



**Western
Gateway**

**Porth y
Gorllewin**

WESTERN GATEWAY

Turbo-charging a greener,
fairer, stronger Britain

**WESTERN | PORTH Y
GATEWAY | GORLLEWIN**

A powerhouse for south Wales
and western England

FOREWORD



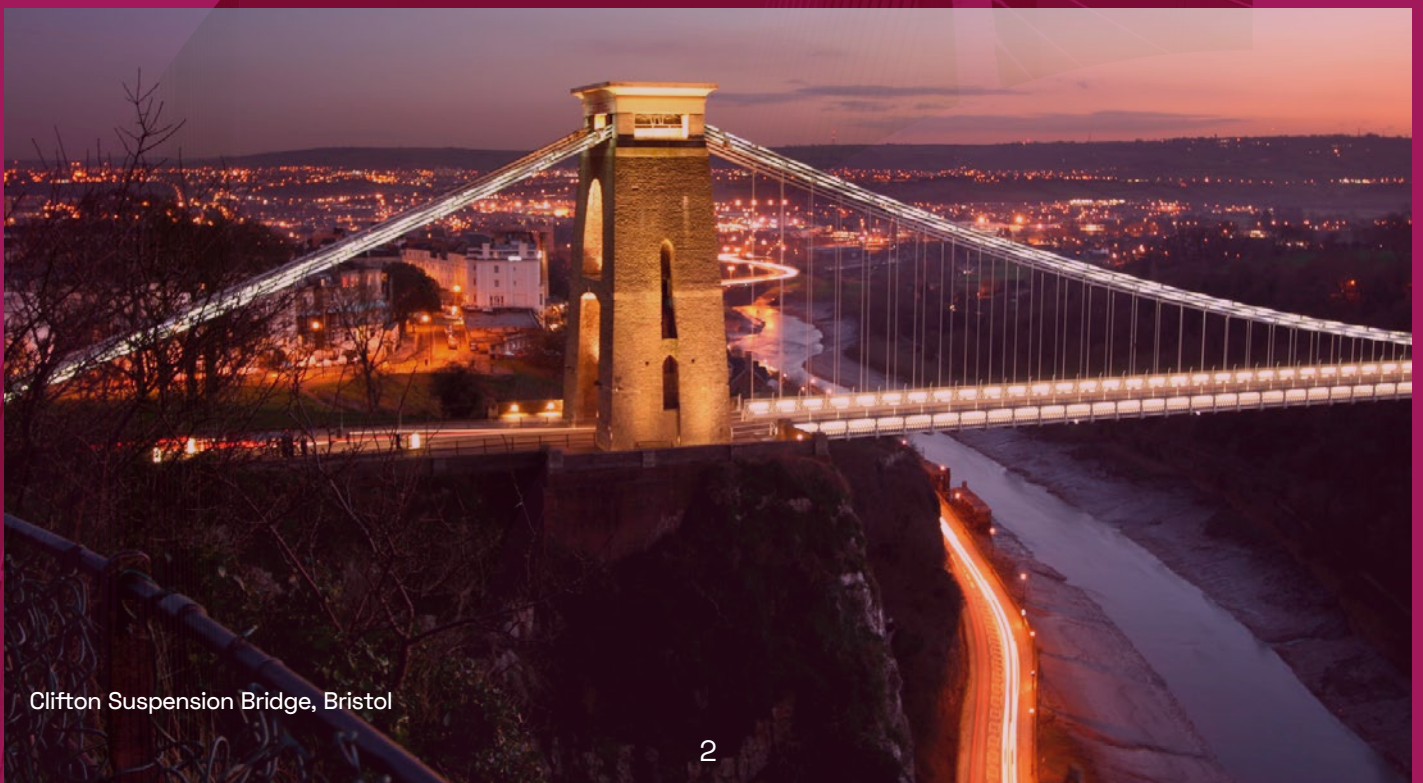
The Western Gateway has long been a powerhouse waiting to happen, and is ready to capitalise on its phenomenal potential to drive Britain’s cleaner, fairer future.

With eight strong cities across the Gateway, alongside rural communities in the wider economic area, the Western Gateway already outperforms the UK average in terms of economic output, and is primed and ready to do so much more.

Working together across borders we offer a unique proposition to UK plc: to turbo-charge transformative, inclusive and greener growth as part of building a new future for the British economy. Whilst we are an economic high performer, we are also a region of contrasts, with significant pockets of deprivation, low skills and low pay in some of our cities and rural areas. Through harnessing the Western Gateway’s innovation and geographical assets we can make a huge difference to people’s lives. We can release the untapped potential of our cities, towns and villages, provide real amplification and additionality to existing projects, infrastructure and industrial strategies. Delivering this vision will add more than £56bn to the UK economy by 2030 and lead the transition to a net zero future.



Katherine Bennett CBE
Chair of Western Gateway
and Senior Vice President
in the UK for Airbus



Clifton Suspension Bridge, Bristol

THE WESTERN GATEWAY

“The Western Gateway is full of bustling towns and cities and boasts a rich cultural and industrial history. We won’t rest until we have unlocked the potential this region has to offer as we level-up opportunities across the UK.”

Rt Hon Sajid Javid, Chancellor of the Exchequer,
November 2019.

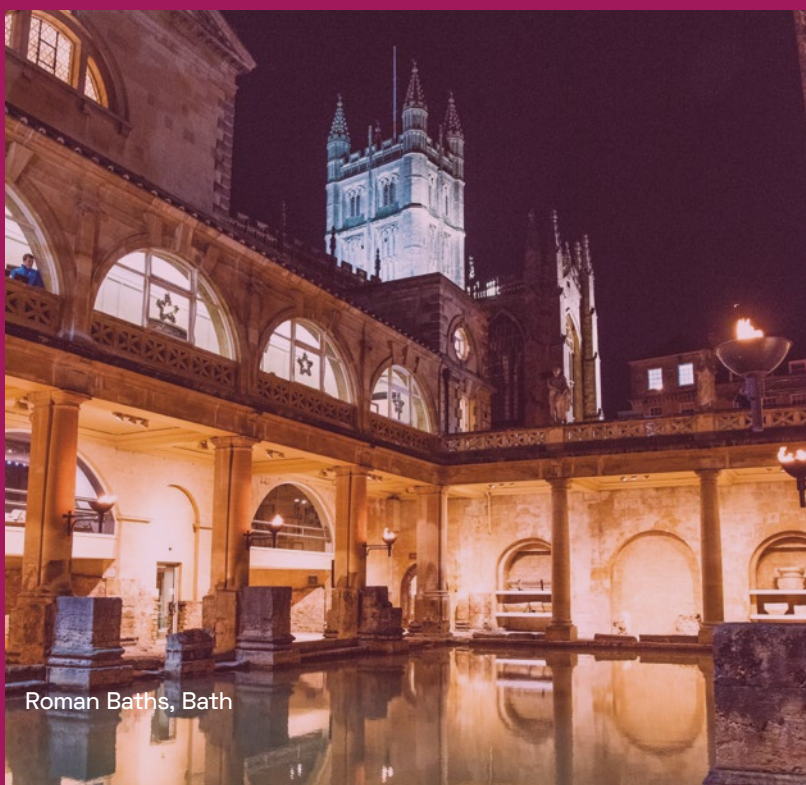
This cross-border Gateway of 4.4m people reaches across south Wales and western England, from Swindon to Swansea, and Salisbury to Tewkesbury, with the core cities of Bristol and Cardiff at its heart. The potential of this economic area is highlighted in our report, ‘A powerhouse for the West’ (Metrodynamics, July 2019).

Our focus is inclusive and decarbonised economic growth, where scale and collaboration can deliver more for our people and the wider economies of our countries than our constituent parts could achieve alone.

We have a track record of economic success, some of the best companies, universities and most skilled and creative people in Britain along with the natural resources to lead a levelled-up, carbon net zero future for the British economy. The Western Gateway is perfectly positioned to drive the UK’s response to the Climate Emergency.

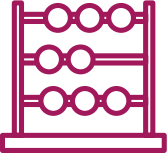

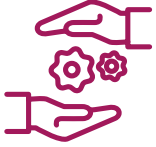

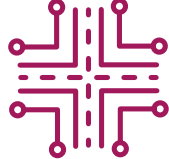




We will do this by:

- **Collaborating** – seeking input from Local Enterprise Partnerships, councils, city regions, Governments (in Wales and Westminster), businesses and universities as we mobilise their combined power and expertise behind the big projects that can deliver our vision.
- **Catalysing** the industry, infrastructure and innovation assets of the area to drive export led growth.
- **Communicating** the scale and strength of our collective offer through a shared voice to Governments and the world.

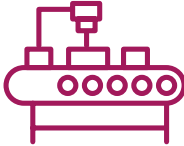




Roman Baths, Bath



KEY FACTS

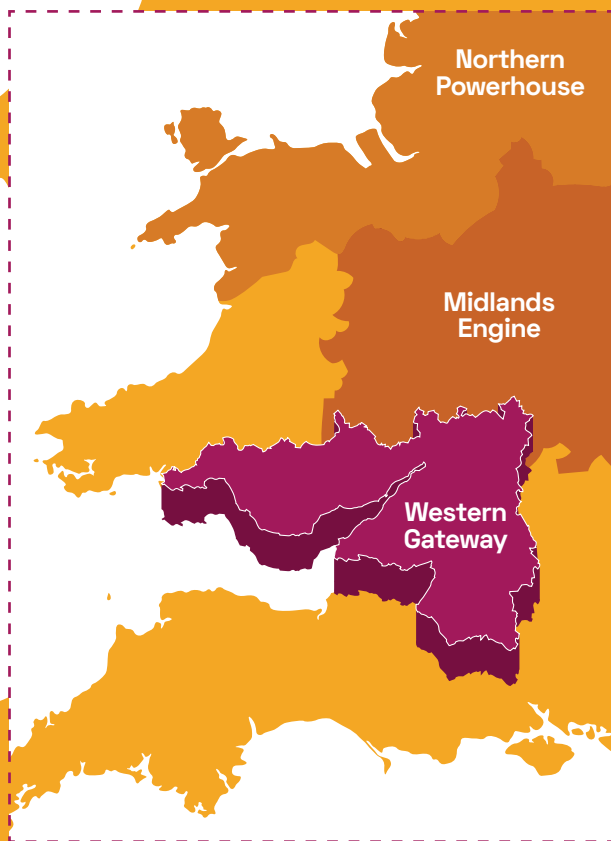
 <p>£107bn economy</p>	 <p>8 cities, 3 City Regions, towns and countryside</p>		
<p>159,650 businesses</p> 	 <p>2.1m jobs</p>	 <p>4 major transport lines 2 airports 9 ports</p>	
<p>£21bn goods exports £11bn service exports</p> 	 <p>3 LEPs and 2 economic partnerships</p>	<p>10 universities, the ONS and 7 research councils</p> 	 <p>4.4m people</p>

KEY SECTORS

 <p>Advanced manufacturing and engineering</p>
 <p>Creative, digital and cyber</p>
 <p>Finance, business and professional services</p>

GROWTH OPPORTUNITIES

 <p>Clean energy and low carbon</p>	 <p>Health and life sciences</p>
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A strong cross-border relationship with high connectivity east-west and north-south, and high levels of economic integration within and across the region.



Geography and membership correct at the time of publication (February 2020). As a developing partnership this may grow or change over time, and up-to-date details of our membership can always be found on our website, www.western-gateway.co.uk

OUR MISSION

**Turbo-charging
a greener, fairer,
stronger Britain**

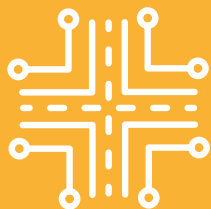
We will draw on our combined strengths and unique assets:

- Economic performance that is already ahead of the UK average, excluding London.
- World leading, export focussed businesses and research in the growth industries of the future.
- Creative, qualified and committed people and some of the best quality of life in Europe.
- Unique environmental and low carbon energy assets.

...to unleash our full potential and blaze a trail for the UK's next generation economy: delivering a gateway to a cleaner, fairer and more prosperous future.

OUR AMBITION Turbo-charging a greener, fairer, stronger Britain

CONNECTIVITY



Ambition 1

Deliver world class physical and digital connectivity, boosting productivity, unlocking housing growth and leading our transition to a net zero future.

GLOBAL GATEWAY



Ambition 2

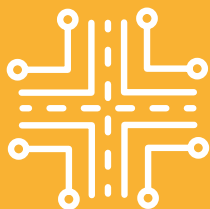
Become Britain's gateway to global markets, increasing export and investment-led growth, marketing our industries and expertise to the world.

INNOVATION



Ambition 3

Spark collaboration and innovation in our distinctive high-tech sectors, universities and R&D assets, making the most of the region's renewable and environmental assets.



CONNECTIVITY

Ambition 1:

Deliver world class physical and digital connectivity into and within our area to boost productivity, unlock housing and lead our transition to a net zero future

Improving our connectivity, within the region, to London, to other powerhouse regions and to the world is at the heart of our Western Gateway vision. We want residents and workers to be able to travel within the area in a ‘golden hour’ with one Western Gateway smart ticket.

With over half the population of the UK within two hours travel, two deep sea ports and two airports giving access to international markets, our location is one of the reasons we are already the UK’s most productive powerhouse. But we know that to deliver our vision of being Britain’s global gateway in the century ahead, investment plans in our region’s infrastructure will need to shift several gears.

Bold and ambitious changes are already underway, with the Severn Bridge tolls a thing of the past, the electrification of the Great Western Mainline nearing completion and the multi-billion pound investments into city-region metro systems now underway.

Our ambition is to join these projects together – and to the national transport system – so the whole is much greater than the sum of its parts, raising productivity, unlocking housing growth and supporting our transition to a ‘net zero’ future.

Working with partners, we will deliver:

- Quicker, more frequent services to London, reducing the journey time from Swansea to London to less than two hours.
- Quicker, more frequent services between the cities of the Western Gateway, with journey times between Cardiff and Bristol reduced to 30 minutes.
- A direct link into Heathrow through delivery of the Reading-Heathrow rail link and frequent, direct trains to other Core Cities and the proposed HS2 network.
- Reduced journey times, allowing residents to travel within the area in a ‘golden hour’ using one Western Gateway smart ticket.
- Improved connectivity through Swindon to England’s Economic Heartland and improved links along the region’s north-south axis.
- Investment to the strategic road network, including upgrades to the M4 and M5 to tackle congestion, boost capacity and unlock housing growth across the region.
- A network of electric charging points along the M4 and M5 road corridors and across the area.
- The UK’s most digitally connected region.
- A Gateway between the UK and the world economy, making the most of the region’s ports and airports.

Already one of the most productive parts of the UK

...but with the same infrastructure spend per head (£389) as London



Spend to 2030 would be...

£37.2bn

£14.3bn higher





GLOBAL GATEWAY

Ambition 2:

Become Britain's Global Gateway for export and investment-led growth

The Western Gateway is already the UK's export powerhouse.

The region is home to world-leading companies in the industries that will power the UK's next industrial revolution. Our world-class research universities and some of the most highly skilled people in Europe, together with connectivity into London and all other powerhouses, makes our region the Gateway into Britain for international investment.

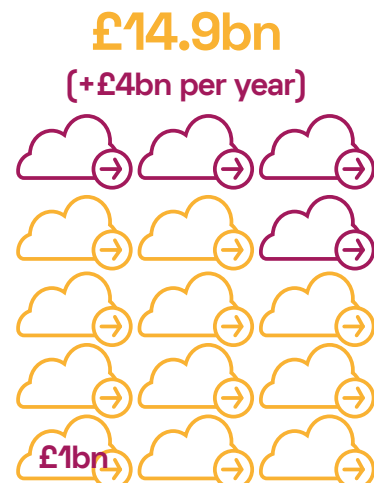
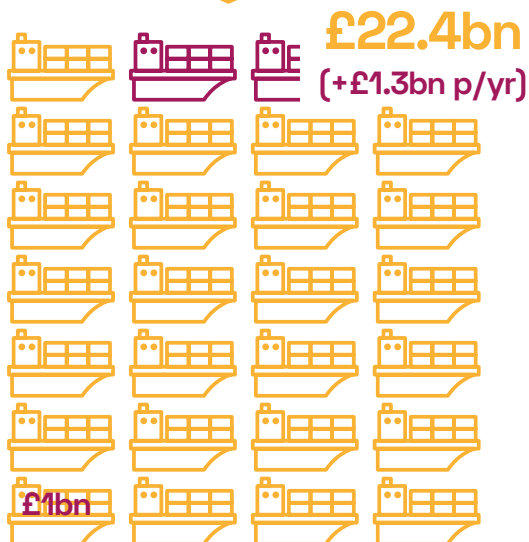
We will develop a coordinated international approach as the Western Gateway. This 'internationalisation' will promote our shared sectoral strengths and assets to key international markets. To support this we are seeking support from designated Department of International Trade resource to develop and promote the Gateway collectively, led by local leadership.

Working with partners, we will:

- Deliver our **Global Gateway Strategy**, looking at trade, investment, ports and airports, visitor economy and business events.
- Put in place a programme of sectoral trade missions to key global markets, beginning with a joint trade mission to China in November 2020.
- Lead a **joint approach to MIPIM UK 2020 and MIPIM Cannes 2021**.
- Become a true Gateway to the UK, forging strong links and collaborations with our neighbours and fellow powerhouses: Midlands Engine, Northern Powerhouse, England's Economic Heartland and the Great South West.

If Western Gateway goods exports per full-time employee were the same as the Midlands Engine in the aerospace, automotive, the digital, cyber and creative industries, life sciences and low-carbon technologies

If Western Gateway service exports per full-time employee were the same as England and Wales





INNOVATION

Ambition 3:

We will bring our universities, businesses and natural assets together to meet the grand challenges and to create the new industries of the 21st century.

The Western Gateway is home to diverse and world-leading public and private sector research, science and technology assets and some of the most highly skilled and creative people in Europe.

We are home to innovative research, digital, science and technology assets such as UK Research and Innovation, the National Composites Centre and the Cyber Security and Digital Innovation Centre. Innovative companies such as Rolls Royce, BAE Systems, Airbus, Catalent, Intel, Dyson, Renishaw, SPTS Technologies, IQE and EDF and ten universities with four research intensive universities – Bath, Bristol, Cardiff and Swansea come together to create an ‘innovation arc’ stretching from Swansea to London.

We will:

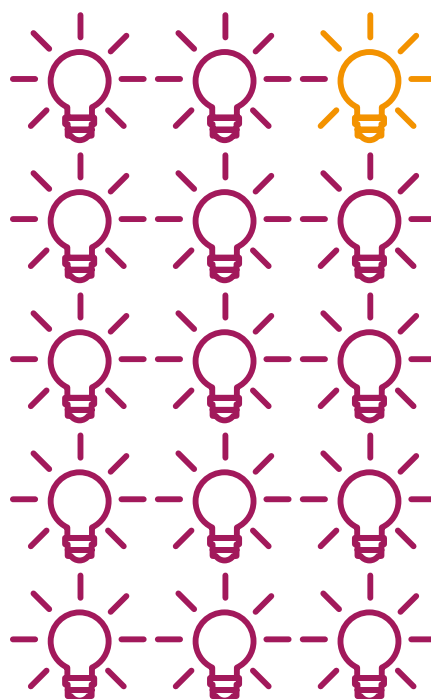
- Capitalise on our unique natural and industrial assets, including the Severn Estuary, Hinkley Point and the potential for Tidal Lagoon in Bristol Channel/Swansea Bay, to drive the development of new energy systems.
- Build on our industrial and research expertise to make the UK’s aerospace and automotive industries a global leader in developing new technologies for ultra-low emission vehicles, low carbon propulsion systems and lightweight structures for cars and planes.
- Become an internationally recognised powerhouse for innovation in the creative, digital and cyber industries.

If Western Gateway had the same innovation spend per full-time employee as England and Wales



Spend to 2030 would be

£29.2bn £4.1bn higher



THE WESTERN GATEWAY'S 2020 ROUTE MAP

We are a new partnership with big ambitions. We are putting in place a solid launch pad for our long-term initiatives while making swift progress on quicker wins. Over the coming year we will work together at pace while making sure that we bring people on the journey.



Our plans for 2020 include:

- Establishing a new leadership board, following an independent review of governance options.
- Establishing a small core professional team to provide dedicated secretariat support.
- Launching a full vision document for the partnership, following the completion of an Independent Economic Review, building on the evidence base we already have from Local Industrial Strategies and City Region Economic Strategies.
- Identifying key international markets for investment and putting in place, with Government, a sectorally-focussed trade mission to China in 2020, in advance of launching an international strategy in 2021.
- Developing detailed outline business case propositions for the major investments we want to see from Government and international investors.
- Forging collaborations with neighbouring powerhouses and beyond, creating a true Gateway for investment, trade and innovation.

Cardiff Bay



Stonehenge, Wiltshire



Regent Circus, Swindon



Friars Walk, Newport



Gloucester Docks



Millennium Bridge, Swansea



Everyman Theatre, Cheltenham



Grand Pier, Weston-super-Mare



Salisbury Cathedral





Western Porth y
Gateway **Gorllewin**