



Swansea Bay City Deal Portfolio Annual Report 2021 - 2022



swanseabaycitydeal.wales



SBCD@carmarthenshire.gov.uk

Executive Summary



SBCD Head Office



£241m	Government
£380m	Public Sector
£625m	Private Sector

The Swansea Bay City Deal (SBCD) is an unprecedented investment of circa £1.2 billion across a portfolio of nine headline programmes and projects delivering a total of 35 individual projects throughout the counties of Swansea, Carmarthenshire, Neath Port Talbot and Pembrokeshire.

During the lifetime of the portfolio the impact will be seen across the entire region generating at least 9,000 job opportunities and an anticipated contribution of £1.8-2.4 billion Gross Value Added (GVA).

Aligned to three themes of economic acceleration, energy and smart manufacturing, and life science and well-being, the financial year began with five of the nine business cases being approved by the Welsh Government and the UK Government. Within nine months, the remaining four business cases were all approved. This represented a significant milestone for the City Deal in December 2021, with the entire portfolio reaching delivery stage.

Progress has also been made in other areas over the year. Work has commenced on five projects and a further three have started contractual engagements.

The three regional programmes are also gathering pace with pilot schemes and funding opportunities being announced.

This report reflects the extent of the ambition of the SBCD and summarises its achievements over the last 12 months. It gives an up-to-date status of each project and programme at the end of March 2022 as well as containing key activities undertaken, case studies on the impact of the SBCD, governance and financial summary reports for the 2021-22 financial year.

The portfolio will deliver:



£1.8bn
Additional Gross
Value Added



9,000+
New Jobs
Created

The SBCD primary stakeholders are:



Forewords

Cllr Rob Stewart

*Swansea Council Leader
and Swansea Bay City
Deal Joint Committee
Chairman*



I am pleased to present the second Annual Report – a year which I feel has seen us successfully ride the storm of the COVID pandemic and accelerate our region into economic recovery by achieving significant and visible milestones that are instrumental for the success of the SBCD and the South West Wales regional economy.

We have made great progress during the last 12 months which has helped create cohesiveness, raise aspirations, create jobs, and rebuild the region to drive the economy forward. All fundamental steps towards our desire to further transform our region to become the perfect destination to work and live.

In December 2021, following the Campuses project approval by Welsh Government and UK Government, the SBCD was the first region in Wales with all headline projects and programmes in its portfolio to progress into delivery. This truly shows that we can set our vision and grow our economy by realising our ideas and plans.

The completion of some projects within our portfolio has already acted as a catalyst for further growth and investment in our region within and beyond the remit of the City Deal portfolio. The local creative sector is thriving since Yr Egin opened for business in 2018 and following the launch of the Swansea Arena in March 2022, restaurants and pubs in the surrounding area have seen a boost in trade.

There are even more exciting times ahead for the City Deal and I look forward to being a part of the journey.

Wendy Walters

*Carmarthenshire County
Council Chief Executive
and Swansea Bay City Deal
Senior Responsible Owner*



As the Senior Responsible Owner for the SBCD I am delighted with the progress that has been made over the last 12 months. Developing business cases and getting them through the regional and government approval process has been demanding, but worthwhile now that we are in full portfolio delivery.

We have invested a lot of energy into the City Deal and experienced closer working relationships across the region and with both the Welsh Government and UK Government during 2021. These engagements and collaborations are certainly a visible added benefit of the City Deal and regional working.

The foundations we have built by working with the four local authorities, two health boards and two universities, along with businesses has underpinned our ambition to become even stronger and to take opportunities that support our regional economy to grow.

We continue to follow robust governance, whilst providing exemplar assurance and audit outcomes and thorough monitoring and reporting so that everyone involved in the City Deal is kept up to date with the latest developments and strategic direction.

I am looking forward to the opportunities the City Deal will create over the next 12 months for local businesses and the benefits these will bring to our communities as we grow the South West Wales economy, shaping the future for generations to come.



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Forewords

Jonathan Burnes

Swansea Bay City Deal
Portfolio Director



The last 12 months have been rewarding, whilst providing a great challenge for the region and me personally. Now that all nine projects and programmes have been given the green light, this has put us into a very strong position to be able to deliver the estimated £1.2 billion of investment by 2033 and create over 9000 jobs.

As I look back over the last year, I am proud of the team and our partners in what we have achieved together. The Portfolio Management Office (PoMO) has become fully operational within the 2 years following my appointment in March 2020. The breadth of skills, experiences and functions across the team compliments the delivery teams across the region to maximise opportunities and to successfully deliver the portfolio. Maintaining robust governance, assurance, and reporting, along with effective engagement and communications is a key strength within the PoMO and will play a crucial role during delivery and in supporting the projects that are already operational.

I am looking forward to the next 12 months as all our key partners and delivery organisations will work collaboratively to further deliver the portfolio. In doing so, we will see development and change across the region through building infrastructure, creating partnerships and collaborations, developing supply chain opportunities, upskilling our workforce, and supporting businesses to incubate, grow and locate within the region.

Chris Foxall

Swansea Bay City Deal
Economic Strategy
Board Chairman



The Economic Strategy Board has been involved in yet another busy year advocating, amplifying and advising the SBCD on opportunities and challenges for many of its transformational projects. This is a once in a generation opportunity to change the flight path of our region's economy and meet the challenges of Brexit, the Covid-19 pandemic, climate change and the cost of living crisis.

We have provided guidance on the Homes as Power Stations Project, Pentre Awel, Skills & Talent, Campuses and Yr Egin Phase 2 in the last 12 months which we think has contributed value to the projects and portfolio as a whole.

As we adapt to hybrid working practices and return to in person meetings, we will maintain our advisory role to help realise the ambitions of the SBCD and will extend our support to the newly formed regional Corporate Joint Committees that will further add to our economic development.

Drawing on our board's leading specialists in the Hydrogen, Manufacturing, Energy, Housing, Finance and Healthcare sectors we believe that we can build on the success of the last 12 months to help shape our region by identifying and maximising opportunities for businesses of all sizes.



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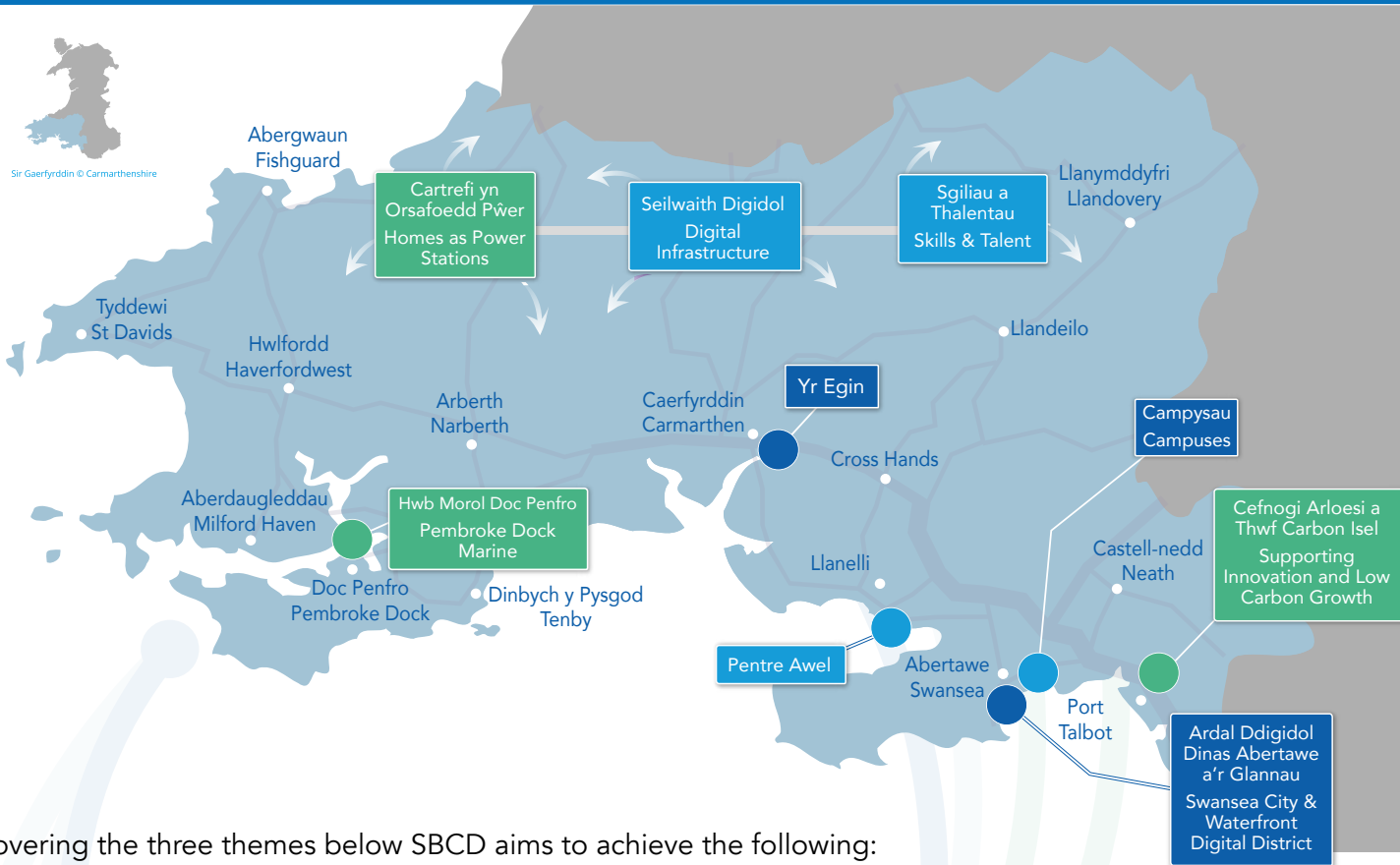


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The Portfolio, Themes and Impact



Covering the three themes below SBCD aims to achieve the following:



Providing the space, skills and connectivity to drive forward the regional economy to provide new opportunities for our businesses and communities to thrive.



Providing integrated developments that will combine cutting edge innovation, research and learning facilities with new business and within areas of life sciences, health, wellbeing and sport.



Placing the region at the forefront of energy and manufacturing innovation as part of the drive towards a low carbon economy and the strengthening of the existing manufacturing base.

£279m
Total investment

£1.08bn
Additional Gross Value Added

1,708
New Jobs

£336m
Total investment

£617m
Additional Gross Value Added

2,973
New Jobs

£625m
Total investment

£687m
Additional Gross Value Added

5,005
New Jobs

Benefits to Date

SBCD has seen significant progress in the benefits being delivered and the monitoring and evaluation activities over the past 12 months. Key benefits delivered to date include:



500+ FTE employment opportunities (including construction) which equates to 5% of the SBCD target



Circa **£160m** of total investment, approximately 13% of SBCD target



8000+ weeks of overall training and upskilling provided across the region



First Skills & Talent project developed, partnering with the PDM programme



Circa **47,380 sq.m** of floor space created across the SBCD themes for Economic Acceleration and Energy and Smart Manufacturing



The completion of the **3500** seater Swansea Arena and associated areas which had over 40,000 visitors within the first month of opening



The completion of the Bay Technology Centre which has **2,322 sq.m** of modern office and laboratory space



Yr Egin phase 1 moved into its 3rd year of operation and has **18** tenants with S4C as the anchor



Installation and ongoing monitoring of Air Quality Sensors, a standalone project within the SILCG programme



Construction underway on two projects, circa **£60m**



Infrastructure contracts awarded circa **£100m**



The Bay Technology Centre

“ I have had the pleasure of meeting many people involved in the Swansea Bay City Deal, which has the ambition of creating 9,000 new jobs. In particular, I found it hugely interesting to talk to partners at the Showcase event, Arena opening, Port Talbot Baglan Energy Park and Harbourside and Swansea University and University of South Wales Trinity Saint David. Approving business cases and seeing the infrastructure being built using £115m of UK Government investment has been inspiring. It demonstrates how South West Wales will utilise City Deal funds that make such a difference to the local economy. ”

David TC Davies

UK Government Minister for Wales

Key highlights of 2021 - 2022

April

Pembroke Dock Marine (PDM) Project works in collaboration with Swansea University

PDM's Marine Energy Test Area (META) secured a partnership with Swansea University for testing a deployment and retrieval method. Additionally, Swansea University were awarded £100k funding based on the Marine Energy Engineering Centre of Excellence (MEECE) capital project to buy a £150k test asset to support Bombora's wave energy project.

May

Vaughan Gething appointed to head up Growth Deals at Welsh Government

Welsh Government appointed Vaughan Gething as the Economy Minister, who will take the lead on City and Growth Deals. He visited the Swansea Arena, stating that: "The Copr Bay development will create new jobs in the industries of the future – this is at the heart of all City Deal Projects."

June

Swansea office development recognised for environmental excellence

The design of the high-tech office development planned for 71/72 The Kingsway was recognised for environmental excellence in helping reduce the carbon footprint and will include 'green features' such as green roof, solar panels, underfloor heating and heat recovery system.

July

Green light for Homes as Power Stations (HAPS) Project

The UK Government and Welsh Government approved the £505.5m HAPS project which will facilitate the take up of energy efficient technologies in thousands of homes, allowing people to save money, cut carbon emissions and improve health.

August

Low Carbon project given the go ahead

The £58.7m Supporting Innovation and Low Carbon Growth (SILCG) programme was approved by the UK Government and the Welsh Government. Working in collaboration with industry, government, and academia it will deliver low carbon growth via seven interlinked projects.

September

City Deal sponsor Swansea Bay start-up business award

SBCD sponsored the Swansea Bay Region startup of the year and DCW Insights were awarded as the overall winner with their Software as a Service tool.



71/72 Kingsway



Key highlights of 2021 - 2022

October

Bouygues UK appointed to start delivering Pentre Awel scheme in Llanelli

Bouygues UK were appointed as the main contractor for Pentre Awel Zone 1. The contract, worth circa £70m was one of the highest contracts the council had ever awarded with a key focus on social value to ensure local people and businesses will benefit.

November

Yr Egin receives a successful Gateway 5 review

Yr Egin received a Gateway 5 review for phase 1 with the Review Report showing a Delivery Confidence Assessment rating of Green, with 7 key recommendations.

December

Campuses project approved by UK Government and Welsh Government

The UK Government and Welsh Government approved the £132m Campuses project, which will promote innovation and business growth in the Medical Technology and Sports Technology sectors.

January

Full portfolio approved and now in delivery

The entire City Deal portfolio was approved by both Welsh Government and UK Government now in full delivery.

February

Contractors appointed to install Internet of Things (IoT) gateways for Digital Infrastructure

Contractors were appointed to install IoT gateways, jointly funded by the Welsh Government. 240+ LoRaWAN gateways started to be deployed and will provide comprehensive LoRaWAN coverage across the entire region.

March

Skills and Talent Programmes first pilot project is approved

Pembrokeshire College and Pembrokeshire schools received the go ahead for the first pilot project for the Skills & Talent programme. Learning opportunities in the 'green sector' will create pathways for employment with delivery planned to start in September 2022.



Progress Made: April 2021 – March 2022

April

- Pentre Awel posted a tender for a Zone 1 contractor through the South West Wales Contractors Framework.
- Regional funding bid submitted to the Welsh Government Local Broadband Fund.
- 70 air quality monitoring sensors were installed as part of the SILCG.
- Presentation to Director of Skills in the Welsh Government to explain the Skills & Talent Programme.

May

- Full approval of planning permission for the PDM Pembroke Dock Infrastructure (PDI) Project.
- Bouygues UK appointed as main contractor for the Carbon Neutral 71/72 Kingsway development.
- Digital Infrastructure Programme financial budgets approved by the Digital Board.
- SILCG policy and strategy alignment workshop completed with Welsh Government and UK Government.

June

- Marine Licence granted for PDM META and first deployment completed.
- Digital Infrastructure Programme appointed Rebecca Llewellyn as a Project Manager.
- UK Government Minister David TC Davies visited SILCG and Campuses.
- Skills & Talent completed a Gateway 0 Review receiving a Green Delivery Confidence Assessment rating.

July

- Yr Egin issued the Creative Sector Demand Study to inform Phase 2 developments.
- Innovation Matrix financial re-profile and design amendments approved.
- Digital Infrastructure Programme appointed a Project Manager, Dija Oliver as well as Spirit Public Sector as an External Specialist Advisor.

“ I am pleased to see the significant progress made in the last twelve months and am hugely supportive of the work which continues to be delivered. Much of the success has been achieved through regional collaboration and provides a great example of our aspiration to work regionally across Wales. It is also particularly pleasing to see the alignment with key Welsh Government objectives including our Economic Action Plan and our Future Generations Act approach. I look forward to working with partners to make progress on our shared ambitions.”

Vaughan Gething MS

*Minister for the Economy
Welsh Government*



Progress Made: April 2021 – March 2022

August

- PDM received Listed Building Consents from CADW allowing commencement of the Pembroke Dock Infrastructure (PDI) project.
- Pentre Awel appoint Gleeds as Zone 1 Client Side service support.
- Campuses awarded a Green/Amber Delivery Confidence Assessment rating for their Gateway Review.
- The PoMo appointed Heidi Harries as the Communications and Marketing Officer.

September

- Ambassador Theatre Group (ATG) announced opening acts for the Arena.
- META completed its tidal resource assessment, its Crown Estate leases and is in the process of procuring consent variation support for its open water sites.
- R&M Williams won the contract for the renovation of the PDM Hangar Annexes.
- The Port of Milford Haven recognised as one of UK's top 10 Ports with potential to support Floating Offshore Wind. Skills & Talent appointed Sam Cutlan as a Programme Manager.
- HAPS appointed Oonagh Gavigan as a Project Manager.

October

- Skills & Talent Business Case approved by UK Government and Welsh Government.
- Marine Energy Wales established the Celtic Sea Developer Alliance made up of 15 floating offshore wind developers with projects in the Celtic Sea.
- Pentre Awel approved the designs for the Clinical Delivery Centre, Clinical Research Centre and Leisure areas.
- Digital Infrastructure Programme delivered Regional 5G workshops and participated in the 5sprinG 5G Accelerator Programme.
- SILCG held workshops with Skills & Talent to discuss requirements for the green economy.

November

- Work began on the PDM Hangar Annexes in Pembroke Port.
- UK Government Minister David T C Davies visited UWTSO and Gower College following the approval of the Skills & Talent Business Case.
- Skills & Talent held their first meeting of the Skills Solution Group. Work began on the Skills Barometer to identify skills gaps.
- Construction began on 71/72 the Kingsway by Bouygues UK.



UK Government Minister David T C Davies visiting UWTSO for Skills & Talent Business Case approval

Progress Made: April 2021 – March 2022

December

- Swansea Arena cladding and the LED completed on the outside of the building. Tickets went on sale for the opening acts.
- Digital Infrastructure submitted a funding bid to the UK Government to accelerate mobile deployment.

January

- Yr Egin Phase 2 delivery strategy development commenced.
- PDM META deploy the SELKIE turbulence testing tool that was developed by Swansea University.
- Bouygues UK submitted their Community Benefits plan for Pentre Awel.
- Digital Infrastructure Programme awarded Welsh Government funding to deploy an Internet of Things (IoT) Innovation Network, hosted by the four Local Authorities.
- Primary Funding Agreement between Carmarthenshire and Neath Port Talbot (NPT) was agreed for HAPS to enable the dissemination of funding.
- Bay Technology Centre completed, and a brochure released for potential tenants.
- The Skills Barometer was presented to the Skills Solution Group.

February

- The SELKIE turbulence testing tool successfully recovered by PDM META.
- PDM MEECE Standard Variation Letter signed, meaning benefits of the grant can be maximised.
- Swansea Arena handed over to ATG and test events took place.
- Pentre Awel ecology and ground investigation began. Stage 3 design reviews for Zone 1 completed.
- SILCG appointed Brett Suddell as a Programme Manager.
- The Skills Barometer was approved by the Regional Learning and Skills Partnership (RLSP).
- UK Government Minister David T C Davies visited Swansea University to hand over the approval letter for Campuses.

March

- Showcase Event at Parc Y Scarlets to celebrate Portfolio being in full delivery.
- Swansea Arena officially opened.
- Meet the Buyer Event held for Pentre Awel in Parc Y Scarlets and guaranteed maximum price agreed for Zone 1.
- SBCD sponsored the Regional Zone at the 4theRegion Event, which was the first event held at Swansea Arena.
- SILCG publicised the £10m Port Talbot Waterfront Property Development Fund.
- HAPS publicised the Financial Incentives Fund and Supply Chain Development Fund.



Swansea Arena during the 4theRegion Event

Programme and Project Updates: April 2021 – March 2022

Home as Power Stations



£505.5m Total Investment
£15m City Deal
£114.6m Public Sector
£375.9m Private Sector



Homes as Power Stations (HAPS) is a pioneering project that will facilitate the adoption of energy efficient design and renewable technologies into homes across the region – helping to tackle fuel poverty, cut regional carbon emissions and support local economic growth.

Supporting development of both new build schemes and retrofitting of existing homes will enable a programme of comprehensive monitoring and data collection. Financial support to develop renewable technologies within the region will ensure there is a sustainable local supply chain.

Key Updates:

- The Business Case was approved by the Welsh Government and UK Government, following regional approval.
- A Project Manager was recruited in September 2021.
- January 2022 saw the finalised Primary Funding Agreement drawn up between Carmarthenshire and NPT to enable the dissemination of funding between the lead and partner authorities.
- The Financials Incentives Fund and the Supply Chain Development Fund was publicised in March 2022, allowing businesses to find out more on how they can benefit from this project.
- Initial mapping activity has commenced to understand and identify what businesses currently working across the region could contribute towards the HAPS supply chain.



£251m
Contribution to Regional GVA



1,804
Jobs Created



10,300 New and Existing Homes
fitted with Renewable Technologies



10,417+ KWh
Energy Saving



19,000+ Tonnes of CO²
Reductions Per Year

Digital Infrastructure



£55.3m Total Investment
£25m City Deal
£13.8m Public Sector
£16.5m Private Sector

With links throughout the entire SBCD Portfolio, the Digital Infrastructure Programme aims to support a thriving digital economy across the region that will stimulate private and public sector investment, improve public services, and generate well-paid job opportunities. There are three elements:

1. **Connected Places:** The ambition is that every home and business in the region will have access to full fibre or mobile broadband capable of offering speeds of up to 1gbps, 30 times faster than superfast broadband.
2. **Rural Connectivity:** Focus on improving access to broadband in the region's rural communities.
3. **Next Generation Wireless:** Investing in 5G and Internet of Things (IoT) and use cases, trials, and testbeds to encourage early adoption of imagined technology and provide a foundation for future innovation and future proof the digital economy.

Key Updates:

- The Board evolved with the appointment of a Senior Responsible Owner, additional Board members and a Programme Board Chair and Vice Chair. Documents were established and updated including the Terms of Reference, Risk and Issues registers and Benefits realisation plan.

- £13m of public sector funding has been secured for the region, contributing towards the aims and objectives.
- The Regional Digital Team are now represented on the UK Government Digital Connectivity Infrastructure Accelerator (DCIA) Programmes Early Adopter Group. This group will help support and shape DCIA activity within Southwest Wales.
- Several Community Voucher Scheme projects are now either in delivery or awaiting approval from the Department for Digital, Culture, Media and Sport (DCMS) across the region. The outcomes will be analysed in 2022/23.
- Supplier Engagement has been ongoing and Openreach and Ogi have made significant private investment throughout the region.
- Delivery workshops and engagement for individual project plans took place and a Regional Digital Strategy has been approved by the Board and is in delivery.
- Several new mobile cell sites have been planned and existing structures are being upgraded.
- LoRaWAN Gateways are being deployed and a joint procurement has been agreed between Neath Port Talbot and Swansea to appoint a contractor to install all remaining Gateways.
- The central Programme Team has been fully resourced with two Project Managers being appointed, along with Spirit Public Sector as an External Specialist Advisor.



£318.8m
Contribution to Regional GVA



200+ Public Sector Sites
upgraded to full fibre



10+
Community Broadband Projects



250+ Internet of Things
Gateways Deployed

Skills & Talent



£30m Total Investment
£10m City Deal
£16m Public Sector
£4m Private Sector

With a particular focus on growth areas in the digital, construction, energy, smart manufacturing and health and wellbeing sectors, the programme will deliver 2,200 additional skills and development opportunities and at least 3,000 new apprenticeships - which will support businesses by allowing them to grow and future proof through developing a talented workforce.

Working alongside partners from the private sector, industry, higher and further education, schools and the third sector, the project team will identify gaps in current provision and establish the changes needed to develop new courses and frameworks to meet these skill gaps. Pilot projects will be developed which align to the needs of industry and key City Deal themes.

Key Updates:

- The programme was awarded a Green Delivery Confidence Assessment rating following a Gateway 0 Programme assurance review.
- The Business Case was approved by the Welsh Government and UK Government, following regional approval.

- Minister David T C Davies visited the University of Wales Trinity Saint David (UWTSU) and Gower College to hand over the approval note and met with students and businesses including those taking part in the Skills & Talent pilot study.
- The team added to their delivery resource with the appointment of a Programme Manager.
- The Skills Solution Group was established with agreements put in place on how the programme should be developed.
- A Skills Barometer, which identifies skills needs and gaps, was finalised and presented to the Skills Solution Group.
- The Skills and Talent Programme fund was launched in Parc Y Scarlets.
- Approval of the first pilot project in partnership with Pembrokeshire College was approved in March 2022 with delivery planned to begin in September 2022.



2,200
Additional Skills



20 New Course Framework



14,000
Upskilling Opportunities



2+ Centres of Excellence Developed



3,000 New Apprenticeship Opportunities

Swansea City and Waterfront Digital District



£168.4m Total Investment
£50m City Deal
£78.5m Public Sector
£39.90m Private Sector

This programme will drive economic development and growth and is made up of:

1. The 3,500-capacity Swansea Arena development at the new £135m Copr Bay phase one district in the city centre that will accommodate live music, comedy, theatre, conferences and other events.
2. A state-of-the-art office development at 71/72 Kingsway that will provide space for 600 jobs, featuring flexible co-working environments and office space for businesses in the innovative technology and digital sectors. It will be a carbon net zero building when in operation.
3. Innovation Matrix and Innovation Precinct developments that will be delivered by the UWTSU, intended for the harbouring of start-up businesses and fostering entrepreneurship through close links with academia.

Key Updates:

- Construction of the Arena, led by the Buckingham Group took place throughout the year. Following the installation of the laser-cut origami Copr Bay bridge in March 2021, work continued on the surrounding area including hard and soft landscaping on the coastal parkland.
- The opening acts were announced in September 2021, including Royal Blood and John Bishop, and tickets started to go on sale in December.
- The Arena was officially handed over to the ATG in February where test events took place before the Arena was officially opened in March 2022.
- Bouygues UK were appointed as the main contractor for 71/72 The Kingsway in May 2021 and construction began in November of the same year. The development was also recognised for environmental excellence for its 'green features' and helping cut the city's carbon footprint.
- Development work also progressed on the Innovation Matrix with a change request being submitted and approved by the Joint Committee in July 2021, followed by the completion of RIBA stage 3 designs.



71/72 Kingsway is part funded by the European Regional Development Fund through the Welsh Government.



£669.8m
Contribution to Regional GVA



8,000+
Training Weeks



1,281
Jobs Created



10,684 sq.m Facility for Digitally Focussed Businesses



50+ Opportunities and space for Graduate Start-Ups



3,500
Capacity Indoor Arena

The Buckingham Group were appointed as the main contractor by Swansea Council to construct the Arena and work began in late 2019. In February 2022 the handover was made to ATG and the official launch took place in March 2022.

The launch event, led by Cllr Rob Stewart, was attended by the Welsh Government First Minister Mark Drakeford and UK Government Minister David T C Davies and was the perfect way to celebrate another City Deal project delivered on time and within budget.

During the construction phase the project delivered 722k hours of employment which is around 140 full time equivalents per year of construction in a large spectrum of trades including plumbing, plastering, electricians, landscapers, concrete workers and roofers. There was also 8,197 person weeks of training was delivered.

Since opening its doors, ATG have created operational and supply chain opportunities with around 21 full time employees in roles including marketing, operations, food and beverage, technical and events. ATG also employ 100 – 150 casual staff during concerts and events for security, technical crew and hospitality.

With opening acts of John Bishop, Royal Blood and Michael McIntyre and events including the 4th Region's City Centre Conference, Swansea University Graduations, UWTSU Graduations, Swansea Comic & Gaming Convention, football for the first month saw in excess of 40,000 visitors. Popularity of the arena is growing with world-class acts in music and comedy securing dates for the next 12 months and follower numbers of social media increasing continually. This confirms that the project is showing success in its early days and on the correct pathway to create a legacy for the region.





“ The official opening of the Swansea Arena shows Swansea is no longer a city of artist’s impressions. We are serious about delivery and have more than delivered on our promises to the people of the city through the £1bn investment programme and a regeneration story that’s continuing to grow and is unfolding across Swansea and the entire region. Part of Copr Bay phase one development has created a fantastic new leisure destination and hundreds of jobs and opportunities for local people, while helping support local businesses and generate more footfall in the city centre. Worth £17.1m a year to Swansea’s economy, Copr Bay is already acting as a catalyst for even more jobs and investment and Swansea is very well-placed to quickly bounce back from the economic impact of Covid. ”

Cllr Rob Stewart

Leader of Swansea Council

“ We have been really pleased with the partnership approach Swansea Council have taken with regards to the project, allowing us to feed in to final designs and operational considerations to ensure the best possible venue for the area. What we have discovered in the short time we have been live is that there is a real hunger from the community for regular premium live entertainment on their doorstep - ticket sales have been some of the best in the country for certain shows. Feedback on the night of events has been overwhelmingly positive regarding the impact the venue has had on the city alongside the actual quality of the venue itself and the impact it makes on the city skyline. ”

Lisa Mart

Venue Director

Ambassador Theatre Group



@SwanseaArena

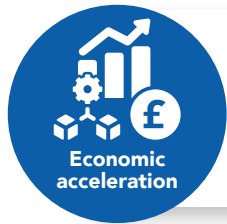


@ArenaSwansea



swansea-arena.co.uk

Yr Egin



£25.17m Total Investment
£5m City Deal
£18.67m Public Sector
£1.5m Private Sector



Canolfan S4C Yr Egin is a digital and creative cluster at the UWTSO in Carmarthen. Yr Egin's iconic building boasts an auditorium, superfast connectivity, state-of-the-art office spaces and post-production facilities for professional and community activities.

With Welsh language broadcaster S4C as its anchor tenant and many of the leading creative and digital companies in Wales co-locating within the centre, Yr Egin aims to be a catalyst for a creative cluster community, inspire collaboration, develop talent, and enhance the status of the Welsh language in Carmarthenshire.

A second phase will support the creative industry sector in the region, allowing for cross-sector engagement between new and established businesses across South West Wales. It will cater for a range of 'new' technological services that will be made available for the region.

Key Updates:

- In November 2021, phase one of Canolfan S4C Yr Egin celebrated three years since its official opening.
- S4C commissioned an economic impact report in 2021 outlining the key benefits of S4C residing in Carmarthenshire.
- A Creative Sector Demand Study was completed August 2021, outlining the requirements of the creative sector and these findings will be considered during the development of Yr Egin Phase 2.
- Discussion took place during towards the latter part of the year with the Economic Strategy Board, regional stakeholders and industry to define how to accommodate the findings.
- The Gateway 5 assurance review resulted in a Green Delivery Confidence Assessment rating for Phase 1 of the project and the lessons learned from the review will inform and support the shaping of Phase 2.



£89.5m
Contribution to Regional GVA



427
Jobs Created



150 Skills and Training Opportunities Created



167 Construction Workplace Employment Opportunities



3,912 sq.m
Workplace Created During Phase 1



25 Creative Sector Small Businesses Incubated


The first City Deal project approved and operating as a business was Yr Egin - home to 18 business in the creative sector including the anchor tenant S4C since October 2018. Delivered by the UWTSB and sited alongside the University's Carmarthen campus, the aim of Egin was the development of the regions creative industry and the support of Welsh language culture.


A report, undertaken by Arad Research and which outlined Yr Egin's economic success so far, was released by S4C in April 2021. (Figures quoted are for 12 months, calendar year 2019-2020)

 Economic impact of **£197.4m** to the UK economy

 Economic impact of **£141.1m** to the Welsh economy

 Economic impact of **£18.2m** to the Carmarthenshire economy

 **61%** of suppliers had a positive impact on turnover

 **101** full time equivalent staff

 **32** employees living in Carmarthenshire

 **30-40%** creative industry apprentices in Wales working on S4C productions

“Being part of an interactive, digital community has been great for networking with others especially with S4C and the students studying at the University of Wales Trinity Saint David. As Stiwdiobox continues to grow I very much look forward to meeting more local pupils, students and education practitioners who can benefit from the bilingual, digital activities I have to offer.”

Marc Griffiths

Founder

Stiwdiobox located at Yr Egin





“ Celebrating its 3rd year of operation in October, Canolfan S4C Yr Egin has established itself as the heart of the creative community in Carmarthen. This iconic building has been the perfect setting for collaborative working between anchor tenants S4C, the University of Wales Trinity Saint David and Small to Medium Enterprises, and the strengths of these relationships has been instrumental in building a thriving creative cluster. I am delighted with the job opportunities Yr Egin has generated, both directly and indirectly, and the boost to the Welsh language has been fantastic.

With Carmarthenshire hosting Yr Urdd National Eisteddfod next year, Yr Egin is sure to play a central role, which will further benefit the local economy.

This City Deal project has had a positive economic impact on the whole of Wales, as well as Carmarthenshire and I'm looking forward to Yr Egin phase 2 and how it can continue to grow the creative sector across the region.”

Cllr Darren Price

Leader of Carmarthenshire County Council

“ S4C is now settled in Carmarthen, and we are delighted that we have been able to employ a large number of talented local people to work with us. With the end of lockdown we are looking to do more in the area that is so key to the future of the Welsh language and recently two drama series have been filmed around Carmarthen.

In addition to this several series of the “Jonathan” programme have been recorded at Yr Egin, which have brought the sound and excitement of a television production into the building and we hope to increase this in the coming months.”

Siân Doyle

*Chief Executive
S4C*



Pentre Awel



£200.49m Total Investment
£40m City Deal
£52.3m Public Sector
£108.19m Private Sector



Combining life science research, business development facilities, community healthcare, assisted living and a state-of-the-art leisure and aquatics centre, Llanelli's Pentre Awel will be among the first development of its kind. Education and training facilities will be at the heart of the project and will focus on training the next generation of healthcare professionals.

Key Updates:

- Gleeds were appointed to provide Client-Side construction management services for Zone 1 in August 2021 and the tender period for Zone 3 design development also closed.
- Bouygues UK were awarded the tender for the construction of Zone 1 in October which included components such as education skills and training, along with clinical delivery and research.
- A Community Benefits group was established to ensure that community benefits are optimised. The structure of the Community Benefits reporting was established with an local authority led group overseeing Bouygues UK stakeholder's group to ensure scrutiny and optimisation.
- All strategic work groups completed on their remit and subject specific implementation groups were established within the overall project governance structure.
- Q3 saw planning confirmation to deliver the innovation aspects of the Zone 1, including the Living Laboratory.
- Cardiff University were named as the strategic partner to lead on innovation and business development functions. This will form part of an innovation network with Hywel Dda University Health Board, UWTSO and Swansea University with wider business support provided by Carmarthenshire County Council.
- Bouygues UK commenced their pre-construction programme for Zone 1, undertaking design reviews with tenants, preparing a Reserve Matters Application and discharging pre-commencement planning conditions through ecology surveys and ground Investigation works.
- Carmarthenshire County Council and Bouygues UK agreed a Guaranteed Maximum Price for the Zone 1 works. Full Council approval was gained to delegate authority to the Senior Responsible Owner to progress on this basis with assurance of affordability.
- A Meet the Buyer event was held in March, and was attended by over 120 business to look at the supply chain opportunities for Zone 1.



£467m
Contribution to Regional GVA



1,853
Jobs Created



50,000 sq.m
Development across all four zones



12,000 sq.m Community
Research, Education & Clinical Space



80 Life Science Businesses
Established / Supported

Campuses



£135.01m Total Investment
£15m City Deal
£58.01m Public Sector
£62m Private Sector

The Campuses project will deliver two complementary initiatives that add value to the regional life science, health and sport sectors; one at the Singleton Campus of Swansea University and one based at Morriston Hospital.

Advanced research and development facilities will be created, building on the success of the Institute of Life Science at Swansea University's Medical School. Collaboration between academic research, industry and the NHS will place the Campuses project at the forefront of new technologies to improve healthcare, while creating new life science and sport-tech companies and innovations as well as highly skilled jobs.



Key Updates:

- The business case was developed early in the year with test and challenge from the Economic Strategy Board and the City Deal Programme (Portfolio) Board. Valuable advice was received and incorporated into the project prior to regional approval.
- In June 2021, Minister David TC Davies visited Swansea University to gain an understanding of the project and partnerships prior to submission to Welsh Government and UK Government for approval.
- In August 2021, the project completed a Gateway Review and received an Amber/Green Delivery Confidence Assessment rating.
- A Project Manager and Communications and Relationships Manager were appointed.
- The Business Case was approved by UK Government and Welsh Government in December 2021 and in February, Minister David T C Davies visited the project to hand over the approval letter.



£150m
Contribution to Regional GVA



700 sq.m Centre for Commercial and Academic Collaboration



1,120
Jobs Created



300+
Cluster Companies



2,000 sq.m Sports Tech & Med Tech Research and Innovation Space



100+ Innovation and Commercial Opportunities

Supporting Innovation & Low Carbon Growth



£58.7m Total Investment
£47.70m City Deal
£5.5m Public Sector
£5.5m Private Sector

Supporting Innovation and Low Carbon Growth (SILCG) will deliver seven elements that support jobs and growth in the low carbon technology and innovation sectors.

1. The Bay Technology Centre (BTC) provides flexible office and laboratory space.
2. South Wales Industrial Transition from Carbon Hub (SWITCH) is an industrial decarbonisation research facility
3. The Advanced Manufacturing Production Facility (AMPF) provides hybrid facilities, production units and office space in conjunction with an apprentice block.
4. Property Development Fund (PDF) is £10m of gap funding aimed to encourage development in the Port Talbot Waterfront area.
5. To develop a Low Emission Vehicle (LEV) charging strategy for the NPT area.
6. The Air Quality Monitoring Project (AQMP) will test alternative low-cost sensors to assess air quality and pollution.
7. Hydrogen Stimulus Project will enable excess renewable electricity from BTC to be converted to hydrogen fuel for vehicles.

Key Updates:

- Following a policy workshop in May and a visit from UK Government Minister David T C Davies in June, the final business case was approved by the UK Government and Welsh Government.
- Skills & Talent Programme workshop took place to discuss skills needs for the green economy.
- In April, the installation of the air quality monitors commenced.
- In January, construction of the BTC was completed, and a marketing brochure released.
- Strategy development progressed for the LEV project and a dedicated resource appointed.
- The development of the delivery plan for the Hydrogen Stimulus Project continued and site works commenced early 2022.
- A joint NPT Council and Swansea University working group for SWITCH continued to develop the building specification requirements.
- The building specification for the AMPF progressed and engagement was undertaken with Industry Wales and other interested parties.
- A Programme Manager was appointed in February.
- The £10m Port Talbot Waterfront Property Development Fund was publicised in March.



This project is part funded by the European Regional Development Fund through the Welsh Government.



£93m
Contribution to Regional GVA



£10m
Property Development Fund



1,320
Jobs Created



45 Enterprises Contributing to Supported Research

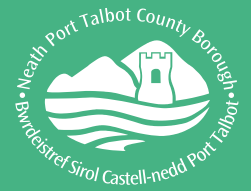


18,500 sq.m Floor Space Created for the Low Energy Sector



4 patents Registered for Products

Case Study: Bay Technology Centre



Morgan Sindall Construction were awarded the contract to build the Bay Technology Centre which was led by NPT council and worth around £7.9m. Construction started in January 2021 and was completed in January 2022, on time and within budget.

The Bay Technology Centre created 16 new jobs for local people during the construction phase. This included 7 apprenticeships in a range of construction trades. In total 380 training weeks were delivered during the project. It also provided 8 paid work experience opportunities for local students who were studying full-time construction courses at college. One work experience candidate was taken on following this experience and is now employed as a trainee engineer.

This 25,000sqft state of the art building provides modern office and laboratory space, with a range of different sized units for start-up companies and established businesses. The centre will focus on innovation in the energy, digital and life science sector and create an environment where business can flourish, produces can be developed and co-working is encouraged.

The centre is the first commercial facility in Wales that is energy positive in operation as it produces more energy than it consumes.

- All electric building with no traditional heating systems to reduce carbon impact
- Photovoltaic panels in the façade providing a clean source of energy
- Ongoing legacy as a carbon sequestering asset
- BREEAM Rating Excellent
- Office and Laboratory Units to a minimum of Biosafety Level 1



“The City Deal is an ambitious investment into key innovation sectors, and the new centre will open up a wealth of opportunities for both start-ups and established businesses within the region. Delivering future-fit sustainable buildings is vital – so the opportunity to deliver the Technology Centre, an energy positive building, has been a privilege. Not only will it have a positive impact on the environment, we look forward to the positive impact it will have on the businesses that work within it too.”

Rob Williams

*Area Director
Morgan Sindall*



92% of the building fabric can be recycled



0.998 energy performance ratio
- a 281% improvement over building regulations



486% net gain on area-based biodiversity through enhanced habitats

Pembroke Dock Marine



£60.47m	Total Investment
£28m	City Deal
£16.35m	Public Sector
£16.12m	Private Sector



Pembroke Dock Marine (PDM) will establish a world class marine energy and engineering fabrication, test and deployment hub, delivering the support and infrastructure needed to grow Wales' low carbon economy further. The project expands upon the region's established facilities and extensive skill base, ensuring maximum operational efficiency and increased innovation opportunities, which will help drive down marine energy production costs.

Focusing on the growth of decarbonised energy production, the project includes dedicated early stage and commercial scale test sites, a CATAPULT innovation centre, and industry focused port infrastructure to ensure developers improve the effectiveness, cost efficiencies and installation of their innovative technology across four headline projects:

1. Pembroke Dock Infrastructure
2. Marine Energy Test Area
3. Marine Energy Engineering Centre of Excellence
4. Pembrokeshire Demonstration Zone

Key Updates:

Pembroke Dock Infrastructure (PDI)

- The Port of Milford Haven was identified by ORE Catapult's Floating Offshore Wind (FLOW) Centre of Excellence as one of UK's top 10 Ports with potential to support FLOW commercialisation.
- PDI applied for a Marine License and were awarded full approval of planning permission for the project by Pembrokeshire County Council. They also received a Listed Building Consents from CADW for the Graving Dock and Slipways.

- R&M Williams secured the construction contract to renovate the Hangar Annexes in the Port of Pembroke and work commenced in November 2021 to create office and light workshop space in these historical buildings.
- An additional £1.1m WEFO funding was secured.
- A brochure was produced to promote the facilities and help attract tenants once the Hangar Annexes renovations are complete.

Marine Energy Test Area (META)

- Marine Energy Wales established the Celtic Sea Developer Alliance made up of 15 floating wind developers with projects in the Celtic Sea.
- META secured its first partner early in the year through a collaboration with Swansea University for testing a deployment and retrieval method for a frame using an air lift cylinder. The device was successfully recovered from the Warrior Way test site.
- META also secured a Marine Licence and later contracted an environmental consultant to undertake a review into expanding the activity that could be undertaken at the site. This has been submitted to the planning bodies and is awaiting approval.
- META completed its tidal resource assessment, its Crown Estate leases and is in the process of procuring consent variation support for its open water sites to continue to meet the long-term needs of developers.
- In January 2022, META deployed the SELKIE turbulence testing tool that was developed by Swansea University and was recovered in February.

Pembroke Dock Marine



Marine Energy and Engineering Centre of Excellence (MEECE)

- Swansea University were awarded £100k funding from the Engineering and Physical Sciences Research Council (EPSRC) based on the MEECE capital project to buy a £150k test asset which is used to support Bomboras mWave energy project.
- MEECE have signed a lease with Pembrokeshire County Council to take on the Workshop Unit in the Bridge Innovation Centre, for use of storage of technical equipment and light engineering activities.
- All universities involved in the project have signed up to the MEECE collaboration agreement with many projects in the pipeline or in the final stages of approval.

- The MEECE Standard Variation Letter was signed by all partners which means that the benefits of the grant can be maximised and further opportunities capitalised.
- Both META and MEECE signed a berthing agreement for a buoy deployment.

Pembrokeshire Demonstration Zone (PDZ)

- In Q2 announcements were made from National Grid ESO and OFGEM around how future offshore energy networks will need to be collaboratively built and how these could be funded through anticipatory investment.
- All third-party approvals and co-funding agreements were in place to progress with the project.
- In November 2021, Three Tocardo tidal stream turbines arrived in Pembroke Dock for fitting to the QED naval tidal stream device.



This project is also part funded by the European Regional Development Fund through the Welsh Government.



£343.4m
Contribution to Regional GVA



1,000mw Contribution to
Decarbonisation Targets



1,881
Jobs Created



60,600 sq.m
Physical Infrastructure Creation

Governance Structure



Welsh Cities and Growth Deal Implementation Board

This is a joint UK Government and Welsh Government Board with responsibility for providing assurance and advice to the Joint Chairs regarding strategic and operational issues, the release of funding to the Portfolio, the oversight and monitoring of projects, and effective governance and assurance.

Joint Committee (JC)

Chair, Cllr Rob Stewart, Leader of Swansea Council

Comprising of the four regional Local Authority Leaders, as well as senior representatives from all eight primary partner organisations, it holds the Programme (Portfolio) Board and PoMO to account and has overall responsibility for scrutiny and approvals.

Economic Strategy Board (ESB)

Chair, Chris Foxall

This is a private sector advisory body which acts as the voice of business. The ESB provides strategic direction for the City Deal through advice to the Joint Committee on matters relating to the City Region.

Programme (Portfolio) Board

Chair, Wendy Walters, Chief Executive Officer, Carmarthenshire County Council

Responsible for overseeing the operations of the City Deal, Programme (Portfolio) Board will review changes to business cases and developments to the portfolio as it progresses. It consists of the head or senior representative of each of the eight partner organisations.

Joint Scrutiny Committee (JSC)

Chair, Cllr Rob James, Elected Member in Carmarthenshire County Council

Provides advice, challenge and support to the Joint Committee and made up of three elected members from each of the four local authorities.

The Portfolio Management Office Team and Statutory Functions

The Portfolio Management Office (PoMO) is responsible for the day-to-day running of the Portfolio and is in regular contact with the wider City Deal teams and board members.



The SBCD is also supported by Carmarthenshire Council's Section 151 Officer and Swansea Council's Monitoring Officer as part of the statutory functions of the portfolio.

Chris Moore

*Director of Corporate Services
Carmarthenshire County Council and SBCD
Section 151 Officer*

Chris is responsible for the administration of the JC affairs under Section 151 of the Local Government Act 1972 and overall responsibility for the financial administration of the City Deal.

Tracey Meredith

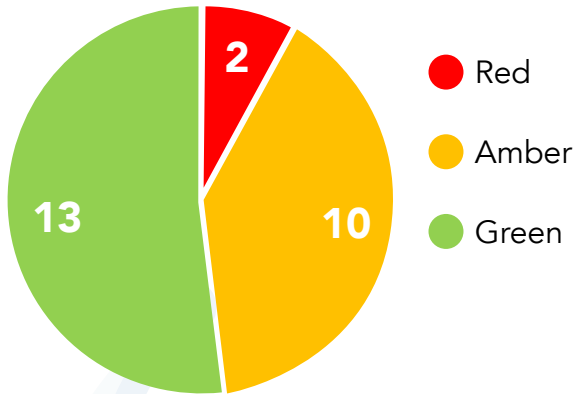
*Monitoring Officer
Swansea County Council and SBCD
Monitoring Officer*

Tracey is responsible for ensuring good governance and maintaining the highest ethical standard, ensuring the legality of arrangements and that the JC Agreement is complied with.

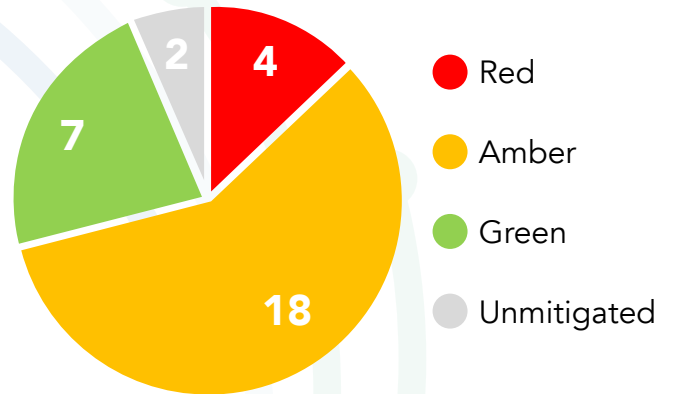
Portfolio Risk Management

Throughout 2021-2022 the SBCD has identified new risks taking the total from 25 at the start to 31 at the end of the financial year across the portfolio, which is reflective of the Portfolio being in full delivery. There have also been many mitigations put in place that have lowered risk ratings.

Mitigated Risks April 2021



Mitigated Risks March 2022

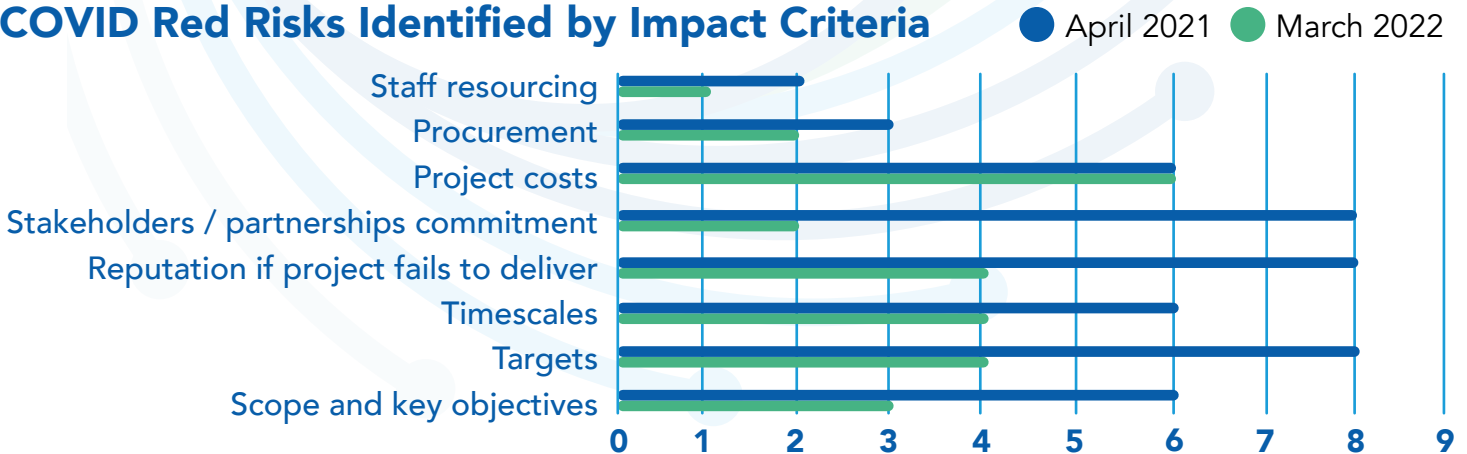


Currently the four red risks for the portfolio are:

1. Private sector funding contributions not realised in line with business case projections
2. Increase in cost of construction
3. Welsh Government 2021 update of Technical Advice Note (TAN) 15 development risk of flooding and coastal erosion and associated maps
4. Slippage in delivery of programmes / projects against key milestones

The COVID-19 impact assessment shows that the COVID related risks have notably reduced throughout the year, primarily linked to the progress achieved in year and the effective management of the Portfolio, Programmes and Projects to ensure all risks are mitigated as far as is reasonably practicable.

COVID Red Risks Identified by Impact Criteria



A Construction Impact Assessment was developed in Quarter 3 to understand and manage the risks associated with rising construction costs and availability of materials and resources. The three key areas of risk include:

- Potential Time implications
- Potential Project cost increases
- Potential Scope changes

Assurance and Audit

Gateway Reviews

The SBCD Portfolio and projects are subject to Office of Government Commerce Gateway Reviews, facilitated by the Welsh Government Integrated Assurance Hub, to assure successful progression and overall delivery of the portfolio and associated projects and programmes.

The SBCD has undertaken two portfolio and eight project/programme Gateway reviews since November 2019, with Gateway Review Delivery Confidence Assessment (DCA) Ratings as follows:

Portfolio / Programme / Project	Stage	Latest Review Date	DCA Rating	Next Planned
Portfolio	0	July 2021		July 2022
Homes as Power Stations	PAR (2/3)	June 2020		July 2022
Supporting Innovation & Low Carbon Growth	PAR (2/3)	June 2020		Sept 2022
Pentre Awel	PAR (2/3)	Sept 2020		Oct 2022
Digital Infrastructure	0	Oct 2020		Sept 2022
Pembroke Dock Marine	PAR (2/3)	Feb 2020		Dec 2022
Yr Egin	5 (Ph 1)	Nov 2021		Dec 2022
Swansea Waterfront & Digital district	0/PAR	-		Sept 2022
Skills & Talent	0	June 2021		Nov 2022
Campuses	PAR (2/3)	Aug 2021		May 2023

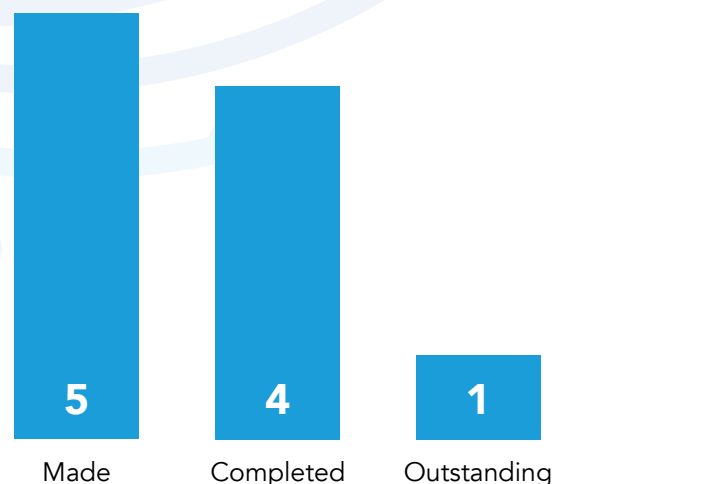
Portfolio Gateway 0 Review Recommendations 2021

The 2021 Gateway assurance review for the Portfolio returned an Amber/Green rating with 4 recommendations. 3 of these recommendations have been enacted and implemented with 1 currently still being finalised. The outstanding recommendation is to update the Terms of Reference and membership for the Portfolio Board, which will be completed in 2022/23.



Internal Audit Recommendations 2021

The 2021 Internal Audit provided the Portfolio with a Substantial rating, meaning the Portfolio has a substantial chance of overall success. 5 recommendations were made with 4 having been successfully actioned. The outstanding recommendation is for one SBCD partner to sign and return a letter of engagement for their contributions to delivery of the Portfolio.



Financial Summary

During the period of unprecedented challenges encountered through COVID-19 pandemic and moving into a period of economic recovery, all regional stakeholders and both governments continue to be fully committed to the SBCD. Their commitment to secure investment and deliver the City Deal's objectives will help drive economic growth and create high skilled jobs across the region.

Progress is reflected in the final business case being approved in 2021, where all nine are now approved and in delivery. In 2021/22 financial year, the SBCD has made £30 million investment of public and private sector funding on the planning, procurement, build and operations across many of the Portfolio's projects and programmes.

We also received the funding award letter in 2021/22, to release the fourth annual draw down of City Deal funding, which has taken the total drawdown to £77m since commencement with £24m dispersed to programmes and projects. The latest City Deal funding draw down included the planned front loading of UK Government grant which will now be awarded over a ten-year period, rather than the original fifteen-year period.

The overall estimated investment position is demonstrated at £1.239bn over the fifteen-year life of the portfolio.



Swansea Arena and Copr Bay

Financial Summary

There is currently an estimated revenue requirement of £60m (5%) to deliver the city deal projects. This will be supported through the use of the Local Authorities flexible capital receipts directive, and alternative public and private sector commitment.

Over the life span of the portfolio the private sector engagement is expected to increase and develop as projects establish themselves and move into completion.

Due to several macro economic factors over the last three years (including resource constraints due to the COVID19 pandemic, delays in the procurement process as a result of construction cost pressures, a delay in business case development and approval and a delay in recruitment), the portfolio is experiencing a delay to delivery of several programmes and projects. This has not increased the overall delivery timeframe for the portfolio.

Currently only £236m is forecast of the grants awarded by the UK Government and Welsh Government, totalling £241m, with the balance of £5m being further considered for investment.

Annual Expenditure Profile Forecast

Investment Component	Cumulative Actuals (20th Mar 2017 to 31st Mar 2021)	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast
		Year 4 2021 - 2	Year 5 2022 - 2023	Year 6 2023 - 24	Year 7 2024 - 25	Year 8 2025 - 26	Year 9 2026 - 27
Capital / Revenue Investment	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)
Capital Investment	89.20	29.55	152.47	166.79	180.20	191.42	206.01
Revenue Investment	5.64	0.78	11.13	14.70	12.98	11.11	0.90
Total	94.84	30.32	163.60	181.49	193.18	202.54	206.87
Funding							
City Deal Investment	11.20	20.90	53.04	35.17	26.02	23.77	24.93
Public Sector Investment	71.31	10.65	51.96	61.04	39.13	56.85	66.32
Private Sector Investment	3.60	0.62	32.98	48.72	123.89	132.69	137.43
Total	86.11	32.10	137.98	144.93	189.03	213.31	228.67

Investment Component	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Total
	Year 10 2027 - 28	Year 11 2028 - 29	Year 12 2029 - 30	Year 13 2030 - 31	Year 14 2031 - 32	Year 15 2032 - 33	
Capital / Revenue	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	
Capital Investment	163.43	-	-	-	-	-	1,179.07
Revenue Investment	0.42	0.44	0.45	0.46	0.47	0.48	59.97
Total	163.86	0.44	0.45	0.46	0.47	0.48	1,239.04
Component Investment							
City Deal Investment	23.15	4.13	3.35	3.35	3.35	3.35	235.70
Public Sector Investment	16.47	-	-	-	-	-	373.73
Private Sector Investment	147.39	0.44	0.45	0.46	0.47	0.48	629.61
Total	187.00	4.56	3.80	3.81	3.82	3.83	1,239.04

Marketing and Communications

A dedicated SBCD Communications and Marketing Officer was appointed in September 2021. In this role, Heidi Harries works closely with the Business Engagement Manager and Project/Programme teams to oversee the Portfolio Communications and Marketing Plan, which includes activity associated with media, social media, web content, internal communications, marketing, and events.

Portfolio Communications and Marketing Plan

The SBCD Communications & Marketing Plan was updated in January 2022 to co-ordinate communications across the SBCD governance groups, partner organisations and wider audiences. The plan outlines key information, schedules, protocols, tools and activity that aim to maximise opportunities arising from communications.

Media Coverage Digital and Print Media

194 positive media references were secured for the SBCD in digital and print media in 2021/22 financial year.

SBCD articles have featured with Wales Online, the Western Mail, ITV Wales, the South Wales Evening Post, Business News Wales, Wales Business Insider, Business Live, Wales 247, the Llanelli Star, the Carmarthen Journal, the Western Telegraph, the South Wales Guardian, The National and Nation Cymru. Specialist media outlets include World Cargo News, Opera News, Premier Construction, FE News and Construction Enquirer.



Social Media

The coverage of social media accounts and bilingual social media posts, tagging relevant partners and organisations between April 2021 and March 2022 was:

	Tag	Combined reach of posts*	Followers
Facebook	@SBCityDeal	76.5	896
Twitter	@SBCityDeal	691.6k	1552
LinkedIn		693	453

*The number of people that saw posts, engaged, clicked on, re-posted, commented or liked

Ministerial Visits

Several Ministerial visits took place during 2021-2022 with UK Government and Welsh Government to receive updates on projects, to award the approval of a business case or attend an opening or milestone event. The Press were invited to attend, with the BBC and ITV filming for inclusion on the Welsh News in some instances, and post-visit press releases were sent out.



UK Government Minister David T C Davies with Professor Paul Boyle, Vice-Chancellor, Swansea University at the Campuses Business Case approval

Marketing and Communications

Events

With the lifting of Covid restrictions this financial year the number of live events that the SBCD have attended has increased.

1. The Showcase Event - This took place on 3rd March to celebrate that all projects and programmes had been approved by the Welsh Government and UK Government. This was one of the first live events that took place and feedback from the event was extremely positive. Further details are included later in this report.
2. 4theRegion Event – The team presented and exhibited at the event on 17th March which welcomed around 2,500 people and 125 exhibitors. It was the first event to be held at Swansea Arena.

“A huge thank you to everyone who attended, exhibited or spoke at this year’s conference. It was an amazing day, showcasing and celebrating all the people, projects, businesses and organisations that make Swansea what it is – and it saw some very exciting announcements about future plans for the city.”

Dawn Lyle

*Founder and Chair
4theRegion*

City Deal Website

The Welsh and English SBCD website is updated regularly to contain the latest news and information.



Branding

Brand Guidelines were updated and feature in the Portfolio Communications and Marketing Plan with details for digital and physical promotion including City Deal construction sites and infrastructure.

Communications with Regional Businesses

Information is regularly shared with businesses, organisations and networks for inclusion in their communication channels such as newsletters and events. Including groups such as regional Business Improvement Districts (BID), business clubs and chambers of commerce, as well as organisations including 4theRegion and Regional Engagement Teams. City Deal announcements are also regularly featured on e-news bulletins sent out by Business News Wales and Wales Business Insider, which reach thousands of businesses throughout the region and further afield.

Partnership Working

Work has continued to establish a network with key stakeholder for marketing and communications, including Welsh Government and UK Government and other City and Growth Deals.

Marketing and Communications sub-groups have been set up for the PDM programme, with meetings held on a monthly basis. The meetings will help determine timelines for communications activities around key milestones.

Business Engagement

As the portfolio moves into delivery, the programmes and projects have been providing more opportunities for local, regional and national businesses with support from our Economic Strategy Board through advice, advocacy and signposting.

Yr Egin continues to be successful, hosting 18 tenants along with the anchor tenant S4C whose presence in Carmarthenshire is estimated to be worth over £18m per year to the local economy and provides over 100 jobs.

Swansea's new Copr Bay destination includes the Arena which has benefitted many businesses in the local area by generating extra footfall. Examples include The Anchor and Gigi Gao's restaurant in the Maritime Quarter. A new café/restaurant adjacent to the Arena, The Green Room, is also now open for business and has enabled its Swansea-based operators to expand their portfolio of businesses, while also creating jobs for local people.

A number of other local businesses have also taken up units in the Copr Bay development at the new Cupid Way link between the city centre and the Arena. These include Coaltown Coffee, FrozziYo frozen yoghurts and KoKoDoo chicken.

Other businesses have spoken about their decision to invest in Swansea city centre because of schemes like Copr Bay. These include Cwtsh Hostel, with owner Llyr Roberts saying the arena, combined with other regeneration in the city, is making Swansea an attractive proposition for the private sector.

As part of the PDM project, R&M Williams has been appointed to undertake works on the renovation of the four Grade II listed hangar annexes at Pembroke Port. This will create flexible modern workspaces and a workshop.

The foundation work being delivered by PDM has raised the profile of the region's supply chain who are winning contracts to deliver the needs of marine energy developers.

Bouygues UK were appointed as the approved contractor for both Pentre Awel and the 71/72 Kingsway development. Two meet-the-buyer events were arranged in partnership with Business Wales and the County Council clients, to promote the opportunities for business.

71/72 Kingsway Online, 16th December

45 companies attended the online event to raise awareness on opportunities including structural steel, glazing, street furniture, road markings, singe, specialist joiner, cleaning, fire protection and landscaping. All were given the opportunity to tender the relevant packages and subsequent contracts have been awarded.

Pentre Awel Parc Y Scarlets, 30th March

141 local businesses attended the live event, which promoted the opportunities within Zone. There were over 50 contract opportunities available for the local supply chain. Of the attendees, 22% of the business were from Llanelli, 36% from Carmarthenshire and 57% from the City Deal region.



Peter Austin, Business Engagement Manager at the Pentre Awel Meet the Buyer Event.

The Showcase Event



- 50% Private Sector
- 21% Education Sector
- 29% Public or other sector associated with projects



Cllr Rob Stewart at the Showcase Event

The Showcase Event at Parc Y Scarlets in March was held to:

- Celebrate that all 9 projects and programmes had been approved by the Welsh Government and UK Government and that the portfolio was in full delivery.
- Provide insights into the portfolio with an emphasis on the opportunities for businesses and other key stakeholders.
- Allow all guests to network and discuss their roles and future opportunities.

The event schedule included:

- **Networking:** All nine projects and programmes were set out in the main room as a marketplace where attendees were able to visit each stand to engage and ask questions. SBCD colleagues were available in the registration, breaks and lunchtime networking sessions.
- **Headline speakers:** Councillor Emlyn Dole, Councillor Rob Stewart, Minister David TC Davies, Minister Rebecca Evans and Chris Foxall.
- **Project/programme updates:** Jon Burnes compèred the sessions with a representative from each project and programme providing a five-minute overview.
- **Breakout sessions:** Three parallel breakout sessions to discuss opportunities across the areas of Skills and Talent, Social Value and Floating Offshore Wind.

Feedback from the Post Event Survey included:



19% response rate



Rated event as 8.3/10



47% wanted to engage further with the projects



Rated 4.4/5 for project updates

“It was great to be at the Swansea Bay City Deal showcase event. Excellent to hear that the funding has now been allocated, and all nine projects have now been approved. We are proud to be part of these projects driving economic development and growth.”

Russell Greenslade

Chief Executive

Swansea Business Improvement District

The Showcase Event

“What a great turnout for the Swansea Bay City Deal event. It was fantastic to hear about the various projects across the region and we are looking forward to the future.”

Nick Gorvett

*Partnerships Manager
2B Enterprising*



“Attending the City Deal Showcase Event was a fantastic opportunity to catch up on the excellent progress made on the deal so far and it’s great to hear that all of the projects have now been approved. I’m looking forward to seeing the plans come into reality and the growth and regeneration it will bring to the region.”

Sharon Adams

*Commercial Manager
Port of Milford Haven*

Feedback from the Post Event Survey included:



Rated **4.5/5**
for headline speakers



Rated **4.2/5**
for networking opportunities



Rated **4.2/5**
for breakout sessions



100% wanted to attend
a future SBCD event

“An enjoyable and very informative conference one which showed such a variety of projects in particular Pembroke Dock Marine’s green energy and engineering, Homes as Power Stations which could be invaluable in future energy generation and the Digital Infrastructure which is vital South Wales technology development.”

Huw Bala

*Project Manager
Tinopolis*



Key activity for April 2022 – March 2023

Quarter 1 (April, May and June 2022)

- **Portfolio:** Briefings for newly appointed Elected Members and Leaders.
- **Digital Infrastructure:**
 - Supplier and Government lobbying and engagement.
 - Facilitation of ongoing and planned regional fibre build by private sector.
 - Devise programme of work for Next Gen and rural human resources.
- **Skills & Talent:** Receive and review further pilot project applications.
- **HAPS:** Finalise technical specification for monitoring & evaluation procurement and commence recruitment for project staff.
- **Swansea Waterfront Digital District:** Finalise planning and RIBA stage 3 for the Innovation Matrix while updating the Business Case to reflect this. Progress made on 71/72 Kingsway.
- **Yr Egin:** Development of proposed delivery methodology to better suit creative sector environment post-COVID to inform change request for approval at Joint Committee.
- **Pentre Awel:** Reserve Matters planning application for Zone 1 approval, RIBA stage 2 designs for Zone 3 completion. Establish Community Benefits reporting framework.
- **Campuses:** Sketty Lane – Ecology assessment completion. Revised cost estimated completion, procurement of design phase commenced.
- **SILCG:**
 - BTC – Fixtures, fittings and furniture installation.
 - PDF publicised and Expression of Interest form released.
 - LEV – recruitment of new staff.
- **PDM:** Appoint contractor for the slipway and workboat pontoons.



Key activity for April 2022 – March 2023

Quarter 2 (July, Aug and Sept 2022)

- **Portfolio:**
Gateway 0 Portfolio Assurance Review.
- **Digital Infrastructure:**
 - Recruit Local Authority hosted resources for our Next Generation Wireless and Rural workstreams.
 - Continue LoraWAN deployment across the region providing functionality to the Internet of Things.
 - Preparatory work for £12m hub site procurements including a “Gigahubs” bid to the UK Government for additional funding.
 - Review projected Gigabit broadband coverage alongside Welsh Government and take decisions on our rural superfast broadband procurement.
- **Skills & Talent:** Appoint remainder of Skills Project Team.
- **HAPS:** Finalise and launch Financial Incentives Fund.
- **Swansea Waterfront:**
Progress construction on 71-72 Kingsway.
- **Yr Egin:**
 - Submit change request for approval at Joint Committee, outlining alignment to the requirements of the creative sector.
 - Progress procurement activity and associated Gateway review.
- **Pentre Awel:** Complete RIBA stage 4 designs for Zone 1. Commence site pre-enablement work.
- **Campuses:**
 - Primary funding agreement signed.
 - Secondary funding agreement issued and signed.
- **SILCG:**
 - BTC - Building handover to Neath Port Talbot Council and first tenants to be secured.
 - SWITCH – legal documents signed and release of the Design and Build tenders.
 - Hydrogen Stimulus Project – Funding agreement approval.
 - AQMP – Recruitment of new data analyst
- **PDM:** Mobilisation starts for the slipway and workboat pontoons.



71/72 Kingsway

Key activity for April 2022 – March 2023

Quarter 3 (Oct, Nov and Dec 2022)

- **Digital Infrastructure:**
 - o Progress hub sites procurement.
 - o Commence delivery of work for Next Generation Wireless and Rural project resources, accelerating activities within local Authorities.
 - o Procurement activities for 5G trails and testbeds project.
- **Skills & Talent:** School engagement events and second Gateway Review. 1st pilot project moves into delivery. Receive and review further pilot applications.
- **HAPS:** Finalise the Supply Chain Development Fund.
- **Yr Egin:** Commence delivery of Phase 2.
- **Swansea Waterfront:** commence with Innovation Matrix construction.
- **Pentre Awel:** Zone 1 full start on site and procurement of Zone 3.
- **Campuses:** Commence delivery of Morrison site phase 1. Finalise designs and procurement for phase 2 Singleton site.
- **SILCG:**
 - o AMPF – Pre-market engagement event with end users/operators, wider industry engagement to assist in the development of the building specification.
 - o Hydrogen Stimulus Project – Equipment procurement.
- **PDM:** Review programme/scope/instruct designer tender for terrestrial Infrastructure works.

Quarter 4 (Jan, Feb and March 2023)

- **Portfolio:** Portfolio Business Case Update and submission to Governments.
- **Digital Infrastructure:** Ongoing delivery of all workstreams.
- **Skills & Talent:** Continued school engagement and receipt of further pilot project.
- **HAPS:** Launch the Supply Chain Development Fund.
- **Swansea Waterfront:** Prepare for hand over and commissioning of 71/72 the Kingsway before operation in Q3 2023/24.
- **Yr Egin:** Continue delivery of Phase 2.
- **Pentre Awel:** Zone 3 start on site.
- **Campuses:** Commence of site Phase 1 Singleton.
- **SILCG:**
 - o Launch of PDF round 2.
 - o Hydrogen Stimulus Project – Equipment Installation.
 - o SWITCH assessment of tender applications and appointment of contractor.
- **PDM:** completion of original META activities, completion of Hangar Annex office and workshop facilities.



Campuses

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