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Monmouthshire County Council

FUTURE MONMOUTHSHIRE
Economies of the Future Analysis
Strategic Direction Report



Final Report

October 2018

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1.0 INTRODUCTION

1.1 The Economies of the Future Analysis explores opportunities for Monmouthshire County's economy, looking at potential growth scenarios and the resulting implications. Phase One of the study has presented the baseline understanding of the economy and property market, as well as critiquing the employment forecasts for Monmouthshire to 2037. Thus far the following documents have been prepared and presented as part of this study:

- Economic Baseline Report
- Property Baseline Report
- Projections Report
- Skills Report

1.2 This report builds on the findings and analysis of these earlier documents and should be read in conjunction with them.

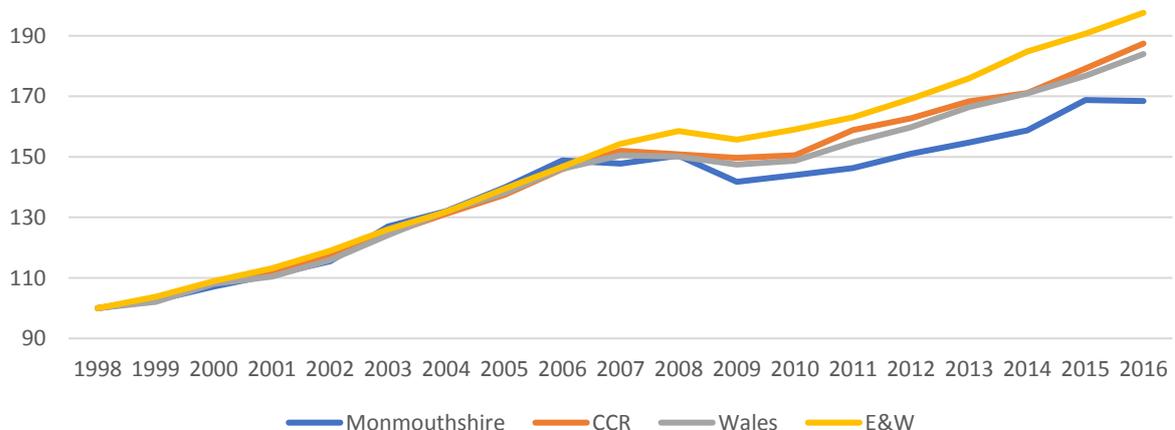
1.3 This Strategic Direction Report presents the implications and opportunities of an accelerated growth scenario in Monmouthshire, ***if such an approach were to be adopted***. This document, along with the earlier work will help inform Council in their decision making regarding the strategic direction for the County.

2.0 THE RATIONALE FOR ACCELERATED GROWTH

2.1 The following presents the rationale for pursuing an accelerated growth agenda for Monmouthshire, rather than continuing to plan for ‘on-trend’ growth. It draws from the findings and research of the Phase One documents.

- The demographic trends of Monmouthshire suggest that the County is not well positioned for economic growth. In particular the ageing population (median age 48 years) and the relatively small working age population base means that the economic performance of Monmouthshire is reliant on a relatively small cohort.
- Monmouthshire’s median age is older than all other local authority areas in the Cardiff Capital Region (CCR), meaning that Monmouthshire is vulnerable to being less economically active than other areas in the CCR.
- This working age population is projected to decline over coming years as the population further ages, with an increase in the retiree population. Therefore, there will be increasing pressures on a shrinking working age population to drive the economy and service the large economically inactive population.
- Recent economic output in Monmouthshire has grown at a lower rate compared to the regional and national averages, as illustrated in the chart below.

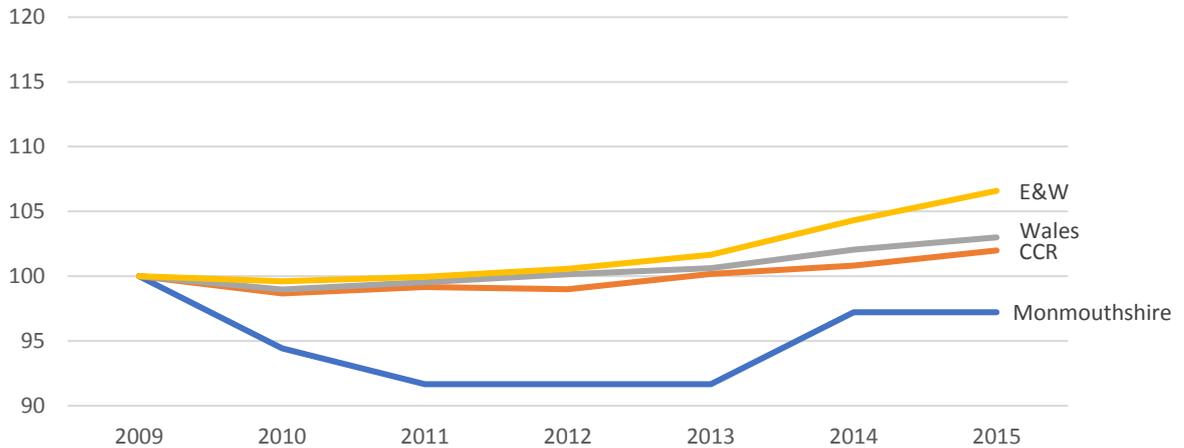
Figure 1 – Recent Economic Performance, GVA growth 1998-2016, (indexed 1998=100)



Source: ONS, Regional GVA for LAs (Experimental Statistics)

- Recent employment growth in Monmouthshire has also been lower than regional comparators, as illustrated below:

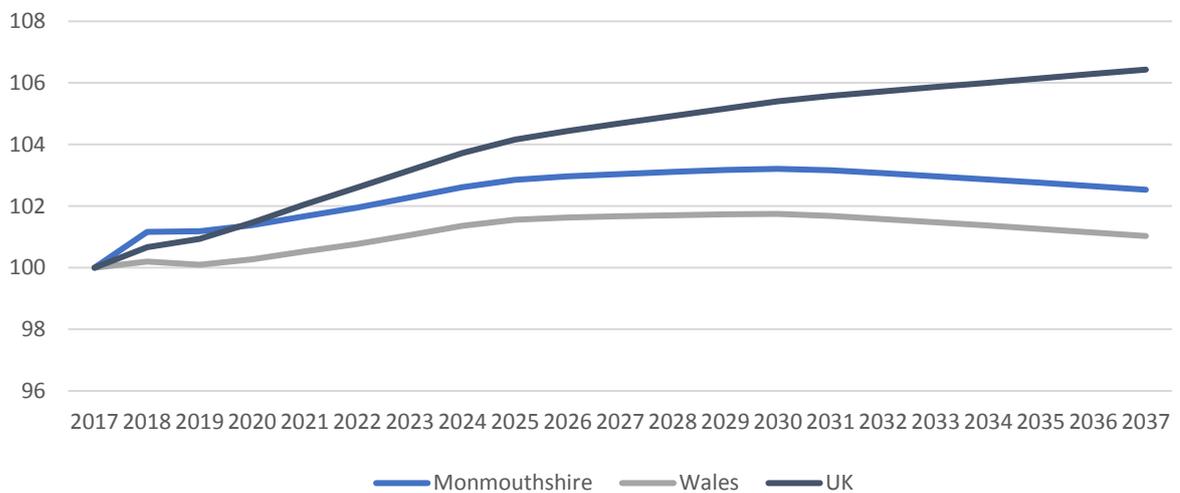
Figure 2 – Indexed Employment Growth (2009=100)



Source: ONS, BRES

- The County has a net out-commuting worker profile. There is a leakage of workers to the larger economic centres outside of the County, such as Cardiff, Newport and Bristol. In particular, there is a leakage of high-value, high-skilled occupations.
- Baseline employment projections for Monmouthshire suggest that employment numbers in the County could peak in 2030 and start to decline thereafter as the implications of the ageing population increase in influence.

Figure 2 – Projected Indexed Employment Growth 2017-37



- The Cardiff Capital Region City Deal presents a generational opportunity for Monmouthshire to prosper and play a central role in regional economic growth.
- In order to fully take advantage of the opportunities of the City Deal, Monmouthshire would need to have a growing, vibrant, high-skilled population.
- The retail market is an extremely competitive market, with town centre high streets across the UK struggling to respond to the growth of online retailing. Stronger growth in the population would add to the surrounding catchments of Monmouthshire's town centres, increasing the potential customer base.

2.2 Therefore, the demographic and economic characteristics, including trends in coming years, suggest risks to the Monmouthshire economy without significant intervention. Continuing with on-trend growth would mean that Monmouthshire would continue to lose ground compared to other economies. Furthermore, the ageing population of Monmouthshire suggests that the County is vulnerable to losing further ground as the working age population shrinks.

2.3 As the City Deal is enacted, it is an appropriate time for Monmouthshire to consider the City Deal's opportunities for the County and how it can be leveraged to address the structural issues that are holding back Monmouthshire's economy.

3.0 OPTIONS AND IMPLICATIONS

- 3.1 This chapter outlines the options for an accelerated growth trajectory for Monmouthshire and provides an overview of the implications of each option for the economy of Monmouthshire.
- 3.2 It is understood that Monmouthshire County Council have yet to adopt any of these growth strategies and may choose a different approach.

Options for Accelerated Growth

- 3.3 Drawing on the research and forecasting contained in the Phase One reports, the following options for accelerated growth are summarised below. All options are for an acceleration above baseline projections.

Table 1 – Options for Accelerated Growth

Option	Description	Additional Jobs by 2037
Match UK Growth Rates	Targeted sectoral interventions in MCC to lift underperforming sectors to match UK growth levels. Improvements in productivity. Interventions are focussed on the jobs provision side that would then drive population growth as workers relocate to MCC for the jobs.	+2,900 jobs above 2017 levels
Radical Structural Economic Change	Substantial changes to economy and communities in MCC. Interventions are multi-faceted including sectoral interventions, employment land supply, housing land supply, planning for new settlements. Focus includes targeting a younger population profile in order to increase the working age population. An aspiration of a population growth of about 20,000 persons. The critical mass of population and employment in MCC is increased such that it has a higher on-going profile in the regional economy.	+5,000-10,700 jobs above 2017 levels

- 3.4 Either approach will require significant interventions, resources and investments over the coming years. It is important to understand that either approach will not emerge without particular, concerted efforts to intervene in the market. It will require a whole-of-Council approach to achieving the changes, along with engagement from the private sector, regional and national bodies and public institutions.

Implications for Monmouthshire

3.5 This section summarises the implications for Monmouthshire of both options, considering employment, housing and town centres. It includes a discussion on what would be needed in order to realise such an outcome.

Matching UK Growth Rates

3.6 Pursuing such a growth strategy would require interventions in particular economic sectors. Improvements in sector performance will be needed to drive improved employment growth rates. Therefore, the implications will relate more directly to the economy and employment, with indirect, but important implications for housing and town centres.

Table 2 – Matching UK Growth Rates: Implications for Monmouthshire

Economy/Employment
<p>Considerations</p> <p>In order to increase the employment growth rate to UK averages, it is necessary to look at the individual sector growth rates.</p> <p>Manufacturing – expected to decline over coming years, despite growth in employment in previous years. Matching UK rates would mean a lesser decline rather than growth in jobs numbers. However, there is significant variation in performance of manufacturing sub-sectors in Monmouthshire. Manufacturing of electrical equipment is a small but fast-growing sector in Monmouthshire. Food and beverage manufacturing is more established and is also seeing solid growth.</p> <p>Services – this sector has declined in recent years, which is contrary to national trends, although importantly Professional, Scientific and Technical Activities has experienced positive growth. In matching UK growth rates in coming years, the higher-skilled services such as Professional, Scientific and Technical would be the focus, given the value and flow-on potential for the economy.</p> <p>Support of start-up and growing businesses would help diversify the economy and retain high-skilled, innovative firms in the County. The provision of premises to service these businesses should be within established employment areas, to encourage collaboration among businesses and spin-out opportunities from larger enterprises. MCC should not solely rely on the CCR resources for this (although these would have a role) and should ensure that there is sufficient start-up and grow-on spaces within the County.</p> <p>Further provision of employment opportunities requires additional labour, which can be brought in from elsewhere (in-commuting or migration) or provided by the spare capacity within Monmouthshire itself. For high-skilled jobs, in-commuting and migration is likely to provide the bulk of the additional labour supply. However, for longer-term sustainability, it will be important to ensure that the labour pool coming through the schools and colleges is appropriately skilled (or has clear pathways to improve skills) for the additional employment positions within Monmouthshire.</p>
<p>What is Needed</p> <p>A series of sector specific strategies for underperforming sectors or sectors with growth potential within Monmouthshire. This would involve in-depth consultation and analysis of each sector and provide targeted actions.</p>

These sector specific strategies would need to be promoted and adopted by the relevant private and public sector stakeholders to achieve the agenda over and above trends.

A specific manufacturing strategy should be prepared to support this sector, which will identify obstacles to growth and opportunities for this sector. While the Economic Baseline Report has identified manufacturing subsectors of existing comparative advantage (Figure 30), Council's focus should be on the support and provision of places for private sector growth in manufacturing, rather than looking to pick certain 'winners' as manufacturing subsectors to support. The manufacturing strategy should seek to make Monmouthshire a more attractive place in which to operate a manufacturing business.

However, it is understood that sector growth will not occur in isolation within Monmouthshire County itself and thus strategies may be preferable at the CCR level.

The Property Baseline Report identified that under this scenario there is likely to be sufficient employment land throughout Monmouthshire, although with limits on choice and locations. Therefore, a review of the employment land requirements would need to be brought forward to enable continuity of choice in the market. As such, an early consideration of the potential next locations of employment land to provide impetus to the target sectors is required.

While overall there appears to be sufficient employment land, particular premises types, such as start-up and grow-on spaces, need to be further catered for, in appropriate locations.

A training and education sector that is geared to the requirements of the local economy.

Housing/Settlements

Considerations

The focus in this Matching UK Growth Rate approach is on encouraging further employment opportunities. Therefore, the shorter-term implications are likely to be lower for housing. People tend to change jobs more often than they change house. However, as momentum is established, particularly in high-value, high-skill jobs, there would be a need to provide further choice in housing options as people move for the improved job opportunities, with the population growing above the expected baseline growth rate.

Recent housing demand data has shown that there is demand across the County, which should be provided for in the further roll-out of housing land.

The commuting patterns in and out of Monmouthshire are likely to alter as employment opportunities are improved. There is likely to be retention of a higher proportion of Monmouthshire residents that will now also work in the County (i.e. reduce the percentage of out-commuting) and an increase in those commuting in from elsewhere for employment opportunities. Higher value and skilled jobs generally have a wider commute distance due to the specialist nature of the jobs and the greater flexibility the higher earning workers have in deciding where to live. Therefore, in targeting high value jobs, it is important to consider the implications of increased in-commuting, including pressures on road networks, public transport services, etc.

Further housing sites would need to be identified within a relatively short period even to accommodate baseline growth. The additional growth anticipated due to the improved employment opportunities would increase the urgency of identifying further sites.

What is Needed

A detailed analysis of the likely origins of workers for the additional jobs would be required to understand the mix of in-commuting, in-migration and local labour that would supply the workers for the additional jobs demand.

Identification and delivery of additional housing sites would be required. This would in part be informed by the analysis of the likely origins of workers listed above.

Town Centres
<p>Considerations</p> <p>Town centres are experiencing pressures across the UK, with losses of significant retailing brands. Despite an increase in economic activity and population from matching UK employment growth rates, it is not anticipated that there would be significant expansions (above those planned for through on-trend growth). Rather the key town centre consideration will be the likely consolidation of retail floorspace in the town centres.</p> <p>As the functions of town centres continue to evolve, Council should consider potential for reuse of sites within town centres that could meet some of the employment premises and/or housing demand for the County, including the additional demand generated by higher employment growth. Opportunities of particular relevance to this study would be for offices, start-up/incubator space and higher density dwellings. However, there remains a need to protect the retail core of the county’s town centres</p>
<p>What is Needed</p> <p>As the town centres continue to be reviewed and monitored, it would be important to factor in an assessment of in-centre employment and housing opportunities, as demand for these facilities rise.</p>

Source: BE Group, 2018

Radical, Structural Economic Change

- 3.7 This approach to accelerating economic growth might be considered as an ‘all-in’ option, which will incorporate the elements of the above Matching UK Growth Rate approach but also consider a more direct population growth agenda. This option will necessitate the roll-out of further significant employment and housing land throughout the County.

Table 3 – Radical, Structural Economic Change: Implications for Monmouthshire

Economy/Employment
<p>Considerations</p> <p>The sectoral considerations listed in Table 2 would still be appropriate for this approach, including looking to target specific manufacturing and services sectors.</p> <p>The Property Baseline Report identified a need for further employment land under this scenario. The consideration of further employment land in Monmouthshire would be a medium-term issue, with further land needing to become available to the market in the mid 2020’s. The assessment of further employment land would include considering the M4/M48 corridor market as the primary location, but also ensure sufficient provision in Abergavenny and Monmouth to diversify the northern economy and around each key town to support local employment growth.</p> <p>The provision of a range of A-grade, leading premises for both offices and industrial, would be important in providing the step change in profile for Monmouthshire’s economy that would be required to pursue this growth agenda. The expectation of high quality, modern office premises is for strategic locations (city centre, quality business park), with high standard of architectural design and construction, excellent digital and physical infrastructure and connectivity to markets and for staff.</p> <p>The future workspaces are anticipated to include a higher devotion to staff health and well-being. This includes encouraging a less sedentary workday, workspace sharing, personalised environments, breakout areas and links to external areas. Furthermore, businesses are increasingly valuing flexibility</p>

in the workspace, with some serviced office providers attracting a wider array of occupier, including more established businesses, with businesses attracted to the shared spaces, user-pays facilities and opportunities for collaboration and networking. In pursuing a high growth agenda, it would be appropriate for a range of contemporary, high quality premises to be provided to attract the knowledge economy.

The digital expectations of businesses and staff are increasing and are key components of location decision making. With the roll-out of 5G over coming years, there will be a substantial advantage for those areas at the forefront of this coverage. Furthermore, high quality broadband is important at the residential end as well as for commercial premises, with an increasing proportion of workers spending at least part of their work week working from home.

Support of start-up and growing businesses would help diversify the economy and retain high-skilled, innovative firms in the County. The provision of such facilities should be within established employment areas, to encourage collaboration among businesses and spin-out opportunities from larger enterprises. MCC should not solely rely on the CCR resources for this (although these would have a role) and should ensure that there is sufficient start-up and grow-on spaces within the County.

Additional labour would be drawn from multiple sources, including in-commuting, in-migration and spare local labour capacity. In addition to the approach for the Matching UK Growth Rates scenario, this option would include a significantly increased reliance on population growth. Skills development of the local existing and emerging population should be considered to secure the long-term momentum and sustainability of an aggressive growth agenda.

What is Needed

A key need to be resolved is the location of the further employment land, which would need to be available to the market by the mid 2020's. The employment land is needed in several locations, including the northern towns (Abergavenny, Monmouth), the M4/M48 corridor and positioned to take advantage of regional economic clusters (e.g. specialised electronic equipment manufacturing).

The additional employment provision should include at least one high quality business park that can be marketed as the leading location(s) for modern business premises in Monmouthshire. This is needed to increase the profile of Monmouthshire as a leading business destination. The business park should include a range of business premises types, from incubator/start-up spaces to larger corporate offices. Opportunities to encourage innovation through research laboratories and studio spaces should also be provided in the business park.

The quantity of additional employment land requirements would depend on the level of additional growth that is targeted. Additional job growth on top of 2017 of 5,000-10,700 jobs (see Table 1) would not all be located on B-class employment land, with about 30% of employment likely to be on B-class land. Significant sectors of jobs growth (e.g. health and social care, education) that would be driven by strong population growth are predominantly located outside of employment land. In regards to B-class employment land, some 15-30 ha of additional land (i.e. above current provision) may be required to 2037 in order to accommodate this accelerated growth agenda. However, further and on-going analysis would be required to refine this additional land figure once the overarching strategic direction has been settled.

There is a need to increase the opportunities for younger workers in the workforce in Monmouthshire, particularly young professionals. This will help to improve the balance of the age profile of residents in the County, broadening the worker base that is supporting the large retirement population.

Sector specific strategies are needed to provide targeted interventions.

A training and education sector that is geared to the requirements of the local economy.

Housing/Settlements

Considerations

Further housing sites would need to be identified as soon as possible to kickstart housing and therefore population growth. This would increase choice for housing stock, which should include choice of location, housing type, price point, developer, etc. Additional housing sites to be allocated throughout the county which is likely to involve some development in the county's main towns. The spatial distribution of future housing growth will be considered as part of the current LDP revision process.

However, Council should also consider the potential for a new settlement in Monmouthshire, such as a Garden Town project. This new settlement should be housing led, but would also include a range of non-residential uses, such as B-class employment, retail, community services, open space, etc. The advantage of a new settlement, rather than an extension to an existing town is that it does not overburden an existing town's resources and can be planned to provide for a full range of services and facilities. However, they are major, long term projects requiring substantial infrastructure investment. It is likely that a new settlement would not fully mature until post-2037. Increasing the population of Monmouthshire by about 20,000 persons equates to about an additional 9,000-10,000 dwellings. This is equivalent to a significant settlement as well as increases of dwelling numbers throughout the County.

Recent housing demand data has shown that there is demand across the County, which should be provided for in the further roll-out of housing land.

The commuting patterns in and out of Monmouthshire are likely to alter as employment opportunities are improved. There is likely to be retention of a higher proportion of Monmouthshire residents that will now also work in the County (i.e. reduce the percentage of out-commuting) and an increase in those commuting in from elsewhere for employment opportunities. Higher value and skilled jobs generally have a wider commute distance due to the specialist nature of the jobs and the greater flexibility the higher earning workers have in deciding where to live. Therefore, in targeting high value jobs, it is important to consider the implications of increased in-commuting, including pressures on road networks, public transport services, etc.

Increasing housing activity has the potential to impact upon the affordability of housing in the market. Increasing supply and choice of products should lead to a moderation of house prices. However, if the economic development strategies are successful and the housing demand is strong, price points are likely to increase. The increase in housing products in the County should include sufficient affordable housing stock and key worker housing. Affordable housing stock is important in retaining young adults in the community.

What is Needed

Once determining to pursue the Radical, Structural Economic Change approach, it would be imperative to start planning for further housing sites as soon as possible. This would help signal to the market that Monmouthshire is looking for growth and would provide an increase in development opportunities available to the sector.

A determination on the need for and location of a new settlement is required. Once determined, the site investigation and masterplanning process should commence.

Further construction capacity is required to significantly increase output in the County. Developers are not building sufficient new dwellings to meet the current five-year supply targets. A significant effort to increase the provision of dwellings to above current targets would require more active developers in the market and more construction workers in the sector. Population growth would provide a portion of that construction workforce.

Town Centres

Considerations

The key considerations for town centres for the Radical, Structural Economic Change approach would be the capacity of the existing town centres to serve the growing population and the need for and timing of new retail schemes.

Any new settlement should contain an array of town centre uses, including retail, leisure and community services. The scale of these services would be dependent on the scale of the residential component of the new settlement. This would emerge through the masterplanning for the settlement.

What is Needed

Town centre and retail needs would be determined by the scale of additional residential and, to a lesser extent, the scale of additional employment. Therefore, determination of these factors is the key need for this sector.

Source: BE Group, 2018

4.0 STRATEGY AND ACTION PLANS

- 4.1 This chapter summarises the overall strategy to pursue either growth option, with action plans detailing key tasks that would need to be addressed for both.

Overall Strategy

Matching UK Growth Rates

- 4.2 This approach seeks to increase employment in Monmouthshire by some 2,900 jobs between 2017 and 2037, compared to 1,150 additional jobs in the baseline scenario. The focus of the strategy to achieve this is to improve underperforming sectors and productivity. Therefore, it is primarily an economic development strategy.
- 4.3 Therefore, the overall strategy for the Matching UK Growth Rates approach is:

Primary Focus – sector-specific growth strategies.

This is achieved both at the County level and through participation in the Cardiff City Region economic development programme. At the County level, a suite of sectoral growth strategies is prepared that will include growth targets, business support and specific interventions.

Secondary Focus – provision of additional employment land

Ensure that there is sufficient choice of land in the medium to long term.

- 4.4 Success of the sector-specific growth strategies will increase pressure on the housing market through in-migration in the medium term and beyond. Therefore, a tertiary focus would be the monitoring and roll-out as necessary of further housing land to meet housing needs above the baseline expectations.

Radical, Structural Economic Change

- 4.5 The overall strategy for this growth strategy is a multi-faceted approach, with several, equally important components. This approach requires a whole of Council engagement to the strategy.

Multi-faceted approach to growth including:

Sector-specific growth strategies

This is achieved both at the County level and through participation in the Cardiff City Region economic development programme. At the County level, a suite of sectoral growth strategies is prepared that will include growth targets, business support and specific interventions.

Provision of additional housing land

Additional housing sites to be allocated throughout the County, which is likely to involve some development in the County's main towns. The spatial distribution of future housing growth will be considered as part of the current LDP revision process and will be set out in the LDP Preferred Strategy.

Investigate, Plan and Deliver a New Settlement

This would be a long term option for Monmouthshire, likely to mature beyond the planning horizon of 2037. However, early site investigations and planning should commence in the short term.

Provision of additional employment land

Ensure that there is sufficient choice of land for Monmouthshire, including adequate locations and sizes. A high quality business park, incorporating larger corporate suites and smaller incubator facilities should be developed in the southern half of Monmouthshire (proximate to the M4/M48 corridor)

Action Plans

- 4.6 The overall strategies are supported by the following action plans. These action plans should be considered as starting points, which would expand and evolve as further planning is undertaken and a strategic direction is settled upon. The Action Plan for the Radical, Structural Economic Change approach would include all the actions from the Matching the UK Growth Rates option, with the tabulated actions being additional to these.

Matching UK Growth Rates

Action/Intervention	Tasks
Broaden the understanding within Council of the growth rates required	<ul style="list-style-type: none"> • Prepare material for dissemination internally at the Council for the purpose of educating and informing members and officers of the current growth rates and the intended targets • Undertake regular updates of targets and performance
Ensure sector specific support is available to the key sectors targeted for growth	<ul style="list-style-type: none"> • Use CCR wide programmes to promote Monmouthshire's strategic locational advantages for the sectors. • Ensure Council's business support programmes are appropriately geared for the sectors, including information portals, networking events, advice services, etc. • Encourage start-up enterprises through the provision of appropriate business spaces for this market, availability of business support, programmes to support innovation.
Encourage the timely delivery of the employment allocations within Monmouthshire	<ul style="list-style-type: none"> • Engage with owners of employment allocation sites • Alongside the landholders, identify and address potential obstacles to development of the employment allocations • Resist, where appropriate, the inclusion of non B-class employment uses on employment allocations • Encourage the development of a masterplan for the Quay Point and remaining Gwent Europark areas, incorporating all landholders and accounting for the changes of the A4810 to the M4. • Monitor the roll-out of employment land to ensure it is appropriate for the target sectors • Ensure that there is continuity of supply and sufficient choice in the market, with the further allocation and delivery of employment land as required.
Review the role and resources of Monmouthshire Business and Enterprise to accommodate higher growth targets	<ul style="list-style-type: none"> • Undertake an audit of resources available for the Business and Enterprise unit and identify areas of further resources required based on the additional tasks in this action plan.
Address skills shortages in the County, with a strong emphasis on engineering and technical skills	<ul style="list-style-type: none"> • Support the CCR programmes for skills development • Support businesses in their efforts to up-skill their staff, through providing information on pathways, funding and support for staff development • With the CCR, promote further in-depth collaboration with the suite of FE and HE institutions in the region • Promote understanding among businesses and students of the proposed T-level and apprenticeship changes emerging from the Post-16 Skills Plan process, including updating as further information becomes available • Promote to current high school students the breadth of engineering and technical opportunities as a career in Monmouthshire, including a programme of events to highlight the opportunities • Undertake a programme of events and promotions to specifically promote engineering and technical vocations to high school girls
Understand implications of the rerouting of the M4 on employment land prospects	<ul style="list-style-type: none"> • Identify the future access arrangements for the employment allocations once the M4 project is completed. • Identify additional land that would be appropriate for employment purposes following the M4 project. • Understand any changes to planning for employment provisions in neighbouring local areas after the M4 project.

Radical, Structural Economic Change

Action/Intervention	Tasks
Secure regional and Welsh Government support for enhanced economic growth agenda	<ul style="list-style-type: none"> • Secure political support • Secure funding commitments to deliver key enabling infrastructure
Provide further employment land choice	<ul style="list-style-type: none"> • Bring forward the identification and allocation of further employment land in Monmouthshire, with a focus on the M4/M48 corridor, with Monmouth and Abergavenny providing key secondary roles • Identify a site for a high quality business park
Identify further areas for expansions of existing settlements.	<ul style="list-style-type: none"> • Site audit and assessment • Technical analyses • Add sites to the housing allocations • Identify areas for the provision of affordable housing and key worker housing schemes
Plan for development and growth of a new settlement.	<ul style="list-style-type: none"> • Outline key parameters for a potential new settlement • Identify potential sites for such a settlement, based on the key parameters • Site audit and assessment • Develop policy and design principles to guide development of the new settlement • Understanding of transport implications • Engagement with site owners • Add sites to the housing allocations • Masterplanning of the new settlement • Secure CCR and Welsh Government support for a new settlement • Identify retail and town centre service requirements for the new settlement
Address additional community infrastructure and services demands emerging from higher growth agenda	<ul style="list-style-type: none"> • Audit of existing provision, including gap analysis • Engagement with local providers of community and services infrastructure to encourage investment in further provision