---|---|
| 04. Levels of nitrogen dioxide pollution in the air | Large scale decarbonisation (Mission 1) |
| 08. Percentage with adults with qualifications at different levels of the National Qualifications Framework | Measures to raise the supply of workforce skills, and improved engagement with employers, over time (across all Missions)<br>Measures to raise demand for skills (across all Missions, but especially relevant to Missions 2 and 1) |
| 09. Gross value added per hour worked relative to UK average | All Missions. This is a measure of productivity, which the Plan overall seeks to address. Note however that 'success' in achieving a relative measure in respect of the rest of the UK depends on the pace of growth elsewhere in the UK (hence the challenges in 'closing the gap' without very large-scale investment) |
| 10. Gross disposable household income per head | All Missions. Note however that this data is not available at the South West Wales geography (it is published at ITL 1 and 2) |
| 11. Percentage of businesses which are innovation active | Measures to increase interaction between business and the knowledge base, and to strengthen the innovation ecosystem (principally Mission 2) |
| 12. Capacity (MW) of renewable energy equipment installed | Developing our renewable energy potential (Mission 1) |
| 16. Percentage of people in employment who are on permanent | Measures to increase economic activity and the supply of higher paid employment. Delivered across all Missions. |

| Indicator | Route to impact: Enabled through... |
|---|---|
| contracts (or on temporary contracts and not seeking permanent employment) and who earn more than 2/3 of the UK median wage) | |
| 18. Percentage of people living in households in income poverty relative to the UK median | Measures to increase access to employment, especially at higher rates of pay. Across all Missions |
| 21. Percentage of people in employment | Key measure of economic success; relevant to all Missions |
| 22. Percentage of people in education, employment or training measured for different age groups | Measures to improve access to, and demand for, education and training (across all Measures) |
| 26. Percentage of people satisfied with their area as a place to live | Consequential measure arising from the success of measures to improve 'quality of place' (especially relevant to Measure 3) |
| 33. Percentage of properties with adequate energy performance. | Measures to achieve a 'net zero' economy and to improve the energy efficiency of the housing stock as part of that (Mission 1) |
| 42. Emissions of greenhouse gases within Wales | Measures to support decarbonisation (Measure 1) |

# Annex C: Developing the Plan: The process

C.1 The Regional Economic Delivery Plan was developed in 2021 with the support of SQW, through a sequential process that worked from a fresh analysis of the economic evidence to identify the key opportunities and challenges facing the region, and based on that, the Ambitions and Missions reflected in the Plan:

**Figure C-1: Developing the Plan: Phases**




- **Phase I** resulted in the development of a detailed **Evidence and Strategic Landscape Review**. This provides an overview of the region's economy and the policy context, informing an overall SWOT analysis. The Evidence and Strategic Landscape Review has been produced as a separate supporting document and informed the analysis in Chapter 2 of this Plan.
- Based on the outcomes of Phase I, **Phase II** involved the preparation of a **'strategic framework'** for the Plan, which identified the set of Ambitions and Missions that we have set out. As part of this, we analysed the outcomes of the SWOT analysis to consider the region's distinctive challenges, and we developed a series of future scenarios.
- In **Phase III**, we developed an initial pipeline of projects to meet the goals of the Ambitions and Missions. This involved a 'call for proposals' with the South West Wales local authorities and other stakeholders, and the development of a **Project Pipeline Supplement**, which will be kept 'live', as set out in Chapter 7.
- Based on the outcomes of the preceding phases, **Phase IV** involved the finalisation of the Plan, which was produced in draft in August 2021.

## Consultation and engagement

C.2 The development of the Plan was led by the South West Wales local authorities, and regular dialogue took place with a steering group involving the four authorities and the Welsh Government, and with the Regional Directors. The strategic framework and contents of the Plan was also considered by South West Wales Leaders and Chief Executives.

In developing the Plan, consultation took place with over 50 stakeholders from business, local and Welsh national government, leaders within the region's Enterprise Zones and local business partnerships, and the third sector. This included bilateral consultations throughout the process; discussions at county-level economic partnership boards, the Regional Learning and Skills Partnership, and the Economic Strategy Group of the Swansea Bay City Deal; and a stakeholder consultation workshop which took place in June 2021.

# Integrated Impact Assessment Screening Form

**Please ensure that you refer to the Screening Form Guidance while completing this form.**

**Which service area and directorate are you from?**
Service Area: Planning & City Regeneration
Directorate: Place

**Q1 (a) What are you screening for relevance?**

- ☐ New and revised policies, practices or procedures
- ☐ Service review, re-organisation or service changes/reductions, which affect the wider community, service users and/or staff
- ☐ Efficiency or saving proposals
- ☐ Setting budget allocations for new financial year and strategic financial planning
- ☐ New project proposals affecting staff, communities or accessibility to the built environment, e.g., new construction work or adaptations to existing buildings, moving to on-line services, changing location
- ☐ Large Scale Public Events
- ☐ Local implementation of National Strategy/Plans/Legislation
- ☐ Strategic directive and intent, including those developed at Regional Partnership Boards and Public Services Board, which impact on a public bodies functions
- ☒ Medium to long term plans (for example, corporate plans, development plans, service delivery and improvement plans)
- ☐ Setting objectives (for example, well-being objectives, equality objectives, Welsh language strategy)
- ☐ Major procurement and commissioning decisions
- ☐ Decisions that affect the ability (including external partners) to offer Welsh language opportunities and services

**(b) Please name and fully <u>describe</u> initiative here:**

The new South West Wales Regional Economic Delivery Plan (REDP) will replace the current Swansea Bay City Region Economic Regeneration Strategy as the strategic framework for economic regeneration at the regional and local level. The REDP has been produced by the four local authorities in South West Wales in partnership with the Welsh Government. It sets out how we will build on our distinctive strengths and opportunities over the next ten years to develop a more prosperous and resilient South West Wales economy.

Preparation of the REDP included a thorough analysis of the evidence base on the region's economy, labour market and infrastructure to determine its strengths, weaknesses, opportunities and threats. Extensive consultation was undertaken with stakeholders across the region. Development of the plan also included consideration of national, regional and local policy context including the Wellbeing of Future Generations Act, decarbonisation and the achievement of net zero by 2050, technological and demographic change and Brexit.

To help plan for the future, the REDP sets out three 'Ambitions' which set out the nature of the South West Wales economy that we want to work towards. These are:

- Resilient and sustainable
- Enterprising and ambitious
- Balanced and inclusive

The ambitions are supported by three complementary Missions, which will guide activity over the next ten years:

- Mission 1 – Establishing South West Wales as a UK leader in renewable energy and the development of a net zero economy
- Mission 2 – Building a strong, resilient and embedded business base
- Mission 3 – Growing and sustaining the 'experience' offer

**Q2 What is the potential impact on the following: the impacts below could be positive (+) or negative (-)**

| | High Impact + | High Impact - | Medium Impact + | Medium Impact - | Low Impact + | Low Impact - | Needs further investigation |
|---|---|---|---|---|---|---|---|
| Children/young people (0-18) | ☐ | ☐ | ☒ | ☐ | ☐ | ☐ | ☐ |
| Older people (50+) | ☐ | ☐ | ☒ | ☐ | ☐ | ☐ | ☐ |
| Any other age group | ☐ | ☐ | ☒ | ☐ | ☐ | ☐ | ☐ |
| Future Generations (yet to be born) | ☐ | ☐ | ☐ | ☐ | ☒ | ☐ | ☐ |
| Disability | ☐ | ☐ | ☐ | ☐ | ☒ | ☐ | ☐ |
| Race (including refugees) | ☐ | ☐ | ☐ | ☐ | ☒ | ☐ | ☐ |
| Asylum seekers | ☐ | ☐ | ☐ | ☐ | ☒ | ☐ | ☐ |
| Gypsies & travellers | ☐ | ☐ | ☐ | ☐ | ☒ | ☐ | ☐ |
| Religion or (non-)belief | ☐ | ☐ | ☐ | ☐ | ☒ | ☐ | ☐ |
| Sex | ☐ | ☐ | ☐ | ☐ | ☒ | ☐ | ☐ |
| Sexual Orientation | ☐ | ☐ | ☐ | ☐ | ☒ | ☐ | ☐ |
| Gender reassignment | ☐ | ☐ | ☐ | ☐ | ☒ | ☐ | ☐ |
| Welsh Language | ☐ | ☐ | ☐ | ☐ | ☒ | ☐ | ☐ |
| Poverty/social exclusion | ☐ | ☐ | ☒ | ☐ | ☐ | ☐ | ☐ |
| Carers (inc. young carers) | ☐ | ☐ | ☐ | ☐ | ☒ | ☐ | ☐ |
| Community cohesion | ☐ | ☐ | ☐ | ☐ | ☒ | ☐ | ☐ |
| Marriage & civil partnership | ☐ | ☐ | ☐ | ☐ | ☒ | ☐ | ☐ |
| Pregnancy and maternity | ☐ | ☐ | ☐ | ☐ | ☒ | ☐ | ☐ |

**Q3 What involvement has taken place/will you undertake e.g. engagement/consultation/co-productive approaches?**
**Please provide details below – either of your activities or your reasons for not undertaking involvement**

The REDP was prepared by the four local authorities in South West Wales in partnership with Welsh Government. In preparing the REDP, consultation has taken place with over 50 stakeholders from business, local authorities and Welsh Government, Universities, Further Education Colleges, leaders within the region's Enterprise Zones and local business partnerships, and the third sector.

Consultation has included one-to-one consultations throughout the process; discussions at county-level economic partnership boards including Regeneration Swansea, the Regional Learning and Skills Partnership, and the Economic Strategy Group of the Swansea Bay City Deal; and a stakeholder consultation workshop which took place in June 2021.

**Q4 Have you considered the Well-being of Future Generations Act (Wales) 2015 in the development of this initiative:**

a) **Overall does the initiative support our Corporate Plan's Well-being Objectives when considered together?**
**Yes** ☒ **No** ☐

b) **Does the initiative consider maximising contribution to each of the seven national well-being goals?**
**Yes** ☒ **No** ☐

c) **Does the initiative apply each of the five ways of working?**
**Yes** ☒ **No** ☐

d) **Does the initiative meet the needs of the present without compromising the ability of future generations to meet their own needs?**

**Yes** ☒ **No** ☐

---

**Q5 What is the potential risk of the initiative?** ***(Consider the following impacts – equality, socio-economic, environmental, cultural, legal, financial, political, media, public perception etc…)***

| High risk | Medium risk | Low risk |
|---|---|---|
| ☐ | ☐ | ☒ |

**Q6 Will this initiative have an impact (however minor) on any other Council service?**

☒ **Yes** ☐ **No** **If yes, please provide details below**

The REDP will provide strategic direction for economic regeneration activities undertaken by the Council

---

**Q7 What is the cumulative impact of this proposal on people and/or communities when considering all the impacts identified within the screening and any other key decisions affecting similar groups/ service users made by the organisation?**

*(You may need to discuss this with your Service Head or Cabinet Member to consider more widely if this proposal will affect certain groups/ communities more adversely because of other decisions the organisation is making. For example, financial impact/poverty, withdrawal of multiple services and whether this is disadvantaging the same groups, e.g., disabled people, older people, single parents (who are mainly women), etc.)*

The REDP sets the strategic direction for economic regeneration regionally and locally over the next ten years. The REDP aims to create an economy that is resilient and sustainable; enterprising and ambitious; and balance and inclusive. It is expected that it will have a positive impact on people and communities in Swansea by improving economic performance and creating sustainable employment opportunities. In line with the Equality Act 2010 and Public Sector Equality Duty, due regard will be given to the impact on protected groups in the development and delivery of all the actions that flow from the REDP. All actions will be screened and full IIAs will be undertaken if appropriate in the future as the actions progress.

# Integrated Impact Assessment Screening Form

**Outcome of Screening**

**Q8 Please describe the outcome of your screening below:**

- **Summary of impacts identified and mitigation needed (Q2)**
  The impacts of the REDP are expected to be positive and are low to medium in nature.

- **Summary of involvement (Q3)**
  Consultation with public, private and voluntary sector partners locally and regionally, including the Regeneration Swansea Partnership, has helped shape ambitions and missions of the REDP.

- **WFG considerations (Q4)**
  The Wellbeing of Future Generations Act has been considered throughout the preparation of the REDP. Annex B of the Plan sets out the contribution to the wellbeing goals.

- **Any risks identified (Q5)**
  The REDP is expected to be low risk. In delivering the actions that flow from the Plan, any risks will be considered at a project level in the normal way.

- **Cumulative impact (Q7)**

The REDP sets the strategic direction for economic regeneration regionally and locally over the next ten years. The REDP aims to create an economy that is resilient and sustainable; enterprising and ambitious; and balance and inclusive. It is expected that it will have a positive impact on people and communities in Swansea by improving economic performance and creating sustainable employment opportunities. In line with the Equality Act 2010 and Public Sector Equality Duty, due regard will be given to the impact on protected groups in the development and delivery of all the actions that flow from the REDP. All actions will be screened and full IIAs will be undertaken if appropriate in the future as the actions progress.

(NB: This summary paragraph should be used in the relevant section of corporate report)

☐ **Full IIA to be completed**

☒ **Do not complete IIA – please ensure you have provided the relevant information above to support this outcome**

NB: Please email this completed form to the Access to Services Team for agreement before obtaining approval from your Head of Service. Head of Service approval is only required via email.

| **Screening completed by:** |
|---|
| **Name: Clare James** |
| **Job title: Economic Development Manager** |
| **Date: 3.12.21** |

| **Approval by Head of Service:** |
|---|
| **Name: Phil Holmes** |
| **Position: Head of Planning and City Regeneration** |
| **Date: 9.12.21** |

**Please return the completed form to accesstoservices@swansea.gov.uk**

Cyngor **Abertawe**
**Swansea** Council

**Report of the Convener**

**Development and Regeneration Scrutiny Performance Panel –
8 March 2022**

# Project Update Report

| | |
|---|---|
| **Purpose:** | The Project Update Report will provide information and update on the regeneration programme and projects in Swansea |
| **Councillors are being asked to:** | Review the departmental 'Dashboard' report and feedback any comments to the relevant Cabinet Member. |
| **Lead Councillor:** | Councillor Robert Francis-Davies, Cabinet Member for Investment, Regeneration & Tourism |
| **Lead Officer** | Huw Mowbray, Development and Physical Regeneration Strategic Manager |

## 1. Background

1.1 The Development and Regeneration Scrutiny Performance Panel meets every two months to review the 'health' of the City Centre and regeneration projects within Swansea.

1.2 As part of the monitoring aspect of the Panel, a departmental 'Project Update Report' is made available for review and scrutiny. This report contains updates on the regeneration programme and various projects throughout Swansea and provides detail and timelines where relevant.

1.3 The Panel are asked to review the report and ask any questions which they may have on the information provided. The Panel may then follow up the meeting with a letter to the relevant Cabinet Member to convey its views and any recommendations.

**Background Papers:** None

**Appendices:** Regeneration Programme / Project Update Dashboard Report

| City Regeneration Programme Board – Summary Report | |
|---|---|
| Steering Group Lead | Martin Nicholls |
| Reporting Period | February 2022 |

| Project: Copr Bay | |
|---|---|

- Handover of the scheme is to be the w/c 21st February. Council officers are aligned with two days of familiarisation on the 21st and 22nd February. Test event tickets for Friday 25th and Saturday 26th went on sale.
- Issues still persist with labour availability.
- Positive discussions have also taken place with BGCL addressing the outstanding construction issues.

| Project: Swansea Central North | |
|---|---|

**Masterplan**

- RIBA Stage 1 proposals are expected to be submitted shortly.
- RIBA Stage 2 - Target date October 2022.

**Office Hubs**

- Meetings with potential tenants in progress to establish requirements.
- Risk - Decision making timelines and governance of interested tenants could impact office hub delivery if timelines are not aligned

| Project: 71/72 The Kingsway | |
|---|---|

**Progress**

- Piling operations ongoing, with relocation of access ramp undertaken to enable this to progress. A temporary closure of the westbound lane on The Kingsway was required to enable work to continue further to Picton Lane access being closed by Hacer
- Picton Lane closure originally agreed between 19/01/22 to 01/02/22, extended to 04/02/22.
- w/c 07/02 required overnight closures of junction of Plymouth St/ Oxford St to enable site set up. Weather constraints prevented its completion - additional day on the 22/02 agreed.

**Programme** - started 22/11/21 – projected completion 08/23. No change.

**Commercial updates -** Avison Young/JLL and |Cushman's reviewed draft HoT's for first tenant for prospective flex tenants. Joint agents preparing lettings strategy.

**Barclays Bank** – BYUK programme for delivery unacceptable. Alternate procurement option required to meet ERDF funding programme requirement.

| Project: Wind Street | |
|---|---|

- Nominated auto bollard sub-contractor still to return to site – now scheduled for early March.
- Operational meeting held with traders/SWP representative

| Project: TAN15 Development and Flood Risk | Project Lead: TE, DH, GE |
|---|---|
| **Strategic Flood consequence assessment (SFCA)**- SC notified WG on intentions regarding preparation of Regional SW joint stage 1 SFCA , as required by WG 31.01.22<br><br>1.**SFCA stage 1** for SW regional authorities **timescale 04.03.22- 04.07.22**. The Stage 1 SFCA brings together the various policies, plans, strategies relevant to a high-level overview of flood risk. Not expected to enable progress with key issues of TAN15, but demonstrates a co-ordinated and joint working approach aligning with WGovt requirements and aligning with SE Wales approach.<br><br>2. **Swansea /River Tawe Appraisal Timescale 07.03.22-18.06.22.** A more detailed assessment to highlight 'real life' issues presented by the new TAN15 to WG. Key outputs to include:<br>a. Development of a detailed understanding of the flood risk to strategic development sites along the River Tawe (City Centre, SA1, Tawe Riverside and Swansea Vale).<br>b. Assess compliance with the new TAN15.<br>c. Undertake high level testing of flood mitigation options that may enable TAN15 compliance.<br>d. Identity other potential options for managing flood risk and development, including potential changes in TAN15 policy/guidance<br>e. Presentation and workshop of findings | |

| Project: Castle Square | |
|---|---|
| **Water Jets/Fountain** Options for scale and location of water fountain feature, pavilion B design and scope of lighting agreed.<br>**WG Transforming Towns Grant –** Formal offer letter received for eligible funding /spend during 2021/22**.**<br>**Leaf Boat**- meeting arranged with original artist Amber Hiscott to discuss options for de commissioning/relocation. Feasibility study required to look at relocation options.<br>**Heritage consultation** Meeting held with Cadw- to discuss update on scheme and heritage Impact assessment.<br>**Landscape Strateg**y- Outline design being updated. | |

| Project: Shaping Swansea | |
|---|---|
| Strategic Partnership Agreement, agreed subject to Legal approval and then to be signed<br>Once signed progress can start on schemes. | |

| Project: Community Hub | |
|---|---|
| Emergency enabling works completed. Phase 2 to start end of February.<br>Paper Storage<br>Not enough future physical storage to relocate out of the Civic Centre, looking at scanning options, internal/external options being looked at. | |

| Project: Palace Theatre | |
|---|---|
| 80% cost certainty expected before the end of the month where further review can be undertaken on a more definitive position.  In the meantime, VE options are being reviewed, without compromising heritage, end product quality, and let ability. | |

| Project: Skyline | |
|---|---|
| **Land Assembly Strategy**- On going discussions continue.<br>**Skyline –** positive discussions continue. | |

| Project: Swansea Vale | |
|---|---|
| ▪ The initial proposed site at Swansea Vale is still a front runner for P&R relocation. | |

| Project: Repurposing | |
|---|---|
| **St David's Place:** Preparatory/soft strip works to Former Mecca bingo being costed. Concept and designs for building to be included in Swansea Central North stage 1 submission<br>**Swansea Market:** improvements works continue. Improvement works to the market entrances and Portland Street public realm improvements to be aligned.<br>**Next Block:** funding and planning permission secured for conversion of upper floors into residential and refurbishment of commercial units<br>**Castle Cinema:** planning application received for residential units<br>**Primark:** Discussions with owners continue.<br><br>**Public Realm:**<br>**Portland Street / Oxford Street Junction:** GI Infrastructure funding application submitted. Initial proposal being developed. Aim for deliver in FY22/23.<br>**St Marys Place:** Concept and designs for building to be included in Swansea Central North stage 1 submission. Traffic circulation to be considered incorporation with the Castle Square works.<br>**The 'Lanes':** investigating funding and delivery options<br>**Marina Pocket Squares:** investigating funding and delivery options<br>**Spring Clean and BAU improvements:** ongoing. New street furniture installed, including cycle racks. | |

Cyngor Abertawe
Swansea Council

**Report of the Cabinet Member for Economy, Finance & Strategy**

**Development & Regeneration Scrutiny Performance Panel – 8 March 2022**

# Impact of Brexit on Rural Development Programme and Funding Update (Post-2023)

| | |
|---|---|
| **Purpose:** | The report presents the Impact of Brexit on Rural Development Programme and Funding Update (Post-2023)'. |
| **Report Author:** | Paul Relf |
| **Finance Officer:** | Aimee Dyer |
| **Legal Officer:** | Debbie Smith |
| **Access to Services Officer:** | Rhian Millar |
| **For Information** | |

## 1. Background

1.1 This report summarises briefly the impact of Brexit on the Rural Development Plan and post 2023 funding of the same.

## 2. Impact of Brexit on the Rural Development Plan

2.1 The current Rural Development Plan is part financed by the European Union through the European Agricultural Fund for Rural Development and Welsh Government. The programme period is 2014-2020 with a further 3 calendar years permitted to December 2023 for final spend of funding allocations and completion of projects.

2.2 The programme in Swansea is coordinated by the Economic Development & External Funding team, working with external stakeholders through the Swansea Rural Development Partnership. The latter has been in existence since 2006, helping to manage successive iterations of the Rural Development Programme.

2.3 Previous versions of the programme in Wales operated both as a more general economic regeneration programme with local access to capital and revenue funding, and a strand of work referred to as ‘LEADER’ for revenue support to pilot new approaches to balanced rural economic and community development.

2.4 The current 2014-2020 phase has been limited to the LEADER strand of work, for which several funding windows have been run over the lifetime of the programme with a funding window currently open for a small number of new projects. 26 community projects have been supported to date, 10 of which are still active, and 16 have been completed. Programme spend to date is £970,107. The team also sign post potential applicants to other funding sources where applicable. Recent new projects include Gower Ambassadors project, Gower Pilgrimage Way and Festival, and Mapping Local Produce & Shorten Supply Chains in Rural Swansea. Further information on all projects can be obtained from the team, and regular e-newsletters are issued.

2.5 Post-Brexit the existing funding commitment from EU funds and Welsh Government is being honoured to December 2023. There is no direct impact on the existing funding mechanism which will continue in its current format until existing funding expires in December 2023.

## 3. Funding update

3.1 Under the EU 7 + 3 year funding cycles, we would now be in the 2021-2027 programme cycle with a new Rural Development programme either in place or having just been launched. Currently there is no specific provision for a replacement Rural Development programme. The only potential option available for a similar successor programme would be to submit projects with a rural focus under the emerging priorities of the UK Shared Prosperity Fund. This does not appear to ring fence any funds for rural development based on initial information available and would require design of new bespoke projects at regional or local level.

## 4. Integrated Assessment Implications

4.1 The Council is subject to the Equality Act (Public Sector Equality Duty and the socio-economic duty), the Well-being of Future Generations (Wales) Act 2015 and the Welsh Language (Wales) Measure, and must in the exercise of their functions, have due regard to the need to:

- Eliminate unlawful discrimination, harassment and victimisation and other conduct prohibited by the Acts.
- Advance equality of opportunity between people who share a protected characteristic and those who do not.
- Foster good relations between people who share a protected characteristic and those who do not.

- Deliver better outcomes for those people who experience socio-economic disadvantage
- Consider opportunities for people to use the Welsh language
- Treat the Welsh language no less favourably than English.
- Ensure that the needs of the present are met without compromising the ability of future generations to meet their own needs.

4.2 The Well-being of Future Generations (Wales) Act 2015 mandates that public bodies in Wales must carry out sustainable development. Sustainable development means the process of improving the economic, social, environmental and cultural well-being of Wales by taking action, in accordance with the sustainable development principle, aimed at achieving the ‘well-being goals’.

4.3 Our Integrated Impact Assessment (IIA) process ensures we have paid due regard to the above. It also takes into account other key issues and priorities, such as poverty and social exclusion, community cohesion, carers, the United Nations Convention on the Rights of the Child (UNCRC) and Welsh language.

4.4 All projects and initiatives referenced in this report are subject to their own Integrated Impact Assessment.

## 5. Legal Implications

5.1.1 As this report is for information there are no additional legal implications falling on the authority.

## 6. Financial Implications

6.1 As this report is for information there are no additional financial implications falling on the authority.

**Background papers:** None

**Appendices:** None

Agenda Item 9

Cyngor Abertawe
Swansea Council

**To:**
**Councillor David Hopkins**
**Cabinet Member for Delivery and Operations**

**And**

**Cllr Robert Francis-Davies**
**Cabinet Member for Investment, Regeneration & Tourism**


*Please ask for: / Gofynnwch am:* Overview & Scrutiny

*Direct Line: / Llinell Uniongyrochol:* 01792 637314

*e-Mail / e-Bost:* scrutiny@swansea.gov.uk


*Date / Dyddiad:* 7 February 2022

**BY EMAIL**
**CC: Cabinet Members**


**Summary:** This is a letter from the Development and Regeneration Scrutiny Performance Panel, following the meeting of the Panel on 25th January 2022. It covers the Foreshore Developments.


Dear Councillor Hopkins and Councillor Robert Francis-Davies,

On the 25th January, the Panel met to hear a verbal update regarding the current position of Foreshore Developments in Swansea. The Panel are grateful for your attendance and input at this meeting. We also thank Geoff Bacon, Head of Property Services, and The Leader for their attendance and contributions.

The Panel heard a limited overview of the current position, in relation to the existing Swansea Bay Strategy. It was agreed that the Panel write to the Cabinet Members outlining specific areas of interest, a response to which could then be submitted to us *in camera* if appropriate. Our main queries centre on the following points:

1. Please may we have an update regarding the marketing of foreshore sites, and in particular any update regarding interest shown in the Civic Centre site.

2. Are there currently plans for the Council to re-develop the Civic Centre site should there be no interest shown by outside parties?

3. In relation to the Civic Centre, it is understood that there are sublet agreements in place with external parties. What is the time span of these agreements and when are they due to end?

4. In the Council's study that was carried out with the Welsh Government in 2008, we understand that three sites were considered to be very important (Sketty Lane car park, Blackpill and Knab Rock). Are there currently any active enquiries about these sites?

Whilst we understand the commercial sensitivity of possible negotiations surrounding development sites, we as a Scrutiny Panel would appreciate updates regarding these important assets and would welcome a future meeting in closed session.

We are interested in any thoughts you may have on the contents of this letter. We would be grateful if you could please provide a written response to the above points by 28th February 2022.

Yours sincerely,

**Councillor Jeff Jones**
**Convener, Development and Regeneration Performance Panel**
✉ **cllr.jeff.jones@swansea.gov.uk**

Cyngor Abertawe
Swansea Council

**Cabinet Office**
The Guildhall,
Swansea, SA1 4PE
www.swansea.gov.uk

Councillor Jeff Jones
Convener, Development and Regeneration Performance Panel

**(VIA EMAIL)**

*Please ask for:* Councillor David Hopkins
*Direct Line:* 01792 63 6141
*E-Mail:* cllr.david.hopkins@swansea.gov.uk
*Our Ref:* DH/RFD/JG
*Your Ref:*
*Date:* 15 February 2022

Dear Cllr. Jones,

**Re: - Response following the Development and Regeneration Scrutiny Performance Panel on 25th January 2022 regarding the Foreshore Developments.**

1. **Please may we have an update regarding the marketing of foreshore sites, and in particular any update regarding interest shown in the Civic Centre site?**

As was referred to in Scrutiny, officers are currently working on a revised Swansea Bay Strategy to review and update the existing 2008 document (attached). As this will be a new policy then the appropriate mechanism to develop is via the Policy Development Committee albeit it is fully accepted the scrutiny will have a key role in this process prior to any cabinet decisions being made. With regards specifically to the Civic Centre this significant site forms part of the development partnership recently announced with Urban Splash and therefore no future marketing is proposed.

2. **Are there currently plans for the Council to re-develop the Civic Centre site should there be no interest shown by outside parties?**

As stated above the Civic Centre forms part of the development partnership recently announced with Urban Splash.

3. **In relation to the Civic Centre, it is understood that there are sublet agreements in place with external parties. What is the time span of these agreements and when are they due to end?**

All third party agreements have been documented to ensure compatibility with any future proposals.

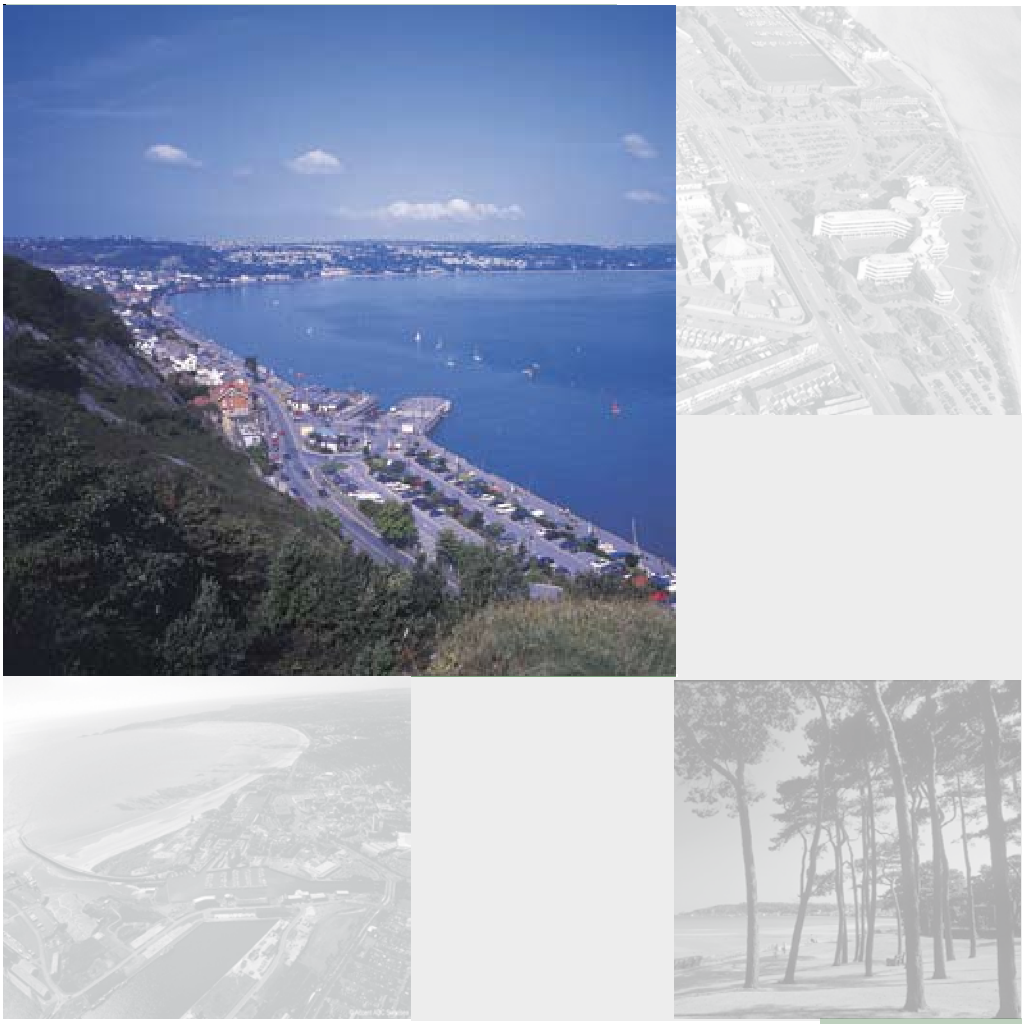
4. **In the Council's study that was carried out with the Welsh Government in 2008, we understand that three sites were considered to be very important (Sketty Lane car park, Blackpill and Knab Rock). Are there currently any active enquiries about these sites?**

There are currently no active enquiries on these sites, however, they are part of the investigations on the emerging revised Swansea Bay Strategy.

Yours sincerely

**Y CYNGHORYDD/COUNCILLOR DAVID HOPKINS**
**AELOD Y CABINET DROS CYFLAWNI A GWEITHREDIADAU**
**CABINET MEMBER FOR DELIVERY & OPERATIONS**

**Y CYNGHORYDD/COUNCILLOR ROBERT FRANCIS-DAVIES**
**AELOD Y CABINET DROS FUDDSODDI, ADFYWIO A THWRISTIAETH**
**CABINET MEMBER FOR INVESTMENT, REGENERATION & TOURISM**



# Action Plan
# Swansea Bay Strategy

**28th February 2008**

# Action Plan
## Swansea Bay Strategy

White Young Green Planning
21 Park Place, Cardiff CF10 3DQ
T: 029 2072 9000
F: 029 2039 5965 E: planning.cardiff@wyg.com
www.wyg.com

in association with

DTZ Consulting

Report status: Version 1
Date: 27 June 2007
Job number: A028066rep[2]070627v1.indd

# Action Plan
## Swansea Bay Strategy

Llywodraeth Cynulliad Cymru
Welsh Assembly Government

## CONTENTS PAGE

# 1. INTRODUCTION

## 1.1 Background

Swansea Bay Strategy is one of a series of interrelated initiatives that the City and County of Swansea is developing to improve the long-term performance of the city and the facilities for residents, visitors and businesses. The other initiatives are:

- City Centre Strategic Framework (Roger Tym & Partners);
- Tawe Riverside Corridor (Hyder Consulting); and,
- Swansea Tourism Strategy (Stevens & Associates).

These studies will provide a framework to guide development and compliment the SA1 development and the retail, sports and employment schemes in Morfa and Swansea Enterprise Park.

White Young Green Planning with sub-consultants DTZ Consulting were commissioned in January 2006 to prepare a Strategy for Swansea Bay with the aim of providing a vision for the Bay and an integrated assessment of its potential for new development and enhancement.

## 1.2 The Study Area

The Swansea Bay Strategy focuses on the 8.5 kilometres of waterfront of Swansea Bay from the West Pier in the east to Mumbles Pier in the west. It is an attractive area of the city offering panoramic views over the bay and a range of facilities serving residents and visitors. It demonstrates the very clear connection of the city's retail and civic functions to the marina, beach and waterfront.

The eastern end of the study area includes the land around the County Council offices and the link up West Way to the proposed redeveloped bus station. The new National Maritime Museum and redeveloped Swansea Leisure Centre are on the north of the Marina close to the Council offices. The study area does not include the city centre, River Tawe or the SA1 areas of the city, which are subject to separate initiatives.

The central area from St Helen's to Blackpill has a strong landscape setting, providing amenity space and sports facilities alongside Swansea University and Singleton Hospital, which are separated from the waterfront by the Oystermouth Road dual carriageway. The western end of the study area includes Oystermouth, Mumbles and Mumbles Pier, which have a traditional seaside charm and attractive promenade.

## 1.3 The Brief

The Brief to Consultants, dated November 2005, stated that the strategy would consist of three main elements, comprising:

- A Vision for the Bay, which presents an holistic view of what it can offer in terms of recreation and tourism and includes an analysis of issues, constraints, policy context, extensive market research and consultations with various stakeholders, landowners and Council officers;
- An Action Plan, which considers the potential development at identified key destinations, and environmental and infrastructure enhancement proposals between those destinations; and,
- A Delivery and Implementation Plan, which sets out the potential mechanisms for bringing forward development and enhancement.

This report is the second part of the study: the Action Plan, and identifies the projects and initiatives to be developed in the bay, based upon the key initiatives identified in the Vision for the Bay report.

The report sets out the vision for the bay and describes how this will be implemented through six key destinations and a bay wide set of initiatives. An action plan is then provided for the bay as a whole and for each destination.

# 2. VISION FOR THE BAY

## 2.1 The Vision

Swansea is unique in Wales as being a city located directly on the waterfront, with miles of accessible golden sand and a gently curving bay offering distant vistas to picturesque destinations. Yet the arc of Swansea Bay, although providing an attractive amenity area for the city, does not provide the quality destinations required of a truly European city.

Over the last 40 years the area has seen minor changes, whilst other parts of the city have undergone major regeneration. The special character of the city is partly derived from its strategic location on the bay and relationship to the waterfront, but little has been done to enhance or develop this characteristic.

If Swansea is to take its place as a European waterfront city, it must make the most of its strategic assets. The bay is Swansea's premier strategic asset and it must play a more positive role in the economic development and vitality that the city has to offer. The vision for Swansea Bay is therefore set out below.

The bay provides the recreational space for the city. It is the place where people should be able to relax and unwind or re-energise themselves through sport. It should be the destination for culture, art, good food, quality places and a place to meet people. The bay should be a symbol of the quality of life that Swansea can deliver for residents and visitors. It is city life at the water's edge.

Sustainability must be at the heart of the revitalisation of Swansea Bay. The uses, the movement pattern, the ecology and design of new buildings must address all aspects of sustainability to ensure that the principles set out in Planning Policy Wales, Wales Spatial Plan and Local Agenda 21, and CCS Sustainable Developer's Guide are achieved.

## 2.2 Objectives of the Vision

Swansea Bay is where city life meets the waters edge and is a place that will through a high quality and sustainable environment:

Stimulate: the senses with the sight, sound, taste and smell of the sea;

Re-energise: the body through activities on the beach, water and land;

Encourage: new visitors with an exciting range of attractions;

Inform: through history and the natural environment;

Celebrate: the achievements of the people of Swansea; and,

Provide: opportunities for all ages to enjoy the bay.

## 2.3 Delivering the Vision:

The vision will be delivered over the next fifteen years through a series of initiatives both on a baywide level and specific to the six key destinations.

Baywide Initiatives

- Create a unified waterfront park which extends from Mumbles in the west to the Tawe Riverside Park in the east, linking the key destinations.
- Create a unified Swansea Bay identity.
- Celebrate the quality and diversity of the environment and landscape.
- Improve accessibility from the City Waterfront to Mumbles Pier.

**Plan showing the varying character of the Bay and the location of the six key destinations**

## Destination Initiatives

### City Waterfront

- Open up County Hall to visitors, introducing new public facilities.
- Connect the city centre to the waterfront.
- Redevelop Paxton Street and surplus car park land.
- Create new visitor facilities and beach activity zone.
- Improve properties along Oystermouth Road.
- Widen the promenade from County Hall to the Slip Bridge.

### St Helen's

- Prepare a site specific development brief in consultation with the local community, and other relevant landowners and stakeholders.
- Create new visitor facilities and car parking next to the beach access.

### Sketty Lane

- Strengthen the sports village.
- Develop a new waterfront park.
- Provide visitor facilities supporting adrenaline beach and water related activities.
- Improve pedestrian and cycle access from the University and boating lake to the waterfront.

### Blackpill

- Improve links to Clyne Park and Clyne Gardens.
- Improve the Lido as a family visitor attraction.
- Create an iconic feature in the design of the new pedestrian/cycle bridge that signals the start of Gower.

### Mumbles

- Develop Oystermouth Square as a focal point for retail and visitor activities.
- Enhance Newton Road retail area and develop a niche retail offer.
- Revitalise the area between Oystermouth Square and Knab Rock, improving visitor facilities.
- Enhance Oystermouth Castle and promote as a visitor attraction.
- Develop a niche cafe and restaurant market, focused on locally procured produce.

### Mumbles Pier

- Refurbish and redevelop Mumbles Pier as an improved visitor attraction and venue.
- Promote new visitor water trips between the pier and marina.
- Increase the profile of Mumbles Pier, developing additional family visitor attractions.
- Promote the mixed-use redevelopment of land fronting the pier and beach area.

## 2.4 Achieving the Initiatives:

Section 3 identifies four key baywide themes and describes seventeen actions required to successfully implement the baywide initiatives. Similarly section 4 describes the various actions required to implement the initiatives for each destination.

## Environment and Landscape Vision Plan

# 3. ACTION PLAN: BAYWIDE INITIATIVES

## Environment and Landscape Vision

Swansea Bay - a unified, high quality contemporary waterfront which extends from Mumbles in the West to Tawe Riverside Corridor in the East. A place that will accommodate a wide variety of spaces for multi purpose uses, include landmark features, open views, protect and enhance environmental quality and raise awareness of the diversity of habitats.

BW1: Waterfront Park

- Create a high quality, contemporary Waterfront Park between St Helen's and West Cross, which will become an important destination central to the bay, incorporating the Common and linking directly with the Clyne Valley. The park will enhance the Oystermouth Road frontage to create a consistent foreshore appearance.
- Commission an international design competition for the design of the Waterfront Park and aspire to the high standards of design and maintenance of other major European waterfront parks.
- Accommodate a variety of spaces that incorporate multi-purpose uses, a range of activities, and allow for formal and informal play/ active use, ensuring flexibility is a central design theme.
- Extend and improve the existing trim trail through the park as a free outdoor health and fitness facility providing an alternative to the indoor gym.

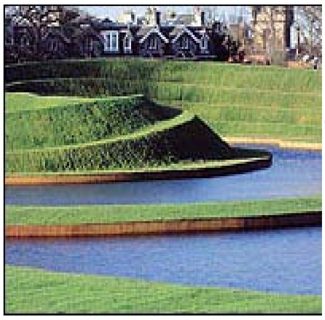
BW2: Landmark Features and Views

- Create a series of landmark features along the foreshore which form recognisable markers to destinations, thereby helping to draw the visitor from one destination to the next.
- Incorporate the landmarks into the lighting strategy to create a legible, safe promenade for evening use (see action BW6).
- Open up key views across the bay, through rationalisation of planting, and improve the quality of existing views.
- Maintain clear unimpeded views of the beach and key landmarks.
- Open up views of the beach in key locations between Sketty Lane and Blackpill to encourage its increased use.


Attractive foreshore


Visitor information points


Well maintained park setting


Incorporating land art


Public art, for everyone


Quality city seafront, Cannes


Quality corniche, Cannes


Learning about the environment


Public art features, Barcelona

Legible City, Bristol

BW3: Natural Environment

- Protect, enhance and celebrate the quality and diversity of the natural environment.
- Develop a bay wide approach to create a place where there are rich and varied ways of learning about and experiencing the natural environment.
- Raise awareness of the diverse habitats and species to be found at the existing attractions of Clyne Valley, the Botanic Gardens, Mumbles Hill Nature Reserve and bird watching opportunities through a series of information boards.

BW4: Beach Quality

- Deliver and maintain quality, award winning beaches.
- Improve existing access to the beach to allow for universal access.
- Enhance the edge between the promenade and the beach whilst ensuring consistency of approach and improving the quality of views of the city from the beach.
- Open up views of the beach in key locations to encourage its increased use.
- Raise awareness of the diverse species supported by the mud and sand inter tidal zone within the SSSI at Blackpill.

BW5: Flooding

- Update Flood Risk Assessment of Swansea Bay to identify the risk of flooding to the key development sites.
- Detailed studies of key development sites will include Flood Risk Assessment.

### Identity Vision


Beach furniture, PPS

Swansea Bay - the destination that matters, the playground of the city. Swansea Bay is one destination with three character areas: the city on the waterfront, the Waterfront Park and Mumbles waterfront. The design of the public realm, together with the public art and events strategy, must combine to give a unified place with specialist character zones.

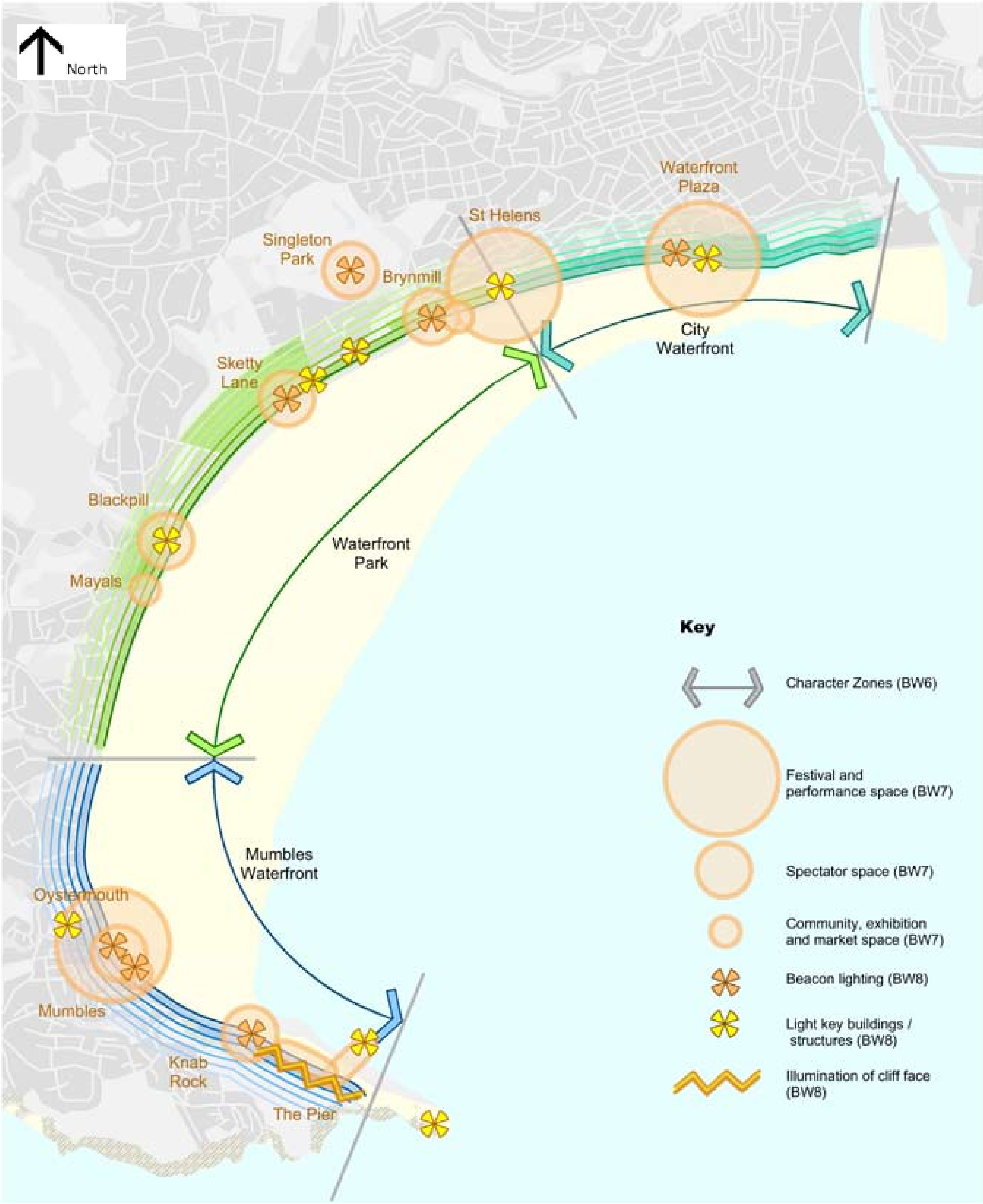
BW6: Public Realm Strategy

- Establish a palette of materials and street furniture that provides a consistent design for the continuous waterfront edge.
- Create ways of distinguishing between the different character zones of the bay, empathising the civic, formal edge of the City Waterfront, the softer natural yet active feel of the waterfront park and the lively, functional qualities of Mumbles Waterfront.
- Accommodate passive users, commuters, parades and festivals.
- Adopt a comprehensive management and maintenance programme.
- Commission a public art strategy to provide a coordinated approach to the inclusion of public art and maximise its potential benefits in enhancing the existing identify. Public art should help unify lighting, seating and parking in a creative way and can involve local community groups and professional artists to celebrate cultural and historic elements along the bay.

BW7: Events

- Develop a Bay Events Strategy, and market a calendar of events, with a local, regional and international flavour.
- Develop venue spaces along the waterfront capable of hosting a variety of events, locating Festival and performance space at City Waterfront Plaza, the Waterfront Park, Singleton Park and Oystermouth Square;
- Spectator space at the bottom of Brynmill Lane, Sketty Lane and Knab Rock;
- Market space at Oystermouth Square and along the approach to Mumbles Pier;
- Exhibition and presentation space at Oystermouth Square and on Mumbles Pier, and;
- Community space within the Waterfront Park.
- Establish links with the transport strategy to manage the safe movement and control of visitor, spectator, local and through traffic.
- Develop a coordinated approach to bidding, funding and hosting events.
- Promote uses both day and night.
- Provide a year round experience.

# Identity Vision Plan (BW6, BW7 BW8)



BW8: Lighting Strategy

- Promote a bay wide lighting strategy that links the key destinations in a coordinated and innovative way.
- Minimise potential adverse impact of light production into the night sky, on nature conservation, residential areas and the road network.
- Develop an energy efficient lighting system using advanced technology.
- Ensure the ongoing management and monitoring of the lighting strategy before and after implementation.
- Introduce a family of bay wide lighting systems, creating a clutter free environment that feels safe and secure after dark.
- Introduce feature lighting of key buildings for major public landmarks
- Consider ways of reinforcing the three distinctive character areas of the bay.
- Consider the sensitive introduction of beacon lighting to signal where events are taking place in and around the bay.


Newcastle Quayside


Net lighting, along the promenade


South Shore Promenade, Blackpool


Lighting the centre, Bristol


Lighting , Delray Beach, PPS

## Bay wide accessibility plan

## Accessibility Vision

Swansea Bay - an accessible destination with improved public transport and access through the area. The new Metro system with interchanges around the bay, a robust new parking and signage strategy, and an extension to the land train route will contribute towards the improvement of the public transport network around the Bay and improve public access through the area. This, together with the new pedestrian/cycle system will improve accessibility and create a more vibrant destination.

BW9: Promenade / Cycling / Land Train

- Create a continuous high quality waterfront experience with an extended promenade linking all the destinations and developments along Swansea Bay from the River Tawe to Mumbles Pier.
- Promote the journey of the bay, encouraging walking, cycling, jogging and skating.
- Maximise opportunities for sitting, socialising, people watching and taking in the views.
- Consider the potential to widen the promenade between County Hall and St Helen's, at Southend Gardens and along the cliff approach to Mumbles Pier.
- Provide dedicated cycling lanes as part of the promenade to minimise user conflict. Identify links to the wide National Cycle Network through the signage strategy (BW13) and at cycle hire centres.
- Improve access across Oystermouth and Mumbles Road with enhanced at grade crossings (road level) and a new high level lightweight bridge of quality design.
- Locate cycle hire and support facilities at County Hall, Sketty Lane, Blackpill and Knab Rock and provide cycle racks and safe storage at key destinations, car parks and attractions.
- Extend the land train to run from Bracelet Bay in the West and to the West Pier Maritime Quarter in the East. This will be made feasible through the promenade widening noted above.
- Introduce additional, environmentally friendly land trains, focused towards an adult market, to encourage their use as part of the public transport system. These would complement the existing child/family orientated trains and the design could reflect the original Mumbles trains.


Cannes

Bike hire facilities along the foreshore


Promenade, Battery Park, PPS


Award winning parks and gardens


Kite flying fun on the beach


Accessing the water, Knab Rock


The new Swansea Metro

Signage Riis Park, NYC, PPS


Existing Swansea land train route


Historic Mumbles Train, Knab Rock

BW10: Beach / Water

- Promote beach access for all, locating key drop off areas for senior and disabled access, with platforms and adapted wheelchairs for access and use on the beach.
- Promote the beach for active use, designating children zone areas along the beach for on beach play facilities and supporting active uses such as kite boarding, land yachting and blokarting.
- Promote access to the water from the northern and southern edges of the bay, supporting larger boating activity around the marina, continued watersports at Knab Rock and facilitating water taxis and recreation boat trips between Mumbles Pier and the River Tawe.
- Encourage safe use of the water through management of activities and designation of uses to specific areas.
- Formalise boat storage to improve use of available space and introduce a new pricing strategy.

BW11: Improved Public Transport Network

- Locate metro interchanges along the bay, encouraging mutli-modal bay travel, providing ticket kiosks, timetable information and public conveniences. Introduce dedicated metro routes between the city centre and County Hall.
- Develop a new pricing strategy with on bus ticketing, rover tickets and multi-modal options.

BW12: Baywide Parking Strategy

- Prepare a parking strategy, with a variable charging system.
- Investigate the potential to provide a park and ride facility in the west and additional car parking at St Helen’s and Mumbles. Increase parking provision at St Helen’s, Sketty Lane, Blackpill, Oystermouth Square and Mumbles Headland. Provide new car parks on the foreshore at Blackpill and on street parking provision between Southend Gardens and Mumbles Pier.

BW13: Signage Strategy

- Develop a Swansea Bay signage strategy. Provide electronic signage along Oystermouth and Mumbles Roads, displaying public transport, car parking, festival and event and water quality information.
- Provide interactive signage along the promenade with links to the environment, education and health.
- Investigate ways of incorporating signage with street furniture through action BW6 to ensure environmental clutter is minimized.

## Quality Vision

Swansea Bay - the quality recreational destination in West Wales. An improved range of visitor facilities along the bay, with food and drink, public art, lighting, toilets and shower facilities, events space, facilities for boating activity and children's play facilities, together with information signs that celebrate the industrial heritage and historical rail links between Mumbles and the City. Through improved maintenance and management coordination, a high quality public realm will be enhanced.

BW14: Visitor Facilities

- Focus public conveniences at key arrival areas around the bay including County Hall, St Helen's car park, Victoria Park, Sketty Lane Adrenaline Sports Centre, Blackpill Lido, Oystermouth Square, Knab Rock and Mumbles Pier.
- Provide shower facilities at City Waterfront, St Helen's, Sketty Lane Adrenaline Centre, Black Pill Waterpark and Knab Rock.
- Extend/enhance existing cafes, bars and restaurant facilities at County Hall; Patti Pavilion; Blackpill Waterpark; Knab Rock and Mumbles Pier. Provide new facilities that support both day and evening entertainment at City Waterfront; Sketty Lane Adrenaline Sports Centre and Oystermouth Square.
- Kiosks should be supported at Victoria Park; the bottom of Brynmill Lane; Westcross and Knab Rock.

BW15: Water Activity

- Support continued water boating activity around Mumbles and the Marina with increased facilities at Knab Rock and the Pier for water users.
- Improve and extend the slips at Southend Gardens and Knab Rock providing supporting facilities for water users, including: public conveniences; shower facilities; information points and safe storage provision.

BW16: Children's Play

- Increase the provision of safe children's play areas at Blackpill and Southend Gardens, providing additional all weather facilities.
- Locate Kids Zones on the beach at County Hall and Blackpill providing temporary and permanent entertainment.

BW17: Historic, cultural and nature links

- Create a themed culture and heritage trail that extends the length of the bay. Extend the trail through Castle Acre to a new visitor centre located within the grounds of Oystermouth Castle.


Water play, New Zealand


Existing facilities, Knab Rock


Event space, Park Andre Citroen


Place for sports and events, Barcelona


Carnival, Swansea

## Bay wide facilities plan

# Action Plan
## Swansea Bay Strategy

BW18: Establishing a bay management group

- Develop a Bay Management Group to coordinate efforts, deliver the vision and facilitate development throughout the bay.
- Pool resources and knowledge, encouraging the continued involvement of key stakeholder including user groups, community groups, environmental protection organisations, Swansea Futures, Tourism Swansea and other organisations that can help facilitate development throughout the bay.
- Strengthen cross-departmental working to ensure the Bay Management Group is effective . A coordination group should be established with representatives from Planning and Economic Regeneration, Environment and Conservation, Parks and the Environment, Tourism and Leisure, Transport and Accessibility, Foreshore Management and Environment and Health.
- Establish an annual programme of meetings with statutory consultees, including the Environment Agency and Countryside Council for Wales, to discuss bay wide issues.
- Maintain a continued dialogue with local communities and local businesses, encouraging active involvement, innovation and creativity in the bay.
- Ensure the on-going management and maintenance of Swansea Bay is continued following the completion of development works.
- Management of wind blown sand is to be coordinated by the Bay Management Group.

BW19: Ensure the quality and sustainability of all development

- Ensure that all development and initiatives are of a high quality, sustainable design and accord with the principles and guidance set out on the Wales Spatial Plan and Local Agenda 21, Planning Policy Wales Technical Advice Notes, in particular TAN 15: Development and Flood Risk; TAN 5: Nature Conservation and TAN 12: Design
- City and County of Swansea to prepare development briefs for each of the waterfront development areas.


Sailing in Swansea Bay

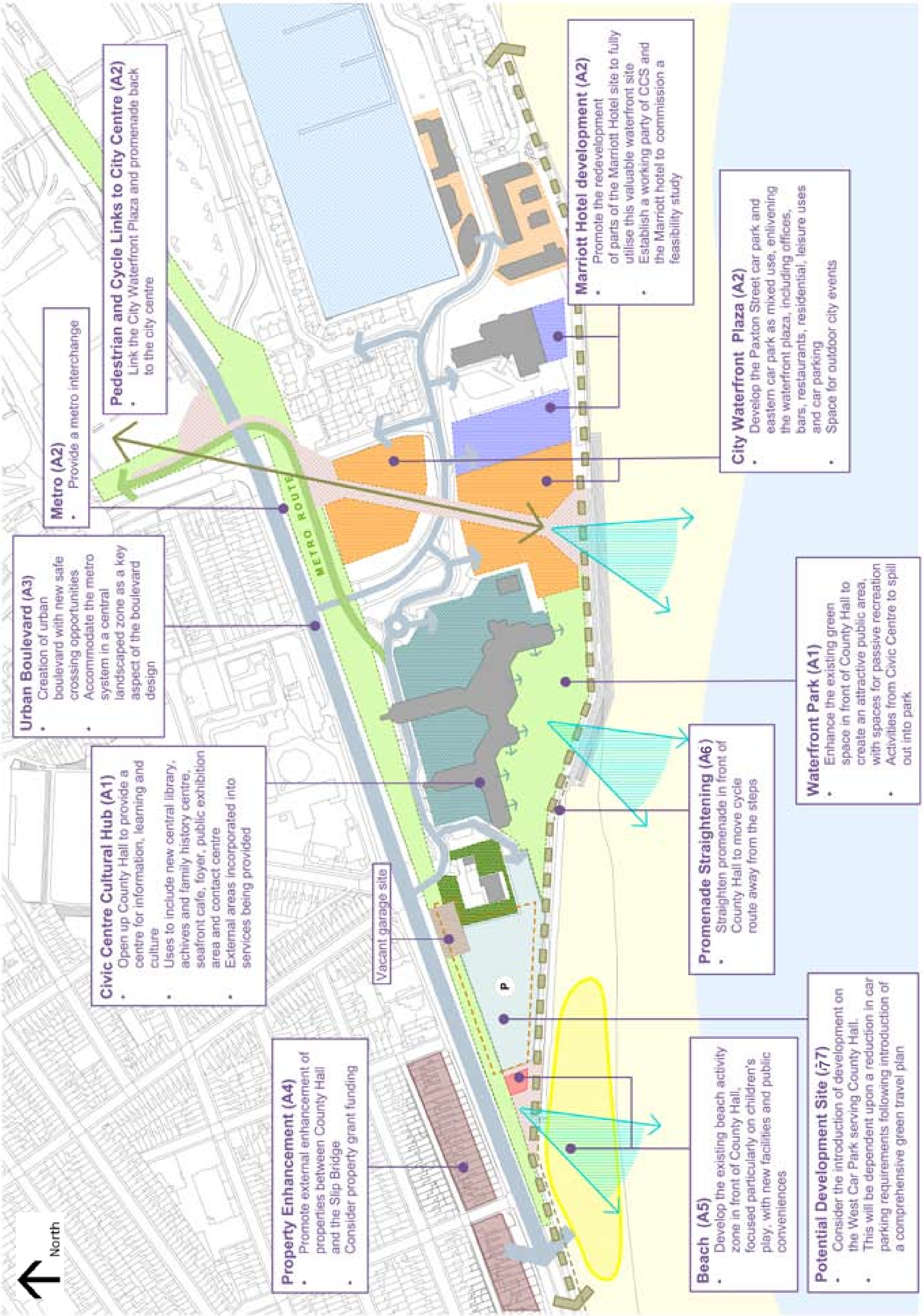

Beach play, Barcelona


Celebrating Oystermouth Castle


Spectator sports in the Bay


Stimulate the sense, Clyne Gardens

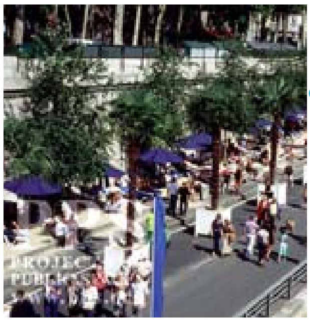
## City Waterfront Concept Plan



# 4. ACTION PLAN: DESTINATIONS

## 4.1 City Waterfront


Aerial view of County Hall


Paris Plage, PPS


Cross walk, Champse Eylse, PPS


Activity both day and night


City beach

City Waterfront is where city life meets the sea and the hustle and bustle of urban living reacts with the sun, surf and sand of Swansea Bay. City Waterfront is where the residents and visitors naturally cross Oystermouth Road to access an exciting range of visitor facilities that spill out onto the promenade and beach. It is a place to meet and be seen and to start a journey exploring the delights of the new Swansea Bay.

- A1: County Hall Development: Open up County Hall to provide a welcoming centre for information, learning and culture. The new Civic Centre will house a new Central Library, archives and family history centre, seafront cafe, customer contact centre and foyer and public exhibition area. The redevelopment could include the rationalisation of the external areas between the wings of the building.

  Enhance the grassed area in front of County Hall to create an attractive public park area, which takes advantage of the spectacular views of the bay and provides a range of spaces for passive recreation. Activities from the Civic Centre will spill out into the park.

- A2: City Waterfront Plaza Site: Create a high quality mixed use waterfront development on Paxton Street car park and the eastern staff car park, as advocated in the Swansea City Centre Strategic Framework. The development will be focused around a City Waterfront Plaza on the promenade, which links back to the city centre through a linear public route with active ground floor uses. Where the linear route crosses Oystermouth Road, a new public space will be created, which includes a metro interchange. The Waterfront Plaza will be enlivened by the various activities and uses aimed at attracting city dwellers, visitors and business users, which include: offices, bars, restaurants, residential apartments, leisure uses and car parking.

  Promote the redevelopment of part of the Marriot Hotel site to fully utilise this valuable waterfront area. Establish a working party of the City and County of Swansea and the Marriot Hotel to investigate development options for this area.

- A3: Urban Boulevard: Create an urban boulevard along Oystermouth Road with safe crossing opportunities for pedestrians and cyclists. Accommodate a dedicated metro route within the landscape zone between West Way and County Hall.

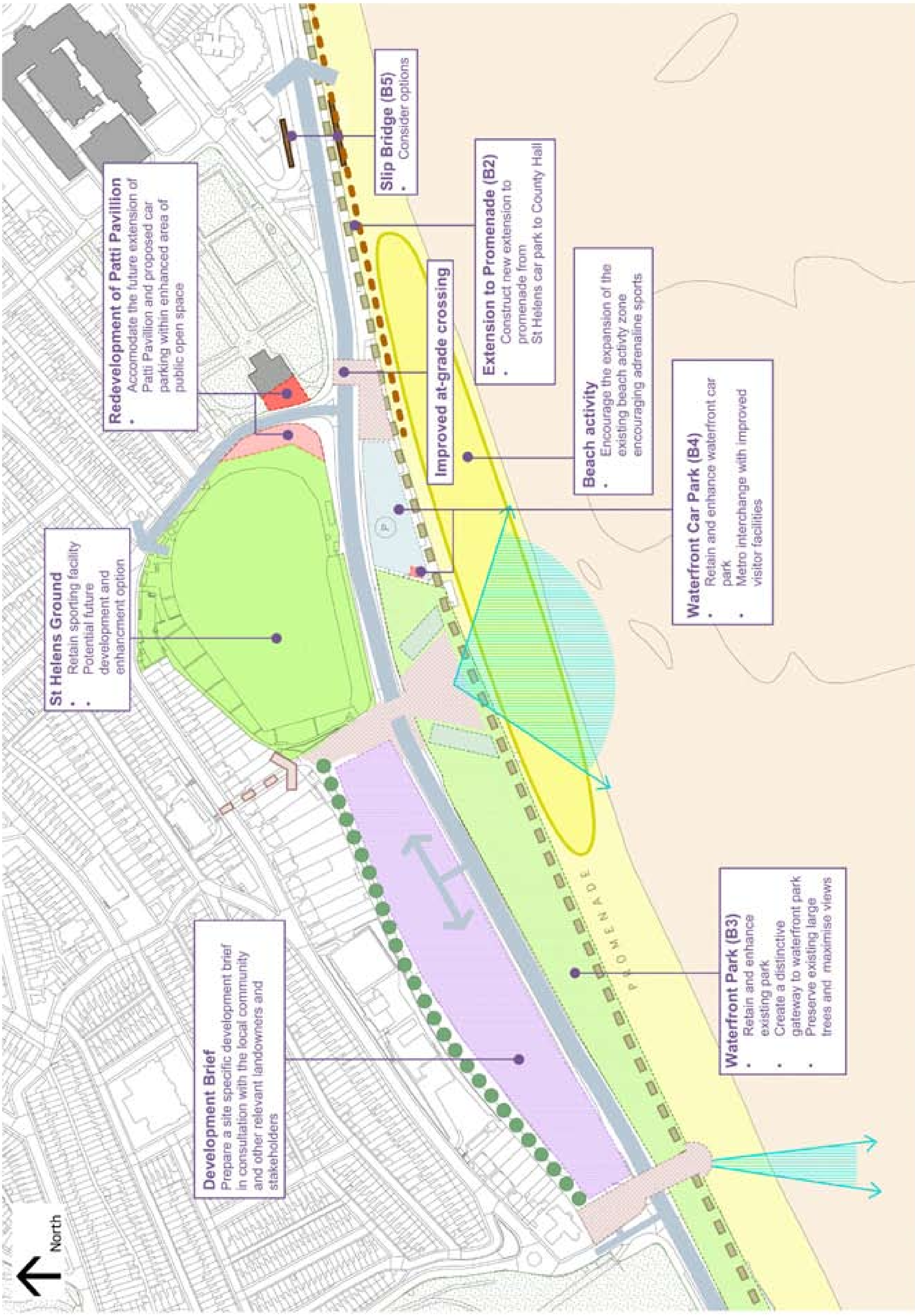
- A4: Property Enhancement: Promote the external enhancement of properties between County Hall and Saint Helen's Road to create a unified attractive place. Consider property grant funding.

- A5: Beach Activity and Visitor Facilities: Develop the existing beach activity zone, focused towards children, with new visitor facilities, including public conveniences and temporary kiosks.

- A6: Promenade Straightening: Straighten the promenade in front of County Hall to move the cycle route away from the steps and provide opportunity for the extension of the land train route.

- A7: Potential Development Site: Following the creation of the Civic Centre cultural hub, review car parking requirements on the west car park, taking account of green travel plan initiatives, to ascertain whether the area could be a future development site.

## St Helen’s Concept Plan



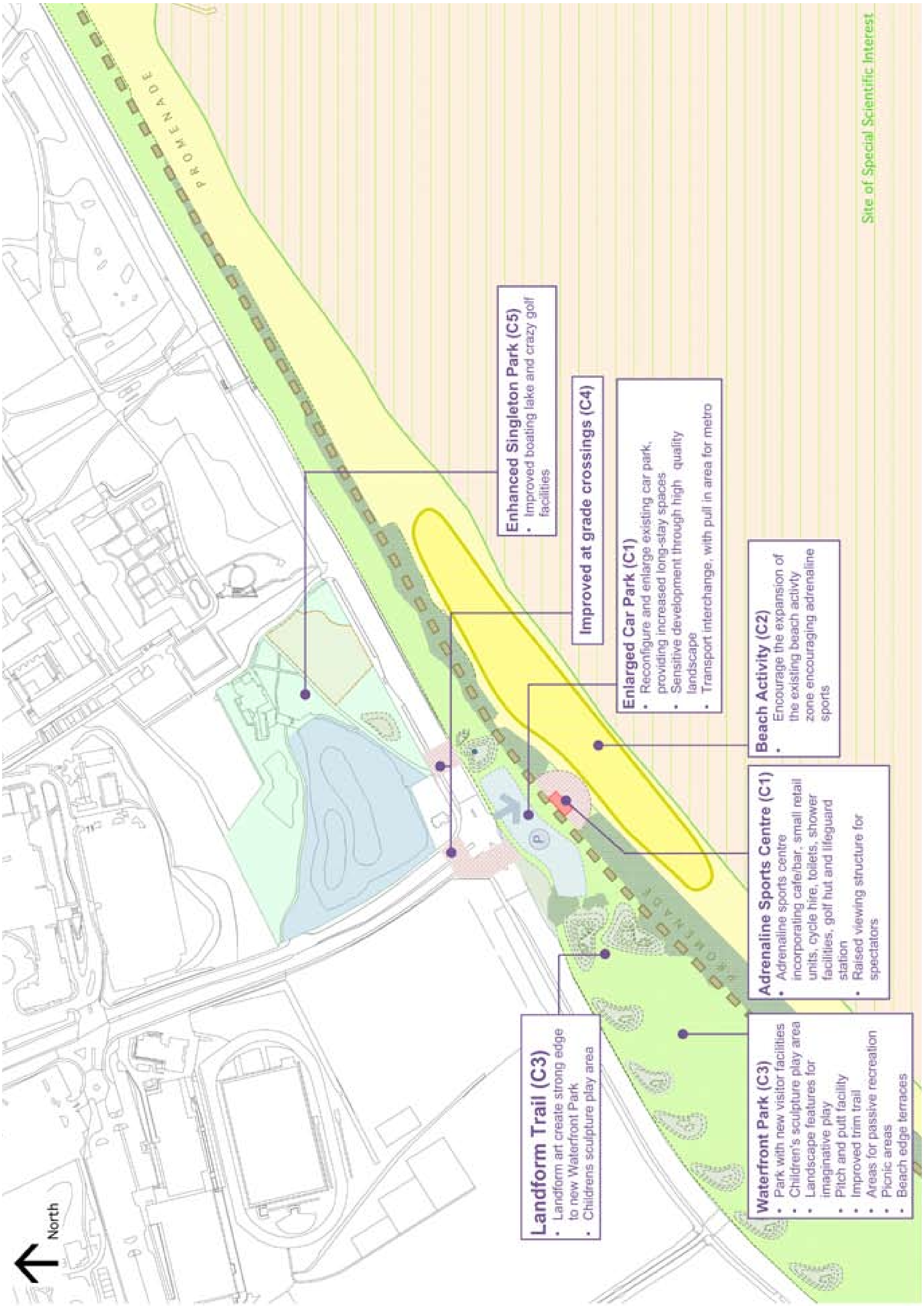
## 4.2 St Helen's

St Helen's is where the Bay changes character from the urban to the landscape, where space gives opportunities for both quiet reflection and a host of activities. St Helen's is a place to celebrate Swansea's unique position on the waterfront, with potential space for new visitor facilities and public entertainment.


Aerial view, St helen's

- B1: Development Brief: Prepare a site specific development brief in consultation with the local community and other relevant landowners and stakeholders.
- B2: Promenade Widening: Consider the potential for widening the promenade over the edge of the beach, from St Helen's car park to County Hall, providing improved access to the beach and helping to eliminate user conflict along the promenade. The extension will need to maintain access to sewer inspection chambers.
- B3: Waterfront Park: Enhance the existing foreshore park to create a distinctive gateway to the Waterfront Park, see action BW1 above. A balance will need to be achieved between preserving existing large trees, which lend maturity and character to the area, and removing poor quality vegetation to allow full advantage of the spectacular views available. Existing features such as the cenotaph and other memorials would be retained.
- B4: Visitor Facilities and Car Park: Retain and enhance the waterfront car park, with an improved at-grade crossing between the Patti Pavilion and the Waterfront. Provide a new building at this location to house public toilets, ticket booth, bus/metro shelter and cycle hire facilities. The public toilets will replace those previously removed from the site of the McCarthy & Stone development.
- B5: Slip Bridge: The slip bridge historically was a major hub for accessing the beach. However activity patterns have changed and the focus for land and beach activities has moved away from this narrow stretch of promenade, and will again re focus as a result of new development at St Helens. Reinstatement of a bridge using the existing stepped supports, would require significant infrastructural works to be fully accessible. However, there may be scope to consider using one of the abutments as a kiosk facility for a leisure related use subject to the proposal being commercially viable. The City and County of Swansea will consider the long-term future of the Slip Bridge, including the possible re-instatement of a bridge crossing on the present abutments as part of the enhancement and development proposals for the St Helen's area.

## Sketty Lane Concept Plan



# Action Plan
## Swansea Bay Strategy

### 4.3 Sketty Lane

Sketty Lane is the recreational heart of the city, focused on the new Waterfront Park, providing a wide range of sporting and recreational activities, with adrenaline sports on the beach, boating, golfing and children's play within the park, all linked to the sporting centre of excellence.

- C1: Adrenaline Sports Centre: Redevelop and enlarge visitor facilities in Sketty Lane to provide a new Adrenaline Sport Centre overlooking the beach, with improved car parking and beach access, including:
  - Café/restaurant, toilets and shower facilities, equipment store, pitch and putt golf hire, and niche retail.

  Enlarge existing car park and introduce a transport interchange, with dedicated pull in area for the metro, shelter and ticketing facilities.

  The CCS will prepare planning guidance to identify planning, design and environmental issues concerning the development of the site.
- C2: Beach Activity: Encourage a range of beach activities including kite surfing and wind surfing and linking to the beach at St Helen's.

  The proposed development and activities will need to fully consider environmental issues, and demonstrate no significant effect on the SSSI.
- C3: Waterfront Park: Provide a Waterfront Park which is a continuation of the park described in action B4 above. The quality and ideas for the park are described under action BW1 above. The park will provide a range of facilities:
  - a children's sculpture play area, with a series of landscape features for non prescriptive imaginative play;
  - an improved trim trail providing fun physical activity for adults and children of all abilities;
  - a pitch and putt facility, albeit a reduced size;
  - a raised viewing structure and space for spectators in front of the Adrenaline Sports Centre; and
  - areas for passive recreation including mown grass areas, picknicking areas and beach edge terraces.
- C4: Pedestrian Crossing Facilities: Enhance the at grade (ground level) pedestrian and cyclist crossing facilities on Oystermouth Road, particularly at Sketty Lane junction to improve pedestrian and cycle access from the University and boating lake to the waterfront.
- C5: Boating Lake: Enhance the boating lake activity areas, including facilities supporting the boating lake and the crazy golf area.

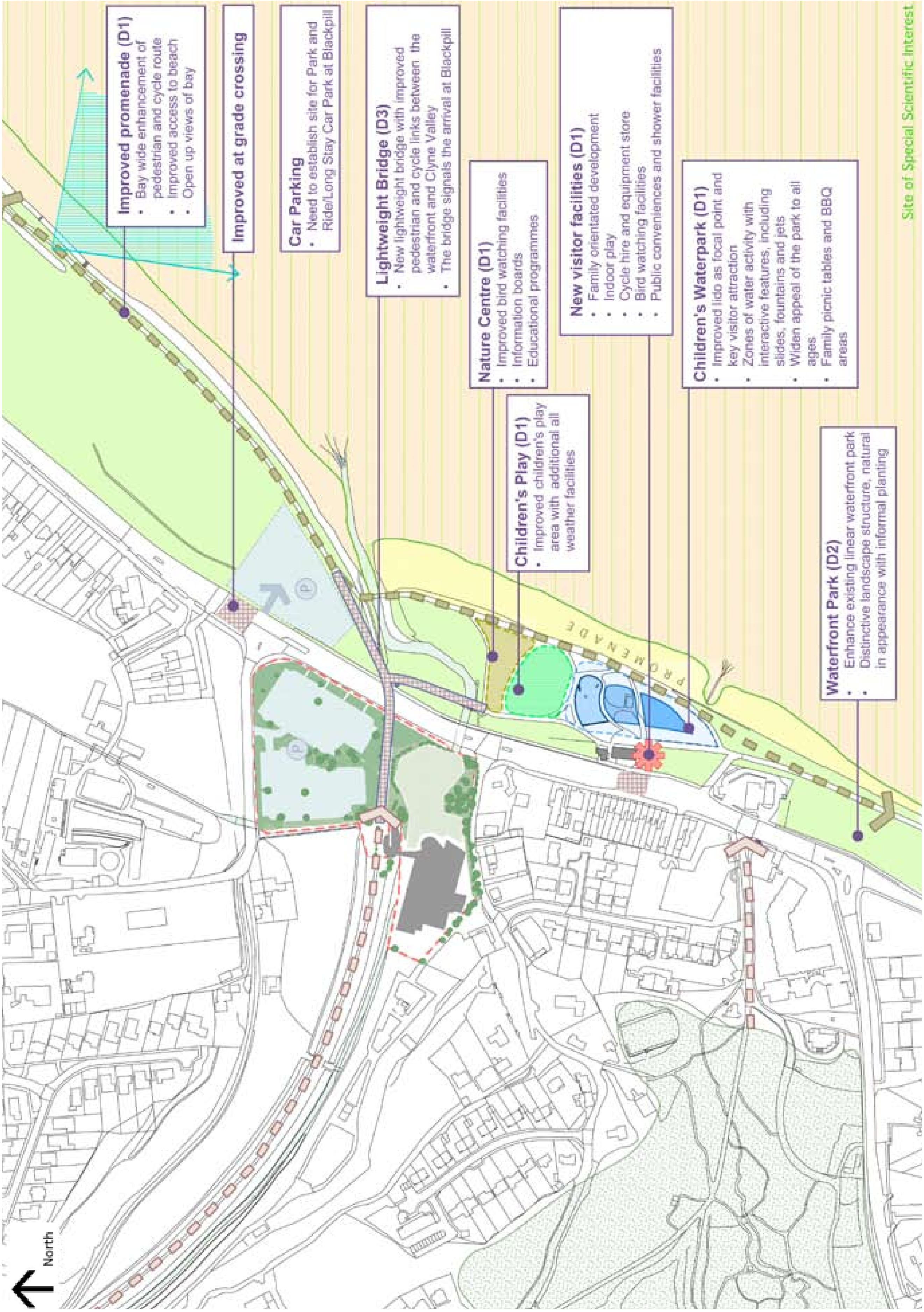

Cairns, outdoor performances


Waterside housing, Barcelona


University life


The Imaginarium, @ Bristol

## Blackpill Concept Plan



## 4.4 Blackpill

Blackpill is a place for fun and family entertainment, based on an expanded water park play area with a wide range of support facilities, linked to the surrounding assets of the Clyne Valley, Clyne Gardens and the bird life on the foreshore. Improved bus and car parking opens up Blackpill as the first stop on the Mumbles experience.

- D1 Waterpark / Visitor Facilities: Expand and improve the children's waterpark with new features to raise the profile of Blackpill. Provide different zones of water activity including slides, fountains and jets of water to extend the appeal of the park to all age groups and provide a year round attraction, with its use as a winter skating rink.

  Provide new visitor facilities to include a family orientated development with opportunity for indoor play; cycle hire; equipment store and public conveniences and shower facilities.

  Provide a new nature centre building with improved bird watching facilities, planting and habitat creation works, and information boards. Promote educational programmes drawing on links with the sea, SSSI and Clyne Valley.

- D2: Waterfront Park: Continue the Waterfront Park through Blackpill (refer to actions C3 and BW1). Key features of the park specific to Blackpill are:
  - Removal of poor quality vegetation to allow full advantage of spectacular views. Areas of poor quality will be subject to detailed assessment.
  - Creation of a play landscape with series of landscape features for non prescriptive, imaginative play adjacent to the waterpark to help relieve the demand at busy times.
  - Creation of spaces for casual and passive recreation including picnicking areas and beach edge terraces.
  - Incorporation and enhancement of the skateboard park as part of the Waterfront Park.
  - Celebration of the history of the Mumbles Train as a feature in the Waterfront Park, and a key marker along the bay wide culture, heritage and nature trail.
- D3: Lightweight Bridge: Construct a high quality, visually exciting lightweight bridge over the dual carriageway, improving pedestrian and cycle links between the waterfront and Clyne Valley.
  - Create an iconic feature in the design of the new pedestrian/cycle bridge that signal the start of Gower.
- D4: Waterfront Car Park: Provide a new car park for the Waterpark, marking the arrival at Blackpill. Reconfigure the existing land side car park, providing for health club parking.
- D5: Beach Activity: Promote beach activities, encouraging kite flying on the beach, with displays and competitions featuring in the Bay Festival of Light and Colour.

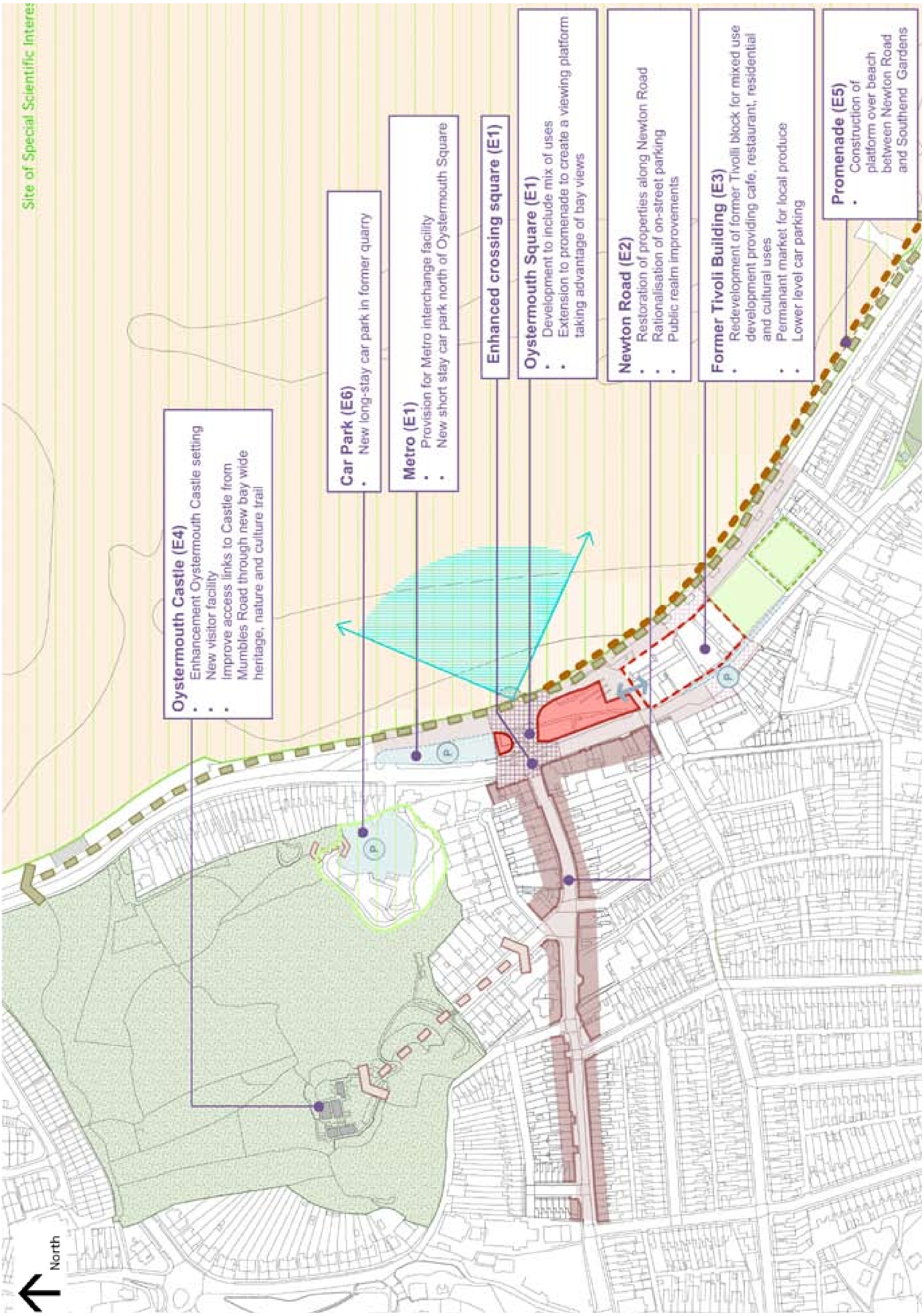

Aerial view of Sketty Lane


Beach play, Barcelona


Landform feature


Activity on the beaches

## Oystermouth Concept Plan



## 4.5 Mumbles

Mumbles is a vibrant seaside resort with an attractive retail area and a wide range of visitor facilities linked to a well designed and managed esplanade that is focused on the dramatic panoramic views of Swansea Bay and the wide range of water activities.


Aerial view of Blackpill


Louvre Fountain, PPS


Granvil Park, Vancouver, PPS


Stimulate the sense, Andre Citroen


Water play

- E1: Oystermouth Square Development: Develop Oystermouth Square for a range of uses which may include retail on ground or ground and first floors, professional and financial services, food and drink outlets, gallery/display areas, hotel, function suite, residential on upper floors only, and provide an extension to the promenade to create enhanced opportunities for viewing the bay.
- E2: Newton Road Enhancement: Strengthen the boutique and niche market retail offer of Newton Road, by property improvements, rationalisation of car parking and improved public realm works.
- E3: Tivoli Block Development: Commission a feasibility study to review the role of the block south east of Oystermouth car park , which includes the Tivoli building, to provide a mixed-use development with lower level car parking. Create a new square within the scheme to connect to the waterfront and accommodate various activities including the local produce market, establishing greater links between the retail centre and waterfront. Create active uses at ground floor level, encouraging the location of cafes, restaurants and cultural uses.
- E4: Visitor Facilities / Amenity: Provide improved visitor facilities at Knab Rock, with new building to house public conveniences, showers, cycle hire and kiosks, supporting the continued presence of Verdi's attraction and the opportunity for future enhancement works to Verdis' building.

  Provide a new visitor facility building within an enhanced setting of Oystermouth Castle. Strengthen the links between Mumbles Road and Oystermouth Castle and link with a baywide heritage, nature and cultural trail (see action BW16).

  Provide amenity areas including a new all weather children's play facility in Southend Gardens, with improved visitor and family facilities including public conveniences.
- E5: Promenade: Create a wider linear promenade route between Southend Gardens and Knab Rock, with an extension of the promenade over the beach. Commission a study to review the rationalisation of on street parking, access, roads, facilities and boat storage, whilst retaining green space.
- E6: Car Parking Strategy: As part of the baywide car parking strategy (see action BW10 above), introduce
  - A metro/bus stop facility north of Oystermouth Square, with short stay car parking provision;
  - On-street car parking along Newton Road with 20 minute limit and Mumbles Road, in front of bowling green; and,
  - On-street car parking between Southend Gardens and Knab Rock, and the tennis courts and bowling green, with 1 hour limit; and
  - A long stay multi-storey car park within the Quarry car park. This would need to be sensitively designed to respect the geological interest of the cliff face (SSSI) and residential amenity.

Market Appraisal

Travelling west along Swansea Bay, as you near Oystermouth Square, the experience changes from broad Avenue along the seafront to a more compact seaside environment. Newton Road rising from the seafront provides an opportunity for niche shopping and a visit to the castle. Oystermouth Square development as proposed will enhance the experience, particularly if as a knock on effect it brings about the redevelopment of the Tivoli and the creation of a new market square and event space. In a similar approach to Oystermouth Square, we would suggest that a development brief is prepared for the area from the Tivoli through to the bowling green. The development brief should be agreed in conjunction with relevant land owners and the delivery mechanism agreed in principle to include predetermined public realm benefits etc.

In order to sustain activity along Newton Road and the proposed Oystermouth Square development and potential ancillary development, there is inadequate car parking in this part of the Mumbles. Increased parking should be provided and rates should be geared to enable short-term visits to the shops as well as more prolonged visits.

Over the last few years, the range of shops, cafes and restaurants around Newton Road have developed into popular destinations for local residents, with the offer of the area significantly changing. This is also helping to change wider perceptions of the area and attract a different customer base to the area. The proposals to further enhance the public realm and the changing perceptions of the area will help to attract further high quality restaurants and bars, building on the success of nearby Verdi's. The provision of high quality bars and restaurants in the area will help to capture the spend of visiting families and the population in the area. The development at Oystermouth Square will add a new dimension to the offer at this location. The development will provide retail units with street frontage and space for bars, cafes and restaurants to enjoy piazza and waterfront aspects.

In addition to the range of bars, cafes and restaurants improving over the last few years, so has the retail offer of Newton Road. A number of specialist boutique shops exist in the area, including units relating to activity sports. Activity related holidays and days trips are forecast to continue to increase in the future. The increased provision of niche shops related to these will help to increase visitor spending in the area. The general public realm improvements in the area and wider Bay improvements combined with the forecast increase in activity related holidays and day trips will help to support more niche retailers in this area, further strengthening the Bay's overall offer.


Knab Rock, Swansea

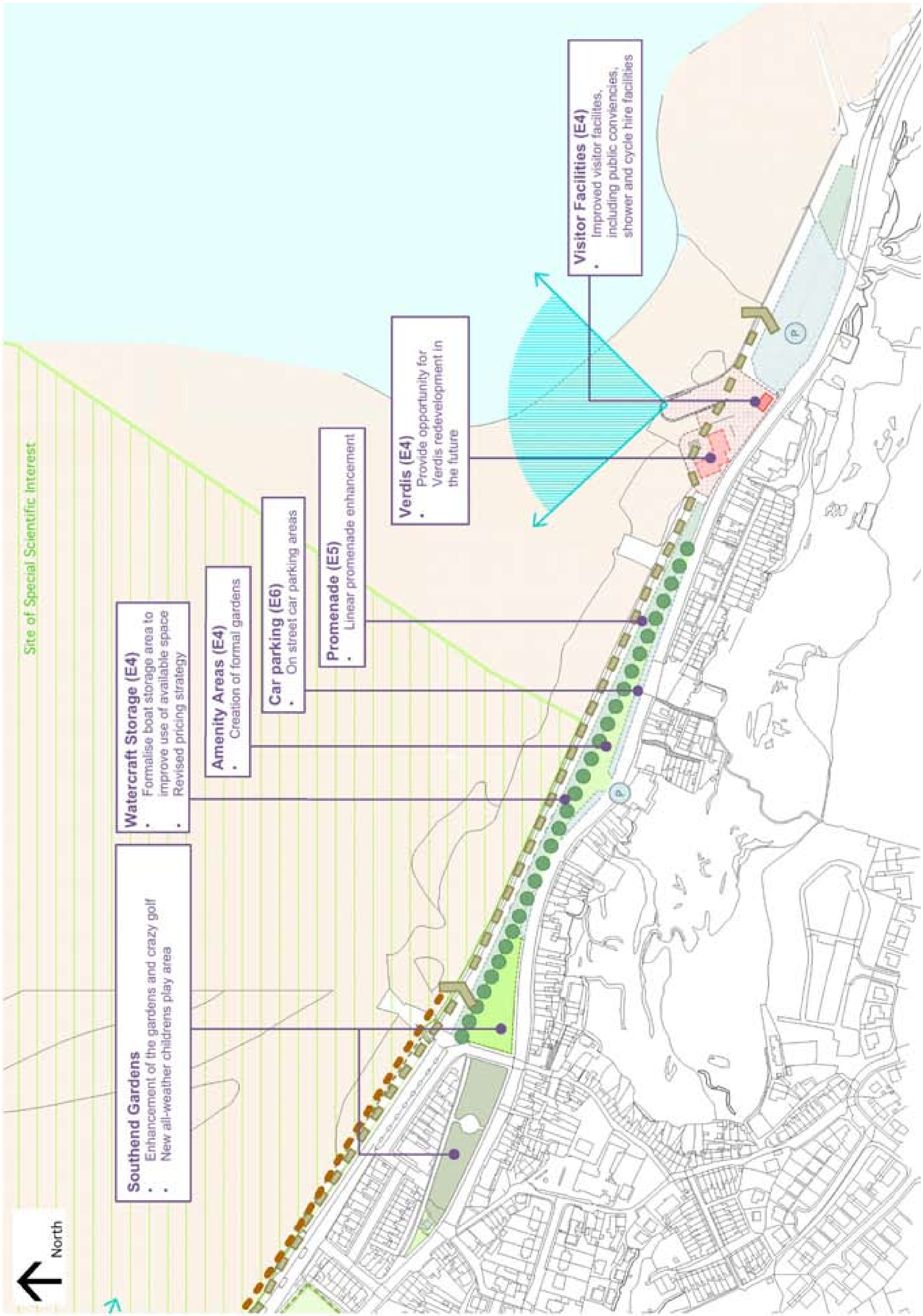

Beach play, Barcelona


Outdoor cafe

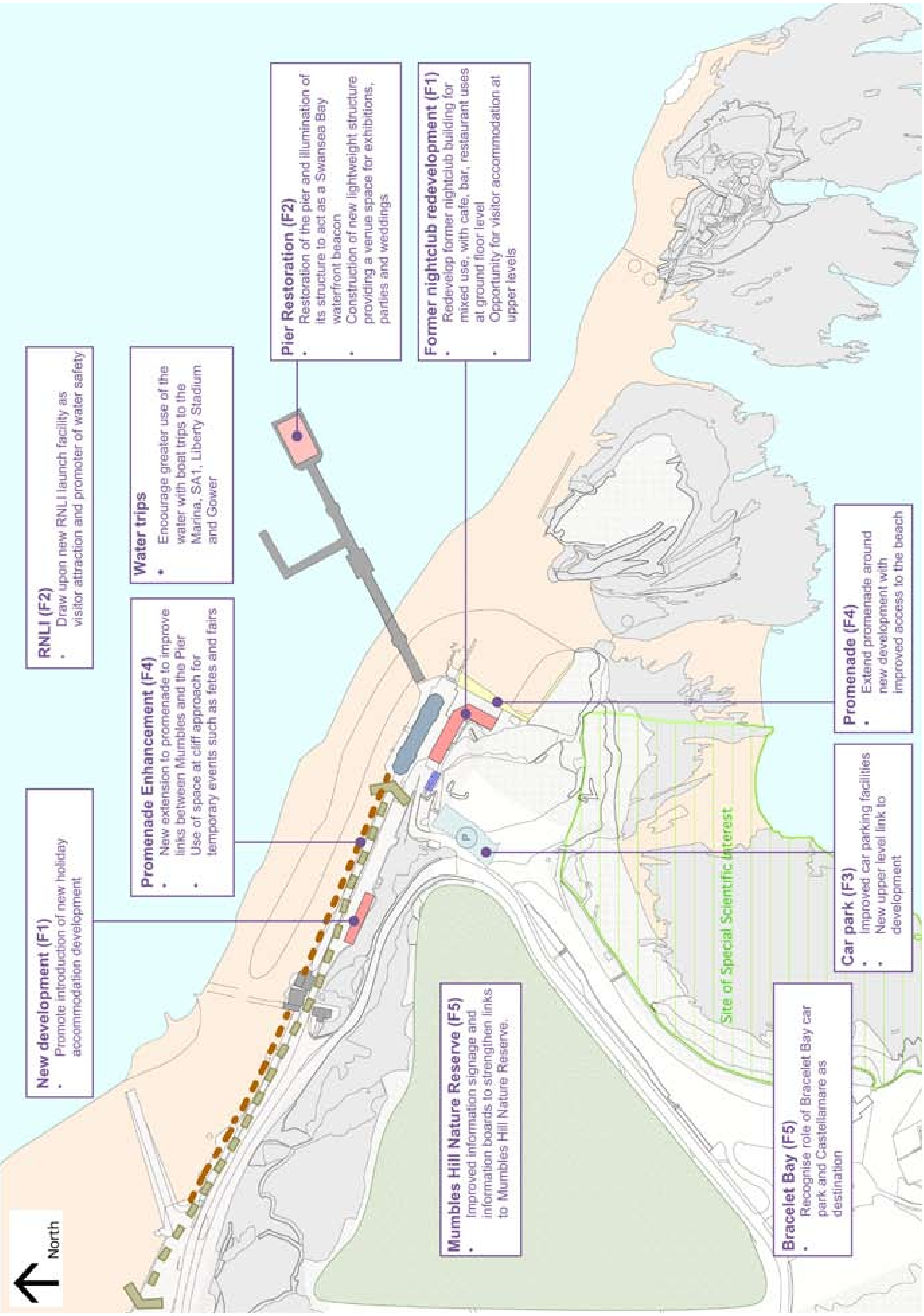

Brooklyn, Botanical Gardens, PPS


Local produce market

## Southend Gardens and Knab Rock Concept Plan Masterplan



## Mumbles Pier Concept Plan



### 4.6 Mumbles Pier

Mumbles Pier - the traditional family seaside attraction at the end of Swansea Bay, providing beach, pier and water activities supported by visitor accommodation, cafes, amusements, restaurants and bars.

- F1: Redevelopment Sites: Encourage the redevelopment of the former nightclub building into a development of up to five or six storeys, exploiting the southerly aspect with cafe, bar and restaurant uses at ground floor level and potential for visitor accommodation above. The new building could provide a focal feature to complement the pier. However the height of the building in relation to the cliff is a sensitive issue and this would need to be subject to a detailed visual appraisal and environmental impact assessement.

  Provide a new public area overlooking the beach and allow the cafe to provide outside sitting areas.

  Promote the external enhancement of the existing amusement building.

  Promote the introduction of development on the pier approach to provide holiday accommodation with integral parking at ground level.

- F2: Pier Restoration: Promote the restoration of the pier and the construction of a lightweight tensile structure at the end of the pier and along the walkway to provide a hire venue for exhibitions, events, parties and weddings.

  Support the continued presence of the RNLI and encourage the redevelopment of the existing slipway and boat hall to support future requirements. Encourage the provision of training facilities and visitor access.

- F3: Car Park: Provide improved long stay car parking facilities on the headland above the pier, with a possible link to the upper storeys of the new development (F1).

- F4: Promenade Enhancement: Consider widening the promenade to improve accessibility between Mumbles and the pier. Promote the cliff approach to the pier as a temporary space for fairs and fetes. Extend the promenade around the cliff, providing improved access to the beach.

- F5: Bracelet Bay / Nature Reserve: Improve links to Mumbles Hill Nature Reserve through signage, footpath improvement works and information boards.

  Recognise the role of Bracelet Bay car park and Castellemare as a destination, particularly for group travel visits, and promote enhancement of this area. The area could provide a final destination and turning area for the metro.

Aerial view, Mumbles Pier

Flags decorating the street, PPS

Effective lighting

Saltburn Pier illuminated

| Actions | | High Priority | Short term | Medium term | Long Term |
|---|---|---|---|---|---|
| BW1 | Waterfront Park | • | ■ | ■ | ■ |
| BW2 | Landmark Features / Views | | | ■ | |
| BW3 | Natural Environment | | | ■ | |
| BW4 | Beach Quality | | | ■ | |
| BW5 | Flooding | • | ■ | ■ | |
| BW6 | Public Realm Strategy | | ■ | ■ | |
| BW7 | Events | | ■ | ■ | ■ |
| BW8 | Lighting Strategy | | | ■ | ■ |
| BW9 | Promenade / Cycling / Land train | | | ■ | ■ |
| BW10 | Beach / Water | | ■ | ■ | |
| BW11 | Public Transport | • | ■ | ■ | ■ |
| BW12 | Car Parking Strategy | • | ■ | ■ | |
| BW13 | Signage Strategy | | | ■ | |
| BW14 | Visitor Facilities | | | ■ | |
| BW15 | Water Activity | | ■ | ■ | |
| BW16 | Children's Play | | ■ | ■ | |
| BW17 | Historic / Cultural / Nature | | | ■ | |
| BW18 | Bay Management | • | ■ | ■ | ■ |
| BW19 | Quality and Sustainability | • | ■ | ■ | ■ |
| A1 | County Hall Development | | ■ | | |
| A2 | City Waterfront Plaza | • | | ■ | ■ |
| A3 | Urban Boulevard | | | ■ | |
| A4 | Property Enhancement | | ■ | ■ | ■ |
| A5 | Beach Activity / Visitor Facilities | | ■ | | |
| A6 | Promenade Straightening | | | ■ | |
| A7 | Potential Property Development | | | | ■ |
| B1 | Redevelopment Sites | • | ■ | ■ | ■ |
| B2 | Promenade Widening | | | ■ | |
| B3 | Waterfront Park | • | | ■ | ■ |
| B4 | Visitor Facilities and Car Park | | | ■ | |
| B6 | Slip Bridge | | ■ | ■ | |
| C1 | Adrenaline Sports Centre | | | ■ | |
| C2 | Beach Activity | | ■ | ■ | |
| C3 | Waterfront Park | • | | ■ | ■ |
| C4 | Pedestrian Crossing Facilities | | | ■ | |
| C5 | Boating Lake | | | ■ | |
| D1 | Waterpark / Visitor Facilities | • | ■ | ■ | |
| D2 | Waterfront Park | • | | ■ | ■ |
| D3 | Lightweight Bridge | | | | ■ |
| D4 | Waterfront Car Park | • | | | ■ |
| D5 | Park and Ride | | | ■ | |
| D6 | Beach Activity | | ■ | | |
| E1 | Oystermouth Square Development | • | ■ | ■ | ■ |
| E2 | Newton Road Enhancement | | | ■ | |
| E3 | Tivoli Block Development | • | ■ | ■ | ■ |
| E4 | Visitor Facilities / Amenity | | ■ | ■ | ■ |
| E5 | Promenade | | | ■ | |
| E6 | Car Parking Strategy | • | ■ | ■ | ■ |
| F1 | Redevelopment Sites | | | ■ | ■ |
| F2 | Pier Restoration | • | ■ | ■ | ■ |
| F3 | Car Park | | | ■ | ■ |
| F4 | Promenade Enhancement | | | ■ | |
| F5 | Bracelet Bay / Nature Reserve | | ■ | ■ | |

# 5. IMPLEMENTATION

## 5.1 Programme

The development programme opposite shows when each of the actions should be developed and implemented over the next 15 years. The implementation of this programme will be dictated by the availability of funding, the interest of private developers and the outcome of detailed assessments required to ascertain whether certain actions are feasible, such as an environmental appraisal, a flood consequences assessment and a traffic appraisal.

Each action has been given a priority according to the following:

- Short term: implementation is anticipated in 1 to 3 years time.
- Medium term: implementation is anticipated in 3 to 5 years time.
- Long term: implementation is anticipated in 5 to 15 years. In addition, a number of actions have been identified as priority projects.

In addition, a number of actions have been identified as priority projects.

## 5.2 Delivery and Implementation Plan

The separate Delivery and Implementation Plan report provides details on the implementation of the various actions.

# 6. ACKNOWLEDGEMENTS

We would like to thank all those who took part in the meetings, workshops and discussions that have led to the preparation of this report.

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Laurence Bailey – Former leader CCS
John Bollom – Mumbles Pier
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Mike Cunningham
Terry Scales
Tim Claypole
Mark Child
Jayne Woodman
Des Thomas
Gerald Clement
Beth Winkley
Rene Kinzett
Rhiannon Deverux
Jane Lamnena
Deb Hill
Huw Rees
June Stanton
Tony Lloyd
Claire Waller
Peter May
Barbara Hynes
Alan Lloyd
Erika Kirchner
David Philips
Alan Robinson
Betsan Cadwell
Cheryl Philpott
Sheena Williams
Mike Hollyman
Sue Butler
Eileen Walters
Cllr Pritchard
Elizabeth May
Mark Durdin
Rhodri Davies
Tahara Idris
Yvonne Jardin
Siwan Thomas
Elinor Evans
Graham King
Geoff Hayden
Eirwen Harry
Eileen Walton
Sam Sampson
Janina Henley
Steven Osborne
Alun Jones

Report of the Convener

**Development & Regeneration Scrutiny Performance Panel – 8 March 2022**

# Annual Work Plan Review

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| **Purpose:** | As the municipal year ends, it is good practice to reflect on the Panel's work, experience, and effectiveness. |
| **Content:** | A summary of the year's activities and achievements is provided. |
| **Councillors are being asked to:** | • Reflect on the year's work; and<br>• Share ideas to improve the effectiveness of scrutiny |
| **Lead Councillor:** | Councillor Jeff Jones, Convener of the Development & Regeneration Scrutiny Performance Panel |
| **Lead Officer & Report Author:** | Brij Madahar, Scrutiny Officer<br>E-mail: brij.madahar@swansea.gov.uk |

## 1. Background

1.1 As this is the final meeting of this municipal year, the Panel is invited to reflect on the year's scrutiny work, experience and effectiveness. Any ideas that will improve the effectiveness of the scrutiny of Development & Regeneration, and scrutiny generally, are welcome.

1.2 To aid Panel members, a summary of the year's work is attached.

1.3 Some of the questions the Panel may want to consider:

- Have things worked well within the Panel over the past year?
- Has the Panel's work focused on the right things?
- What, if anything, could be done better?
- What have we learnt that will help us to improve and develop future scrutiny?

## 2. Panel Overview

2.1 The Development & Regeneration Scrutiny Performance Panel has been responsible for ongoing monitoring of Council performance in relation to development and regeneration, including the 'health' of the city centre, wider economic development across Swansea, and discussion about progress on the Swansea Bay City Deal.

2.2 The Panel has a membership of 15 councillors. Attendance levels at meetings has been a very healthy 88% (i.e., on average 13 out of 15 members attending every meeting).

2.3 In accordance with the agreed Scrutiny Work Programme, the Panel has met every two months. During the 2021/22 municipal year, five meetings were held on 1 July, 7 September, 2 November, 25 January and 8 March. Meeting discussions have regularly been reported on by the local press, indicating the Panel has been focussed on issues of public interest.

2.4 To support regular monitoring of key development and regeneration activity the Panel has received the 'Project Update Dashboard Report' report at each meeting, providing overview of all projects and assessment of progress, highlighting, for example, notable achievements, relevant risks, any major issues /delays, etc. This provides a regular 'health check' on development and regeneration activity to facilitate challenge by the Panel. The Panel has then, where necessary, drilled down on specific work, to provide a more in-depth level of scrutiny. This has included discussion over the past year, on: local City Deal projects; the Swansea Arena development (this included site visit in October 2021); City Centre Travel Plan; Swansea Business Improvement District; Foreshore Developments; and the South West Wales Regional Economic Delivery Plan.

2.5 The Panel has written to relevant Cabinet Members, to convey its views including suggested action, arising from meeting discussions. Letters, and responses where requested, were reported back to the Panel for comments and discussion as necessary.

## 3. Future Scrutiny Work Programme

3.1 Some specific development and regeneration topics have been identified that it has not been possible to consider in the available time and may be appropriate to carry forward into future work plan.

3.2 The continuation of a Development & Regeneration Scrutiny Performance Panel, or otherwise other arrangement, will be a matter for Councillors in the new Council year, following the Council elections in May.

**Background Papers:** None

**Appendices**:

Appendix 1 - Completed Work Plan 2021-2022

**Appendix 1**

# Development and Regeneration Scrutiny Performance Panel
# Completed Work Plan 2021-22

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| **Meeting 1**<br><br>Thursday 1st July | 1. **Confirmation of Panel Convener**<br><br>2. **Dashboard Report**<br>Phil Holmes – Head of Planning and City Regeneration<br>Huw Mowbray - Property Development Manager<br><br>3. **Annual Review of Work Plan 2020-21 and Draft Work Plan 2021-22** |
| **Meeting 2**<br><br>Tuesday 7th September | 1. **Swansea University: Update on City Deal Investment**<br>Professor Steve Wilks – Swansea University Provost<br><br>2. **Dashboard Report**<br>Cllr Robert Francis-Davies – Cabinet Member for Investment, Regeneration & Tourism<br>Phil Holmes – Head of Planning and City Regeneration<br>Huw Mowbray - Property Development Manager |
| **Arena Site Visits**<br>4 - 11 October | Group tours of the Arena led by Lee Richards, City Centre Team Leader (Development & Physical Regeneration) |
| **Meeting 3**<br><br>Tuesday 2nd November | 1. **City Centre Travel Plan update**<br>Cllr Mark Thomas – Cabinet Member for Environment Enhancement & Infrastructure Management<br>Stuart Davies – Head of Highways and Transportation<br>Mark Thomas - Group Leader Traffic & Highway Network Management<br>Matt Bowyer - Principal Telematics Engineer<br><br>2. **Dashboard Report**<br>Cllr Robert Francis-Davies – Cabinet Member for Investment, Regeneration & Tourism<br>Phil Holmes – Head of Planning and City Regeneration<br>Huw Mowbray - Development and Physical Regeneration Strategic Manager |

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| **Meeting 4**<br><br>Tuesday 25th January | 1. **Swansea Business Improvement District (BID)**<br>Russell Greenslade - Chief Executive, Swansea BID<br><br>2. **Foreshore Developments**<br>Cllr Robert Francis-Davies – Cabinet Member for Investment, Regeneration & Tourism<br>Cllr David Hopkins - Cabinet Member for Delivery & Operations<br>Geoff Bacon – Head of Property Services<br><br>3. **Project Update Report** (for Information only) |
| **Meeting 5**<br>Tuesday 8th March | 1. **South West Wales Regional Economic Delivery Plan**<br>Cllr Rob Stewart – Cabinet Member for Economy, Finance & Strategy<br>Cllr Robert Francis-Davies – Cabinet Member for Investment, Regeneration & Tourism<br>Phil Holmes - Head of Planning and City Regeneration<br>Clare James – Economic Development Manager<br><br>2. **Project Update Report**<br>Cllr Robert Francis-Davies – Cabinet Member for Investment, Regeneration & Tourism<br>Phil Holmes – Head of Planning and City Regeneration<br>Huw Mowbray - Development and Physical Regeneration Strategic Manager<br><br>3. **Impact of Brexit on Rural Development Programme and Funding Update (Post 2023)** – For information only |

**To be scheduled** (inclusive of suggestions from Work Planning Conference 2020)

- Destination Management Plan / Tourism & Leisure
- Tidal Lagoon / Blue Eden
- Relocation of Council depots
- Auditor General for Wales Review of Town Centre Regeneration
- Historic / Listed Buildings
- Foreshore Developments