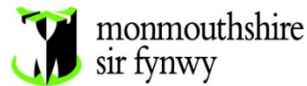


Public Document Pack



County Hall
Rhadyr
Usk
NP15 1GA

Wednesday, 6 February 2019

Notice of meeting

Economy and Development Select Committee

Thursday, 14th February, 2019 at 10.00 am

The Council Chamber, County Hall, Rhadyr, Usk, NP15 1GA

AGENDA

THERE WILL BE A PRE MEETING FOR MEMBERS OF THE COMMITTEE 30 MINUTES PRIOR TO THE START OF THE MEETING

Item No	Item	Pages
1.	Apologies for Absence.	
2.	Declarations of Interest.	
3.	Public Open Forum.	
4.	Economies of the Future Analysis.	1 - 76
5.	Monmouthshire Replacement Local Development Plan Draft Issues, Vision and Objectives.	77 - 138
6.	To confirm the following minutes:	
6.1.	Special Meeting - Economy and Development Select Committee dated 18th December 2018.	139 - 144
6.2.	Ordinary Meeting - Economy and Development Select Committee dated 10th January 2019.	145 - 152
7.	List of actions arising from the previous meetings.	153 - 156
8.	Economy and Development Select Committee Forward Work Programme.	157 - 160

9.	Council and Cabinet Forward Work Programme.	161 - 188
10.	Next Meeting. Thursday 28 th March 2019 at 10.00am.	

Paul Matthews
Chief Executive

MONMOUTHSHIRE COUNTY COUNCIL
CYNGOR SIR FYNWY

THE CONSTITUTION OF THE COMMITTEE IS AS FOLLOWS:

County Councillors:

J. Becker
A. Davies
D. Dovey
M. Feakins
P. Pavia
R. Roden
B. Strong
A. Watts
Vacancy (Independent Group)

Public Information

Access to paper copies of agendas and reports

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Watch this meeting online

This meeting can be viewed online either live or following the meeting by visiting www.monmouthshire.gov.uk or by visiting our Youtube page by searching MonmouthshireCC.

Welsh Language

The Council welcomes contributions from members of the public through the medium of Welsh or English. We respectfully ask that you provide us with adequate notice to accommodate your needs.

Aims and Values of Monmouthshire County Council

Our purpose

Building Sustainable and Resilient Communities

Objectives we are working towards

- Giving people the best possible start in life
- A thriving and connected county
- Maximise the Potential of the natural and built environment
- Lifelong well-being
- A future focused council

Our Values

Openness. We are open and honest. People have the chance to get involved in decisions that affect them, tell us what matters and do things for themselves/their communities. If we cannot do something to help, we'll say so; if it will take a while to get the answer we'll explain why; if we can't answer immediately we'll try to connect you to the people who can help – building trust and engagement is a key foundation.

Fairness. We provide fair chances, to help people and communities thrive. If something does not seem fair, we will listen and help explain why. We will always try to treat everyone fairly and consistently. We cannot always make everyone happy, but will commit to listening and explaining why we did what we did.

Flexibility. We will continue to change and be flexible to enable delivery of the most effective and efficient services. This means a genuine commitment to working with everyone to embrace new ways of working.

Teamwork. We will work with you and our partners to support and inspire everyone to get involved so we can achieve great things together. We don't see ourselves as the 'fixers' or problem-solvers, but we will make the best of the ideas, assets and resources available to make sure we do the things that most positively impact our people and places.

Monmouthshire Scrutiny Committee Guide

Role of the Pre-meeting

1. Why is the Committee scrutinising this? (background, key issues)
 2. What is the Committee's role and what outcome do Members want to achieve?
 3. Is there sufficient information to achieve this? If not, who could provide this?
- Agree the order of questioning and which Members will lead
 - Agree questions for officers and questions for the Cabinet Member

Questions for the Meeting

Scrutinising Performance

1. How does performance compare with previous years? Is it better/worse? Why?
2. How does performance compare with other councils/other service providers? Is it better/worse? Why?
3. How does performance compare with set targets? Is it better/worse? Why?
4. How were performance targets set? Are they challenging enough/realistic?
5. How do service users/the public/partners view the performance of the service?
6. Have there been any recent audit and inspections? What were the findings?
7. How does the service contribute to the achievement of corporate objectives?
8. Is improvement/decline in performance linked to an increase/reduction in resource? What capacity is there to improve?

Scrutinising Policy

1. Who does the policy affect ~ directly and indirectly? Who will benefit most/least?
2. What is the view of service users/stakeholders? Do they believe it will achieve the desired outcome?
3. What is the view of the community as a whole - the 'taxpayer' perspective?
4. What methods were used to consult with stakeholders? Did the process enable all those with a stake to have their say?
5. What practice and options have been considered in developing/reviewing this policy? What evidence is there to inform what works?
6. Does this policy align to our corporate objectives, as defined in our corporate plan?
7. Have all relevant sustainable development, equalities and safeguarding implications been taken into consideration? For example, what are *the procedures that need to be in place to protect children*?
8. How much will this cost to implement and what funding source has been identified?
9. How will performance of the policy be measured and the impact evaluated.

Questions for the Committee to conclude...

Do we have the necessary information to form conclusions/make recommendations to the executive, council, other partners? If not, do we need to:

- (i) Investigate the issue in more detail?
- (ii) Obtain further information from other witnesses – Executive Member, independent expert, members of the local community, service users, regulatory bodies...
- (iii) Agree further actions to be undertaken within a timescale/future monitoring report...

General Questions....

Empowering Communities

- How are we involving local communities and empowering them to design and deliver services to suit local need?
- Do we have regular discussions with communities about service priorities and what level of service the council can afford to provide in the future?

Service Demands

- How will policy and legislative change affect how the council operates?
- Have we considered the demographics of our council and how this will impact on service delivery and funding in the future?

Financial Planning

- Do we have robust medium and long-term financial plans in place?
- Are we linking budgets to plans and outcomes and reporting effectively on these?

Making savings and generating income

- Do we have the right structures in place to ensure that our efficiency, improvement and transformational approaches are working together to maximise savings?
- How are we maximising income? Have we compared other council's policies to maximise income and fully considered the implications on service users?
- Do we have a workforce plan that takes into account capacity, costs, and skills of the actual versus desired workforce?

SUBJECT:	ECONOMIES OF THE FUTURE ANALYSIS
MEETING:	ECONOMY AND DEVELOPMENT SELECT COMMITTEE
DATE:	14TH FEBRUARY 2019
DIVISION/WARDS AFFECTED:	ALL

1. **PURPOSE:**

- 1.0 Following the decision for the Cabinet Member for Enterprise to commission the 'Economies of the Future' analysis'(Appendix A) in December 2017, the Cabinet Member invites Members to discuss the findings with a view to determining the next steps with regard to consideration of an ambition and growth plan for the County. This in in turn will inform the development of the revised Economic Growth and Inward Investment Strategy for the Council. The 'Economies of the Future' analysis is also a fundamental piece of work that will also provide evidence to support the developing Monmouthshire Replacement Local Development Plan (LDP).

2. **RECOMMENDATIONS:**

That the Economy and Development Select Committee provides feedback to inform a document, prior to consideration at Cabinet in the forthcoming weeks.

3. **KEY ISSUES:**

- 3.1 Monmouthshire is experiencing a once in a generation opportunity to reconsider its future direction. Monmouthshire's unique border county location, the Council's decision to participate in the Cardiff Capital City Region ('CCR') City Deal, and the UK Government's decision to remove the Severn Bridge Tolls in 2018, all present a rare chance for Monmouthshire to become a key economic growth area in the CCR.
- 3.2 In order to capitalise on these opportunities and address our economic issues at a county level, research was commissioned, in December 2017, to help the Council build on its current economic development strategy and identify a new strategy that is future ready. The research takes the Baseline Economic Analysis for South East Wales 2015 and the Monmouthshire Digital Maturity Analysis of 2016 as its baseline data, considers the priorities and actions detailed in the current Monmouthshire Business Growth and Enterprise Strategy and then identifies economic opportunities and growth sectors that will provide jobs for our communities in the future. The research also considers the centrality of Monmouthshire in terms of its proximity to the English borders of the South West including Bristol and Gloucester and the West Midlands on its north-eastern border, whilst also identifying the supporting housing and commercial infrastructure that will be required to facilitate identified economic growth sectors and inform the replacement LDP.
- 3.3 Specifically the research has focused on:
- The most appropriate growth sectors that will provide the economies of the future for Monmouthshire;

- The provision of a detailed observational study of the accommodation and locational needs of the identified growth sectors;
- An assessment of the suitability and deliverability of existing employment sites as identified by the Local Development Plan;
- Identification of locational criteria for additional employment, retail and housing sites;
- An indication of the skills sets that will be required to address the growth sector needs and whether it is feasible for Monmouthshire citizens to meet these needs or whether the County needs to look to attract labour from elsewhere, if so where?;
- An assessment of whether current population levels can sustain the economic growth required in the county;
- Potential inward migration required to develop and sustain the identified growth sectors;
- Potential for a new settlement that can be put forward as options for consideration in the replacement LDP process;
- Modelled scenarios and associated ambition targets, to include current and predicted geodemographic segmentation analysis;
- The additional infrastructure required to service the changing demographic and economic landscape over and above residential and commercial property;
- An assessment of the identified economic and population impact on existing retail sectors, taking account of the 'Monmouthshire Retail Expenditure Forecasts Update 2016' with a view to identifying potential growth and development opportunities for the county; and
- The impact of inward migration on the indigenous population and house prices and the mitigation that would need to be built in to seek to offset any negative impact.

The purpose of the research is to inform a scalable Economic Growth and Inward Investment Strategy that will identify the most efficient and cost effective method to attract new and sustainable growth sectors into Monmouthshire.

3.4 The attached Economies of the Future Analysis – Strategic Direction Report 2018 (Appendix B) presents the rationale for pursuing an accelerated growth agenda for Monmouthshire, rather than continuing to plan for 'on-trend' growth, if such an approach were to be adopted. The report draws from the findings and research of the Phase One documents, namely the Economic Baseline Report (Appendix C); the Property Baseline Report; the Projections Report and the Skills Report (Appendix D). For ease some key statistics from this report are detailed below:

- Monmouthshire's Economy (Gross Value Added) in the last 15 years has performed below its full potential – lower growth than comparators since 2006 which is mirrored by employment trends;
- Monmouthshire has a small scale economy, when compared to other Local Authorities within CCR, in terms of population, employment and number of businesses;
- Monmouthshire's population age structure is strikingly low on working age groups in relation to comparators which means that it is not geared towards strong economic growth;
- Monmouthshire's Median age is 48 – the oldest in CCR (Cardiff, the youngest, has a median age of 34) - which if unchanged will result in the future economic inactivity rate growing;

- Over 40% of Monmouthshire's economically active resident population out-commute;
- 25% of Monmouthshire's population is 65+ and the proportion of our population over 65 and over 85 are increasing well in excess of the Wales average. Meanwhile the proportion of young people is set to diminish.
- Average house prices in the County are high at £302,514 when compared to the Welsh average of £187,293 (Hometrack October 2018).

3.5 In conclusion:

- 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; and
- 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 could add to the surrounding catchments of Monmouthshire's town centres, increasing the potential customer base;
- 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;
- The ageing population of Monmouthshire suggests that the County is vulnerable to losing further ground as the working age population shrinks;
- 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.

4. **WELLBEING OF FUTURE GENERATIONS IMPLICATIONS (INCORPORATING EQUALITIES, SUSTAINABILITY, SAFEGUARDING AND CORPORATE PARENTING):**

- 4.1 An Equality Impact Assessment has not been undertaken at this stage as although the research has been concluded, a decision regarding its findings is yet to be made.

5. **OPTIONS APPRAISAL**

- 5.1 The current Monmouthshire Business Growth and Enterprise Strategy ends in 2020. However, since the production of the last Strategy in 2014, the regional economic landscape has changed significantly with the approval of the Cardiff Capital Region City Deal in 2016 and the recent abolition of the Severn Bridge Tolls. There is therefore a strong desire to consider how to best place the County to capitalise on these significant economic development opportunities.

- 5.2 In addition, as the Council is currently producing a replacement LDP it makes sense to undertake joint research to ensure that the future LDP is data driven and that both the Planning and Economic Development Services can take intelligent decisions that will enable appropriate development and wealth creation opportunities in the future.

- 5.3 The data provided through this piece of research, will inform the evidence base for both the LDP and a Strategic Development Plan at a CCR level. And, when coupled with modelled

scenarios of future growth sectors and future skills needs, this research will enable the Authority to identify significant potential growth and development opportunities for the county.

5.4 The Economies of the Future Analysis – Strategic Direction Report 2018 (Appendix B) presents options and associated action plans to enhance Monmouthshire’s growth potential. The report considers two options as detailed in the Table One below:

Table One: Growth Options

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

5.4.1 As the ‘Match the UK Growth’ option provides merely an additional 2,900 jobs over a 20 year period it suggests that an ‘Aspirational Growth Agenda’ will be needed to address the demographic and economic issues faced by the county. This will require:

- Housing led growth – underpinned by business opportunities;
- The attraction of a younger economically active demographic; and
- A broader range of housing types - wider market appeal & affordability

5.4.2 A Quantum Shift will also need scalability which will potentially require:

- A new Settlement rather than relying solely on housing growth to existing towns;
- Sustainable Garden Towns – Design Quality; and
- Densification in urban areas close to transport hubs;

5.4.3 In identifying suitable growth scenarios, sustainable growth can be achieved at different scales to support local community services and attract employment as illustrated below:

- 1,000 – 2,000 home Urban Extensions – tapping into existing service capacity;
- 3,000 – 5,000 home Garden Village network with larger settlements for larger services (e.g. secondary schools, hospitals etc.);
- 8,000 – 10,000 home Garden Town more self-contained and able to support wider range of local services.

5.4.4 Population led growth will in turn create the following:

Population led growth (indicative)		Labour Demand
20,000	assuming current conditions	3,000 additional jobs
20,000	higher activity/lower commuting	5,000 additional jobs
20,000	max growth/reverse commuting	10,700 additional jobs

6. EVALUATION CRITERIA

6.1 An evaluation assessment is included as Appendix E. The purpose of the report is to present the findings from a research exercise and to encourage discussion in readiness for presentation of report to Full Council in April 2019.

7. REASONS:

7.1 The Monmouthshire Business and Enterprise Strategy is a key document in outlining the Council's ambitions and ideas to support business growth and build enterprise capacity in Monmouthshire. The LDP is a key document, providing the legal framework for the development and use of land within Monmouthshire and the context for determining local planning applications.

7.2 This joint piece of research is therefore an essential ingredient informing both of these documents to enable the Council and the County to capitalise on the forthcoming regional opportunities and address our economic issues at a county level. The findings of this research will also be used to inform the delivery of the Council's Commercial Strategy which will rely upon accurate trend and forecasting data to inform future activities.

8. RESOURCE IMPLICATIONS:

8.1 This research has been funded by 50% via the Rural Development Programme with match funding provided by the Authority through the LDP budget. The total cost of the research was c£33,000.

9. CONSULTEES:

Senior Leadership Team

Economy and Development Select 26th April 2018

Conclusions drawn included:

- It was felt that getting the right balance is crucial and an integral part of the LDP process.
- Members praised the synergy between planning and economic development colleagues and hoped that would increase positive outcomes.

- The challenges and barriers to growth need to be addressed, namely broadband and this committee will speak to Welsh Government on the 19th July 2018 on this matter (Discussions with Welsh Government remain on-going)
- Affordability and affordable housing is an issue but as raised by a member of the committee there are challenges on both ends of the spectrum.
- Further survey work needs to be done with residents to understand the economic draws for themselves and their families. Inequalities and the need for social mobility to be addressed..
- The development of the curriculum and identifying the skills shortages needs to be focussed on.

Member's LDP workshop 22nd January 2018

10. BACKGROUND PAPERS:

Appendix A: Presentation of Findings to Date

Appendix B: Future Analysis – Strategic Direction Report 2018

Appendix C: Economic Baseline Report

Appendix D: Skills Report

Appendix E: Evaluation Criteria

11. AUTHOR:

Cath Fallon (Head of Enterprise and Community Development)

12. CONTACT DETAILS:

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Appendix A: Economies of the Future Analysis: Findings to Date

To: Economy and Development Select Committee
From: James Woodcock, Business Insights Manager
Date: 17th April 2018, revised January 2019
Re: Economies of the Future Analysis: Findings to Date

Context

Monmouthshire is entering an exciting time in its history. With the establishment of the Cardiff Capital Region's (CCR) economic growth City Deal agenda and the UK Government's decision to remove the Severn Bridge tolls, the county has the potential to be a key economic growth area in the CCR.

To enable it to capitalise on the forthcoming regional opportunities and realise the county's economic potential, Monmouthshire County Council commissioned the BE Group to undertake research and analysis that will:

- Help it to develop a new economic regeneration strategy, including identifying economic opportunities and growth sectors that will provide jobs for our communities in the future;
- Inform the Council's review of its current Local Development Plan (LDP) and identify the supporting housing and commercial infrastructure that will be required to facilitate the identified opportunities and economic growth sectors.

Findings

Early data capture, recent trends and forecasts from BE Group evidence the following:

- **Economy (Gross Value Added) in the last 15 years has performed below its full potential** – lower growth than comparators since 2006 - this is mirrored by employment trends;
- **Small scale of the economy**, when compared to CCR, in terms of population, employment and number of businesses;
- **Population age structure is strikingly low on working age groups** in relation to comparators which means that it is not geared towards strong economic growth;
- **Median age is 48 – the oldest in CCR** (Cardiff, the youngest, has a median age of 34) - which if unchanged will result in the future economic inactivity rate growing.

Monmouthshire is a dual economy:

- Occupational profile of residents is skewed towards high skill occupations;
- Resident earnings are higher than workplace earnings;
- Occupational profile of those coming in is different to those going out, inferring that we are importing lower level skills based on the direction of flows.

Current Employment Sectors Analysis:

- **Manufacturing** is relatively large and growing – bucking the national trend;
- **Business and professional and scientific** is growing from a small base and could grow more;
- **Arts, entertainment and recreation** is growing well and is well represented.

Indigenous Economic Growth

Forecasts suggest that endogenous (internal) growth could create approximately 1,200 jobs in Monmouthshire between 2017 and 2037. However, by exceeding this trend the county could realise 3,000 new jobs over this timescale.

However:

- These are still modest numbers, starting from a modest base.
- This will bring about only modest improvements in productivity.

Initial Conclusions:

- Current employment forecasts are low – driven by low population growth, demographic age profile and scale of economy;
- Significant growth will therefore need to come from out of county i.e. inward migration and inward investment;
- The economy can do better than the baseline but not from its existing structure.

An alternative approach will therefore be required in order to develop radical policies that enable higher economic growth and increase productivity.

Drivers for Growth:

In order to achieve this higher growth, Monmouthshire will need to consider:

- Identifying the best routes to draw businesses to the county;
- Reducing out-commuting, currently at 40%– retaining high value occupations;
- Augmenting existing growth sectors;
- Generating population growth;
- Targeting working age growth (particularly under 45 year olds);
- Housing sites – increasing the availability of affordable housing stock to attract 20-45 year olds;
- Availability and quality of employment sites and premises;
- Geographic differences – employment and housing markets.

Evaluation Criteria – Cabinet, Individual Cabinet Member Decisions & Council (Appendix E)

Title of Report:	ECONOMIES OF THE FUTURE ANALYSIS
Date decision was made:	
Report Author:	Cath Fallon

What will happen as a result of this decision being approved by Cabinet or Council?

What is the desired outcome of the decision?
 What effect will the decision have on the public/officers?

No decision is required at this stage. The purpose of the report is to present the findings to date of the current 'Economies of the Future Analysis' for discussion and scrutiny (Appendix A) with a view to determining the next steps with regard to adoption of an ambition and growth plan. This will in turn inform the development of the revised Economic Growth and Inward Investment Strategy for Monmouthshire County Council. The Economies of the Future study will also provide evidence to support the current Replacement Monmouthshire Local Development Plan.

What benchmarks and/or criteria will you use to determine whether the decision has been successfully implemented?

Think about what you will use to assess whether the decision has had a positive or negative effect:
 Has there been an increase/decrease in the number of users
 Has the level of service to the customer changed and how will you know
 If decision is to restructure departments, has there been any effect on the team (e.g. increase in sick leave)

The report presents findings to date which on completion will inform the Replacement Local Development Plan and the revised Economic Growth and Inward Investment Strategy for Monmouthshire County Council

What is the estimate cost of implementing this decision or, if the decision is designed to save money, what is the proposed saving that the decision will achieve?

Give an overview of the planned costs associated with the project, which should already be included in the report, so that once the evaluation is completed there is a quick overview of whether it was delivered on budget or if the desired level of savings was achieved.

N/A

Any other comments



HATCH

perConsulting
Planning Economics Regeneration

Monmouthshire County Council

FUTURE MONMOUTHSHIRE
Economies of the Future Analysis
Strategic Direction Report



Final Report

October 2018

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3.0	OPTIONS AND IMPLICATIONS.....	5
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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.

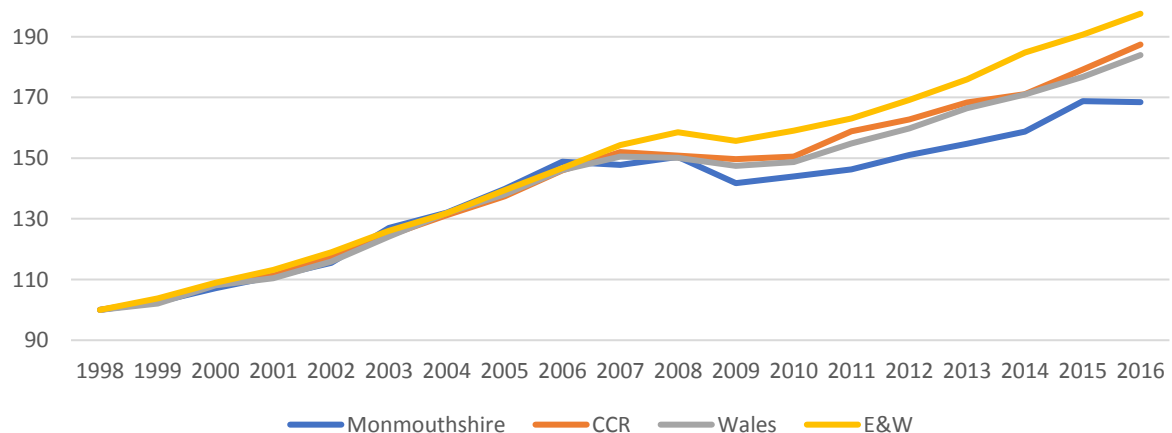
1.3 This Strategic Direction Report presents the implications and opportunities of an accelerated growth scenario in Monmouthshire, ***if such an approach were to be adopted***. This document, along with the earlier work will help inform Council in their decision making regarding the strategic direction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

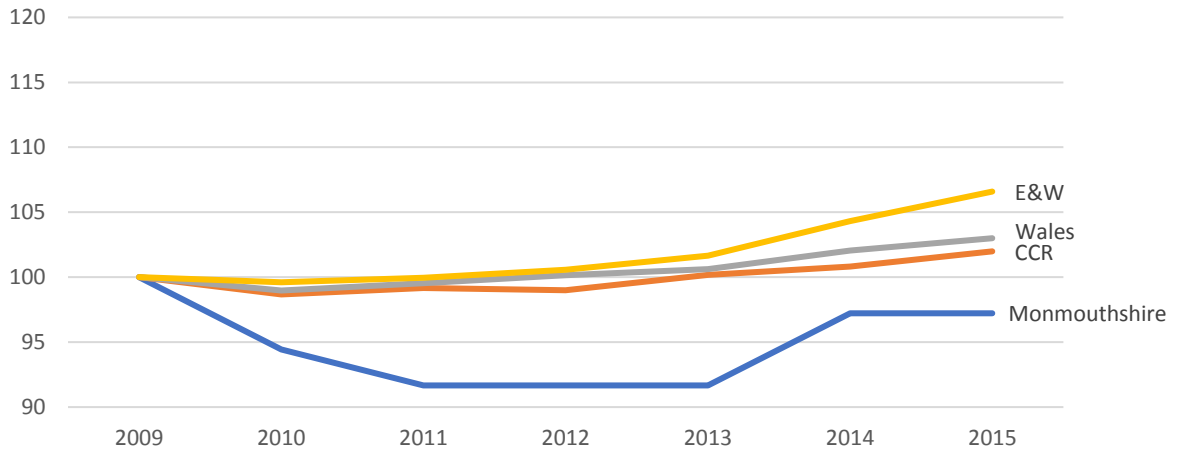
Figure 1 – Recent Economic Performance, GVA growth 1998-2016, (indexed 1998=100)



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

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

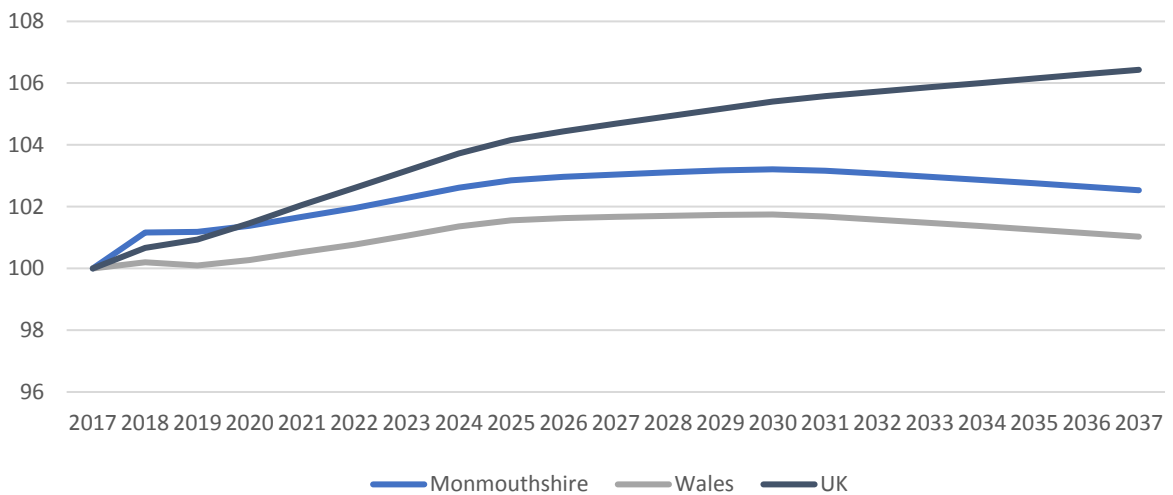
Figure 2 – Indexed Employment Growth (2009=100)



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

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Future Monmouthshire

Economies of the Future

Economic Baseline Report

March 2018

Prepared for Monmouthshire County Council

This report presents the findings from the data review undertaken for the study: *Future Monmouthshire – Economies of the Future Analysis*. The research has been commissioned by Monmouthshire County Council to provide insight and an evidence base to inform the future economic regeneration strategy for Monmouthshire.

The principal comparators utilised in the data review for Monmouthshire County Council are:

- Cardiff Capital Region (CCR) - Bridgend, Vale of Glamorgan, Rhondda Cynon Taff, Merthyr Tydfil, Caerphilly, Monmouthshire, Blaenau Gwent, Torfaen, Newport and Cardiff;
- Wales; and
- England & Wales.

Introduction & Context

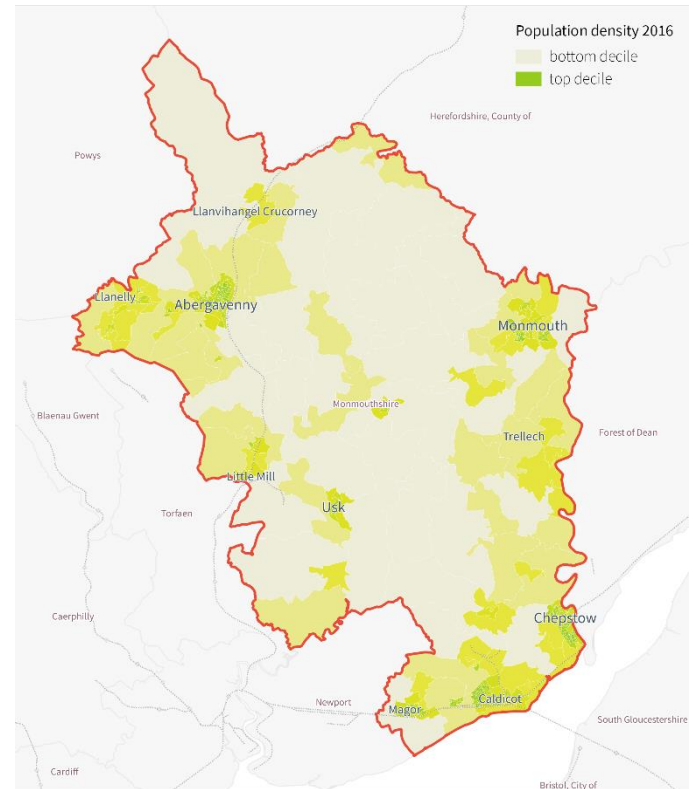
Monmouthshire is a Unitary Authority located in South East Wales, bordering with England to the east. It is also one of the ten local authorities constituting Cardiff's city region, the Cardiff Capital Region (CCR).

Monmouthshire has a primarily rural character, supports a population of 92,800 people, which accounts for 6% of Cardiff Capital Region (CCR) total population and ranks it 7th out of 10 in CCR for population size. It is the largest local authority in CCR by area, covering 850km², but also the one with the lowest population density, counting 109 people per km², and with the lowest job density of 42 jobs per km².¹

The highest population densities in Monmouthshire can be found around the centres of Abergavenny, Monmouth, Chepstow, and Caldicot (Figure 1).

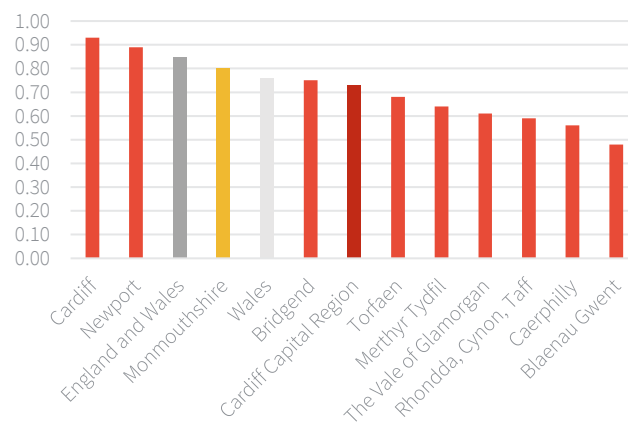
The official ONS figures for job densities (Figure 2), counting job per person aged 16 to 64, are quite positive for Monmouthshire, ranking it as third highest job density in CCR, but this is driven by a relatively small proportion of population in working age groups. A different measure of job density, calculating jobs per km² (Figure 3), gives a more intuitive picture of the relatively low number of jobs spread sparsely over a very large area.

Figure 1: Population density 2016



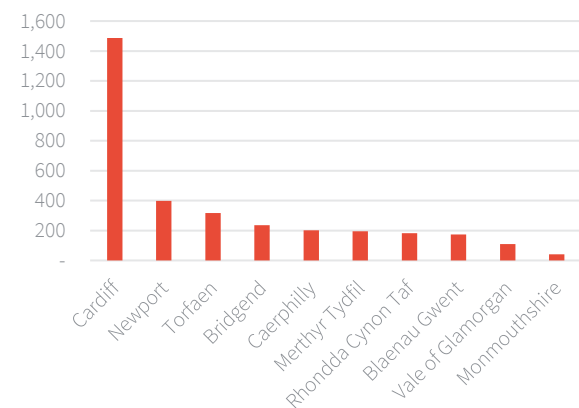
Data Source: ONS, Population Estimates

Figure 2: Job density per person aged 16-64 - 2016



Data Source: ONS, Job Densities

Figure 3: Job density per km² - 2016



¹ ONS, 2016, Population Estimates and BRES

Policy Context

There are a wide range of policies and economic programmes at the national, city region, and county levels that can shape future economic development of Monmouthshire. This section reviews some of the principal ones.

Wales

Prosperity for All: Economic Action Plan

The purpose of the Economic Action Plan launched in December 2017 is to support the delivery of Prosperity for All – the national strategy for Wales. The Plan sets out a vision for inclusive growth, built on strong foundations, ‘supercharged’ industries of the future and productive regions. The Plan supports the twin goals of growing the economy and reducing inequality. It simplifies the Government approach to sector prioritisation, recognising that traditional sector boundaries are increasingly blurred and identifying three thematic sectors for proactive government support

- Tradable Services (e.g. fintech services and online insurance)
- High Value Manufacturing (e.g. compound semiconductors and new composites manufacturing)
- Enablers (e.g. digital, energy efficiency and renewables)

The plan also recognises the importance of Foundation Sectors - tourism, food, retail and care – committing to develop cross-government enabling plans to maximise impact.

Rural Development Programme

The Welsh Government Rural Communities – Rural Development Programme 2014-2020 is a European Commission 7-year investment programme aimed at: (i) fostering the competitiveness of agriculture; (ii) ensuring the sustainable management of natural resources and climate action; and (iii) achieving a balanced territorial development of rural economies and communities, including the creation and maintenance of employment.

Cardiff Capital Region

Priority Sectors

Cardiff Capital Region prioritise five sectors for employment and skills support,² which largely overlap with some of the sectors prioritised by the Welsh Government:

- Advanced Materials & Manufacturing
- Construction
- Financial, Legal & Professional Services
- ICT/Digital - including creative industries
- Human Foundational Economy

City Deal

The Cardiff Capital Region has secured a £1.2bn City Deal with the UK and Welsh Governments. The City Deal includes the following elements:

<i>Key Element</i>	<i>Comment</i>
£1.2 billion investment in the Cardiff Capital Region’s infrastructure	A key priority for investment will be the delivery of the South East Wales Metro, including the Valley Lines Electrification programme.

² Cardiff Capital Region Employment & Skills Plan 2017

Connecting the region	The Cardiff Capital Region has established the Cardiff Capital Region Transport Authority (CCRTA) to co-ordinate transport planning and investment within the region, in partnership with the Welsh Government
Support for innovation and improving the digital network	To develop capabilities in Compound Semiconductor Applications in the UK, UK Government has invested £50 million to establish a new Catapult Centre in Wales. In addition, the Cardiff Capital Region City Deal has invested a further £37.9 million to support the development of a compound semiconductor industry cluster in south-east Wales.
Developing a skilled workforce and tackling unemployment	The Cardiff Capital Region Skills and Employment Board will be created (building on existing arrangements) to ensure skills and employment provision is responsive to the needs of local businesses and communities. The Cardiff Capital Region and the Welsh Government will work with the Department of Work and Pensions to co-design the future employment support from 2017, for people with a health condition or disability and/or long term unemployed.
Supporting enterprise and business growth	An Economic Growth Partnership has been established to commission an Economic Growth Plan for the next twenty-year period. A Regional Business Council has also been established to engage with all businesses and articulate their needs, providing a strong voice for business to guide both the design and delivery of significant economic development and regeneration activities across the South-East Wales region.
Housing development and regeneration	The Welsh Government and the Cardiff Capital Region commit to a new partnership approach to strategic planning. This will ensure the delivery of sustainable communities, through the use and re-use of property and sites. A Regional Housing Investment Fund has also been established to support house building, ranging from larger builders and developers on stalled housing sites on former industrial sites, through to small builders, community builders, custom builders and regeneration specialists, on small sites across the region. The fund will also help stimulate the SME building sector across the region by providing loan development finance and launching a Custom Build Scheme, releasing smaller plots of public sector land with a full package of support for SMEs to deliver new homes in the communities.

Data Source: Cardiff Capital Region City Deal

Over its lifetime, the Cardiff Capital Region City Deal is expected to deliver up to 25,000 new jobs, leverage an additional £4bn of private sector investment and deliver a 5% uplift³ in Gross Value Added (GVA). In February 2018, *three development strategies* were agreed by the CCR cabinet to support the strategic themes of housing, skills, and digital connectivity within CCR and drive the City Deal forward.

The City Deal is also supported by a *five-year strategic business plan*, which sets out the required actions and outcomes to achieve CCR’s long-term objectives, including details of how the Wider Investment Fund can be used in the next 5 years to act as a catalyst to drive the actions forward.

Employment and Skills Plan, 2017

The latest Employment and Skills plan for Cardiff Capital Region identifies the need to develop a demand-led system that is driven by the needs of the industry and which delivers employment and skills support in response to infrastructure and other investments to achieve growth within the regional economy.

According to the plan the key regional priorities for employment and skills include objectives such as:

- Promoting digital skills and high value skills, and reversing falling numbers in STEM and computer related subjects;

³ Corresponding to an estimated per head rise in productivity of £1,000 (Wales Online)

- Promoting strategic leadership and management skills;
- Promoting ‘train the trainer’ programme to develop the capacity and capability of education providers;
- ‘People and personal skills’ programmes for soft and essential skills such as numeracy, literacy and ICT;
- Developing higher level skills to future-proof the workforce;
- Increasing the number and range of apprenticeships;
- Delivering employment and skills support for the industry, infrastructure and other investments to enable growth by creating through regional academies or centres of excellence and other institutions;
- Developing succession plans for European Union funded programmes post-Brexit-risk assessment and to support services offered through local and regional ESF operations.

Monmouthshire County

Monmouthshire Local Development Plan 2011-2021

The Local Development Plan identifies employment & economic development as one of the key issues to be addressed. It emphasises the need for inward investment and local employment opportunities, recognising high levels of out-commuting and slow uptake of employment land in the County. It acknowledges the need to regenerate and diversify the County’s rural economy and the role of tourism in sustaining the historic town centres.

The Council is embarking on the preparation of a revised LDP to cover the period 2018-2033 which will be informed by this study.

Business Growth and Enterprise Strategy, 2014-2020

The Enterprise Strategy identifies three key areas of support for local businesses in order to enable Monmouthshire’s business community to work in partnership and benefit from an economy which is prosperous and supports enterprise and sustainable growth. These three “strategic priorities” are detailed in the table below:

<i>Strategic Priority</i>	<i>Strategic Outcome</i>	<i>Strategic Aims</i>	<i>Headline Success Indicators</i>
Supporting Business Growth	Increased business and employment opportunities in Monmouthshire	<p>To support existing businesses to grow and diversify to give them confidence to create new employment opportunities, including the county’s major events</p> <p>Enhance access to investment</p> <p>Enable businesses to take advantage of training and skills opportunities to meet present and future needs</p> <p>Support and encourage use of physical and digital infrastructure</p> <p>Support and enhance existing business networks</p> <p>Aid and support e-commerce activities</p> <p>Aid and support procurement opportunities</p>	<p>No. of business enquiries received</p> <p>No. of businesses assisted through support received</p> <p>No. of business start-ups supported</p> <p>Increase GVA</p> <p>Monitor take-up of employment land at 1.9 ha per annum in accordance with the LDP</p> <p>Monitor town centre viability and vitality in accordance with LDP indicators</p>

		<p>Improve business efficiency through the use of ICT</p> <p>Facilitate opportunities to access global network and to aid research & innovation</p> <p>Support development of LDP allocated employment sites</p> <p>Support the town centre retail economies</p>	
Encouraging Inward Investment	A clear and coordinated approach to inward investment that meets the needs of investors	<p>To enable businesses to start up and create employment opportunities</p> <p>To proactively target specific high growth sectors to develop business clusters and shared networks</p> <p>To improve broadband speed and coverage</p> <p>To improve mobile phone coverage</p> <p>To improve range and quality of employment land opportunities</p> <p>To facilitate conversations between new businesses, statutory bodies and academic institutions to enable smooth progress</p>	<p>No. of investments made in Monmouthshire as a direct result of Monmouthshire Business and Enterprise support</p> <p>No. of business start-ups supported</p> <p>No. of new jobs created</p> <p>No. of investments made in Monmouthshire as a direct result of Monmouthshire Enterprise support</p> <p>No. of business start-ups supported</p> <p>No. of new jobs created</p>
Growing Entrepreneurs	A well respected and coordinated programme of Enterprise activities that supports current and future local business needs	<p>To raise awareness of the wide range of employment opportunities</p> <p>To create a gateway to self-employment opportunities</p> <p>To improve connectivity between businesses and education to understand the future needs of businesses</p> <p>To raise aspirations and encourage creativity and innovation</p>	<p>No. of schools engaged</p> <p>No. of pupils engaged</p> <p>No. of businesses engaged</p> <p>No. of new business start-ups</p>

Data Source: Monmouthshire County Council, 2014

Digital Strategy

Monmouthshire County Council’s Digital Strategy concentrates on improving its digital maturity as an organisation to enable it to capture the wider benefits for the people who live, learn, visit and work in Monmouthshire and at the same time stimulate Monmouthshire’s digital economy. The strategy is based on 7 key themes:

- Building a digitally skilled and enabled workforce
- Digital Customer Services
- Business Digital Capacity and Automation
- Technology
- Data and evidence
- Digital Platforms and Standards

- Protecting our Digital Assets and Security

It also details the key actions that need to be taken to implement it.

Educational Assets

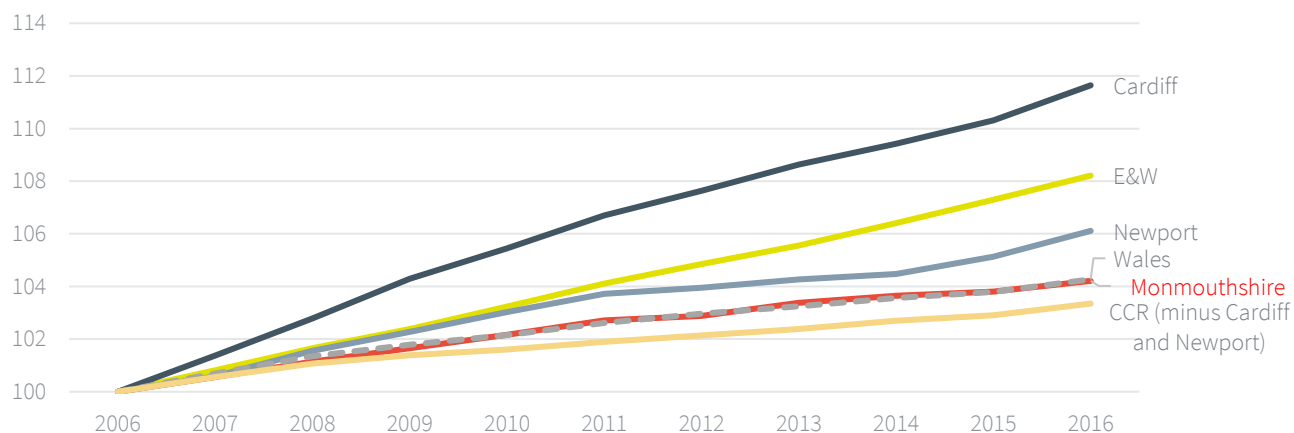
Monmouthshire boasts a strong base of primary and secondary educational providers in both the State and Independent sectors. The Haberdashers' Monmouth Schools, which include boys' and girls' boarding schools, had all their schools rated as 'excellent' in every category by Estyn, the Welsh Ofsted equivalent. Usk is home to a campus of Coleg Gwent, one of the best performing colleges in Wales offering academic or vocational courses including A-Levels and Apprenticeships, professional qualifications or workforce training for employers.

Demographics

Trends

Population growth in Monmouthshire over the last decade (Figure 4) has been modest and has aligned with growth in Wales. Given its rural character, growth has, expectedly, been lagging behind the cities of Cardiff and Newport, but it has been above the CCR average, excluding Cardiff and Newport.

Figure 4: Indexed Population Growth 2006-2016 (2006=100)

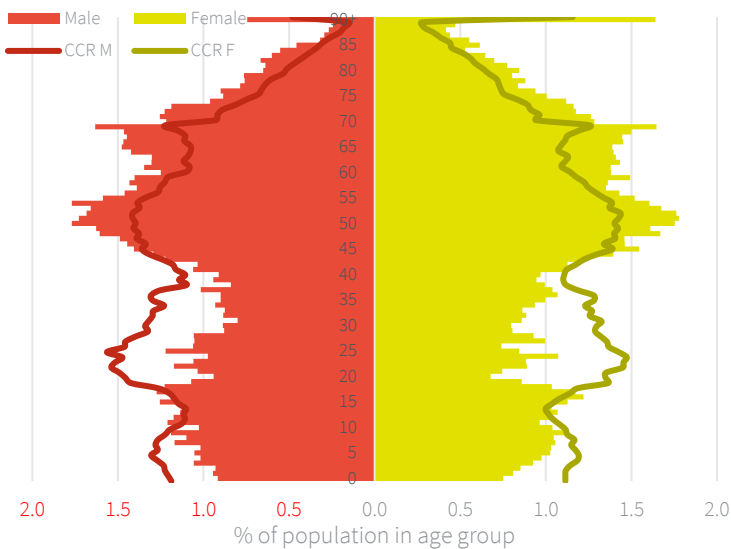


Data Source: ONS, Population Estimates

Age Structure

The age structure of Monmouthshire's population and its relation to the rest of CCR is illustrated in Figure 5. The chart shows the distribution by single year of age for males and females, comparing Monmouthshire shape, in solid colour blocks, to CCR's, outlined. The most striking feature is the low presence of people aged 20s and 30s, which are usually correlated to urban and dynamic economies. On the other hand, there is a significant proportion of population in older age groups, particularly between the age of 50 and 70, indicating that the County is largely home to a population in retirement age.

Figure 5: Population Structure 2016 - Monmouthshire vs CCR



Data Source: ONS, Population Estimates

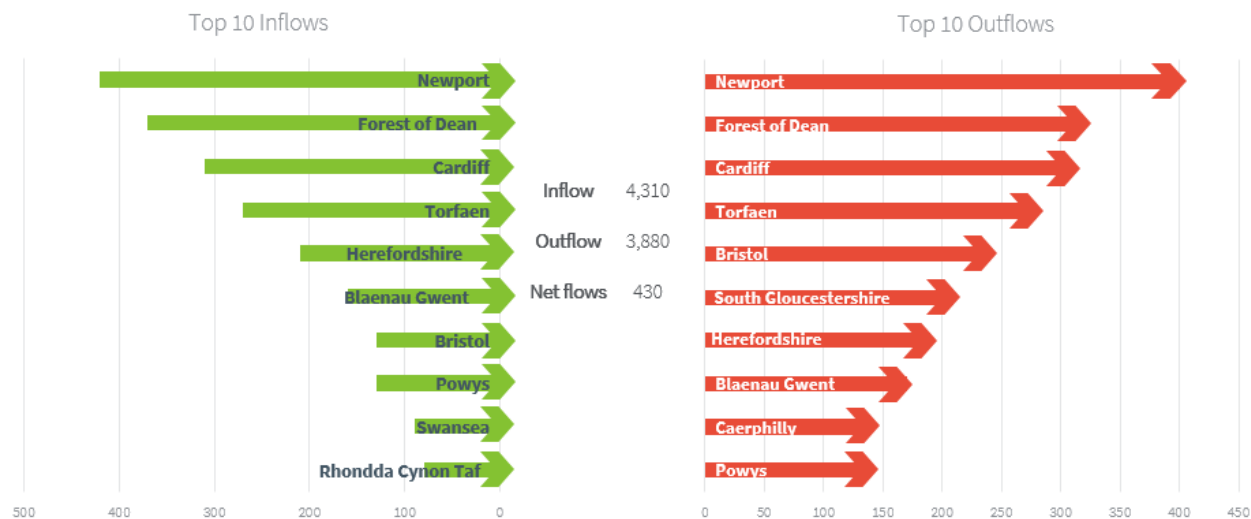
With a median age of 48, Monmouthshire is the local authority with the oldest population in CCR (Cardiff, the youngest, has a median age of 34).

Migration

The chart in Figure 6 isolates the top 10 inflows and outflows for Monmouthshire in 2016, highlighting the very strong relationship with the immediate neighbours Newport (negative net flow of 20 people) and Forest of Dean (net flow -50), but also with the cities of Cardiff and Bristol. Bristol and South Gloucestershire on the other side of the Severn, which act as a strong magnet for Monmouthshire residents, whilst the inverse relationship is weaker.

A more detailed analysis of outflows by age groups indicates that 42% of total outflows are by people aged 15 to 29, which include the years young adults move to university, graduate, and look for graduate jobs.

Figure 6: Top internal migration flows between LAs 2016



Data Source: ONS, Internal Migration Statistics - moves within the UK during the year ending June 2016

Key points:

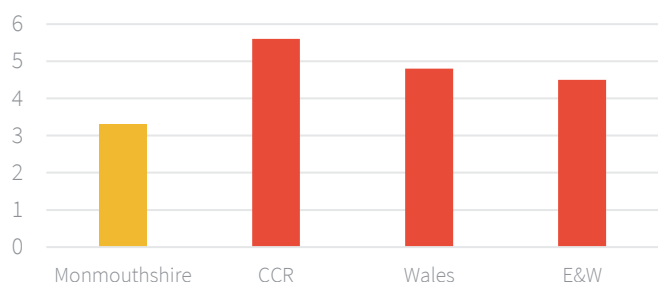
- Population growth over the last decade has been lagging behind the cities of Cardiff and Newport, but it has been above the CCR average, excluding Cardiff and Newport
- Population age structure is not geared towards growth: lack of people in their 20s and 30s, and large proportion of people in retirement age
- Monmouthshire is the local authority with the oldest population in CCR
- Strongest migration relationship with the immediate neighbours Newport and Forest of Dean, but also with the cities of Cardiff and Bristol
- Bristol and South Gloucestershire act as a strong magnet for Monmouthshire residents, but the reverse does not hold
- 42% of total migration outflows are by people aged 15 to 29, which is typically education and economically driven

Labour Market and Skills

Unemployment and inactivity rates

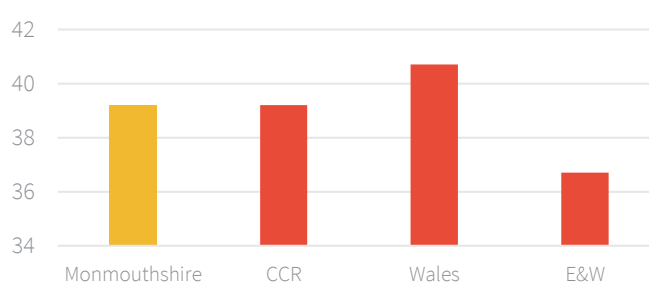
The labour market profile of Monmouthshire's residents is healthy despite high economic inactivity levels. Unemployment rate (Figure 7) is at 2.2%, 3 percentage points below the CCR average, and is also lower than the regional and national average. The economic inactivity rate (Figure 8) in Monmouthshire is at 39%, which is a reflection of its population structure where many are in retirement age. The inactivity rate is lower than the Welsh average of 41%. However, when considering the economic inactivity rate for the working age group (rather than for the aged 16+), Monmouthshire has the lowest levels (20%) among the comparators.

Figure 7: Unemployment rate (%) 16/17



Data Source: ONS, Annual Population Survey - July 2016 to June 2017
Note: Resident population aged 16+

Figure 8: Economic inactivity rate (%) 16/17

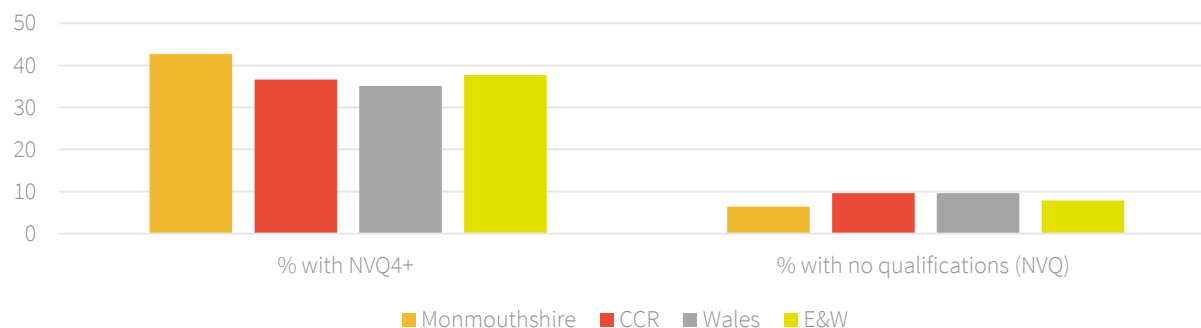


Data Source: ONS, Annual Population Survey - July 2016 to June 2017
Note: Resident population aged 16+

Qualification profile

The qualification profile (Figure 9) suggests that Monmouthshire's residents are highly educated: with around 43% qualified at degree level or above, and with only 6% of people holding no qualifications, Monmouthshire is doing better than its regional and national comparators.

Figure 9: Qualification profile (%) 2016



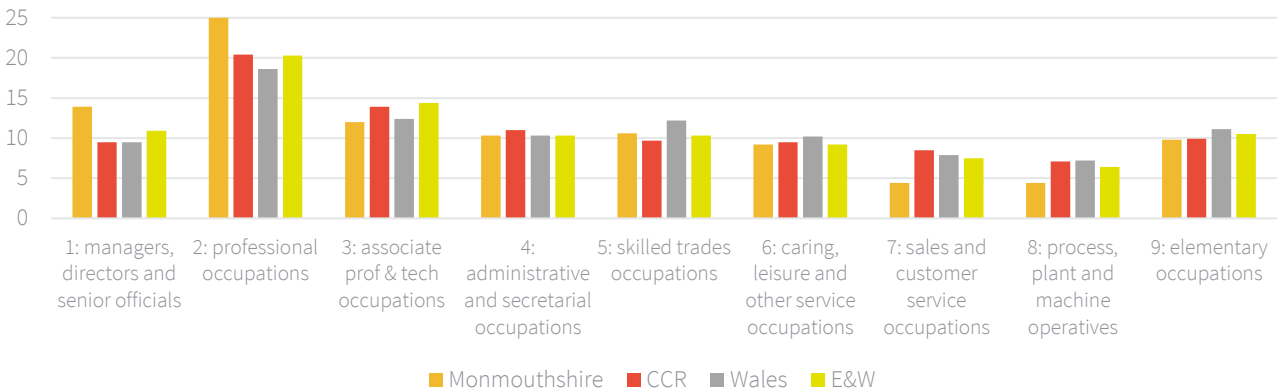
Data Source: ONS, Annual Population Survey - January 2016 to December 2016

Occupational Profile

Below we take a look at the occupational profile of Monmouthshire by residents (Figure 10) and by workplace (Figure 11).

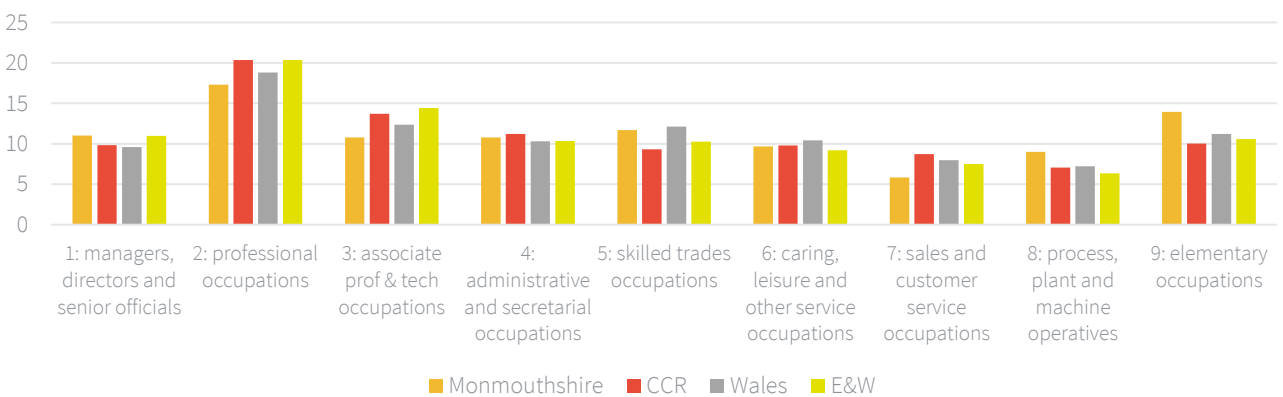
While the resident profile is markedly skewed towards high-skills/high-earning occupations (groups 1 to 3) with especially group 1 and 2 above regional and national average, the workplace profile has a smoother shape, presenting a relatively higher proportion of people employed in low-skill and routine occupations. This suggests that there is a dual labour market in Monmouthshire.

Figure 10: Occupational profile – resident analysis (%) 16/17



Data Source: ONS, Annual Population Survey - July 2016 to June 2017

Figure 11: Occupational profile – workplace analysis (%) 16/17



Data Source: ONS, Annual Population Survey - July 2016 to June 2017

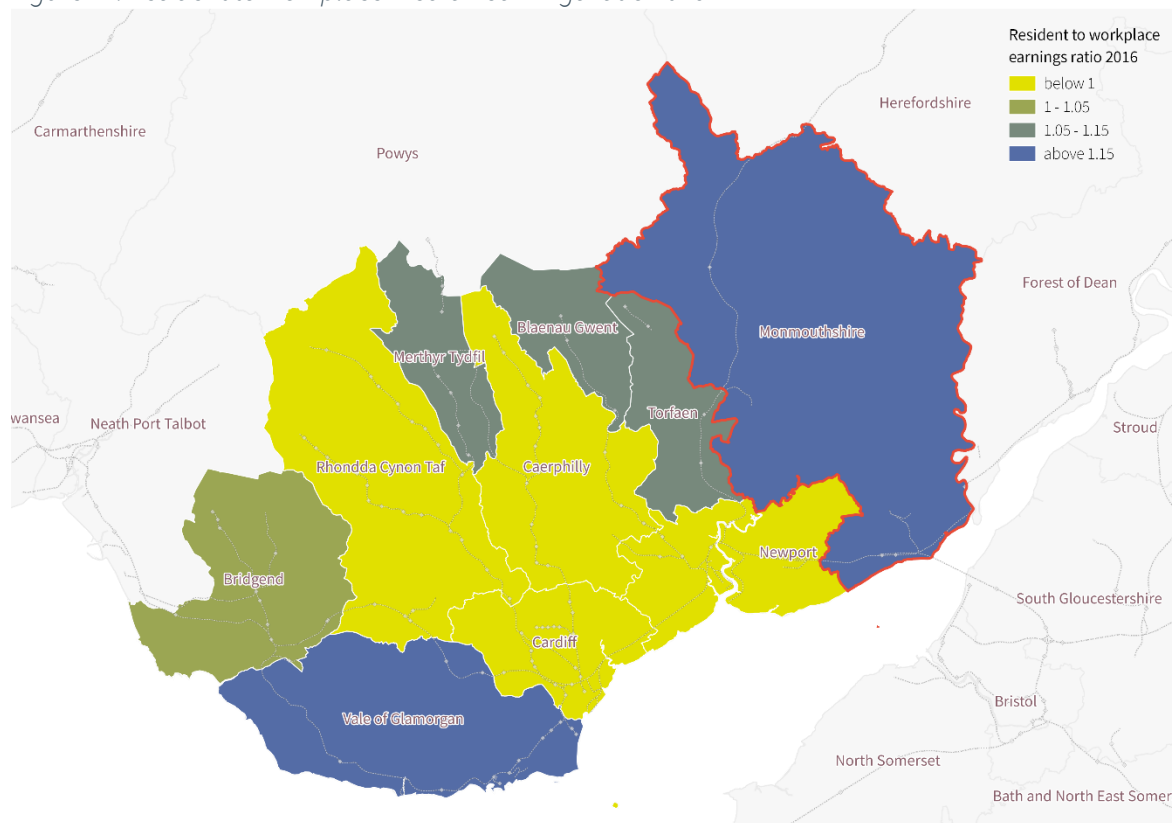
Earnings

This labour market duality is also reflected in the resident to workplace earnings difference. The map in Figure 12 presents the ratio between median earnings of residents, who are not necessarily working in the local authority they reside in, against earnings of people working in the given local authority. A ratio above one indicates that resident earnings are higher than workplace earnings.

As shown in the map below, in Cardiff, Newport, Rhondda Cynon Taff, and Caerphilly, workplace earnings are higher than resident earnings, while in the remaining local authorities, on average, residents earn more than the average salary of the place they reside in. This picture clearly reveals the underlining city region relationships between the local authorities of Cardiff Capital Region, where we find the more urban core in the middle, and the residential fringe around it.

This, coupled with the occupational analysis, suggests that Monmouthshire residents must be earning their relatively higher wages in higher skills jobs outside Monmouthshire.

Figure 12: Resident to workplace median earnings ratio 2016



Data Source: ONS, ASHE
 Map contains OS data © Crown copyright and database right 2017

Regardless of this dual economy relationship, earnings in Monmouthshire are relatively high. With median resident earnings at £31,466, the County is second highest in CCR after the Vale of Glamorgan – which seems to play a similar role to Monmouthshire on the West side of CCR. Median workplace earnings, at £26,713, are relatively high too, ranking Monmouthshire 3rd highest in CCR.

Figure 13: Median annual earnings (£) – Resident 2016

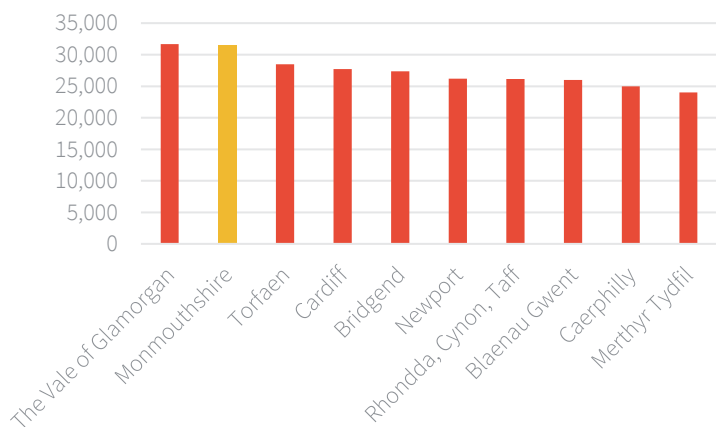
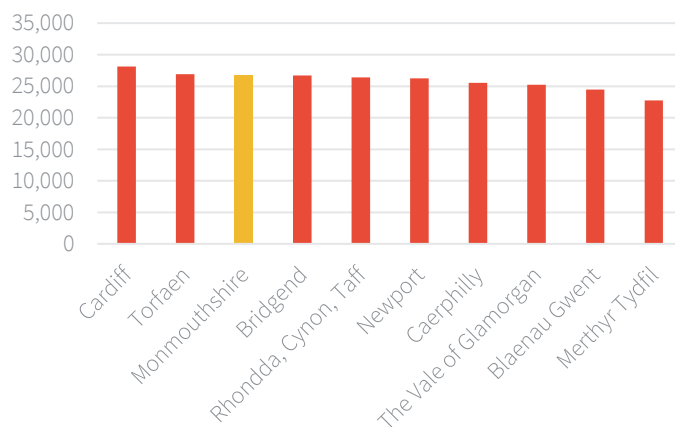


Figure 14: Median annual earnings (£) – Workplace 2016

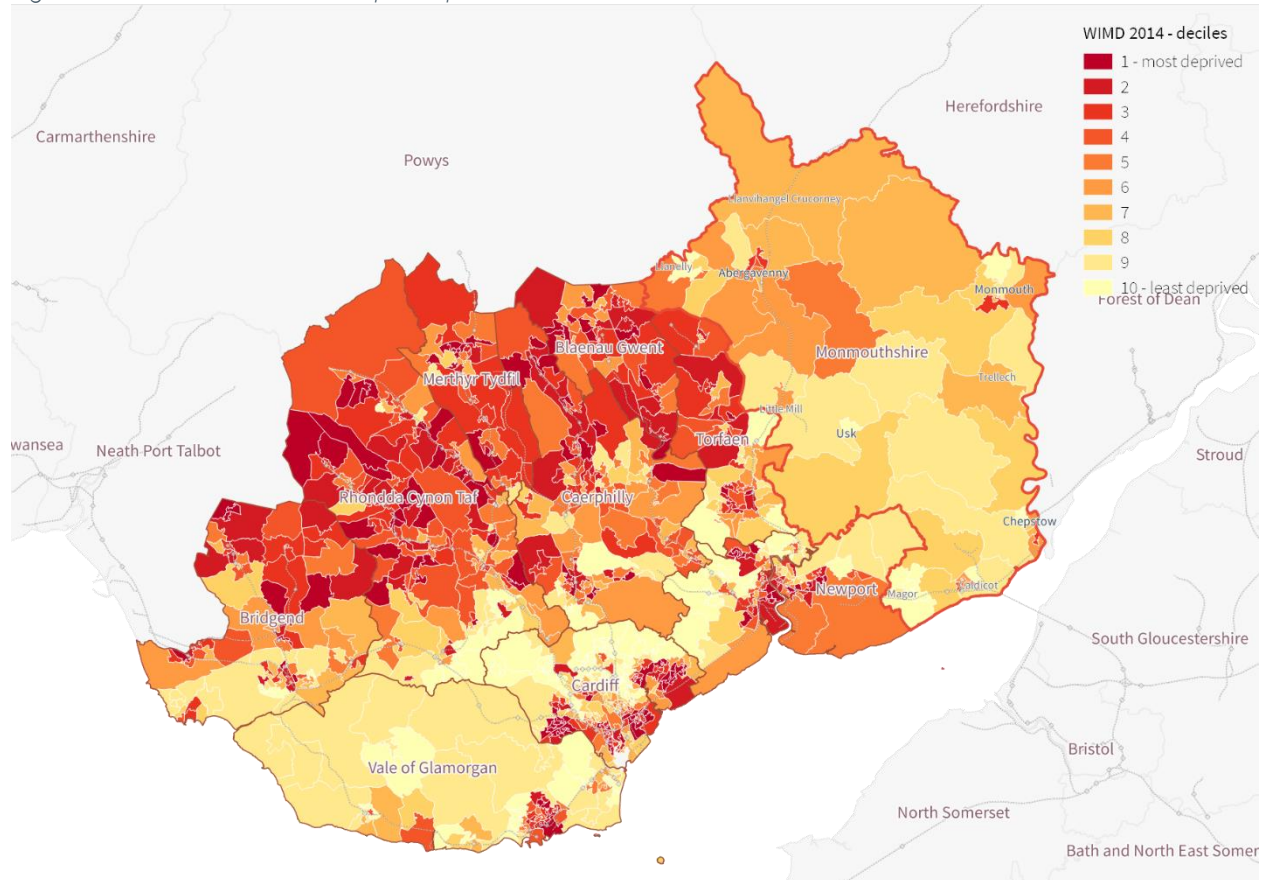


Data Source: ONS, ASHE

Deprivation

The Welsh Index of Multiple Deprivation (WIMD) also evidences a relative lack of deprivation in the County. The WIMD metric is built assigning a score for different domains of deprivation (for example income or health) to neighbourhoods in Wales, a neighbourhood rank is then drawn that allows comparative analysis for small areas across Wales. The map below (Figure 15) presents the WIMD 2014 (the latest available comprehensive assessment) expressed as deciles for neighbourhoods in CCR: the darker the red, the more deprived the neighbourhood. The County of Monmouthshire appears to do well compared to its CCR neighbours and Wales as a whole: it is the only local authority in Wales with none of its neighbourhoods ranking in the 10% most deprived. The median decile across all 56 neighbourhoods within the County is 8, indicating that the average neighbourhood in Monmouthshire is amongst the 30% least deprived in Wales.

Figure 13: Welsh Indices of Multiple Deprivation 2014 - deciles



Data Source: Statistics for Wales

Map contains OS data © Crown copyright and database right 2017

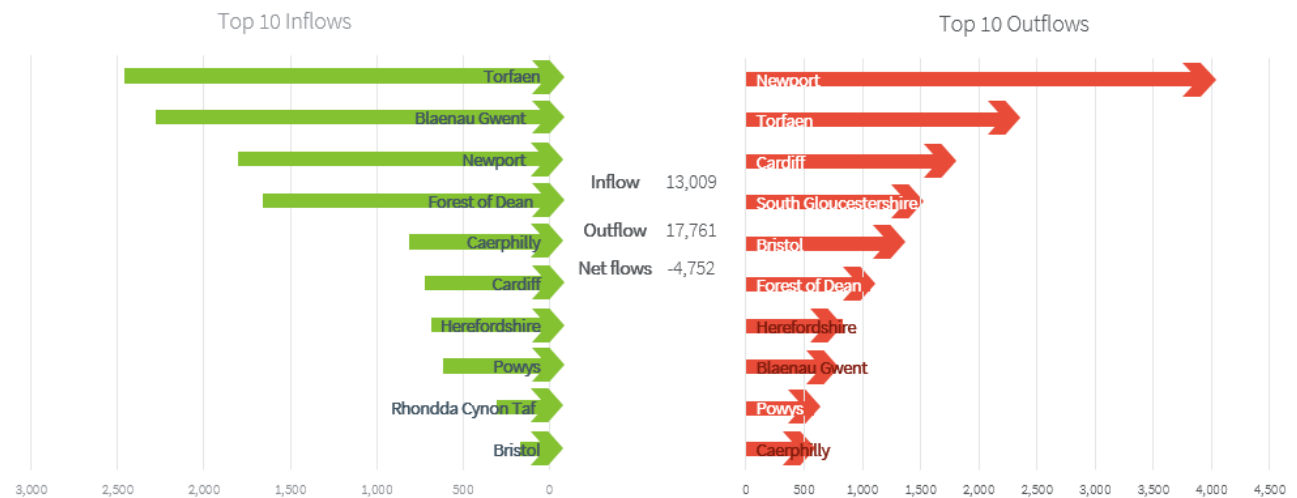
Key points:

- The labour market profile of Monmouthshire's residents is healthy despite the high economic inactivity levels
- The qualification and occupational profiles of Monmouthshire residents are representative of a high-qualified and skilled population
- There is a dual labour market in Monmouthshire, meaning that the people who live in Monmouthshire have a different profile from those who work in Monmouthshire:
 - the resident profile is markedly skewed towards high-skills/high-earning occupations, while the workplace profile presents a relatively higher proportion of people employed in low-skill and routine occupations
 - resident earnings are higher than workplace earnings - residents are likely to be earning their relatively higher wages in higher skills jobs outside Monmouthshire
- Monmouthshire is the only local authority in Wales with none of its neighbourhoods ranking in the 10% most deprived

Commuting

The analysis of commuting flows (Figure 16) confirms the relationships we uncovered in the previous section.

Figure 14: Commuting flows



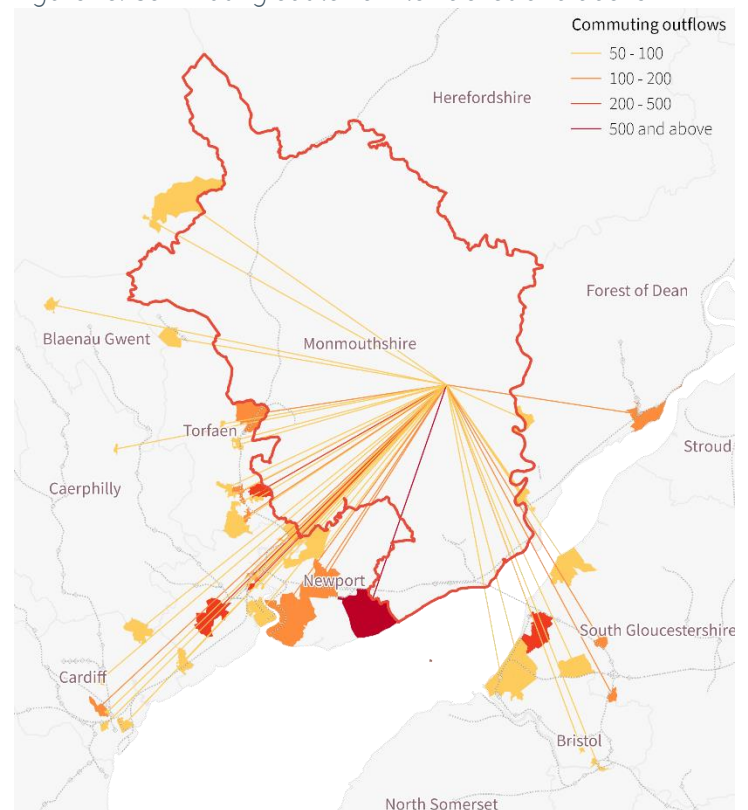
Data Source: ONS, Census 2011

Even though 13,000 people commute from outside the County to come and work in Monmouthshire, the outflow is more considerable, with 17,760 Monmouthshire residents working outside the County. Around 40% of Monmouthshire's residents who are in employment work outside the County. The pull from the neighbouring city of Newport is very strong, attracting almost a quarter of total outflows from Monmouthshire. Torfaen ranks 2nd as commuting destination, capturing 13% of outflows, followed by Cardiff, at 10%. Significant is also the pull exerted by South Gloucestershire and Bristol.

Figure 15 on the right maps the direction of the most significant outflows (50 moves and above to OAs). From the map, we can see some employment areas emerging because of their proximity to the west and east borders of the County. However, we can also see some key employment centres in Cardiff, Newport, Bristol and South Gloucestershire, some just past the Severn Bridge, south of Severn Beach.

Commuting inflows to Monmouthshire are strongest among its closer neighbours, with Torfaen constituting about a fifth of total incoming commuting. Although Monmouthshire is a net contributor to Newport and Cardiff, it also manages to attract a substantial number of

Figure 15: Commuting outflows – flows of 50 and above



Data Source: ONS, Census 2011

Map contains OS data © Crown copyright and database right 2017

commuters from the two cities. Bristol makes it to the top ten inflows chart, but commuting levels from it are low.

The announced removal of the Severn Bridge Toll is expected to foster labour market integration and strengthen commuting relationships between Monmouthshire and the Bristol City Region⁴. Also, as previously observed in the internal migration analysis, a relatively important proportion of housing moves in the last year were to Bristol and South Gloucestershire, which may have been spurred by an attempt to make the commute cheaper while increasing proximity to jobs in the Bristol City Region. The removal of the toll may curtail housing moves beyond the Severn by effectively increasing the perception of proximity to Bristol's job market. Furthermore, the plan to remove tolls may also be the cause of recent house price increases in Caldicot and Chepstow reported in December 2017.

Key points:

- Around 40% of Monmouthshire's residents who are in employment work outside the County
- The pull from Newport is very strong, attracting almost a quarter of total outflows from Monmouthshire
- Commuting inflows to Monmouthshire are strongest among its closer neighbours
- The announced removal of the Severn Bridge Toll is therefore expected to foster labour market integration and strengthen commuting relationships between Monmouthshire and the Bristol City Region
- The recent increases in house prices in Caldicot and Chepstow may also be thought to be a consequence of the plan to remove the tolls.

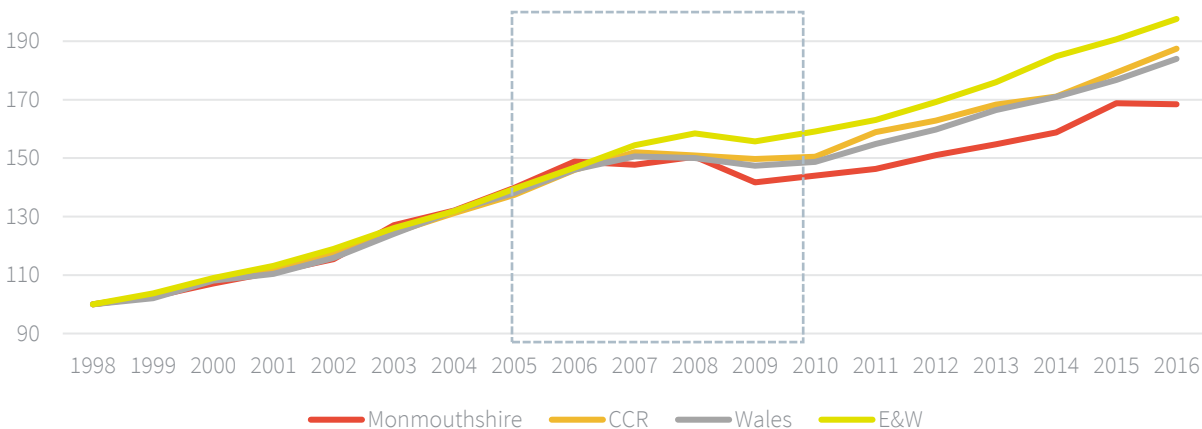
⁴ Arup, *The Impact of the Severn Tolls on the Welsh Economy* (2012)

Historic and Recent Economic Performance

The analysis of Monmouthshire's economic performance in terms of GVA growth (Figure 16) reveals that the County kept up with national growth until the financial crash, after which it has been lagging behind not only national growth but also its neighbours' performance.

A closer look at Monmouthshire's performance between 2006 and 2009 suggests that the County's economy started to slow down ahead of the crash, and it was then hit harder than its neighbours. This is likely due to the sectoral mix of employment in Monmouth which, like many areas in the UK where placed based employment is lower value than resident based employment experienced decline early.

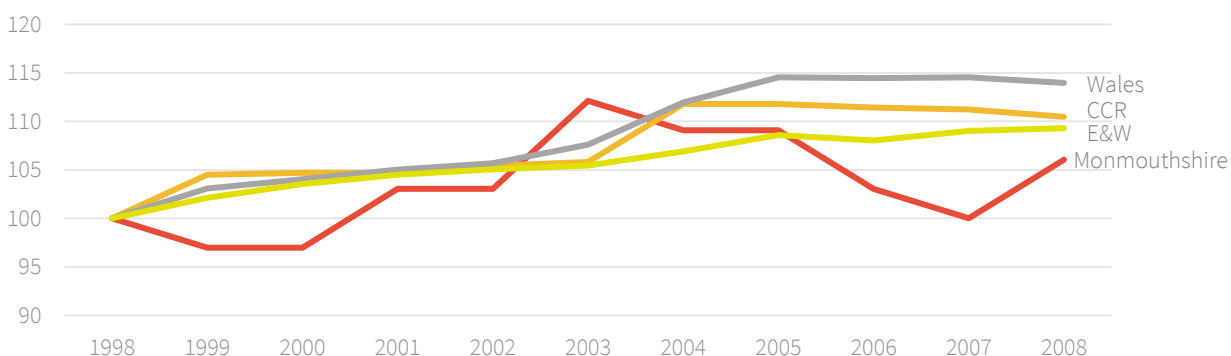
Figure 16: Indexed GVA growth 1998-2016 (1998=100)



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

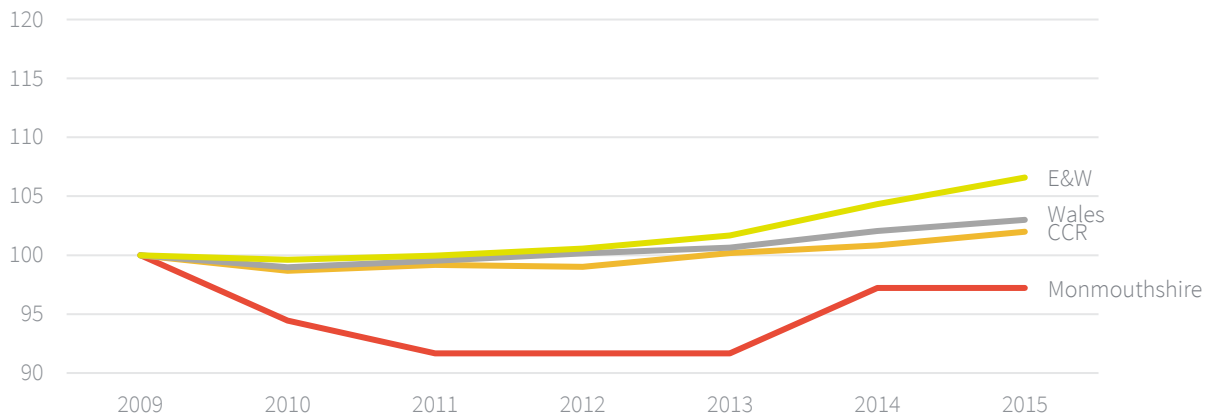
This is also reflected in the employment growth analysis in Figure 17 and Figure 18, where the growth periods were broken into pre- and post-crisis. Monmouthshire pre-crisis performance was less stable than its comparators', and after it peaks in 2003, employment begins to decline. The post-crisis picture confirms that the County's economy is somewhat stuck in a nearly 15-year-long recovery, with employment levels still below their 2003 peak. This recessionary impact is common in areas with an older working population as people take early and voluntary retirement as companies seek to cut costs.

Figure 17: Indexed Employment Growth 1998-2008 (1998=100)



Data Source: ONS, ABI

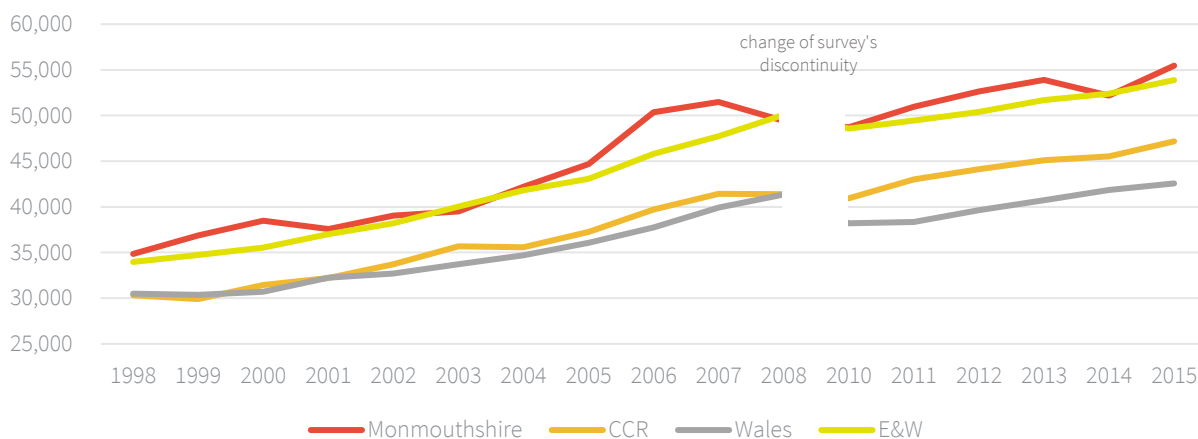
Figure 18: Indexed Employment Growth 2009-2015 (2009=100)



Data Source: ONS, BRES

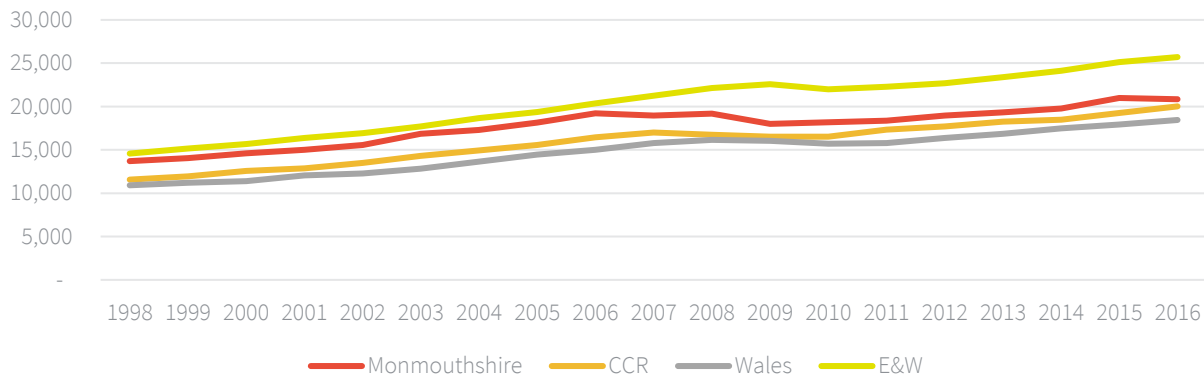
On the other hand, productivity levels (Figure 19), as signalled by GVA per job, set Monmouthshire above its regional neighbours and national average. While GVA per head of population (Figure 20) is below England & Wales but still above its regional (CCR) neighbours.

Figure 19: GVA per job 1998-2008 (£)



Data Source: ONS, Regional GVA for LAs (Experimental Statistics) & ABI & BRES

Figure 20: GVA per head 1998-2016 (£)



Source: ONS, Regional GVA for LAs (Experimental Statistics) & Population Estimates (all residents)

Key points:

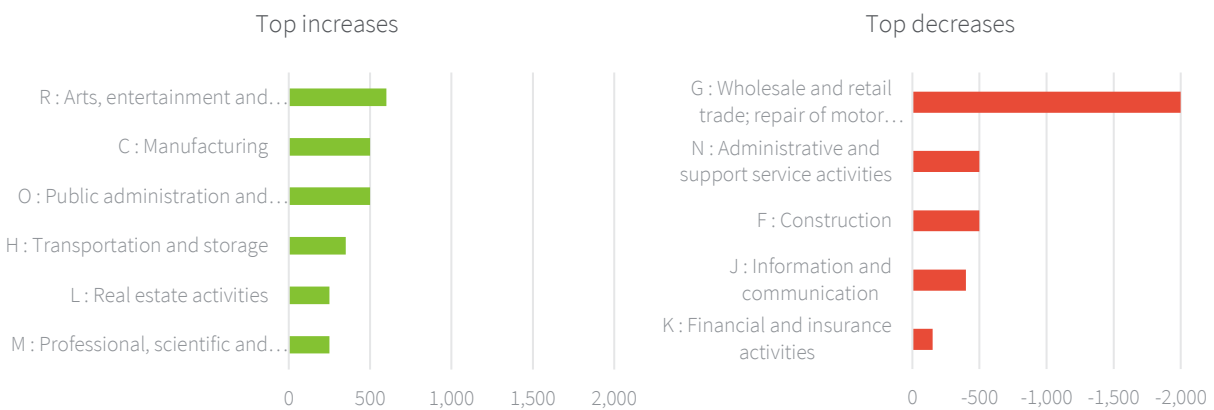
- In terms of GVA performance, Monmouthshire kept up with national growth until the financial crash, after which it has been lagging behind not only national growth but also its neighbours' performance
- The economy started to slow down ahead of the 2007 crash, and it was then hit harder than its neighbours
- In terms of employment levels, Monmouthshire economy is somewhat stuck in a nearly 15-year-long recovery, with employment levels still below their 2003 peak
- Productivity levels are above national and CCR average
- GVA per head of population is below England & Wales but still above its regional neighbours

Sectorial analysis

From the economic performance analysis in the previous section, it appears that Monmouthshire's economy has performed below its full potential over the last decade. Large employment changes by sector have been captured in Figure 21. First of all, the largest change between 2009 and 2015 is found in the loss of 2,000 jobs in Wholesale and Retail (-1,000 Retail jobs, Figure 22), followed by losses in Administration support (-500) and Construction (-500). The decline of jobs in Information and Communication and Finance and Insurance is against national trend, and although these activities are peculiar to an urban setting, their decline is hinting towards an increasingly rural economy.

Also, very interesting, and against trend, is the increase in manufacturing, which gained 500 jobs between 2009 and 2015. Arts, Entertainment and Recreation has been driving growth with the addition of 600 jobs over the period, 550 of which have been in Sports and recreation activities (Figure 21 and 22).

Figure 21: Largest employment increases and decreases between 2009 and 2015



Data Source: ONS, BRES

Figure 22: Largest employment increases and decreases between 2009 and 2015 - subsectors



Data Source: ONS, BRES

Figure 23 introduces a more dynamic analysis of Monmouthshire sectoral strengths and weaknesses. The chart depicts patterns of sectorial specialisation, as indicated by the location quotient⁵, against sectorial growth trends. Broadly speaking, in the top right quadrant of the chart we can find Monmouthshire sectors of strength, intended as industrial areas of specialisation and growth. Sectors in the bottom left quadrant represent areas of weakness, underlined by underrepresentation with respect to national average and in decline in overall employment terms.

Strengths

Arts, entertainment and recreation is the sector with the highest location quotient, meaning that it represents an area of specialism for Monmouthshire, and it is also amongst the highest growth sectors (67%). A further breakdown at subsector level reveals that growth is driven primarily by Sports activities and amusement and recreation activities, and at even more detailed level (SIC5) by Operation of sports facilities.

⁵ A location quotient for a place is ratio of a sector share of employment in that place compared to the average, in this case, for England & Wales.

The sector of water supply is also exhibiting high growth and specialism, which is aligned with the large number of businesses operating in it as observed in the previous section.

Manufacturing appears as a relatively large sector, employing 3,500 people; it is growing against national trend and is also found in relatively higher concentration in Monmouthshire than compared to the E&W average.

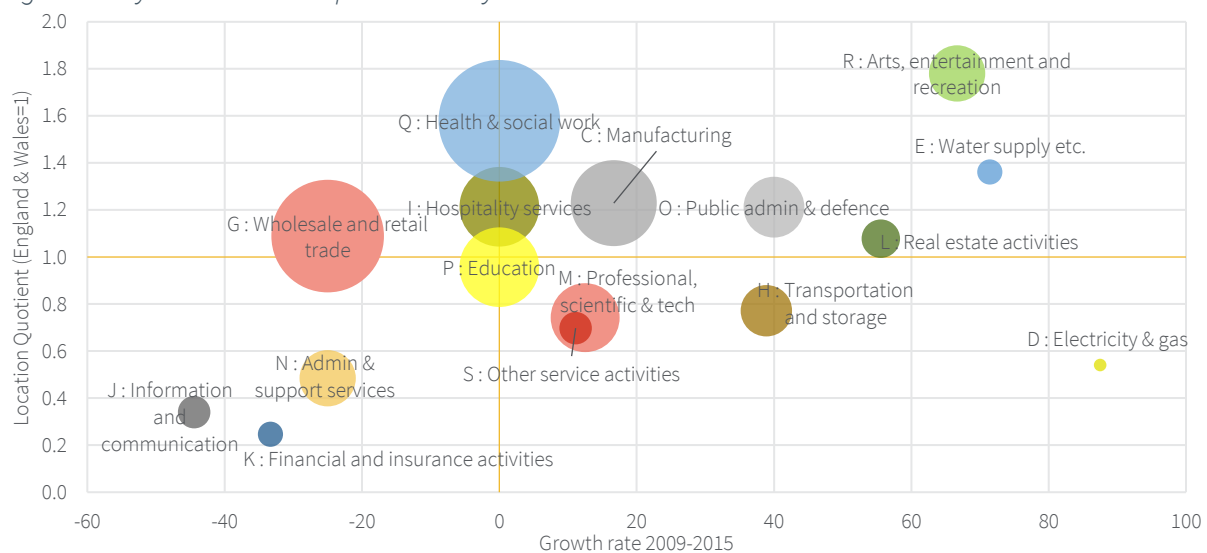
Real estate activities have undergone high growth but their degree of specialisation is only just above average.

Public administration and defence is a sizable sector too, exhibiting specialisation and growth, but rather than considering it a sector of strength, its relatively large size can be explained by the nature of necessary services the County requires despite its relatively small pool of jobs.

Weaknesses

Information and communication, Finance and Insurance, and Administration, are all displaying a low location quotient and have experienced decline over the last few years. These sectors are part of the modern service economy which is driving growth at a national level. They are however predominantly urban sectors and as they have restructured post -recession growth has been stronger in larger towns and cities which may explain the lower relative growth in Monmouthshire.

Figure 23: Dynamic location quotient analysis 2009-2015

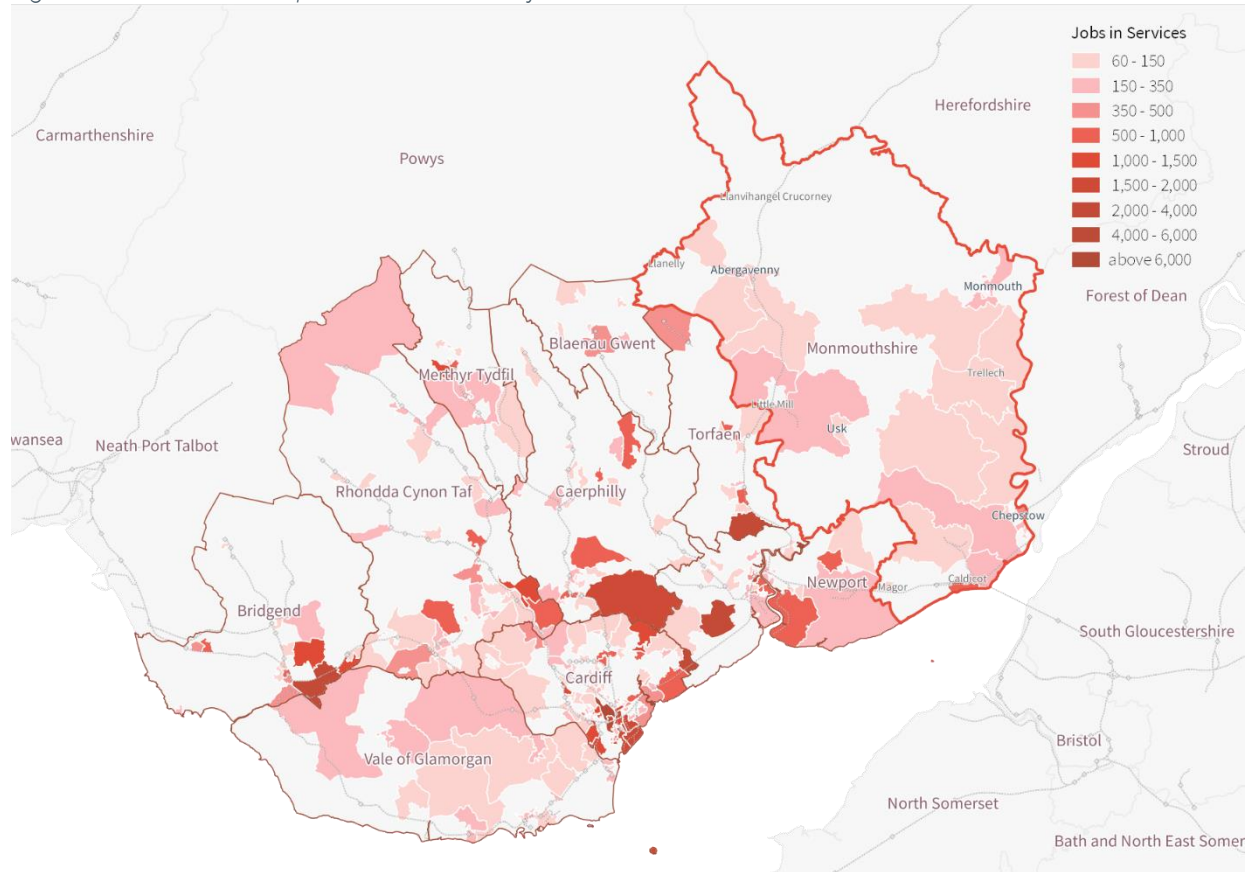


Data Source: ONS, BRES

Note: since not all farm jobs are covered by the BRES database, the sector of Agriculture was excluded from the analysis

Figure 24 below maps the distribution of jobs in Professional services in CCR. These include Information and communication, Administration and support services, Finance and insurance, but also Real estate activities and Professional, scientific and Technical occupations. With the exception of a small employment area near Caldicot, jobs in Professional Services are found in very low concentration in Monmouthshire.

Figure 24: Distribution of professional service jobs in CCR - 2016

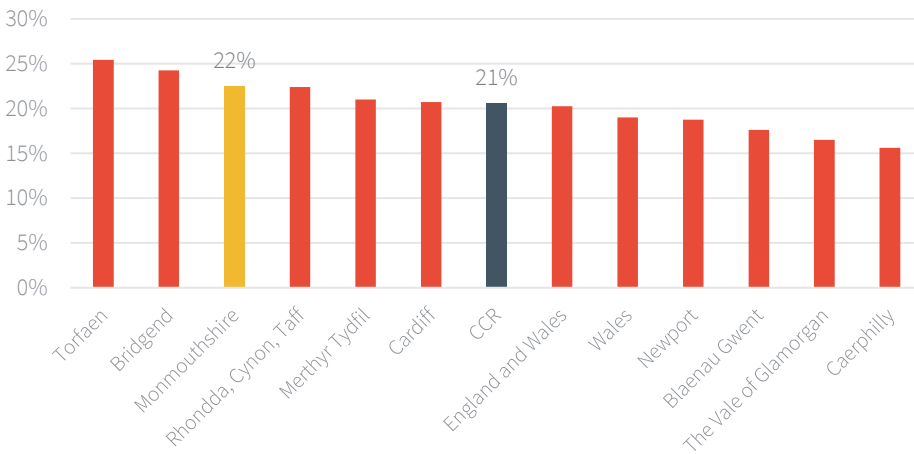


Data Source: ONS, BRES
 Map contains OS data © Crown copyright and database right 2017

Science & Technology

The Science and Technology (S&T) sector is usually intensive in knowledge and linked to innovation activity. In Monmouthshire, 22% of total jobs are in S&T, making the County the third in CCR for employment in the sector, even though very close to the CCR average of 21% (Figure 25).

Figure 25: Proportion of employment in S&T - 2016

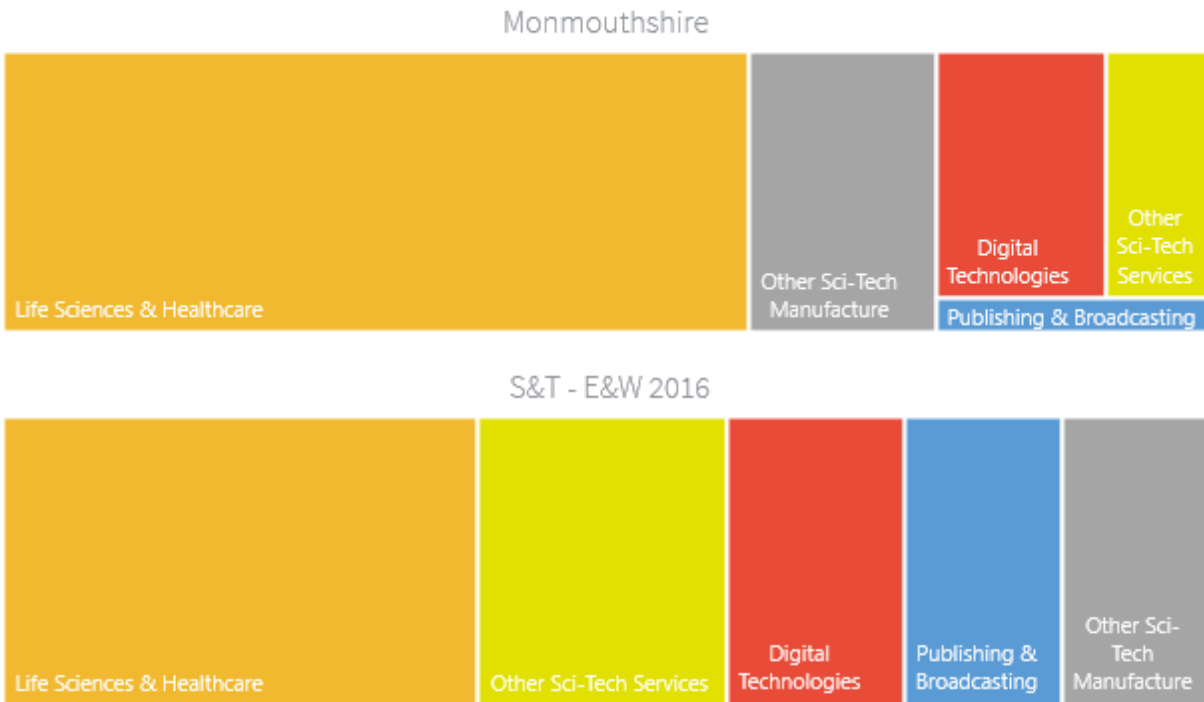


Data Source: ONS, BRES

The composition of employment in the S&T sector is dominated by Life Sciences & Healthcare, which employs 5,000 people in Monmouthshire and is proportionally larger than the E&W average (Figure 26). On the other hand, Publishing and Broadcasting is underrepresented and employs only 225 people.

Figure 27 provides a further breakdown into the Life Sciences & Healthcare sector in Monmouthshire. The majority of employment is in Hospital Activities, which supports 3,500 (Figure 27 indicates 3,500 jobs).

Figure 26: Composition of employment in S&T for Monmouthshire and E&W - 2016



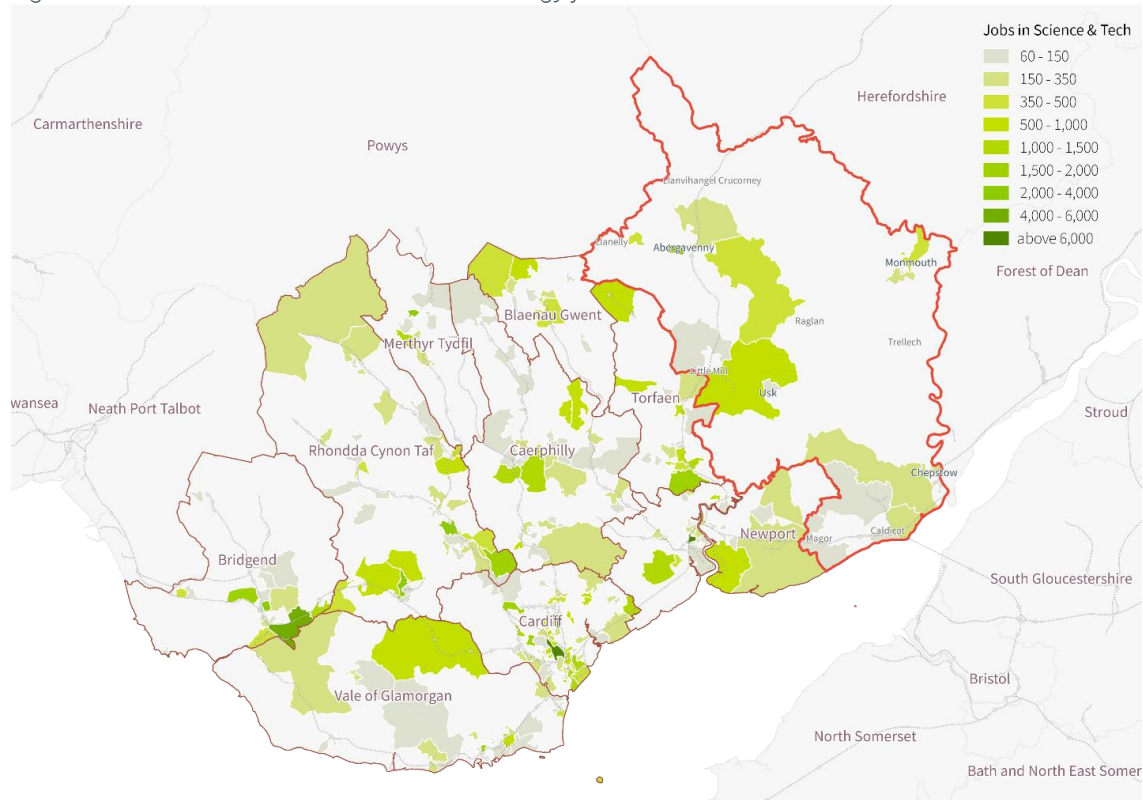
Data Source: ONS, BRES

Figure 27: Composition of employment in Life Sciences & Healthcare for Monmouthshire - 2016



Figure 28 maps out the distribution of Science and Technology jobs across CCR. Although Monmouthshire's employment in the sector is not particularly dense, some areas emerge around Monmouth, Abergavenny, Chepstow and Caldicot, and along a corridor between Abergavenny and Usk.

Figure 28: Distribution of science and technology jobs in CCR - 2016

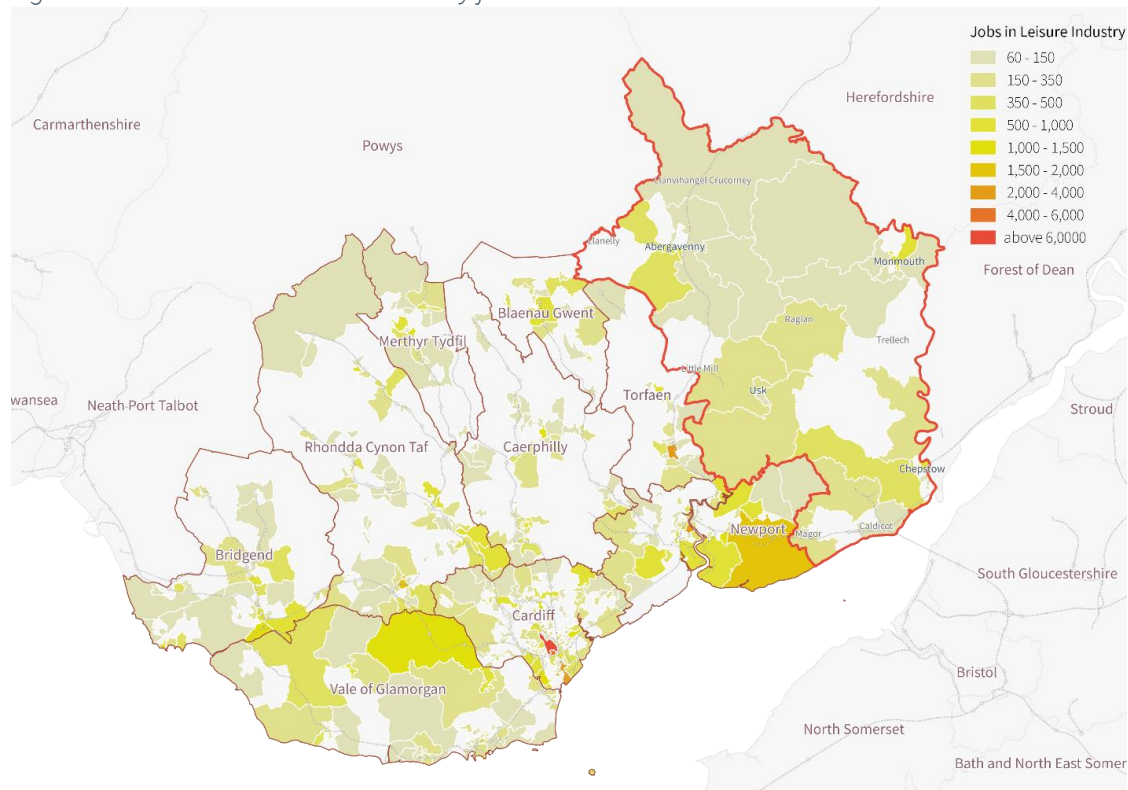


Data Source: ONS, BRES
 Map contains OS data © Crown copyright and database right 2017

Leisure Industry

Employment in the leisure industry is more evenly distributed across CCR, expectedly with some very high concentrations in the centres of Cardiff and Newport. The leisure industry, which includes tourism and hospitality, seems to be among the sectors more evenly spread across Monmouthshire.

Figure 29: Distribution of leisure industry jobs in CCR - 2016



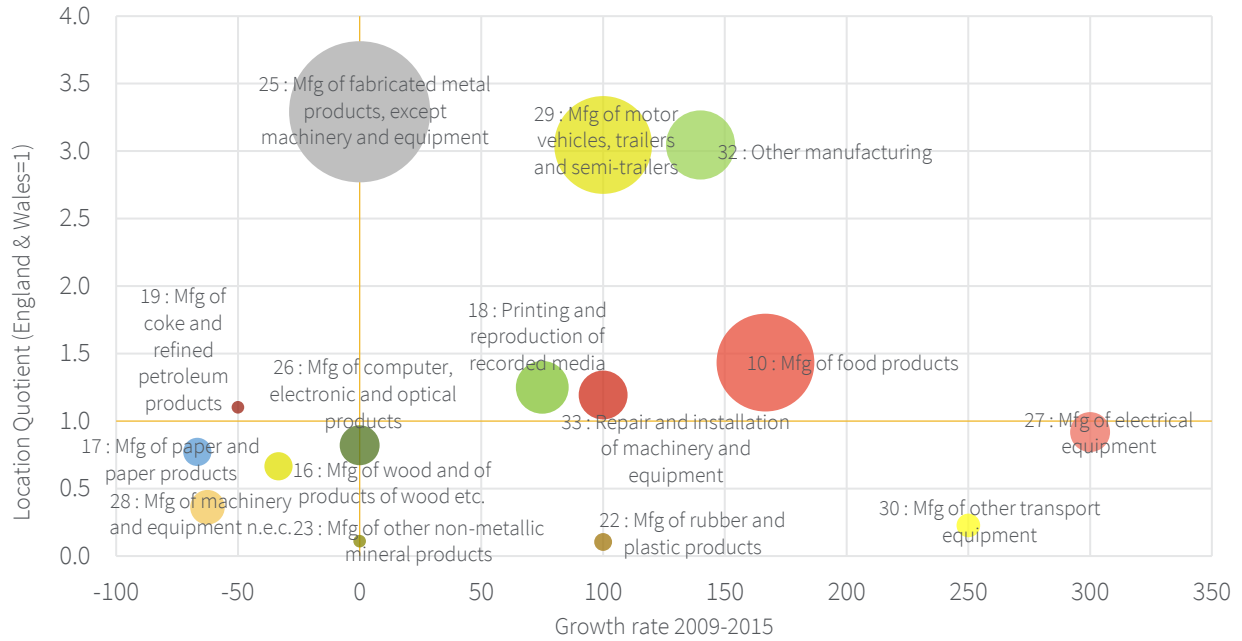
Data Source: ONS, BRES

Map contains OS data © Crown copyright and database right 2017

Manufacturing

In order to better understand what is driving growth and specialisation within the manufacturing sector, Figure 31 presents the breakdown for manufacturing at subsector level. Manufacturing of electrical equipment is the subsector that has experienced the fastest employment growth (300%); its location quotient is still below one but given the observed high growth there is an opportunity for it to become a sector of specialisation for the County. The highest level of specialisation is found in the Manufacturing of metal products, which supports 1,250 jobs but experienced zero growth over the analysis period. Manufacturing of food products is another large sector of specialisation, employing 600 people, which also experienced high growth over the period and is important for the County's rural economy. Manufacturing of Motor vehicles is highly concentrated in Monmouthshire, being three times more concentrated than the national average, and has doubled in size between 2009 and 2015.

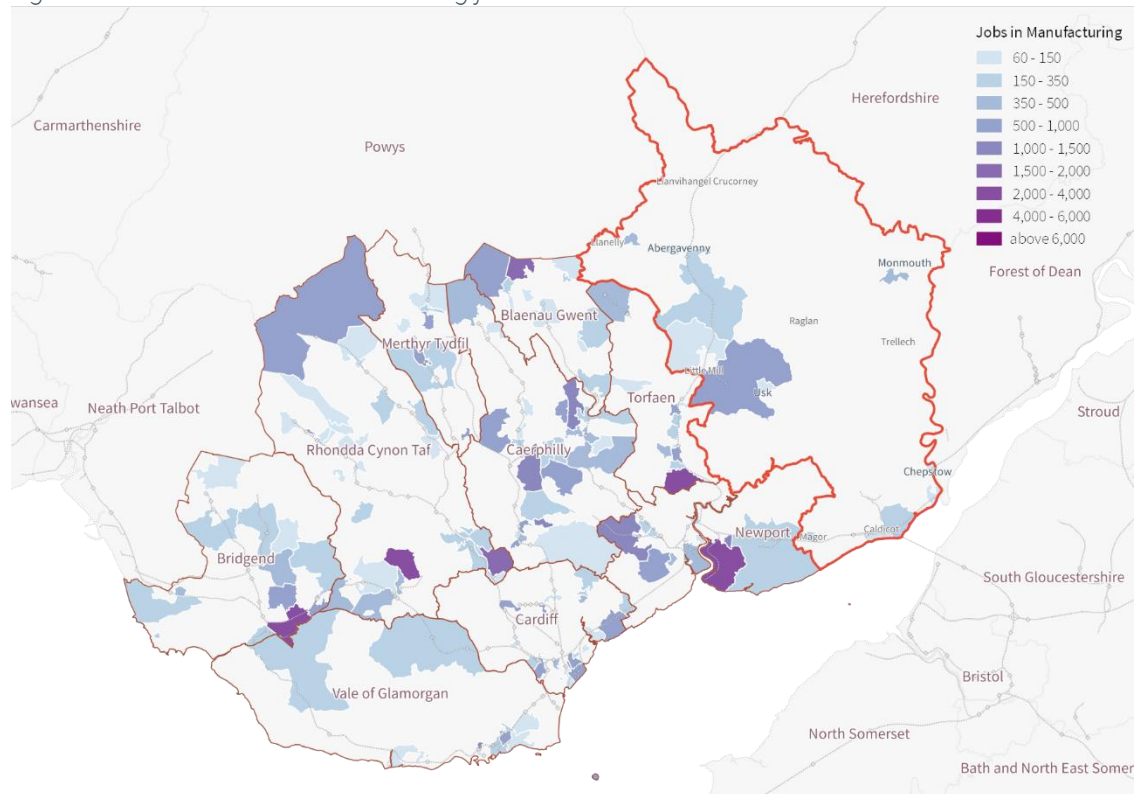
Figure 30: Dynamics of change (2009-2015) – Manufacturing subsectors



Data Source: ONS, BRES

As illustrated by Figure 31, manufacturing jobs in Monmouthshire are mostly located along the corridor between Usk and Abergavenny, and near Monmouth, Caldicot and Chepstow.

Figure 31: Distribution of manufacturing jobs in CCR - 2016



Data Source: ONS, BRES

Map contains OS data © Crown copyright and database right 2017

Key points:

- The largest employment losses between 2009 and 2015 were in Wholesale and Retail (-2,000 jobs), Administration support (-500 jobs) and Construction (-500 jobs)
- Manufacturing is a relatively large and growing sector – against national trend
- Arts, entertainment and recreation is the sector exhibiting the highest specialisation and very strong growth
- Many service sectors have declined and are underrepresented - against national trend
- Professional, scientific and technical activities are under-represented but growing
- With 22% of total jobs are in Science & Technology, Monmouthshire is third in CCR for employment in the sector
- The composition of employment in the Science & Technology sector is dominated by Life Sciences & Healthcare, which employs 5,000 people and is proportionally larger than the average for England and Wales. Hospital activities form a significant part of this employment.

Business Demography

Business demography data (Figure 32) suggest that Monmouthshire business activity is relatively low. The lower than average death rate and the 5-year survival rate are positive but can be partially explained by a very low and below average business start-up rate.

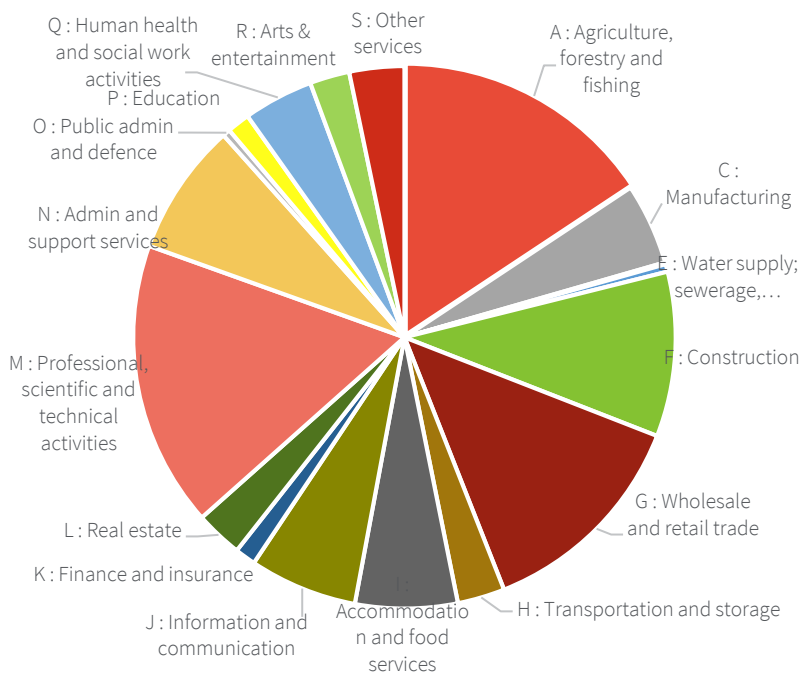
Figure 32: Business demography data 2016

	Birth rate	Death rate	Active	5-year survival rate
Monmouthshire	10.4	9.7	4,120	45
CCR	14.3	11.4	45,480	42
Wales	12.3	10.5	98,445	43
E&W	14.9	11.6	2,597,505	44

Data Source: ONS, Enterprise Demography - % of active enterprises

Data for 2017 report 4,430 active enterprises in Monmouthshire which measured per 10,000 of population is the second highest in Wales. As shown in Figure 33, the majority of enterprises (17%) are involved in Professional, scientific and technical activities, which is a sector normally associated with high-skill and high-value jobs. There is also a very large proportion (16%) of businesses involved in Agriculture, forestry & fishing, which is expected given the widely rural character of the County. The number of enterprises in the sector is almost 3 times and a half the average for England & Wales. Despite the seemingly low number of businesses in Water Supply and Public Admin, these sectors are over represented in Monmouthshire. This can be a symptom of a relatively small economy that nevertheless requires a minimum number of businesses involved in necessary services providing activities.

Figure 33: Sectorial distribution of enterprises with location quotient (E&W=1) table 2017

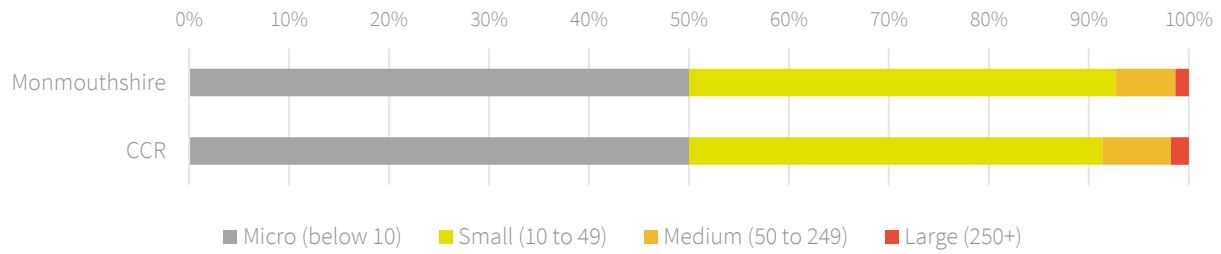


	LQ 2017	No.
A : Agriculture, forestry and fishing	3.4	695
B : Mining and quarrying	0.0	0
C : Manufacturing	1.0	215
D : Electricity, gas, steam etc.	0.7	5
E : Water supply; sewerage,...	1.6	20
F : Construction	0.8	435
G : Wholesale and retail trade	0.9	580
H : Transportation and storage	0.7	125
I : Accommodation and food	1.1	270
J : Information & communication	0.8	285
K : Finance and insurance	0.6	55
L : Real estate	0.8	125
M : Professional, scientific & tech.	0.9	755
N : Admin and support services	0.9	350
O : Public admin and defence	1.5	20
P : Education	0.7	60
Q : Human health and social work	0.9	185
R : Arts & entertainment	1.0	105
S : Other services	0.8	145

Data Source: ONS, UK Business Counts

When considering business size (shown in Figure 34) - where size refers to a business' number of employees - Monmouthshire supports a smaller proportion of large and medium-size companies relative to the average for CCR.

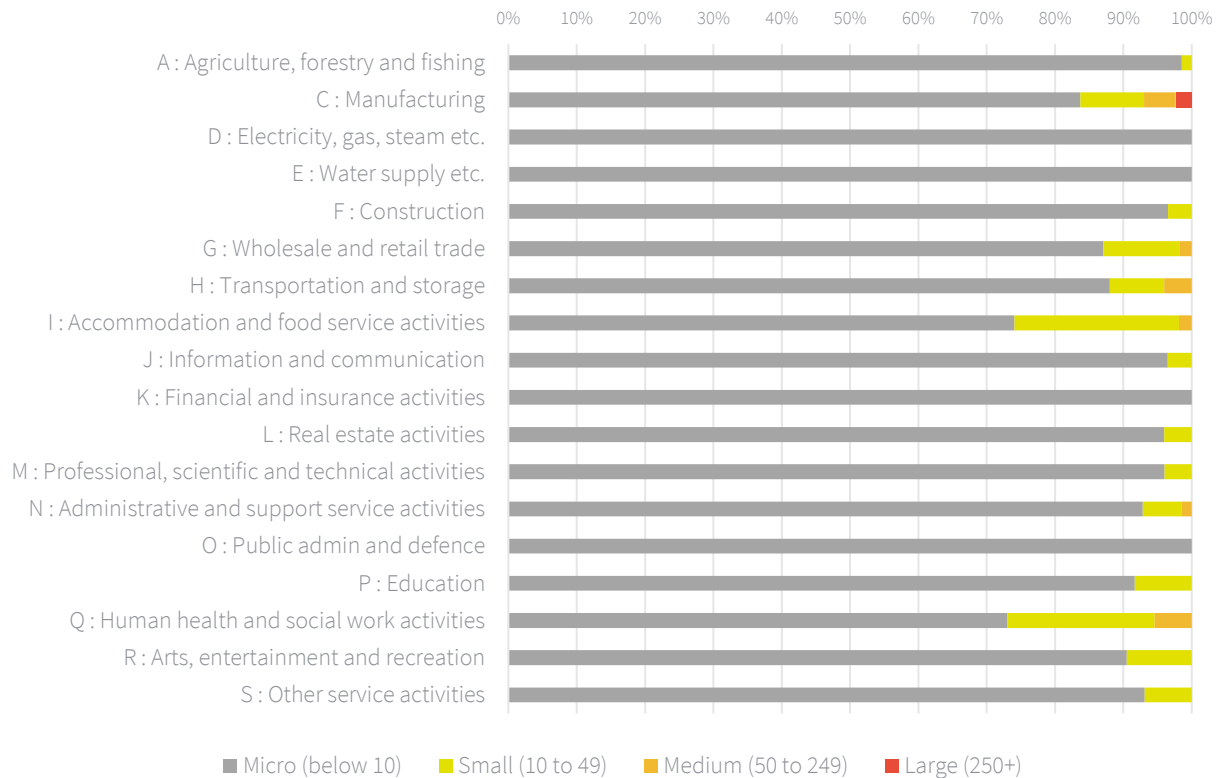
Figure 34: Split of enterprises by size - 2017



Data Source: ONS, UK Business Count

Figure 35 presents the enterprise split by sector and size. The only sector presenting large firms (i.e. businesses with 250 people or above) is the manufacturing sector, while Human Health, followed by Accommodation and Food Services, are the sectors with a proportionally larger number of small & medium-sized businesses vs micro businesses. Utilities companies appear to be all micro size in Monmouthshire, but so is it true for Public Admin and Defence. Data for these sectors (which are understood to be mostly constituted by few medium/large-size companies/organisations) are likely to be misrepresented by statistics for business counts, where figures are disclosed rounded up to the nearest 0 or 5.

Figure 35: Enterprise split by size and sector - 2017



Data Source: ONS, UK Business Count

Key points:

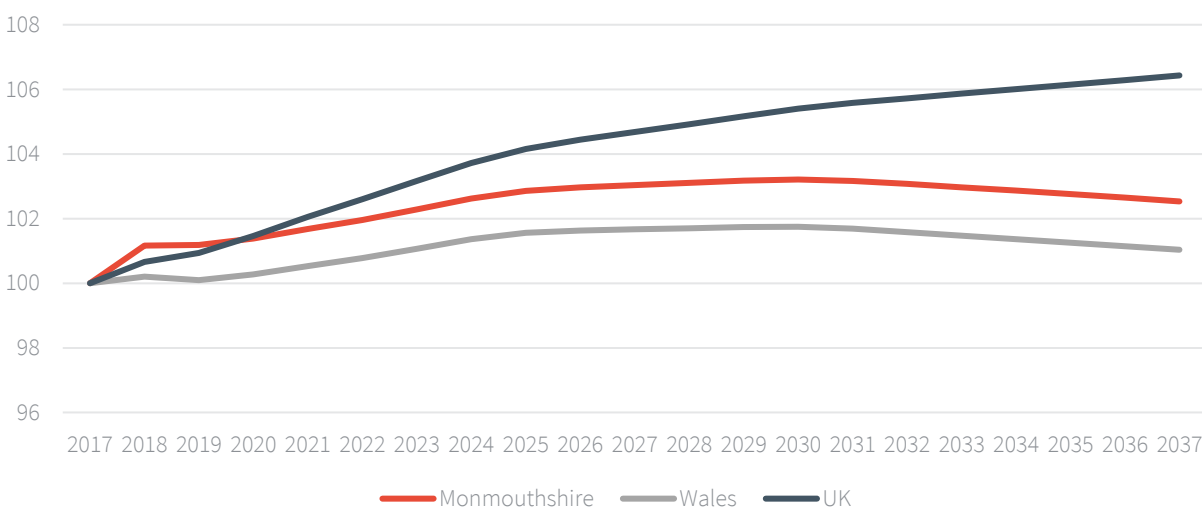
- Monmouthshire business activity is relatively low, with a very low and below average business start-up rate
- The largest sector by number of business is in Professional, scientific and technical activities
- Agriculture, forestry & fishing supports 16% of the businesses and in terms of enterprises numbers is almost 3.5 times the average for England & Wales
- Monmouthshire supports a smaller proportion of large and medium-size companies relative to the average for CCR
- In terms of total businesses per 10,000 of population Monmouth is the second highest in Wales.

Baseline Projections

While the snap-shot analysis indicates that the County's labour market and resident population are doing well, baseline projections into the next two decades suggest that Monmouthshire's ageing population is set to hinder and slow down economic growth.

Baseline projections on employment growth by Oxford Economics⁶, shown in Figure 36, indicate that Monmouthshire is expected to perform above the Welsh average (3% vs 1% growth), adding 1,155 new jobs by 2037, but well below the UK (6%), particularly from the second half of 2020s onwards. A closer look at the trend reveals that Monmouthshire's employment is also expected to peak in 2030 and decline thereafter.

Figure 36: Projected Indexed Employment Growth (2017-2037)



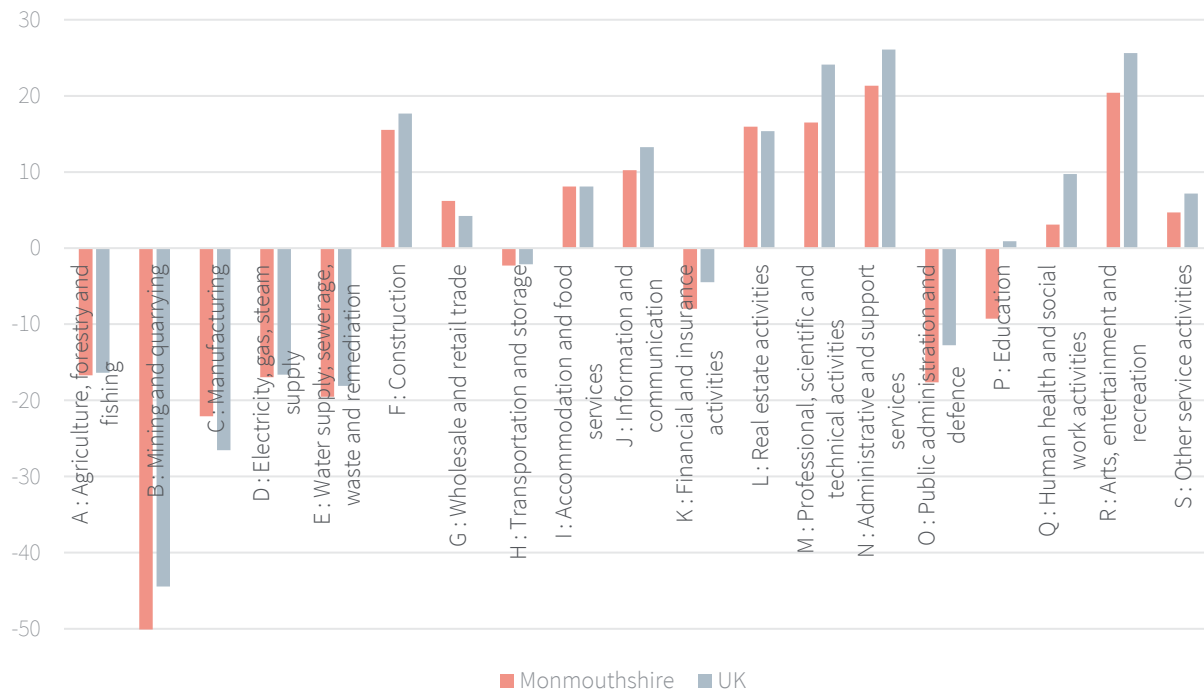
Data Source: Oxford Economics

The composition of employment change by sector is illustrated in Figure 38 below. Broadly, Monmouthshire's trend follows the UK economy, with a general expansion of the private sectors and employment decline in traditional primary sectors and manufacturing. Education is the only sector projected to behave against UK trend (which is predicted to decline by around 9%), whereas in Monmouthshire it is anticipated to experience growth of about 1%.

Professional Service Occupations, with the exclusion of finance which is forecast to decline, are projected to grow, with Administrative and Support Service Activities expected to be the sector registering the highest growth at 21%, despite having experienced decline in recent years. Similarly, Information and Communication, which underwent decline in previous years, is projected to increase by 10%. Conversely, Manufacturing, which experienced a 17% employment growth between 2009 and 2015, is forecast to undergo a 17% employment decline, mimicking, albeit less severely, the UK trend.

⁶ Oxford Economics are one of the most established and well regarded producers of economic forecasts in the UK and internationally, however all forecasts are trends based and should be regarded as indicative rather than as a precise prediction and as such should be reviewed periodically.

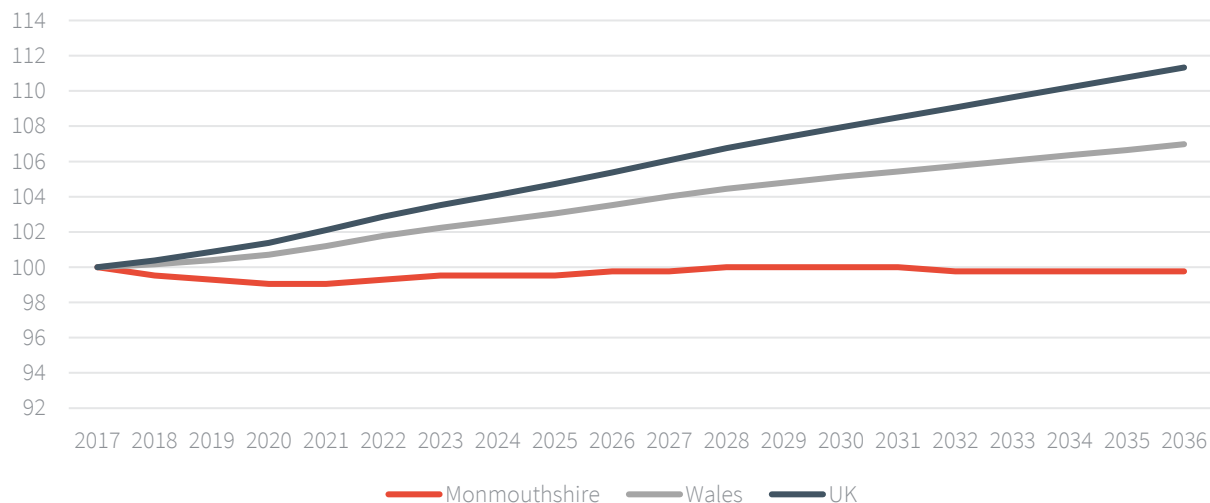
Figure 37: Projected % Employment Growth 2017-2037 by Sector



Data Source: Oxford Economics

The relatively low employment growth projections for Monmouthshire were challenged by considering another set of employment projections by Experian, illustrated in Figure 38, which were found to be even more negative for the County. As per Experian’s projections, employment growth is expected to stagnate/decline throughout the next two decades, placing Monmouthshire below both UK and Welsh projected growth levels.

Figure 38: Projected Indexed Employment Growth (2017-2036)

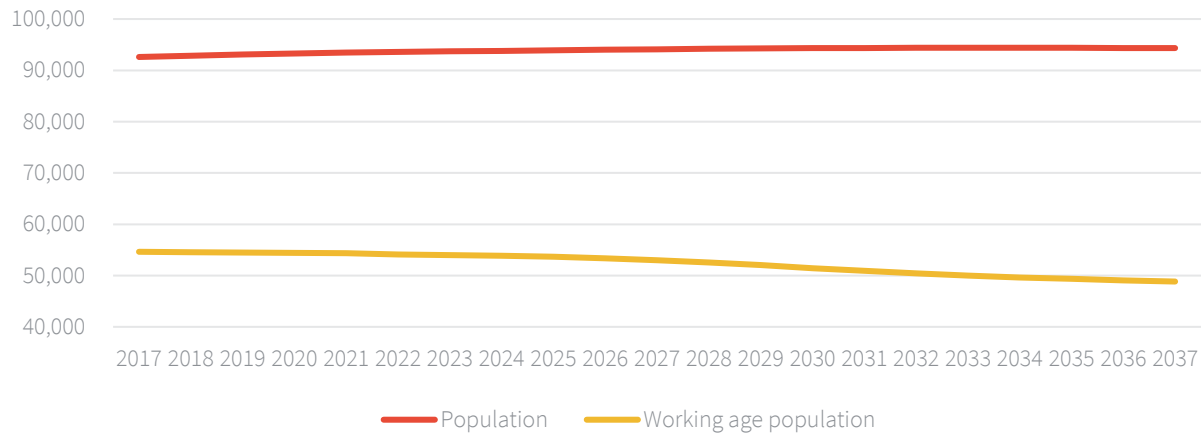


Data Source: Experian

In order to validate the hypothesis that the distinctive population-age structure of Monmouthshire may partially explain projected low employment growth, we also considered projections for population by Oxford Economics and Statistics for Wales.

As illustrated in Figure 39, while Monmouthshire population is expected to experience a very low growth of 2%, the working age population is projected to decline by 11% (or 5,800 people) over the same period.

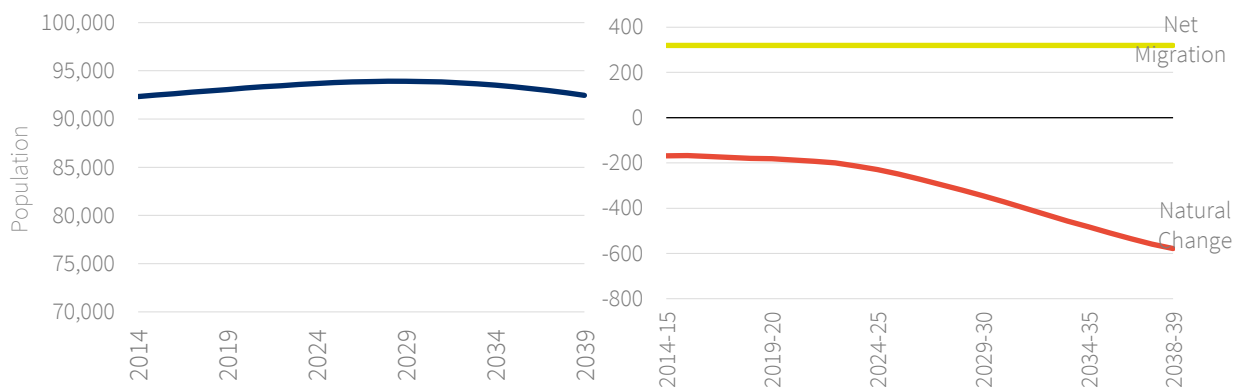
Figure 39: OE Population Projections (2017-2037)



Data Source: Oxford Economics

This is also confirmed by population projections by Statistics for Wales⁷ (based on past trends), shown in Figure 41, which attribute the largest decline to natural change, indicating that death rate is going to significantly outstrip birth rates to a level that cannot be offset by positive net migration.

Figure 40: Projected Population, Natural Change and Net Migration for Monmouthshire (2014/15-2038/39)



Data Source: Statistics for Wales

⁷ Statistics for Wales is the most reliable and widely cited source for considering future population change in Wales. In this case it's projection aligns with other independent sources including Oxford Economics. This is a trend based projection and does not take into account specific or arbitrary changes on the ground such as toll removal etc. which would be extremely difficult to quantify.

Key points:

A comprehensive approach was undertaken in this study to the analysis of baseline population and employment growth forecasts to 2037. Three established sources were considered: Oxford Economics, Experian and Statistics for Wales. The evidence points unequivocally to the fact that (without significant intervention) Monmouthshire's ageing population is set to hinder and slow down employment growth.

Populations structure is critical to economic growth in any area because the availability of working age population underpins the ability to increase economic activity and employment rates. In Monmouthshire an ageing population and shrinking working age population is limiting economic growth. This finding is supported by both sets of forecasts and the population projections produced by Statistics for Wales.

- Baseline projections to 2037 suggest that Monmouthshire's ageing population is set to hinder and slow down economic growth
- In terms of employment growth, Monmouthshire is expected to perform above the Welsh average, but well below the UK, particularly from the second half of 2020s onwards
- Professional service occupations, with the exclusions of finance, are projected to grow, with Administrative and Support Service Activities expected to be the sector registering the highest growth
- Manufacturing is forecast to undergo a 17% employment decline according to national trends
- Monmouthshire total population is expected to experience a very low growth, while the working age population is projected to significantly decline by 11% over the same period

What does all this mean for future growth

Demography, scale and a dual economy combine to drive low growth in Monmouthshire

Findings from the baseline analysis presented in this report suggest that **future growth in Monmouthshire is set on a low trajectory**. The County exhibits features of a dual economy structure, whereby the resident population is better off than the people who work in the area. The County is home to a relatively high-skilled, high-earning population, with over 50% of its residents being in managerial or professional occupations (SOC groups 1 to 3) however, the profile of people working in Monmouthshire is skewed towards the lower end of the skills/occupational spectrum. This is further evidenced by commuting flow patterns indicating that 40% of residents travel to work outside the County. The direction of flow of incoming commuters suggests that Monmouthshire imports workers that take up lower skill jobs in the County, while high-skill residents commute out for high-skill and high-paid jobs, mostly located in Newport, Cardiff and Bristol/South Gloucestershire. The low local availability of attractive employment opportunities is intensified by low business formation rates and concentrations. In addition, the age structure of the resident population is very different from that of a dynamic, high-growth economy, where we would observe a larger proportion of people in working-age groups, particularly in their 20s and 30s. Instead, only about a fifth of Monmouthshire residents are aged between 20 and 39 years old, while as much as 55% are aged 45 or above. The impact of the age structure on future growth will be particularly acute as the current relatively small working age population moves into retirement age. These demographic factors are also reflected in the baseline employment projections by both Oxford Economics and Experian.

Economic interventions can bring about modest gains

Economic policy or intervention has some potential to set the economy on a higher growth path, but, given the current low base, future growth rates would still be modest. Support to priority sectors, if effectively targeted and resourced, could lead to higher future growth, for example there maybe something to be gained from capturing the potential indicated by the ‘green shoots’ in the Professional Service Sector, which has been growing rapidly in recent years but is still under-represented in the County (suggesting the potential to capture further growth). In addition, the breakdown of employment forecasts at sectorial level points towards a potentially very sharp decline in manufacturing jobs, which could however be partially contained by targeting specific sectors and capitalising on policy alignment with Cardiff Capital Region’s and Welsh Government’s sector priorities. Furthermore, the recent data shows a resurgence in manufacturing employment in Monmouthshire and across Wales in general and it is possible that the forecasts overplay the decline locally.

If stronger growth is desired, then more radical intervention is required to tackle the demographic factors that underpin low growth

If transformational growth is to be delivered, supply side issues will need to be addressed. The provision of good quality housing in the right locations to attract economically mobile younger people is essential. Increased housing coupled with the creation of more attractive employment opportunities in accessible, well connected locations would enable greater retention of the existing high-skill workforce and also encourage the attraction of high-skilled workers from other parts of Cardiff Capital Region and potentially from Bristol City Region too. This will have the combined effect of increasing the scale of available labour force and increasing the economic activity rates by changing the demographic structure. Efforts to attract inward investment through the increased availability of high-quality employment sites and premises would not only help to drive local employment but contribute to the creation of a more fertile environment for businesses and in turn also increase the range of employment opportunities.

A multifaceted approach is required

It is important to note that just building new homes in itself doesn't directly increase local jobs, rather there needs to be a multifaceted approach with each element delivered in parallel to achieve sustainable growth, involving the following steps:

- 1- **Increasing housing provision targeted at economically active people and working households.** This will positively change the demographic structure by increasing the proportion that is working age. This will automatically raise economic activity rates and employment rates.
- 2- **Delivering new employment sites and premises.** Many of those new residents described above would inevitably travel outside the County to access work due to lack of opportunities locally, therefore in parallel new employment sites in well-connected locations would need to be delivered targeting higher value employment to meet the needs of both the future and existing Monmouthshire labour market.
- 3- **Undertaking both elements in parallel to optimise the impact.** The creation of local employment in the County without increasing the local working age population would just lead to much higher in-commuting and the County would lose much of the associated economic benefits because additional spend from the new jobs will leak out of the economy. Furthermore, it is unlikely that large employers would be attracted to Monmouth if there wasn't a sufficient local workforce.
- 4- **The final consideration is affordability,** new housing must be accessible to younger economically mobile people and working families in order to support growth.

SWOT analysis

<i>Strengths</i>	<i>Opportunities</i>
<ul style="list-style-type: none"> • Strong resident skill base with occupational profile skewed towards high-pay/high-skill jobs • Low unemployment and economic inactivity rates • Relative lack of deprivation across the County • High quality of life is an element of attraction for economically mobile individuals • A large Manufacturing sector growing despite overall decline across the UK • High growth in the manufacturing of food products • Proportional size of Science and Technology sector is significant (albeit low in absolute terms) • Internationally renowned, high-quality schools act as an attractor for economically mobile families • Benefit from belonging to the wider city-region policy context of Cardiff Capital Region 	<ul style="list-style-type: none"> • Removal of Severn Bridge toll will take down an economic barrier between Cardiff Capital Region and Bristol City Region, opening up opportunities to businesses and workforce by effectively enlarging the labour market • Growth in Professional, Scientific and Technical occupations • Manufacturing of electrical equipment is undergoing high growth and there is potential for it to become a sector of specialisation • High growth in transportation and storage - possibility to play a bigger role in the logistics sector of Cardiff Capital Region • Availability of employment land • Availability of land for new residential development • Capitalising on good connectivity of key settlements in the southern part of the County • A proportion of the existing high-skill residential workforce could be retained and commuter rates lowered if good jobs could be provided locally
<i>Weaknesses</i>	<i>Threats</i>
<ul style="list-style-type: none"> • Low job density • Low business formation rates • Population age structure not geared towards growth: relative absence of people aged 20s and 30s • 42% of total migration outflows are by people aged 15 to 29 • A dual economy with the population working in the area being relatively less skilled and doing lower paid jobs than the resident population • Around 40% of Monmouthshire's residents who are in employment work outside the County • Large proportion of public sector employment • Lack of large companies 	<ul style="list-style-type: none"> • High median age with a large proportion of people in and approaching retirement age • Overall population is projected to decline • Significant projected decline in working age population • Decline in some key 'knowledge economy' sectors such as Information and communication, Finance and Insurance, and Administration suggest Monmouthshire is losing jobs to other areas outside the County and this could hinder future growth • Projected decline in public sector employment • Projected further decline in Finance and Insurance activities • The business base is relatively small and threatened by forecast decline in some key sectors such as the public sector

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Future Monmouthshire

Economies of the Future

Skills Paper

April 2018

Prepared for Monmouthshire County Council

Introduction

This paper's discussion relative to skills shortages, skills provision, incentives and programmes takes into account multiple levels of governance, from the national to the regional and county level, in recognition of Monmouthshire's effective contribution to the wider regional labour market of Cardiff Capital Region, which is in turn inserted in the national skills development framework.

Given Monmouthshire's high proportion of skilled workers currently out-commuting, understanding opportunities for skilled employment and skills development at city region level is especially important to ensure Monmouthshire's residents will continue to reap opportunities outside the county. Most importantly, ensuring that Monmouthshire's workforce participating in the local labour market is equipped with the adequate skills sets will be crucial to meet the growth ambitions set out in the *Projections Report*. Consequently, the broader discussion on sectorial trends and associated skills demand for employment in manufacturing, services and the public sector, is of particular interest if growth aspirations are to be met.

Higher Education Providers and Skills & Training Programmes

This section does not set out to comprehensively map out all training opportunities and providers across Monmouthshire and the city region. Nonetheless, it outlines the principal ones that Monmouthshire's residents could benefit from.

Higher education is a devolved area in Wales. The Higher Education Funding Council for Wales (HEFCW) has regulatory powers to ensure that higher education institutions meet Welsh Government priorities around fee levels, fair access, quality of education and financial management. Higher education in Cardiff Capital Region is offered mainly through its 3 universities: Cardiff University, Cardiff Metropolitan University, and University of South Wales, with campuses in Cardiff, Newport and Pontypridd. Wales also has its own Open University and student finance system, Student Finance Wales, offering loans and grants to students wanting to study in Wales at undergraduate and postgraduate level.

Numerous skills and training programmes are available across Cardiff Capital Region. Business Wales lists 21 of these for Monmouthshire:

- Access to Work
- Active Inclusion
- Apprenticeships
- Financial Sector Graduate Programme
- Jobs Growth Wales
- Pre Employment Contact Centre Training
- ReAct
- Traineeships
- GO Wales
- Business Class
- Progress for Success
- Upskilling at Work
- Workplace Welsh
- WULF
- BOSS
- IIP
- Professional & Career Development Loan
- Qualifications Wales
- 20Twenty
- Agile Nation 2
- Higher Level Apprenticeships

Trends and Opportunities

Wales boasts a highly proficient workforce, as evidenced by the latest Employer Skills Survey (2015), where employers reported to be meeting their skills needs through the provision of training, with investment having increased since the 2013 and 2011 surveys. However, there remain challenges that need addressing, such as under-utilisation, retention difficulties and skills shortages.

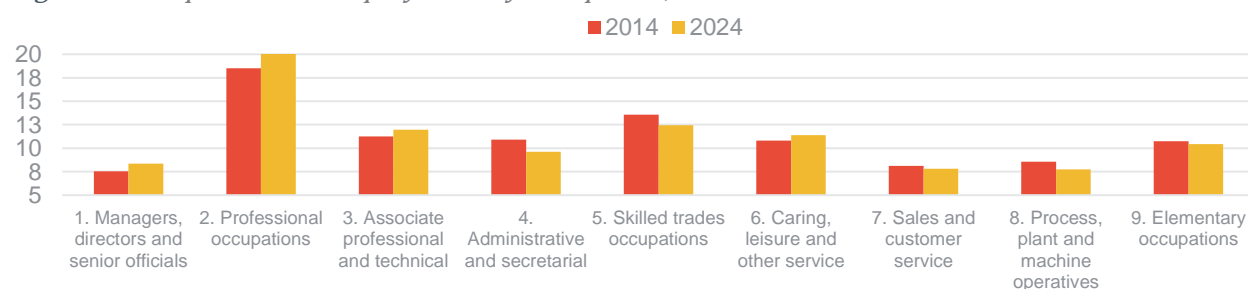
In order to identify skills needs in the workforce, the Welsh Government has established three Regional Skills Partnerships for Wales, which are tasked with producing Regional Employment and Skills Plans instrumental to supporting growth and key infrastructure projects in each region. South East Wales Learning, Skills and Innovation Partnership (LSkip) is the partnership responsible for driving investment in skills by developing responses based upon needs specific to South East Wales. The South East Wales Skills Observatory (SEWSO) was created to assist in the production and analysis of labour market information, regional skills plans and reviews of regional skills provision.

Sectorial considerations draw on the UK Commission for Employment and Skills' (UKCES) *Working Futures* study, a comprehensive and detailed projection model of the UK labour market for the period 2014 to 2024, which apply at national level. The more detailed sub-sectoral discussion is primarily based on LSkip's 2017 *Skills Plan for Cardiff Capital Region* (CCR). The plan recognises the need for CCR to develop a demand-led skills system that is driven by the needs of industry and to that end five sectors are prioritised for employment and skills support: Advanced Materials & Manufacturing; Construction; Financial, Legal & Professional Services; ICT/Digital - including creative industries and Human Foundational Economy.

Change in Wales' Occupational and Qualification profiles, 2014 - 2024

In terms of occupational trends, as illustrated in Figure 1, Working Futures predicts an increasingly strong bias towards skilled occupations in Wales, with Professional occupations being the group expected to see the greatest employment growth in absolute terms and Administrative & Secretarial occupations the group expected to see the greatest decline.

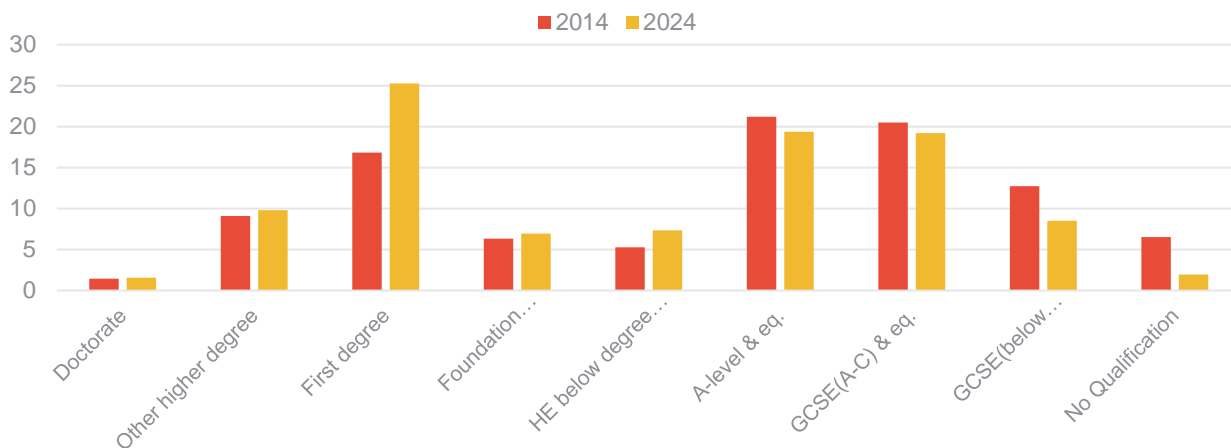
Figure 1: Composition of employment by occupation, % shares 2014 - 2024



Data Source: UKCES

The qualification profile (Figure 2) is expected to see growth in employment of workers with qualifications at Higher Education level and above, and a decrease in employment of workers qualified below Higher Education level. First Degree level is the qualification group expected to see the greatest increase in employment, taking over A-level & equivalent which in 2014 was the dominant employment group.

Figure 2: Composition of employment by qualifications, % shares 2014 - 2024



Data Source: UKCES

Manufacturing

Productivity growth in manufacturing is expected to lead to a continued decline in employment, with traditional roles being particularly affected mostly due to increasing automation in the sector. Future growth in manufacturing output is expected to be constrained by increasing competition from overseas manufacturers. On the other hand, global growth in advanced manufacturing demand will drive an increase in domestic activity, especially for industries in which the UK has specialised, such as aerospace, pharmaceuticals, and other technology-intensive industries.

The availability of *skilled labour* will be an important consideration for the employment outlook in the long-term. Employment for workers with qualifications below higher education is forecast to drop, especially for those holding No Qualifications, while employment for Higher Education qualifications, with the exception of Doctorate level, is expected to increase, particularly for First Degree level qualifications. In general, high demand for science, technology, engineering and mathematics (STEM subjects) graduates.

The Advanced Materials & Manufacturing sector is a priority sector for both the Welsh government and Cardiff Capital Region. At CCR level, it will be impacted by a number of projects:

Automotive

Skills demand areas:

Engineers/specialists/technicians in battery, software, power electronics, calibration and engine testing, quality, design, production, lightweight and composite, maintenance

Local drivers:

The opening of Aston Martin's manufacturing facility in St Athan, in the Vale of Glamorgan, with production starting in 2019/2020, is expected to create 750 high-skill jobs. About 40 miles from the Aston Martin factory, TVR, the sports car manufacturer, has plans to open a base in Ebbw Vale, which is expected to create 150 jobs. Ebbw Vale Enterprise zone is already a focal point for manufacturing in Wales, and in addition to this, the Welsh Government plans to create at least

1,500 jobs over the next ten years via the Tech Valleys project in Blaenau Gwent and surrounding areas.

Aerospace and Defence

Skills/occupations in high demand:

Engineers in: aerospace, mechanical, lightweight and composite, product development/product support, design, R&D, production and assembly; but also pilots, cabin crew, aviation medicine, air law experts, airline marketing

Local drivers:

There are over 60 large companies in Wales, 10 of which are in the Cardiff Capital Region: British Airways Avionics Engineering; British Airways Maintenance Cardiff; GE Aircraft Engine Services Ltd; General Dynamics UK Ltd; Nordam Europe Ltd; Qioptiq; TES Aviation Group; Sony UK Technology Centre and Zodiac Seats UK. Most of these companies are recognised as Tier One for procurement which increases opportunities to develop skills locally.

Food & Drink Manufacturing

Skills in high demand:

Science, technology, engineering and mathematics, food science, new product development, nutrition, enzymology, microbiology, pharmacology, toxicology, effects of manufacturing, processing and storage, food safety management

Local drivers:

Cardiff Metropolitan University's specialist Food Industry Centre has attracted significant investment (£11.9m) for research. Higher education institutions are being encouraged to work collaboratively with local further education institutions to expand their food and pharmaceutical courses. Since April 2018, food & drink companies based in Wales can benefit from the Food Skills Cymru funding package worth £3m for technical and staff development training. In 2017, the Welsh Government launched Project HELIX, a programme worth £21m to fund research in drink and food production, aimed at increasing production and reducing waste.

Compound Semiconductor

Skills in high demand:

Mathematics, processes for manufacturing, electronics, power electronics, physics, radio frequencies, computer & software, nanophotonics, semiconductor technology

Local drivers:

Cardiff is the heart of the Welsh Compound Semiconductor cluster, largely supported by Cardiff University and Cardiff based research bodies such as IQE, the Compound Semiconductor Technology Centre, the Institute, the Manufacturing Hub, and the Applications Catapult. At its announcement in 2015, it was estimated that the cluster would create 5,000 high-value jobs over the following 5 years.

Construction

Construction is expected to see the fast growth, in both output and employment terms, resulting from an anticipated increase in public and private investment, in particular in major infrastructure projects such as HS2 and Crossrail 2. Overall, regulatory policies are likely to encourage construction growth, particularly as firms seek innovative processes and technologies to adapt to environmental concerns.

The majority of workers in the construction industry hold qualifications at A-level and GCSE (grade A-C) & equivalent. This is set to remain the same but with a drop in employment for A-level and increase for GCSE (grade A-C). Across the skill spectrum however, employment is

expected to increase for workers with qualifications above A-level, with a peak in demand for workers holding a first degree.

Occupations expected to have high increases in demand:

Wood trades and interior fit-out, bricklayers, electrical trades and installation, non-construction professional, technical, IT and other office-based staff¹

Local drivers:

Across Cardiff Capital Region, there are a number of major construction projects in the pipeline which are expected to create jobs and raise demand for skills in the construction industry, among which:

- Work on the A465 and the new M4 relief road. These projects have a contractual commitment to a 50-mile travel-to-work area which has the potential to protect jobs in the Cardiff Capital Region. This radius includes Mid and West Wales and the West of England;
- Electrification and the Metro project will create demand for high-level construction, engineering, manufacturing, building and maintenance skills;
- Coleg y Cymoedd is investing significantly in a specialist training centre to meet future demand of the Metro and for the electrification of the Great Western Railway linked to the Construction Wales Innovation Centre;
- Subject to approval for the go-ahead, the Swansea Bay Tidal Lagoon and Cardiff-Newport Tidal Lagoon are going to raise demand for skills in marine power, engineering and construction;
- Hinkley Point C Nuclear Power Station in North Somerset will have a long-term impact on demand for skills in construction (steel fabrication), advanced materials and manufacturing (coded welding), and energy and environment sector. Cardiff and Swansea are inside the travel-to-work area for Hinkley Point C.

Business and other services

Business and other services are forecast to see a moderation in its rate of growth in output and employment compared with that seen between 2004 and 2014. Strong investment into the sector and technological progress are anticipated to be major factors driving long-term growth.

The sector is expected to see strong growth in labour demand in the long run; much of this demand is likely to remain in high-skilled and low-skilled roles (elementary occupations) continuing the trend of occupational polarisation, but with a substantial rise in demand for high-skill/high-pay occupations (SOC groups 1-3).

The sector is expected to see stronger employment of workers with qualifications at Higher education level and above. In particular, workers holding a first degree qualification will be in increasingly high demand.

Financial, Legal & Professional Services

Skills in high demand:

Digital, technical, adaptability, collaboration, problem solving, risk management, data analysis, big data, data science, coding, negotiating, active listening, questioning and interviewing

¹ CTBI

Local drivers:

Cardiff is home to the UK's only Enterprise Zone dedicated to Financial and Professional Services, which is playing a leading role in driving the Financial & Professional Services' sector growth. Following UK Government regionalisation of HM Revenue & Customs (HMRC), HMRC is moving into its new HQ in Cardiff in 2020, in the first phase of a public-sector hub that will employ 4,000. The sector is strongly backed up by a highly skilled workforce and higher education institutions, such as Cardiff University, Cardiff Metropolitan University, Open University in Wales and the University of South Wales, which are all offering a range of specialist financial and professional services qualifications.

Cardiff Capital Region is also a centre for internet comparison websites. GoCompare is based in Newport, Creditsafe and Confused.com (part of the Admiral Group) in Cardiff.

Cyber Security

Skills in high demand:

System security, secure servers and networks configuration, incident management, digital crime and digital forensic techniques

Local drivers:

The University of South Wales (USW) and the Welsh Government have joined forces to establish the National Cyber Security Academy (NCSA) at USW's Newport City Campus. The Academy has been set up to address a shortage of cyber security skills and develop the next generation of cyber security experts. Courses at the academy have a good offer of placement opportunities with industry, including companies such as Airbus and General Dynamics.

Advanced digital skills in Newport are also supported by the National Software Academy, an initiative supported by the University of Cardiff offering courses in software engineering and programming.

Public administration, health and education

Activity in *public administration, health and education* are dependent on political decisions, as government is a major component of this sector's demand. Current government commitments to reducing the deficit will constrain the sector's growth potential in the medium-term. Activity and employment in education services, especially within private education and higher education institutions, are forecast to increase.

The sector is expected to see a decrease in employment for nearly all qualifications level below first degree level, coupled with a spike in demand for workers with first degree level qualifications.

The National Health Service (NHS) employs 74,000 staff in all organisations in Wales (2015) and has three major offices in the Cardiff Capital Region, with the head office in Cardiff and smaller offices in Pencoed and Pontypool. The NHS is working hard to attract and retain jobs across Wales offering strong work and benefits packages. A not-negligible share of workforce in the health and social care sectors comes from other European countries; following the UK's exit from the European Union the sector is therefore expected to experience increased pressures and a potential skills shortage.

Trade, accommodation and transport

Although diverse in composition, the performance of the trade, accommodation and transport sector is largely dependent on the amount of activity in the wider economy. Employment growth in

the sector is expected to be mainly driven by jobs growth in retail, accommodation and catering. Retail, accommodation and food services, as well as transportation services are likely to be partly dependent on the outlook for tourism growth, which is expected to be modest.

The skills structure of the sector is typically skewed towards low-skills. The structure is expected to remain approximately the same but it will see a high increase in employment for workers holding qualifications at first degree level.

Primary Sector & Utilities

Activity is expected to grow modestly in Primary Sector & Utilities, leading to a fall in its share of total output. Agricultural output is expected to grow modestly, driven by changing consumer patterns. However, productivity improvements are expected to result in a fall in employment.

The skills structure of the sector has been dominated by workers with qualifications below Higher Education. The structure is not expected to undergo any dramatic shift, but it will see an increase in demand for qualifications at Higher Education level associated with a decrease in employment for workers with qualifications below Higher Education level.

Conclusions

Monmouthshire is endowed with a highly skilled resident population and benefits greatly from participation in the wider regional labour market of Cardiff Capital Region, where good universities and skilled employment opportunities create a healthy balance of skills supply and demand.

Historically, pathways for students pursuing academic options have been easier to navigate, while today more specific skills sets are required in order to stand out in the labour market and support emerging sectors and future economic growth. Moreover, with demand for skills set to increasingly favour high-skilled individuals - mostly educated at degree-level or above, ensuring that the County's residents access the wide-range of skills provision at both local and regional level is critical to the delivery of aspirational growth targets.

The labour market is becoming increasingly digital, and the mastering of digital skills, be these basic/intermediate or very advanced, is becoming a necessary requisite for labour market participation. Advanced digital skills, such as software development, cyber-security, and big data analytics, are ever more cross-sectorial thanks to their wide range of applications, and underpin most of the priority sectors and sub-sectors for Cardiff Capital Region and Monmouthshire. In particular, digital skills coupled with a STEM background constitute the skills package most in demand today, and even more so in the future. On the other hand, a skills set that comprises both technical, subject-specific skills and good relational, soft skills not only offers greater adaptability to future hard-to-predict changes in the job market, but it is also the skills set increasingly more in demand in the service sector, which is the fastest growing in the economy.

This paper provides a discussion around future sectorial trends, demand for skills and local opportunities, that taken all together should help frame the discussion of support around skills and training, to ensure that Monmouthshire's population continues to seize opportunities for upskilling available at city region level and is adequately equipped with the right skills set to support the County's ambitious growth targets.

**SUBJECT: MONMOUTHSHIRE REPLACEMENT LOCAL DEVELOPMENT PLAN
DRAFT ISSUES, VISION AND OBJECTIVES PAPER**

MEETING: ECONOMY AND DEVELOPMENT SELECT COMMITTEE

DATE: 14 FEBRUARY 2019

DIVISION/WARDS AFFECTED: ALL

1. PURPOSE

- 1.1 The purpose of this report is to inform the Economy and Development Select Committee of consultation feedback received to date, to seek any further feedback from this Committee, and to seek the Committee's endorsement of the Draft Issues, Vision and Objectives Paper which has been prepared in connection with the Monmouthshire Replacement Local Development Plan (LDP).

2. RECOMMENDATIONS:

- 2.1 To note the consultation feedback received to date.
- 2.2 To endorse the Draft Issues, Vision and Objectives Paper which has been prepared in connection with the Monmouthshire Replacement Local Development Plan (LDP), noting that the objectives and vision will continue to be refined as the LDP Preferred Strategy is drafted and consulted on.

3. KEY ISSUES:

- 3.1 A full review of the current Monmouthshire Local Development Plan (LDP) commenced in 2017, with the final Review Report published in March 2018. Based on the evidence contained in the Review Report, it was concluded that the LDP should be revised and that this should take the form of a full revision procedure. Council resolved in May 2018 to commence work on a replacement LDP for the County (excluding the area within the Brecon Beacons National Park).
- 3.2 The Replacement LDP will cover the period 2018-2033 and will be the statutory land use plan to support delivery of the Council's vision for the future of the County and its communities. The LDP will set out land use development proposals for the County and will identify where and how much new development will take place over the replacement Plan period. It will also identify areas to be protected from development and provide policies against which future planning applications will be assessed.
- 3.3 The Replacement LDP is being prepared in accordance with the Delivery Agreement (DA) which was agreed by WG in May 2018. The DA sets out the approach, timescales and consultation arrangements for the Replacement LDP. The agreed timetable will see the

Replacement LDP being adopted at the end of 2021/early 2022. Work has commenced on the Replacement LDP with the initial call for Candidate Sites and a targeted consultation on the draft Sustainability Appraisal (SA) Scoping Report having recently closed.

Purpose of the Draft Issues, Vision and Objectives Paper

- 3.4 The preparation of the issues, vision and objectives is one of the first key stages in Replacement Plan preparation process. The Draft Issues, Vision and Objectives Paper (attached as **Appendix 1**) sets out the identified issues (both challenges and opportunities) and proposed vision and objectives for the Replacement LDP. It sets out the key issues, challenges and drivers facing the County informed by a range of evidence, including the Monmouthshire Public Service Board (PSB) Well-being Plan, Monmouthshire Corporate Business Plan, LDP Review Report, LDP Annual Monitoring Reports and Replacement LDP Sustainability Appraisal Scoping Report, along with wider contextual factors such as national guidance/legislation and the Cardiff Capital Region City Deal and economic growth in the Bristol and South West region. It also sets out the revised draft LDP vision and objectives to address the issues/challenges identified. The Issues, Vision and Objectives Paper will subsequently inform the Replacement LDP Preferred Strategy which will be subject to statutory consultation later in 2019.

What are the LDP Issues, Vision and Objectives?

- 3.5 The issues relate to the key challenges, opportunities and drivers for the future of our County and communities (economic, environmental, social and cultural aspects). The objectives seek to address the identified issues, in the context of a land use planning framework, to achieve the vision. The key issues set out in the adopted Monmouthshire LDP have been reviewed to determine whether they remain relevant. New issues, challenges and drivers that have arisen since the adoption of the current LDP have also been identified. The issues have been informed by a wide range of evidence as noted in paragraph 3.4. The draft Replacement LDP issues are set out in **Section 2** of the Paper and are grouped in accordance with the Seven Well-being Goals as set out in the Well Being of Future Generations (Wales) Act 2015.
- 3.6 The role of the LDP vision is to clarify the core purpose of the Plan and provide a framework for developing the Preferred Strategy and future detailed policies. The vision will set the overarching context for Monmouthshire for the period up to 2033. The vision set out in the adopted LDP has been reviewed and updated to take account of the issues, challenges, opportunities and drivers facing the County and reflects key elements of the PSB Well-being Plan and MCC Corporate Business Plan. The draft Replacement LDP vision is set out in **Section 3** of the Paper.
- 3.7 The LDP objectives reflect and elaborate on the Plan's vision and set out how the issues/challenges identified as facing the area will be addressed through the Replacement LDP. The objectives identified should be capable of being addressed through the land use planning system. As with the issues and vision, the objectives set out in the adopted LDP have been reviewed/updated and reflect key elements of the PSB Well-being Plan and Corporate Business Plan. The Replacement LDP draft objectives are set out in **Section 4** of the Paper and are grouped in accordance with the Seven Well-being Goals. The links to both the issues and main policy themes of Planning Policy Wales (Edition 10 December 2018) are also identified.

Targeted Engagement

- 3.8 The identified issues and proposed vision and objectives are heavily drawn from/reflect the PSB Well-being Plan which was extensively consulted on in 2017 and resulted in contributions from more than 1,400 people. This approach reflects Welsh Government guidance which recognises the significance of local well-being plans as a key evidence source for LDPs (paragraphs 1.6 and 1.27, Planning Policy Wales Edition 10, December 2018). In view of this, and given that it is not a statutory requirement to consult on the LDP issues, vision and objectives, it is not considered necessary to undertake a full public consultation exercise on this initial stage of the plan preparation process. Discussions on the draft issues, vision and objectives have, however, taken place through an Economy and Development Select Committee workshop which was open to all Members, and Area Committee and Area Cluster meetings in January/February 2019, where views were sought on the Draft Paper. Feedback from these meetings has been noted, and where appropriate, will inform the issues, vision and objectives which will be set out in the Preferred Strategy. A summary of the comments received to date is attached at **Appendix 2**.¹

Next Steps

- 3.9 The Draft Paper will be updated, as appropriate, to reflect comments received from the targeted engagement. The Replacement LDP vision and objectives will continue to be refined prior to inclusion in the Preferred Strategy (Autumn 2019) to reflect the outcomes of further stakeholder engagement/consultation in relation to the growth options and a revised evidence base. The spatial element of the vision will also need to be determined following consultation on the LDP growth options and will be set out in the Preferred Strategy. The growth options and Preferred Strategy will be the subject of further engagement and political reporting, including an Economy & Development Select Committee workshop.

4. EQUALITY AND FUTURE GENERATIONS EVALUATION (INCLUDES SOCIAL JUSTICE, SAFEGUARDING AND CORPORATE PARENTING):

Sustainable Development and Equalities

- 4.1 The Planning and Compulsory Purchase Act (2004) sets out the requirement for all LDPs to be subject to a Sustainability Appraisal (SA). All stages of the Replacement LDP will be subject to an Integrated Sustainability Assessment (including Strategic Environmental Assessment (SEA), Well-being of Future Generations (WBFGE), Health Impact Assessment (HIA), Equality Impact Assessment (EqIA), and Welsh Language Impact Assessment (WLIA)), whose findings will be used to inform the development of the Replacement LDP strategy, policies and site allocations in order to ensure that the Plan will be promoting sustainable development.
- 4.2 A Future Generations Evaluation (including equalities and sustainability impact assessment) is attached to this report at **Appendix 3**.

¹ At the time of writing this report, not all Cluster meetings have been held. Feedback from these meetings will be reported to the Select Committee's meeting if possible, and will feed into the refinement exercise.

Safeguarding and Corporate Parenting

- 4.3 There are no safeguarding or corporate parenting implications arising directly from this report.

5. OPTIONS APPRAISAL

- 5.1 The LDP Manual (Edition 2, August 2015) states that strategic issues, vision and objectives should be included within the Preferred Strategy. The Issues, Vision and Objectives Paper will therefore play a key role in informing the Replacement LDP Preferred Strategy which will be made available for consultation later in 2019. The options in relation to the Draft Issues, Vision and Objectives Paper are limited to:

1. Amend the issues, vision and objectives set out in the Draft Paper, as appropriate, to reflect the comments received from targeted engagement undertaken via the LDP Member Workshop, Area Committees/Area Cluster meetings and Economy & Development Select Committee. Continue to refine the vision and objectives prior to inclusion in the Preferred Strategy (Autumn 2019) to reflect the outcomes of further stakeholder engagement/consultation associated with the growth options and a revised evidence base.
2. Accept the proposed issues, vision and objectives as set out in the Draft Paper with no amendments and use these as the basis for preparing the Preferred Strategy.
3. Do nothing in relation to the issues, vision and objectives set out in the Draft Paper.

6. EVALUATION CRITERIA

- 6.1 Option 1: Amend the issues, vision and objectives set out in the Draft Paper, as appropriate, to reflect the comments received from the targeted engagement and continue to refine the vision and objectives prior to inclusion in the Preferred Strategy. **This is the preferred option.** The purpose of targeted engagement on the Draft Paper was to seek views on the identified issues and proposed vision and objectives. It is, therefore, considered appropriate to amend the issues, vision and objectives, where relevant, to take account of the comments received from the engagement process. As noted above (3.9), the vision and objectives will need to be further refined to ensure that they accurately reflect and address the growth options and Preferred Strategy which are the next stages of the Replacement LDP process. In addition, the spatial element of the vision will need to be determined following consultation on the LDP growth options and will be set out in the Preferred Strategy.. This option is also considered appropriate having regard to the five ways of working as set out in the Well-being of Future Generations Act.
- 6.2 Option 2: Accept the proposed issues, vision and objectives as set out in the Draft Paper with no further amendments and use these as the basis for preparing the Preferred Strategy. The purpose of targeted engagement on the Draft Paper was to seek views on the identified issues and proposed vision and objectives. Accordingly, it would not be appropriate to disregard the comments received from this engagement process. In addition, as explained above, the vision and objectives will need further refinement prior to inclusion in the Preferred Strategy to reflect the outcomes of further stakeholder engagement/consultation associated with the growth options and a revised evidence base. This option should therefore be discounted.

- 6.3 Option 3: Do nothing in relation to the issues, vision and objectives set out in the Draft Paper. As noted above, the LDP Manual (Edition 2, August 2015) requires the strategic issues, vision and objectives to be included within the LDP Preferred Strategy which will be made available for consultation towards the end of 2019. As the Issues, Vision and Objectives Paper will play a key role in informing the Replacement LDP Preferred Strategy, and that the Replacement LDP is essential to shape and enable the future growth of the County, it is not considered appropriate to do nothing. This option should therefore be discounted.

Recommendation:

- 6.4 Based on the reasons above, Option 1 (amend the issues, vision and objectives set out in the Draft Paper, as appropriate, to reflect the comments received from the targeted engagement and continue to refine the vision and objectives prior to inclusion in the Preferred Strategy) is the preferred option.

7. REASONS:

- 7.1 Under the Planning and Compulsory Purchase Act (2004), Planning (Wales) Act 2015 and associated regulations, Local Planning Authorities are required to ensure that their LDPs are kept up-to-date. The Council has commenced preparation of a Replacement LDP for the County (excluding the area within the Brecon Beacons National Park) which will cover the period 2018-2033. The preparation of the Issues, Vision and Objectives is one of the first key stages in Replacement Plan preparation process. As part of the LDP pre-deposit proposals, a Preferred Strategy must be prepared, which in accordance with the LDP Manual (Edition 2, August 2015) should include the strategic issues, a vision and objectives. This Paper will play a key role in informing the Replacement LDP Preferred Strategy which will be made available for consultation later in 2019.

8. RESOURCE IMPLICATIONS:

- 8.1 Officer time and costs associated with the preparation of the Replacement LDP Draft Issues, Vision and Objectives Paper. These were within the existing Planning Policy budget and carried out by existing staff.

9. CONSULTEES:

- SLT
 - Cabinet
 - A Member Workshop was held on January 22nd 2019 to discuss/ seek views on the Draft Issues, Vision and Objectives Paper.
 - Area Committees (Sevenside, Central Monmouthshire, Lower Wye and North Monmouthshire).
 - Area Cluster Meetings (Monmouth, Usk, Caldicot and Chepstow).
 - Economy & Development Select Committee
- Feedback to date from the above is included in Appendix 2 to this report.

10. BACKGROUND PAPERS:

- PSB Well-Being Plan (February 2018)
- Monmouthshire Corporate Business Plan 2017-2022 (February 2018)
- Monmouthshire Local Development Plan Review Report (March 2018)

- Monmouthshire Local Development Plan Annual Monitoring Reports, 2014-15, 2015-16, 2016-17, 2017-18
- Monmouthshire Replacement LDP Sustainability Appraisal Scoping Report (December 2018)

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Monmouthshire Replacement Local Development Plan

DRAFT ISSUES, VISION AND OBJECTIVES PAPER

January 2019



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1. Introduction

Purpose of this paper

- 1.1 This Paper will play a key role in informing the Replacement Local Development Plan (LDP) Preferred Strategy which will be made available for consultation towards the end of 2019. It sets out the key issues, challenges and drivers facing the County informed by a range of evidence, including the Monmouthshire Public Service Board (PSB) Well-being Plan (February 2018), Monmouthshire Corporate Business Plan 2017-2022 (February 2018), LDP Review Report (March 2018), LDP Annual Monitoring Reports (2015-2018) and Replacement LDP Sustainability Appraisal Scoping Report (December 2018), along with wider contextual factors. It also sets out the Replacement LDP draft vision and objectives to address the issues, challenges and drivers identified.

Background

- 1.2 A full review of the Monmouthshire Local Development Plan (LDP) commenced in 2017, with the final Review Report published in March 2018. Based on the evidence contained in the Review Report, it was concluded that the LDP should be revised and that this should take the form of a full revision procedure. The publication of the LDP Review Report triggered the process through which a replacement LDP will be prepared and adopted for the County.
- 1.3 The Council is currently in the process of preparing a Replacement LDP for the County (excluding the area within the Brecon Beacons National Park) which will cover the period 2018-2033. The Replacement LDP will set out land use development proposals for the County and will identify where and how much new development will take place over the replacement plan period. It will also identify areas to be protected from development.
- 1.4 The Replacement LDP will be prepared in accordance with the Delivery Agreement (DA) which was agreed by WG in May 2018. The DA sets out the proposed approach, timescales and consultation arrangements for the Replacement LDP. The agreed timetable will see the Replacement LDP being adopted at the end of 2021/early 2022. Work has commenced on the Replacement LDP with the initial call for Candidate Sites and a targeted consultation on the draft Sustainability Appraisal Scoping Report both having recently closed.
- 1.5 The preparation of the Issues, Vision and Objectives is one of the first key stages in Replacement Plan preparation process. This Paper identifies the key issues, challenges and drivers facing the County and sets out the draft vision and objectives for the Replacement LDP. It should be noted that there are some elements of the current adopted LDP that are still considered relevant and as such this is a review process as opposed to writing a completely new Plan.

- 1.6 As part of the LDP pre-deposit proposals, a Preferred Strategy must be prepared¹. The LDP Manual (Edition 2, August 2015) notes that strategic issues, a vision and objectives should be included within the Preferred Strategy. This Paper will play a key role in informing the Replacement LDP Preferred Strategy. The Preferred Strategy will be made available for consultation at the end of 2019. This paper sets out the key issues, challenges and drivers for the County informed by a range of evidence including the PSB Well-being Plan, Corporate Business Plan 2017-2022, LDP Review Report, LDP Annual Monitoring Reports and Replacement LDP Sustainability Appraisal Scoping Report, along with wider contextual factors such as national guidance/legislation and the Cardiff Capital Region City Deal. It also sets out the Replacement LDP draft vision and objectives to address the key issues, challenges and drivers identified. In accordance with Welsh Government guidance this stage of the plan preparation process draws heavily on and reflects the PSB Well-being Plan (paragraphs 1.6 and 1.27 Planning Policy Wales (PPW) Edition 10, December 2018).

What are the Issues, Vision and Objectives?

- 1.7 The **issues** relate to the key issues, challenges and drivers that the Replacement Plan is seeking to address (economic, environmental, social and cultural aspects) and form the basis of the LDP objectives. As noted above, the issues are informed by a wide range of evidence, including the Monmouthshire PSB Well-being Plan, Corporate Business Plan 2017-2022, LDP Annual Monitoring Reports (2015 – 2018) and LDP Review Report, along with wider contextual factors such as national guidance/legislation and the Cardiff Capital Region City Deal. The issues, challenges and drivers are also informed by key sustainability matters which must be developed as part of the Sustainability Appraisal/Strategic Environmental Assessment (SA/SEA) of the Replacement LDP. The sustainability issues must be addressed in order for the Plan as a whole to be considered sustainable. The sustainability issues are developed utilising baseline information, which describes the position of a number of different economic, social, cultural and environmental characteristics relating to the County at a set point in time (the baseline). This information is set out in the Replacement LDP SA Scoping Report (December 2018).
- 1.8 The role of the LDP **vision** is to clarify the core purpose of the Replacement Plan and provide a framework for developing the Preferred Strategy and future detailed policies. It should set out how Monmouthshire will develop, change or be conserved and provide the land use expression of this (Paras 6.1.1 and 5.2.3.1 respectively, LDP Manual Edition 2, 2015). However, the spatial element of the vision cannot be determined at the current stage as the Preferred Strategy is not yet established.
- 1.9 The LDP **objectives** reflect/elaborate on the Plan's Vision and set out how the issues, challenges and drivers identified as facing the area will be addressed through the LDP. The objectives identified should be capable of being addressed through the land use planning system. The objectives have regard to those set out in the Monmouthshire PSB Well-being Plan² and other corporate plans and are formed having undertaken a

¹ In accordance with Regulation 2 of The Town and Country Planning (Local Development Plan) (Wales) Regulations 2015

² Paras 1.6 and 1.27 of Planning Policy Wales edition 10

review of the wider national, regional and local policy context, baseline evidence and SA Scoping Report. This has enabled us to understand the wider context and identify the main issues facing the County and set out objectives to address the issues. This should identify how economic, social, cultural and environmental considerations are balanced to deliver sustainable development in Monmouthshire over the replacement plan period.

Replacement LDP Proposed Issues, Vision and Objectives

- 1.10 The Issues, Vision and Objectives have been updated since the Adopted LDP (2011 – 2021) to reflect the current position within Monmouthshire. Of note, a review of the adopted LDP Issues, Vision and Objectives was undertaken to support the LDP Review Report. The Monmouthshire PSB Well-being Plan and Monmouthshire Corporate Business Plan 2017-2022 (Incorporating Well-being Objectives) were both published in February 2018. Both of these documents provide well-being objectives and are key contributors to the update of the issues, vision and objectives for the Replacement LDP. Planning Policy Wales Edition 10 (December 2018) supports this approach, recognising the significance of local well-being plans as a key evidence source for LDPs (paragraphs 1.6 and 1.27).
- 1.11 The Monmouthshire Well-being Plan was prepared by the Public Service Board (PSB) which is made up of four statutory members namely; Monmouthshire County Council, Aneurin Bevan University Health Board, South Wales Fire and Rescue Service and Natural Resources Wales. Other organisations are also invited, in Monmouthshire this includes; Public Health Wales, Gwent Police, Police and Crime Commissioner for Gwent, Monmouthshire Housing Association, Melin Homes and voluntary organisations represented through the Gwent Association of Voluntary Organisations. While this work has been carried out on behalf of the Public Service Board rather than Monmouthshire County Council specifically, it surfaces important issues for the County as a whole that must be considered.
- 1.12 The Corporate Business Plan is produced by Monmouthshire County Council. This utilises the contributions made to the Well-being Plan along with issues raised most frequently to County Councillors and issues reported to Community Hubs, the contact centre and on the My Monmouthshire App. The Corporate Business plan 2017-2022 sets out the Council's four Well-being Objectives:
- Provide children and young people with the best possible start in life.
 - Develop opportunities for communities and businesses to be part of a thriving and well-connected County.
 - Maximise the potential of the natural and built environment for the well-being of current and future generations.
 - Maximise the potential in our communities to develop the well-being of people throughout their lives.
- 1.13 The Adopted LDP Sustainability Issues have also been updated and are published in the Replacement LDP Sustainability Appraisal (SA) Scoping Report. The SA Scoping

Report includes a wide range of social, cultural, environmental and economic baseline data. The Sustainability Issues have also been considered and incorporated as appropriate in this document, but are not repeated in their entirety.

- 1.14 The Issues and Objectives have been grouped in accordance with the Seven Well-being Goals as set out in the Well-being of Future Generations (Wales) Act 2015. The Well-being Goals are set out in Appendix 1. It should be noted that many of the issues and objectives cross a number of well-being goals, and have, therefore, been grouped as a best fit with the goals. However, the cross-cutting themes should not be overlooked.

Consultation on Replacement LDP Proposed Issues, Vision and Objectives

- 1.15 As stated above, the proposed issues, vision and objectives are heavily drawn from and reflect the PSB Well-being Plan which was extensively consulted upon by the Public Service Board in 2017 and resulted in contributions from more than 1,400 people. This approach reflects Welsh Government guidance which recognises the significance of local well-being plans as a key evidence source for LDP preparation (paragraphs 1.6 and 1.27, PPW10, Edition 10, December 2018). In view of this, and given that it is not a statutory requirement to consult on the LDP issues, vision and objectives, it is not considered necessary to undertake a full public consultation exercise on this initial stage of the plan preparation process. Discussions on the draft issues, vision and objectives will, however, take place through the Area Committee and Area Cluster meetings in January 2019, where views will be sought on the Draft Paper. A LDP Member Workshop will also take place in January 2019 to seek views on the draft issues, vision and objectives. Feedback from these meetings will be noted and considered, and where appropriate, will inform the final issues, vision and objectives. The Replacement LDP issues, vision and objectives will be reported Economy and Development Select Committee on 14th February 2019, and subsequently finalised prior to inclusion in the Preferred Strategy (autumn 2019). Any comments received at the Area Committee and Area Cluster meetings/by 14th February will be reported to the Economy and Development Select Committee.

2. Replacement LDP Draft Issues

2.1 In order to assist in the development of the LDP vision and objectives, a number of key issues have been identified that will need to be addressed in the Replacement LDP. The existing LDP issues have been reviewed to determine whether they remain relevant. New issues, challenges and drivers that have arisen since the adoption of the LDP have also been identified, including those contained in the PSB Well-being Plan, as well as wider contextual factors. Accordingly, the issues have been updated, where appropriate, to reflect the current position within Monmouthshire. The Issues have been grouped in accordance with the Seven Well-being Goals as set out in the Well-being of Future Generations (Wales) Act 2015 to ensure that they are framed within this context (Appendix 1 refers). This allows for the appreciation of social, economic and environmental matters to be embedded into the Plan. Further detail/background information on the identified issues, challenges and drivers is set out in Appendix 2.

Table 2.1: Draft Issues and Opportunities

Draft Issue	How can the Replacement LDP Influence these Issues?
A Prosperous Wales (Well-being Goal 1)	
Employment & Economy	
<ul style="list-style-type: none"> • There has been a slow uptake of employment land in the past. There is subsequently a need to consider whether existing available land is suitably located and fit for purpose for appropriate growth sectors. There is also a need to consider potential future demand for employment land along with Council aspirations for innovation across Monmouthshire in light of the recent removal of the Severn Bridge tolls and the ambitions and opportunities associated with the Cardiff Capital Region City Deal (CCRCD). (Issue 1) • While unemployment is low there is a net-outflow of commuters, both levels of out commuting and distances travelled to work are relatively high. There is a need to provide 	<ul style="list-style-type: none"> • The Replacement LDP can encourage a vibrant economy within the County, specifically by ensuring that sufficient employment sites are suitably located in attractive, accessible and sustainable locations and are of an appropriate size and type to meet the needs of the market/key employment/growth sectors, including, through support of start-up and growing businesses to help diversify the economy. • The Replacement LDP can aim to ensure that there is a portfolio of sites available which is appropriate to market conditions and the needs of the Monmouthshire economy along with the wider Cardiff Capital Region. Consideration can be given to using CPO powers to ensure sites come forward.

Draft Issue	How can the Replacement LDP Influence these Issues?
<p>support for inward investment and local employment growth/opportunities. (Issue 2)</p> <ul style="list-style-type: none"> • Wage levels available for local jobs are lower than the average for Wales and the UK. Evidence continues to suggest that the income for economically active women who both live and work within the County is significantly lower than that of men within the same category. This coupled with high property prices makes it difficult for young people and future generations to live and work locally. Additional employment opportunities for young people are required to help reduce the numbers of this age group leaving the County. (Issue 3) • Monmouthshire has a dual economy. The qualifications, skills and earnings of the residents are above the regional and national average, however, for those working in the area earnings are lower and employment is relatively less skilled. (Issue 4) • The increasing ageing population and shrinking working age population (the relative absence of 20-40 year olds and our median age of 48 years, compared to a median age of 34 years in Cardiff) is limiting employment growth within Monmouthshire and social sustainability of communities. This is exacerbated by limited Job opportunities and affordable housing availability (Issue 5). • There is a need to sustain and regenerate the County’s rural economy. There is current uncertainty regarding the impact of Brexit on agricultural subsidies. (Issue 6) • Higher levels of those in employment work at home compared to the Welsh average. Efficient digital infrastructure is 	<ul style="list-style-type: none"> • The Replacement LDP can ensure that, wherever possible, jobs and homes are located in close proximity to each other to provide greater opportunity for people to work and live locally. The Replacement LDP can also ensure a range and choice of homes are available, in new developments, particularly where there is a need for affordable housing, to assist in regaining a balanced population • The Replacement LDP needs to take a role in strengthening the local economy, ensuring an appropriate economic base to enable people to live and work in the County. • The Replacement LDP can contain policies that support the diversification of the rural economy. • The Replacement LDP can help to address digital exclusion by seeking to support the improvement of rural broadband and delivery of high speed connections. • The Replacement LDP must contain policies that protect the vitality and viability of existing town centres, providing additional retail opportunities where appropriate, including in relation to the regeneration of Caldicot and Usk, and ensure that the distribution of development supports these main centres in order to retain retail expenditure. • The Replacement LDP will enable a review of the towns’ primary shopping frontages (PSF) and related policies to have regard to the changing role of the high street. • The Replacement LDP can contain policies that encourage tourism development while at the same time ensuring that the natural and built heritage that attracts visitors to the area is preserved and enhanced.

Draft Issue	How can the Replacement LDP Influence these Issues?
<p>essential to support home working and the general connectivity of the County’s rural areas and to support economic growth³. (Issue 7)</p> <ul style="list-style-type: none"> • The role of high streets is changing due to out of town retail centres, the increase in internet shopping, changing shopping habits (e.g. top-up grocery shopping) and austerity and as a result vacancy rates in some of the County’s retail centres have increased. There is a leakage of expenditure out of the County and a need to protect the County’s retail centres from out of town developments. (Issue 8) • Tourism plays a significant part in the Monmouthshire economy particularly in assisting in the diversification of the rural economy and in sustaining the County’s historic town centres. Visitor numbers to both serviced and non-serviced accommodation are significantly higher in Monmouthshire compared to the South East Wales average and have increased by 14.5% since 2012 (Monmouthshire STEAM Report 2017). Staying visitors generate a higher economic impact than day visitors (£146 million compared to £58 million in 2017: Monmouthshire STEAM Report 2017) highlighting the continued need for visitor accommodation. (Issue 9) 	

³ The current situational analysis of Superfast Broadband Next Generation Access (NGA) coverage in the Cardiff Capital Region, based on the OMR/SAPC undertaken prior to the Superfast Cymru Phase 2 (SFC2) Procurement, paints a stark picture in terms of the current lack of coverage in Monmouthshire in comparison to our other nine Local Authority partners - currently 12.56% of premises in Monmouthshire are NOT covered in comparison to 3-4% in the other nine Local Authorities within the region.

Draft Issue	How can the Replacement LDP Influence these Issues?
A Resilient Wales (Well-being Goal 2)	
Air	
<ul style="list-style-type: none"> While air pollution is not a major problem in Monmouthshire it can cause significant problems for people's health. The greatest problems associated with air quality in the County are caused by vehicle emissions, this is particularly apparent in the two Air Quality Management Areas in the County at Usk and Chepstow. (Issue 10) 	<ul style="list-style-type: none"> The Replacement LDP can seek to minimise any polluting effects that might arise from new development in the County by encouraging appropriate patterns of development that seek to reduce the usage of private vehicles and to allow for increased walking, cycling and use of public transport (active travel). It can also take measures to ensure that the location of new development does not worsen conditions in existing Air Quality Management Areas or result in new ones.
Green Infrastructure, Biodiversity & Landscape	
<ul style="list-style-type: none"> Monmouthshire is renowned for its beautiful landscapes and major biodiversity resources. The best of these assets should be protected, managed and enhanced for future generations. (Issue 11) There is a need to improve connectivity within the landscape through protecting and improving existing wildlife networks and corridors, including both green and blue infrastructure, and creating new linkages to allow species to move and adapt to climate change impacts. GI is also beneficial to human well-being. (Issue 12) 	<ul style="list-style-type: none"> The Replacement LDP should ensure that new development is sustainable, does not cause harm to international, national and locally protected sites and species and, that where appropriate, necessary mitigation measures are taken to avoid any such adverse effects The Replacement LDP must ensure biodiversity is considered in any development in order to protect any interest on the site and encourage biodiversity enhancements where necessary. It will be necessary to undertake a Habitats Regulations Assessment of the Replacement LDP to ensure that any cumulative effects of development in Monmouthshire and adjoining areas does not result in harm to internationally designated nature conservation sites. The Replacement LDP can contain policies to protect and enhance the green and blue infrastructure networks across the County.

Draft Issue	How can the Replacement LDP Influence these Issues?
Flooding	
<ul style="list-style-type: none"> Parts of the County are vulnerable to flooding. Climate change is likely to increase the risk of flooding, as well as many other risks, so mitigating climate change and building resilience is crucial. (Issue 13) 	<ul style="list-style-type: none"> The Replacement LDP must ensure new development is located away from flood risk areas and has a role to play in terms of reducing the risk from present day flood risk, as well as in relation to climate change adaptation and resilience.
Minerals & Waste	
<ul style="list-style-type: none"> Monmouthshire has made good progress in the promotion of the recycling and composting of waste, and the elimination of waste to landfill. Monmouthshire also has to make an appropriate contribution to the regional requirement for waste management. (Issue 14) Mineral extraction plays a limited role in Monmouthshire's economy but there is a need to safeguard the County's resources in order to make an appropriate contribution to the sustainable supply of aggregates to the South Wales economy as a whole. (Issue 15) 	<ul style="list-style-type: none"> The Replacement LDP can identify sites that are appropriate for waste management or disposal facilities to meet local or regional requirements. The Replacement LDP can ensure that mineral resources are safeguarded and exploited in a sustainable fashion that also enables Monmouthshire to meet its obligation to make a contribution to the requirements of the South Wales region.
Land	
<ul style="list-style-type: none"> There are limited opportunities for brownfield development within the County's existing urban areas. (Issue 16) Monmouthshire has a significantly high percentage of best and most versatile agricultural land (i.e. Grade 1, 2 or 3a). While there is a need to conserve these resources, there are limited opportunities within the County for brownfield development and development on lower grades of agricultural land (i.e. Grade 3b, 4 and 5). (Issue 17) 	<ul style="list-style-type: none"> The Replacement LDP will seek to prioritise the use of previously developed land where opportunities arise. The Replacement LDP should seek to protect best and most versatile agricultural land whilst at the same time recognising that this will not always be possible where there is an overriding need for development.

Draft Issue	How can the Replacement LDP Influence these Issues?
A Healthier Wales (Well-being Goal 3)	
Human Health	
<ul style="list-style-type: none"> • While Monmouthshire performs relatively well on indicators relating to health, there is a need to promote opportunities for healthy living particularly in the context of an ageing population. (Issue 18) • While an ageing population brings many opportunities, it also brings challenges and increases in the number of people living with long term conditions can create pressures on existing health care provision. (Issue 19) • On the whole Monmouthshire’s residents have good access to public open space, however, there are deficiencies in many of the County’s communities in relation to community and recreational facilities. This can contribute to rural isolation in certain areas. (Issue 20) • Obesity is a growing problem throughout Wales. Although obesity rates in Monmouthshire are below the Welsh average consideration should be given to promoting healthy lifestyles. (Issue 21) 	<ul style="list-style-type: none"> • The Replacement LDP can assist in creating a healthier Monmouthshire by ensuring sufficient policies are in place to support the provision of blue and green infrastructure and retention of the existing resource. • The Replacement LDP can provide policies to ensure health care provision is supported. • The Replacement LDP can affect the provision of public open space and recreation by protecting, where necessary, existing open space and facilities as well as requiring new development to make a contribution to the provision of additional facilities.
A More Equal Wales (Well-being Goal 4)	
Population	
<ul style="list-style-type: none"> • Monmouthshire is a predominantly rural county with almost half (47%) of the total population living in wards defined as being in rural areas (i.e. with a population of less than 10,000). (Issue 22) 	<ul style="list-style-type: none"> • The Replacement LDP must decide on the level of growth appropriate for Monmouthshire and the spatial distribution of this growth between different urban and rural communities to address the challenges we face (including demography and affordability), balancing the greater sustainability of urban

Draft Issue	How can the Replacement LDP Influence these Issues?
<ul style="list-style-type: none"> The population of Monmouthshire has shown a steady increase over a ten year period to 2011, although more recently the rate of growth has slowed. This growth is being fuelled by in-migration. (Issue 23) Monmouthshire has a significantly higher proportion of older age groups (65+) and lower proportion of young adults (16 – 44) compared to the Welsh average, the sharpest decline of which is in the working age population. The relative absence of young adults is often linked to the affordability of housing across the County and has an impact on future prospects of economic growth. (Issue 24) 	<p>settlements with the difficulties of maintaining services in rural areas.</p> <ul style="list-style-type: none"> There is a need to achieve a more balanced population structure to ensure there is a sufficient population of working aged people to support the Monmouthshire economy and to provide more opportunities for young people to both to stay within and move to the area. The Replacement LDP needs to take a role in strengthening the local economy, ensuring an appropriate economic base to enable people to live and work in the County and ensuring that demand for homes is satisfied by providing good quality affordable homes for those who need them. The Replacement LDP can help to address issues surrounding the ageing population through facilitating the provision of accessible services supported by connective infrastructure to meet local population growth needs.
A Wales of Cohesive Communities (Well-being Goal 5)	
Housing	
<ul style="list-style-type: none"> Average house prices in the County are high at £302,229 when compared to the Welsh average of £186,256 (Hometrack October 2018). The most significant increases have been experienced in recent years. There is a need to consider the potential impact on house prices arising from the recent removal of the Severn Bridge Tolls, the ambitions and opportunities associated with the Cardiff Capital Region City Deal and the South East Wales Metro, together with the economic growth of the Bristol/SW region and the opportunities for Monmouthshire as a border county and its 	<ul style="list-style-type: none"> The Replacement LDP will affect the amount of housing to be provided by both deciding on overall levels of growth/spatial options and by setting thresholds and proportions to determine the amount of this residential development that is affordable. It can also ensure a range and choice of homes are available in new developments and influence the type, tenure and nature of housing built within the County. The Replacement LDP will have to resolve the amount of housing to be built in rural areas, balancing the need to sustain rural settlements by supporting services and enabling people to

Draft Issue	How can the Replacement LDP Influence these Issues?
<p>location between Bristol and Newport and Cardiff, the ‘Great Western Cities’. (Issue 25)</p> <ul style="list-style-type: none"> • House prices are also high in relation to earnings and there is a pressing need for additional affordable housing in the County in both urban and rural areas to assist in ensuring a balanced population. (Issue 26) • A range and choice of housing is needed to both meet the needs of an ageing population and to attract and retain the younger age groups. (Issue 27) • There is limited scope for significant or long term expansion of the existing urban areas within the County due to a mix of physical, environmental and policy constraints. (Issue 28) 	<p>remain in their communities with the need to protect the countryside and ensure sustainable patterns of development.</p> <ul style="list-style-type: none"> • The Replacement LDP process must balance the extent to which the Main Towns and Severnside area can continue to accommodate further growth in the medium to long term against the potential for a new settlement in order to facilitate the creation of sustainable resilient communities.
Infrastructure	
<ul style="list-style-type: none"> • Poor access to community facilities and declining local service provision is a particular issue for rural communities. (Issue 29) • Limited public transport, particularly in rural areas makes it harder to access jobs, services and facilities, which could be exacerbated by rising fuel prices. There are nevertheless future opportunities for investment in public transport through the Cardiff Capital Region City Deal and advances in technology. (Issue 30) • There is a need to ensure that adequate physical and digital infrastructure is provided to support new development. This includes: broadband infrastructure, the provision of sufficient water and sewerage infrastructure, transport infrastructure 	<ul style="list-style-type: none"> • The Replacement LDP can consider allocating land for housing and employment in rural areas in an attempt to sustain existing rural community facilities and services, weighing this against the need to avoid unsustainable travel patterns. • The Replacement LDP can help ensure adequate provision of infrastructure to serve new development and can contain support policies to enable improvements or enhancements for existing development, e.g. provision of electric vehicle charging (EVC), broadband connectivity and renewable energy. • The Replacement LDP will contain allocations and policies to support the priorities of the emerging local transport plan and cycling strategy

Draft Issue	How can the Replacement LDP Influence these Issues?
and active travel to support non-car modes of travel. (Issue 31)	
A Wales of Vibrant Culture & Thriving Welsh Language (Well-being Goal 6)	
Cultural Heritage	
<ul style="list-style-type: none"> • Monmouthshire has a significant built heritage resource in terms of scheduled ancient monuments, listed buildings, conservation areas, historic parks and gardens and archaeologically sensitive sites that, together with their settings, require protection and enhancement. (Issue 32) • There is a need to protect, promote and enhance the best of our landscape and heritage which are an important part of our culture and play a key role in tourism and economic growth, along with providing support for the Welsh Language to ensure it is safeguarded and supported. (Issue 33) • The distinctive settlement pattern of Monmouthshire relates to historic towns and villages and their relationship with the surrounding rural areas. There has nevertheless been substantial suburban expansion in the South of the County, particularly adjacent to the M4 corridor. This area is likely to receive further pressure for growth due to the recent removal of the Severn Bridge Tolls and the ambitions and opportunities associated with the Cardiff Capital Region City Deal and the South East Wales Metro, together with the economic growth of the Bristol/SW region and the opportunities for Monmouthshire as a border county and its location between 	<ul style="list-style-type: none"> • The Replacement LDP can contain measures to preserve and enhance the built heritage and best of the historic environment of Monmouthshire. • The Replacement LDP can help protect, promote and enhance the best of our landscape and heritage which are an important part of our culture and play a key role in tourism and economic growth, along with providing support for the Welsh Language to ensure it is safeguarded and supported. • Community involvement provides an opportunity to seek views on how Welsh language and culture interact with LDP policies and proposals. The future of the Welsh language depends on a range of factors beyond the planning system, particularly education, demographic change, community activities and a sound economic base to maintain thriving sustainable communities. The planning system can contribute to the future well-being of the Welsh language by creating conditions for well-paid employment opportunities and a range of quality housing options resulting in sustainable communities. Planning policies must not seek to control housing occupancy on linguistic grounds⁴.

⁴ Technical Advice Note 20 paragraphs 1.7.3, 2.2 and 2.6.4

Draft Issue	How can the Replacement LDP Influence these Issues?
<p>Bristol and Newport and Cardiff, the ‘Great Western Cities’. (Issue 34)</p>	<ul style="list-style-type: none"> • The Replacement LDP can play a key role in promoting good quality sustainable design that will enable new development and future growth to respect and enhance the existing distinctive character of Monmouthshire.
<p>Landscape</p>	
<ul style="list-style-type: none"> • Monmouthshire has a rich and diverse landscape that brings wider benefits to the local economy particularly through tourism and health and well-being. Monmouthshire as a whole incorporates parts of the Wye Valley Area of Outstanding Natural Beauty, the Brecon Beacons National Park and the Blaenavon Industrial Landscape World Heritage Site. (Issue 35) 	<ul style="list-style-type: none"> • The Replacement LDP must seek to protect high quality landscapes throughout the County, paying particular attention to those contained in the Wye Valley Area of Outstanding Natural Beauty, the Blaenavon World Heritage Site and in the setting of the Brecon Beacons National Park.
<p>A Globally Responsible Wales (Well-being Goal 7)</p>	
<p>Climatic Factors</p>	
<ul style="list-style-type: none"> • The volume of traffic in the County has continued to increase, up nearly 10% in the seven years to 2017 (<i>StatsWales, August 2018</i>). There is a pattern of relatively long travel to work distances, high levels of car ownership and reliance on the private car. (Issue 36) • Small Scale and Local Authority wide Renewable Energy schemes are generally supported across Monmouthshire, however, a more proactive approach should be undertaken for schemes of a local authority scale (i.e. 5MW - 25MW). (Issue 37) 	<ul style="list-style-type: none"> • Concerns about climate change require that efforts are made to reduce the reliance on the private car and the consequent impact of carbon dioxide emissions. The Replacement LDP needs to consider appropriate patterns of development that promote a safe, efficient, accessible and sustainable transport system that provides opportunities for walking and cycling and encourages active travel. • A renewable energy assessment will be undertaken to support the Replacement LDP with areas of potential identified in the plan for local authority and strategic renewable energy development, as appropriate.

3. Replacement LDP Draft Vision

3.1 The role of the LDP vision is to clarify the core purpose of the Plan and provide a framework for developing the Preferred Strategy and future detailed policies. The vision will set the overarching context for Monmouthshire for the period up to 2033. The vision set out in the adopted LDP has been reviewed and updated to take account of the issues, challenges and drivers facing the County and reflects key elements of the PSB Well-being Plan and Corporate Business Plan.

3.2 It is not considered appropriate, at this stage, to provide any detail in relation to the spatial implications of achieving the vision as the spatial distribution of future growth/development is not yet known. This will be determined following consultation on the LDP growth options and will be published as part of the Preferred Strategy.

3.3 The Proposed Monmouthshire Replacement LDP Vision

By 2033 Monmouthshire will be a place where:

- (1) People are living in sustainable, resilient communities that support the well-being of current and future generations and are more inclusive, cohesive, prosperous, vibrant and balanced demographically. Both urban and rural communities are well-connected with better access to local services and facilities, open space and employment opportunities.**
- (2) Communities and businesses are part of an economically thriving and well-connected County.**
- (3) The best of the County's built heritage, countryside, landscape and environmental assets has been protected and enhanced to retain its distinctive character.**
- (4) People enjoy healthier, more sustainable lifestyles with improved access to public transport and active travel opportunities and have a minimised impact on the global environment.**

The spatial implications of achieving this Vision will be that by 2033: *As noted above this will be completed following consultation on the LDP options and published as part of the Preferred Strategy.*

4. Replacement LDP Draft Objectives

4.1 In order to achieve the vision and address the key issues a number of draft objectives have been produced for the Replacement LDP (as set out in Table 4.1), building upon the Adopted LDP objectives and the well-being objectives set out in the Monmouthshire Local Well-being Plan. As with the issues, the draft objectives have been grouped in accordance with the Seven Well-being Goals as set out in the Well-being of Future Generations (Wales) Act 2015. The table also sets out the links between the draft objectives and the LDP issues and the main policy themes identified in Planning Policy Wales (PPW) Edition 10. Table 4.2 further demonstrates the alignment of the draft objectives with the Seven Well-being Goals.

Table 4.1 – Replacement LDP Draft Objectives

Headline	LDP Objective	LDP Issues addressed	Main PPW10 theme
A Prosperous Wales (Well-being Goal 1)			
Economic Growth/ Employment	To support a thriving, well-connected, diverse economy, which provides a range of good quality employment opportunities to enable and encourage indigenous business growth and attract inward investment and competitive innovative businesses in appropriate growth sectors, including through the provision of start-ups and grow on spaces.	1, 2, 3, 4, 5, 6, 7, 24	Productive and enterprising places
Retail centres	To sustain and enhance the main County towns of Abergavenny, Chepstow, Monmouth and Caldicot as vibrant and attractive retail centres serving their own populations and those of their surrounding hinterlands, along with increasing the potential customer base through future growth whilst recognising that the role of these centres is evolving.	8	Active and social places
A Resilient Wales (Well-being Goal 2)			
Green Infrastructure, Biodiversity and Landscape	To protect, enhance and manage Monmouthshire's natural environment and ecosystems. This includes, the Wye Valley Area of Outstanding Natural Beauty, the County's other high quality and distinctive landscapes, protected sites, protected species and other biodiversity interests, along with the connectivity between them by creating new linkages for them to adapt while at the same time maximising benefits for the economy, tourism, health and well-being.	11, 12, 35	Distinctive and natural places

Headline	LDP Objective	LDP Issues addressed	Main PPW10 theme
Flood risk	To ensure that new development takes account of the risk of flooding, both existing and in the future, including the need to avoid inappropriate development in areas that are at risk from flooding or that may increase the risk of flooding elsewhere and the need to design development to appropriately manage surface water run-off.	12, 13	Distinctive and natural places
Minerals and Waste	To meet the County's regional and local obligations to manage and dispose of its waste and to safeguard and exploit its mineral resource in a sustainable fashion.	14, 15	Productive and enterprising places
Land	To promote the efficient use of land, including the need to maximise opportunities for development on previously developed land, whilst recognising that brownfield opportunities are limited in Monmouthshire.	16, 17	Strategic and spatial choices
Natural resources	To promote the efficient use of natural resources including providing increased opportunities for water efficiency, energy efficiency, renewable energy, recycling and waste reduction.	14, 15, 31, 37	Productive and enterprising places
A Healthier Wales (Well-being Goal 3)			
Health and Well-being	To improve access for all ages to recreation, sport, leisure activities, open space and the countryside and to enable healthier lifestyles.	18, 20, 21, 33, 35	Active and social places
A More Equal Wales (Well-being Goal 4)			
Demography	To increase opportunities for the younger population to both live and work within Monmouthshire to assist in ensuring a balanced demography.	2, 3, 4, 5, 24	Active and social places
A Wales of Cohesive Communities (Well-being Goal 5)			
Housing	To provide a level of housing that is sufficient to provide a wide ranging choice of homes both for existing and future residents, while ensuring that local needs for appropriate, affordable and accessible housing are met as far as possible, particularly in towns but also in rural areas, so long as such housing can assist in building sustainable balanced communities.	23, 25, 26, 27, 28	Active and social places
Place-making	To promote good quality sustainable design and layouts that enhance the character and identity of Monmouthshire's settlements and countryside; create attractive, safe and	1, 11, 12, 18, 20, 27, 28, 29, 30,	Strategic and spatial choices

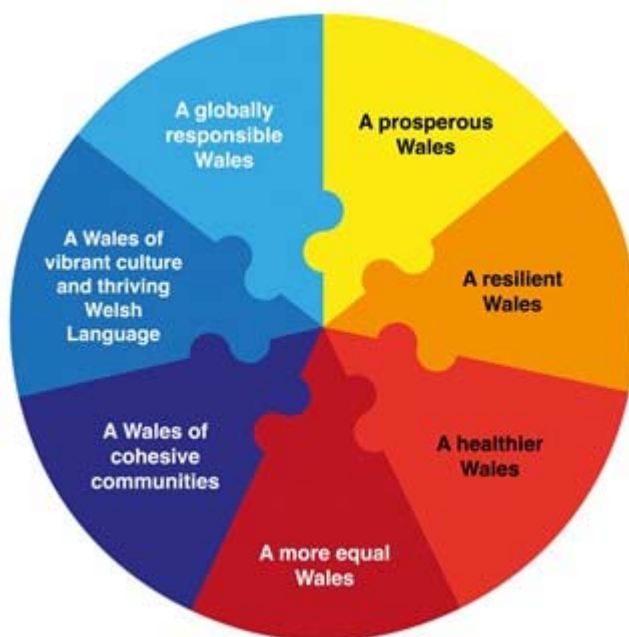
Headline	LDP Objective	LDP Issues addressed	Main PPW10 theme
	accessible places to live, work and visit; and promote people's prosperity, health, happiness and well-being.	31, 32, 34, 35	
Communities	To build sustainable resilient communities where people have good access to employment, shops, housing, public transport, active travel, healthcare, community and cultural facilities.	1, 5, 7, 8, 9, 18, 20, 25, 26, 27, 29, 30, 31, 33, 35	Strategic and spatial choices
Rural Communities	To sustain existing rural communities as far as possible by providing development opportunities of an appropriate scale and location in rural areas in order to assist in building sustainable rural communities and strengthening the rural economy.	6, 7, 20, 22, 26, 29, 30, 34	Productive and enterprising places
Infrastructure	To ensure that appropriate physical and digital infrastructure (including community and recreational facilities, sewerage, water, transport, schools, health care and broadband etc.) is in place or can be provided to accommodate new development.	12, 19, 20, 31	Productive and enterprising places
Accessibility	To seek to reduce the need to travel by promoting a mix of land use allocations and improved internet connectivity, and where travel is required, to provide opportunities for active travel and integrated sustainable transport.	10, 30, 36	Active and social places
A Wales of Vibrant Culture & Thriving Welsh Language (Well-being Goal 6)			
Culture, Heritage and Welsh Language	To protect and enhance the built environment, culture and heritage of Monmouthshire for the future while maximising benefits for the economy, tourism and social well-being, including supporting and safeguarding the Welsh Language.	9, 32, 33, 34, 35	Distinctive and natural places
A Globally Responsible Wales (Well-being Goal 7)			
Climate Change	To ensure that new development can adapt to the impacts of a changing climate, promote opportunities for carbon reduction and decrease impact on air quality in order to reduce the contribution made by residents, businesses and industry in Monmouthshire to climate change.	10, 12, 36, 37	Distinctive and natural places

Table 4.2 – Matrix of Replacement LDP Draft Objectives against the Well-being Goals

	Prosperous Wales	Resilient Wales	Healthier Wales	More equal Wales	Wales of cohesive communities	Wales of vibrant culture and thriving Welsh Language	Globally responsible Wales
Housing							
Economic Growth/Employment							
Demography							
Place-making							
Retail centres							
Communities							
Rural Communities							
Accessibility							
Health and Well-being							
Culture, Heritage and Welsh Language							
Infrastructure							
Green Infrastructure, Biodiversity and Landscape							
Flood risk							
Climate Change							
Natural resources							
Minerals and Waste							
Land							

APPENDIX 1

Seven well-being goals of the Well-being of Future Generations (Wales) Act 2015



Goal	Description of the goal
A prosperous Wales	An innovative, productive and low carbon society which recognises the limits of the global environment and therefore uses resources efficiently and proportionately (including acting on climate change); and which develops a skilled and well-educated population in an economy which generates wealth and provides employment opportunities, allowing people to take advantage of the wealth generated through securing decent work
A resilient Wales	A nation which maintains and enhances a biodiverse natural environment with healthy functioning ecosystems that support social, economic and ecological resilience and the capacity to adapt to change (for example climate change).
A healthier Wales	A society in which people's physical and mental well-being is maximised and in which choices and behaviours that benefit future health are understood.
A more equal Wales	A society that enables people to fulfil their potential no matter what their background or circumstances (including their socio economic background and circumstances).
A Wales of cohesive communities	Attractive, viable, safe and well-connected communities.
A Wales of vibrant culture and thriving Welsh language	A society that promotes and protects culture, heritage and the Welsh language, and which encourages people to participate in the arts, and sports and recreation.
A globally responsible Wales	A nation which, when doing anything to improve the economic, social, environmental and cultural well-being of Wales, takes account of whether doing such a thing may make a positive contribution to global well-being.

Source: Well-being of Future Generations (Wales) Act 2015

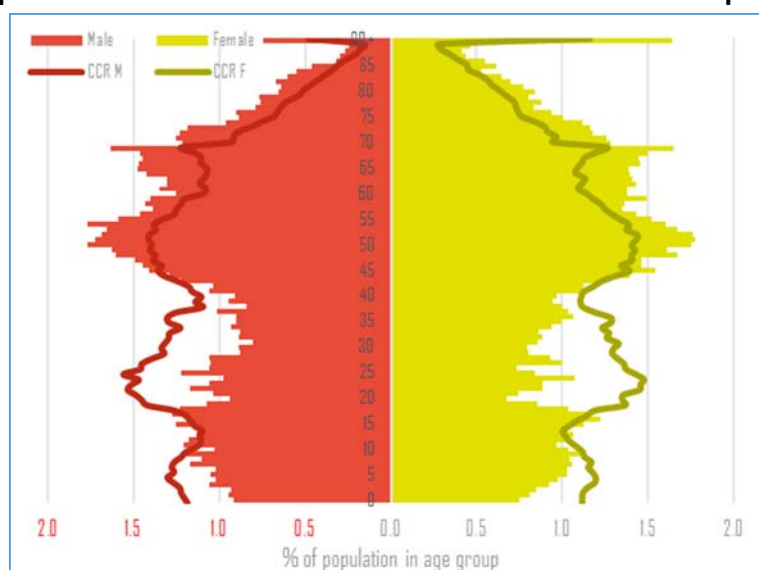
APPENDIX 2

Monmouthshire's Key Issues, Challenges and Drivers

Demography

- The population of Monmouthshire has shown a steady increase over the ten year period to 2011, increasing from 84,885 to 91,323 (7.58%) over the period 2001 - 2011 (Census 2011). The population has continued to grow since 2011, albeit at a slower rate. This growth is being fuelled by in-migration.
- Whilst the rate of population growth has slowed compared to the relatively high levels experienced in the 10 years to 2011, population levels continue to exceed those anticipated from the 2008-based projections which were used as the starting point for assessing the adopted LDP housing requirement. The latest Mid-Year Estimates (2017) give Monmouthshire a population of 93,590 in 2017. This latest population estimate for 2017 is higher than the earlier 2021 population estimates from both the 2008-based projections (91,923) and the most recent 2014-based projections (93,341).
- Monmouthshire has a significantly higher proportion of older age groups (65+) and lower proportion of young adults (16 – 44) compared to the Welsh and Cardiff Capital Region (CCR) average. The age structure of Monmouthshire's population and its relation to the rest of CCR is illustrated in the chart below. This clearly indicates the low presence of people aged 20-40 in the County, which are usually correlated to dynamic economies. On the other hand, there is a significant proportion of population in older age groups, particularly between the age of 50 and 70, indicating that the County is largely home to a population in retirement age and are not economically active.

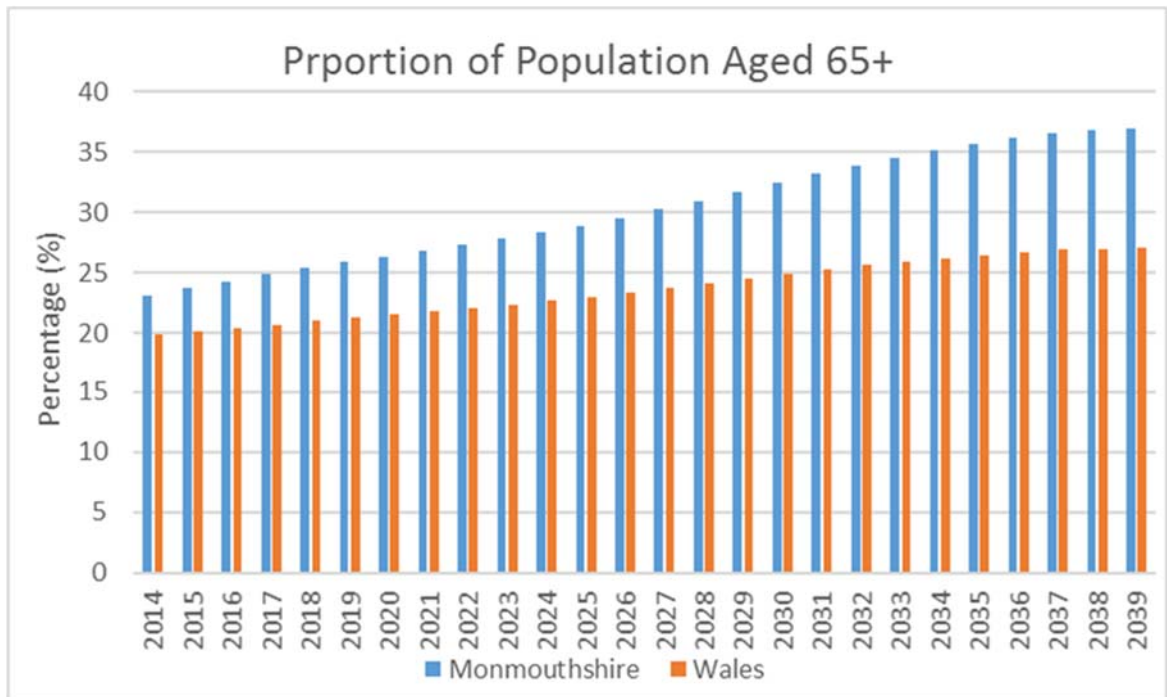
Figure 1: Population Structure 2016 - Monmouthshire vs Cardiff Capital Region



Source: ONS Population Estimates

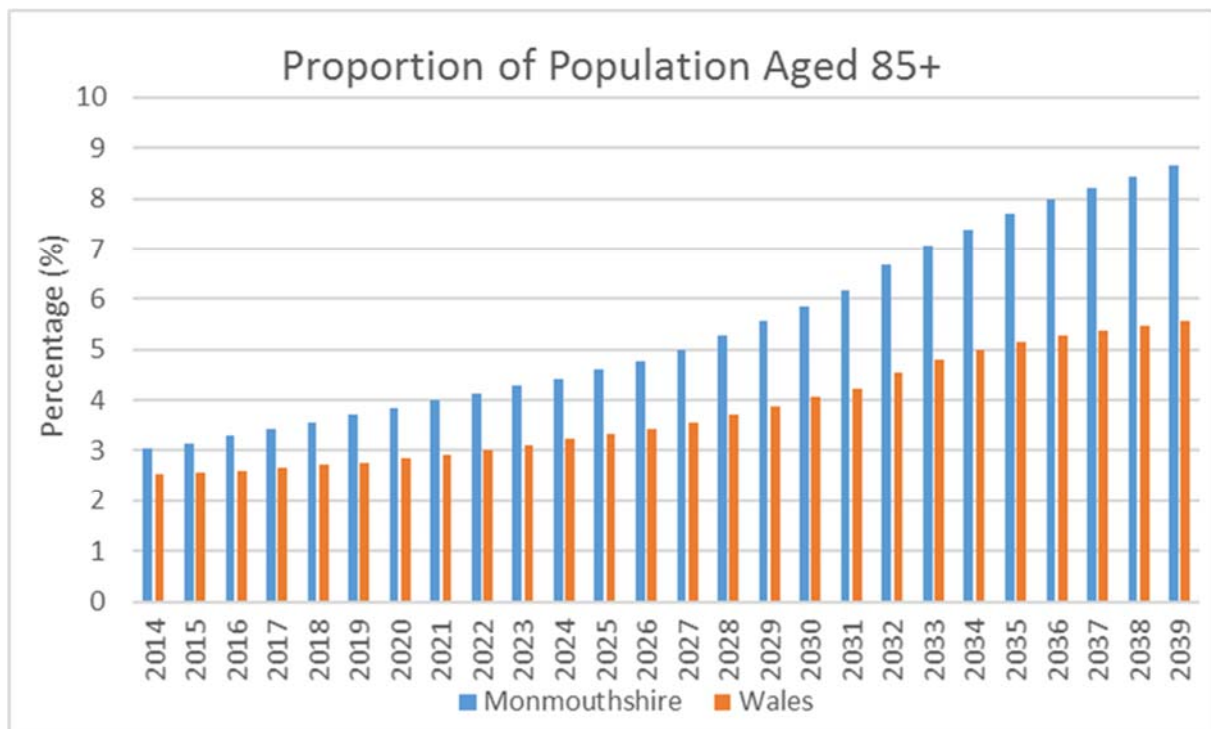
- Monmouthshire has a median age of 48, compared to a median age of 34 in Cardiff (ONS population estimates). The increasing ageing population and shrinking working age population is limiting employment growth within Monmouthshire and the social sustainability of communities. The relative absence of young adults is often linked to the affordability of housing across the County and has an impact on future prospects of economic growth.
- This trend is projected to continue as shown in the graphs below.

Figure 2: Population Estimates Ages 65+ in Wales and Monmouthshire



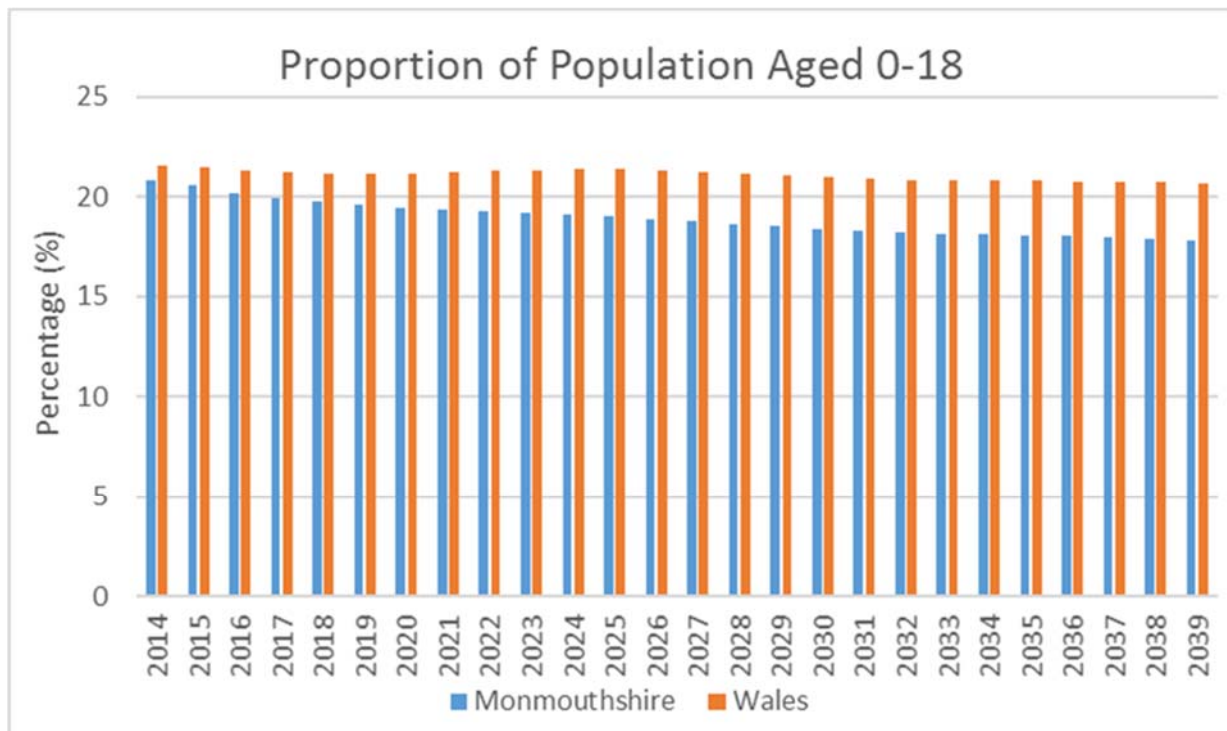
Source: StatsWales

Figure 3: Population Estimates Ages 85+ in Wales and Monmouthshire



Source: StatWales

Figure 4: Population Estimates Aged 0-18 in Wales and Monmouthshire



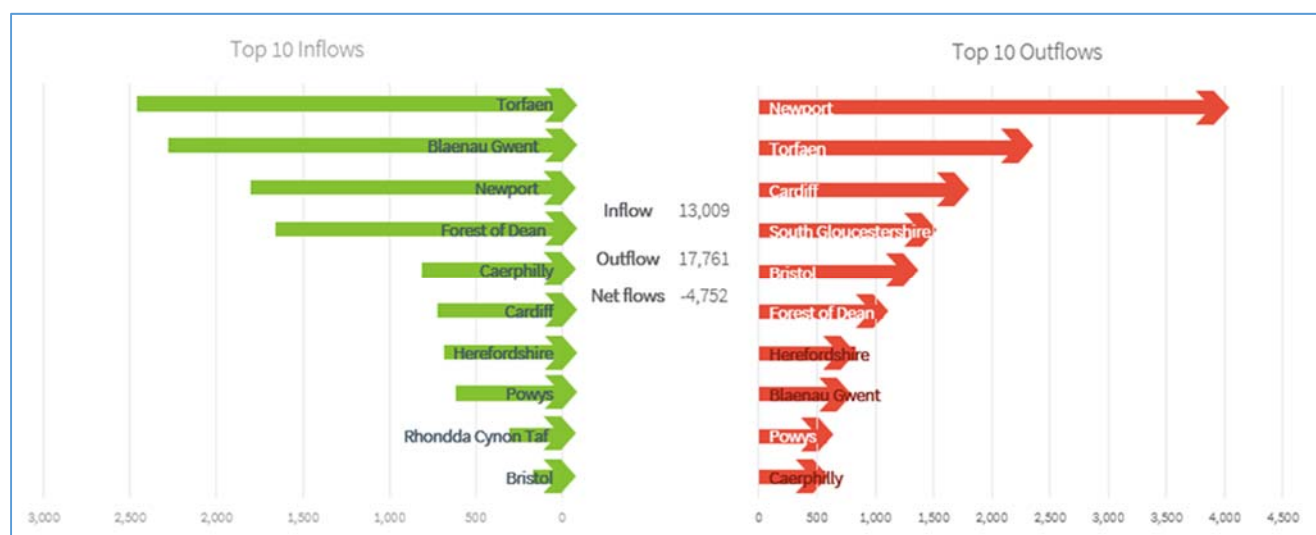
Source: StatsWales

Economy

Employment and Commuting

- The labour market profile of Monmouthshire's residents is healthy despite its high economic inactivity levels. Unemployment rate stood at 2.2% 2016/17 which is 3 percentage points below the Cardiff Capital Region (CCR) average, and is also lower than the national average (ONS, Annual Population Survey - July 2016 to June 2017). The economic inactivity rate in Monmouthshire stood at 39% in 2016/17, which is a reflection of its population structure where many are of retirement age (ONS, Annual Population Survey - July 2016 to June 2017).
- Levels of out commuting and distances travelled to work are relatively high. Around 40% of Monmouthshire's residents who are in employment work outside the County (Census, 2011). The charts below show the top 10 inflow and outflow commuting destinations for Monmouthshire.

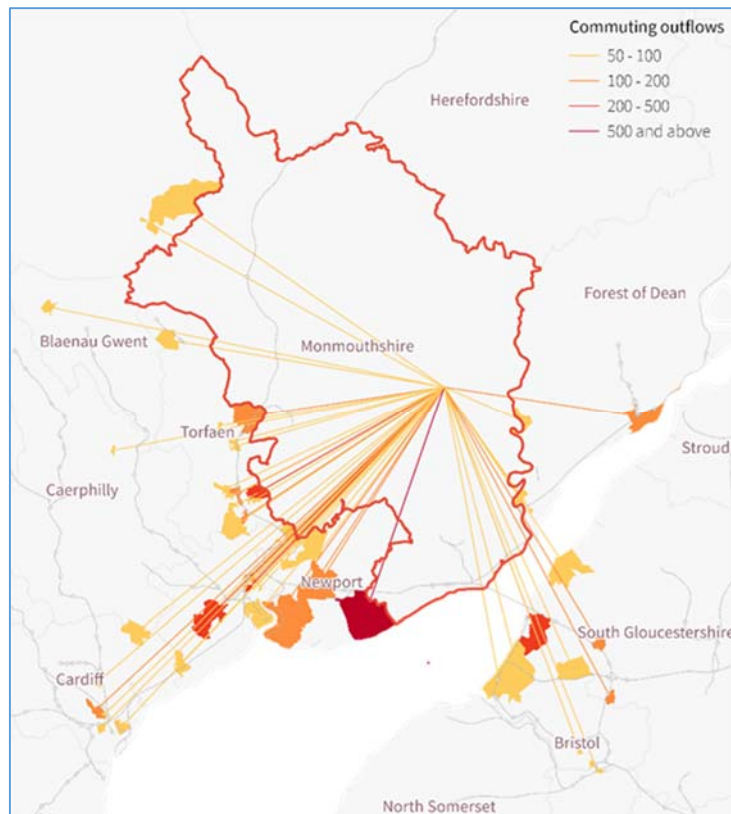
Figure 5: Commuting Flows



Source: ONS, Census 2011

- Figure 6 below maps the direction of the most significant commuting outflows from Monmouthshire (50 moves and above) which shows some key employment centres in Cardiff, Newport, Bristol and South Gloucestershire.

Figure 6: Commuting Outflows from Monmouthshire – flows of 50 and above



Source: ONS, Census 2011

Map contains OS data © Crown copyright and database right 2017

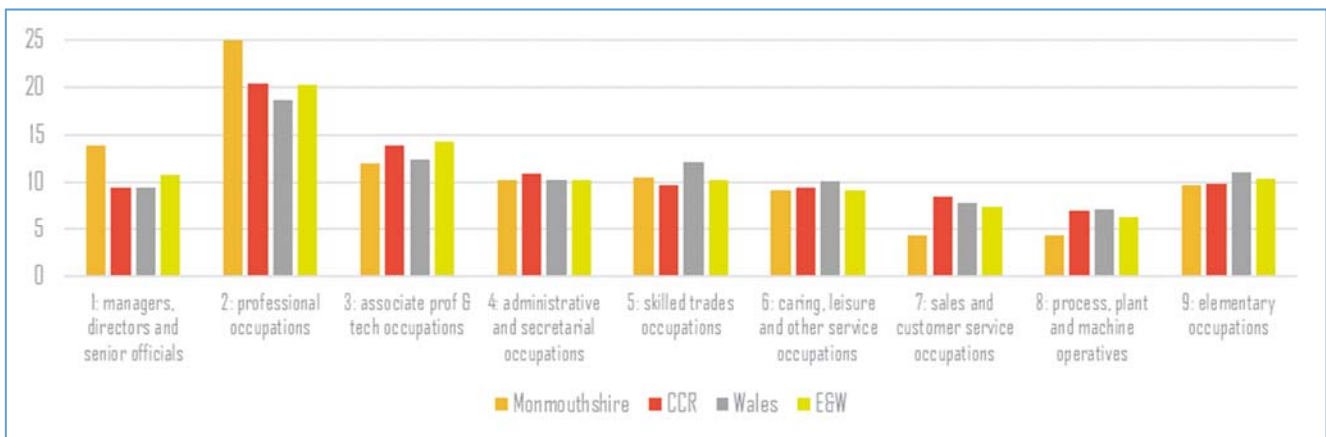
- There is a need to provide support for inward investment and local employment growth/opportunities to reduce out commuting, retain young people, and increase prosperity.

Occupation and Earnings

- There is a dual labour market in Monmouthshire, meaning that the people who live in Monmouthshire have a different profile from those who work in Monmouthshire. The qualifications, skills and earnings of the residents are above the regional and national average, however, for those working in the area earnings are lower and employment is relatively less skilled:
 - The resident profile is markedly skewed towards high-skills/high-earning occupations, while the workplace profile presents a relatively higher proportion of people employed in low-skill and routine occupations, as shown in figures 7 and 8 below.
 - Residents' earnings are higher than workplace earnings. Residents (and those who can afford to buy a house in Monmouthshire) are likely to be earning their relatively higher wages in higher skills jobs outside Monmouthshire. Wage levels available for local jobs are lower than the average for the UK and

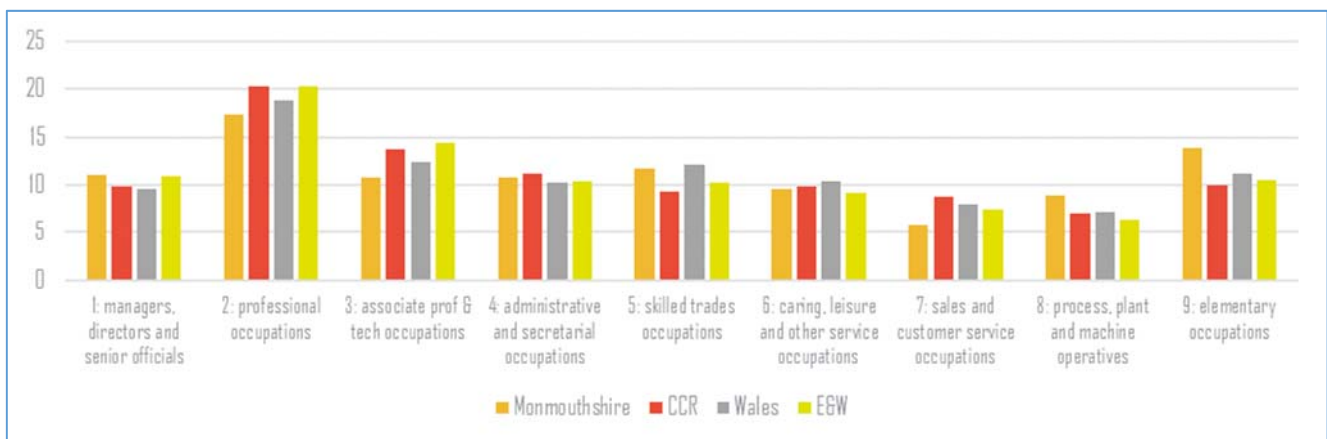
Wales. The gross annual mean pay for people working in Monmouthshire stood at £30,001 in 2018, compared with £36,611 in the UK and £30,357 in Wales (ONS, ASHE, 2018). This coupled with high property prices makes it difficult for young people and future generations to live and work locally. Additional employment opportunities for young people are required to help reduce the numbers of this age group leaving the County.

Figure 7: Occupational Profile – Resident Analysis (%) 2016/17



Data Source: ONS, Annual Population Survey - July 2016 to June 2017

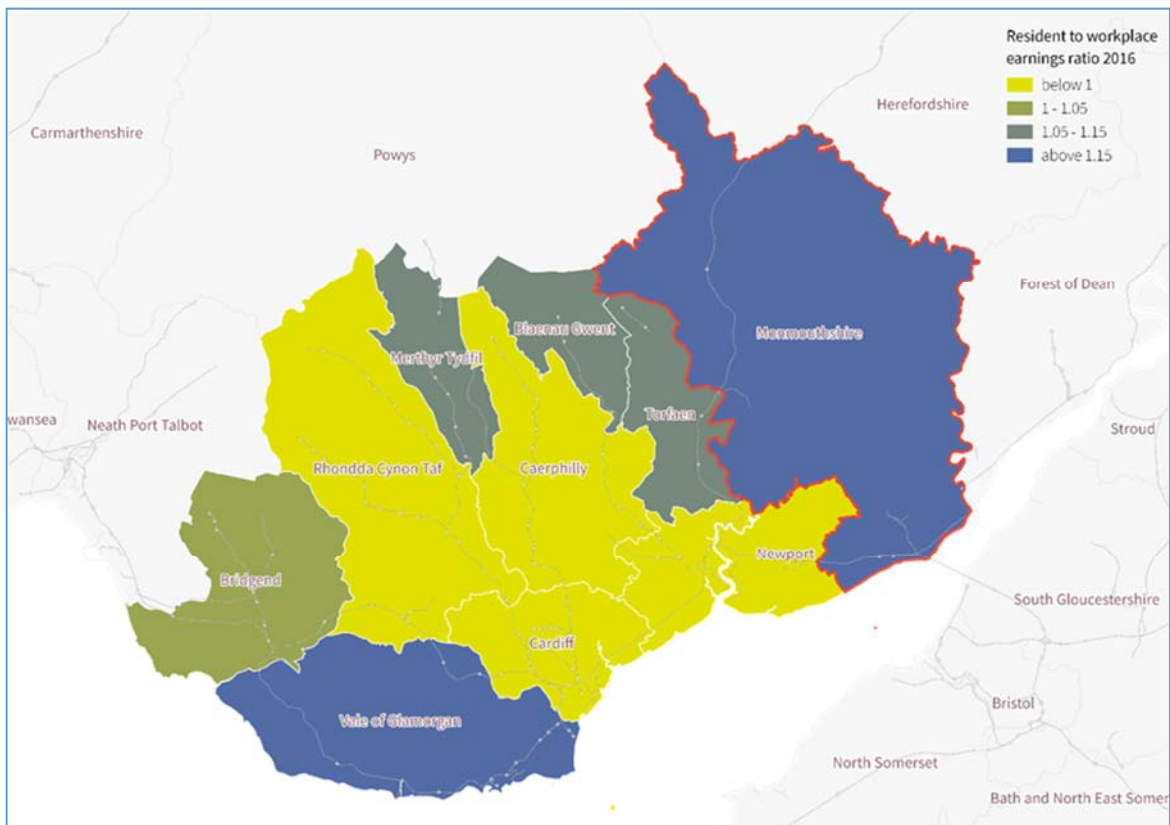
Figure 8: Occupational Profile – Workplace Analysis (%) 2016/17



Data Source: ONS, Annual Population Survey - July 2016 to June 2017

- Figure 9 below presents the ratio between median earnings of residents, who are not necessarily working in the local authority they reside in, against earnings of people working in the given local authority. A ratio above one indicates that resident earnings are higher than workplace earnings. This, coupled with the occupational analysis, suggests that Monmouthshire residents must be earning their relatively higher wages in higher skilled jobs outside Monmouthshire.

Figure 9: Resident to workplace median earnings ratio 2016



Data Source: ONS, ASHE

Map contains OS data © Crown copyright and database right 2017

- Evidence continues to suggest that the income for economically active women who both live and work within the County is significantly lower than that of men within the same category, as indicated in Figure 10 below.

Figure 10: Median Gross Weekly Earnings (2018)

Indicator	Earnings
Monmouthshire - Resident (Male)	£690.90
Great Britain (Male)	£612.00
Monmouthshire - Workplace (Male)	£578.90
Monmouthshire - Resident (Female)	£567.50
Great Britain (Female)	£510.00
Monmouthshire - Workplace (Female)	£469.30

Source: ONS, ASHE

Employment land

- There has been a slow uptake of employment land in the past (2014-15: 0.38ha; 2015-16: 1.13ha; 2016-17: 3.21ha; 2017-18: 5ha, LDP Annual Monitoring Reports 2015-18). There is subsequently a need to consider whether existing available land is suitably located, fit for purpose and readily available for appropriate growth sectors.
- There is also a need to consider potential future demand for employment land along with Council aspirations for innovation across Monmouthshire in light of the recent removal of the Severn Bridge tolls and the ambitions and opportunities associated with the Cardiff Capital Region City Deal (CCRCD).

Home Working and Digital Connectivity

- Higher levels of those in employment in Monmouthshire work at home compared to the Welsh average i.e. 35% in Monmouthshire compared to the Welsh average of 12% (Census, 2011). Efficient digital infrastructure is essential to support home working and the general connectivity of the County's rural areas and to support economic growth. This could also improve quality of life and reduce commuting.
- The current situational analysis of Superfast Broadband Next Generation Access (NGA) coverage in the Cardiff Capital Region, based on the OMR/SAPC undertaken prior to the Superfast Cymru Phase 2 (SFC2) Procurement, paints a stark picture in terms of the current lack of coverage in Monmouthshire in comparison to our other nine Local Authority partners - currently 12.56% of premises in Monmouthshire are NOT covered in comparison to 3-4% in the other nine Local Authorities within the region.

Retail and Town Centres

- The role of high streets is changing due to out of town retail centres, the increase in internet shopping, changing shopping habits (e.g. top-up grocery shopping) and austerity and as a result vacancy rates in some of the County's retail centres have increased. There is a leakage of expenditure out of the County and a need to protect the County's retail centres from out of town developments. (Monmouthshire Retail Background Paper, 2018; Monmouthshire Retail Expenditure Forecasts Update, 2017).

Tourism

- Tourism plays a significant part in the Monmouthshire economy particularly in assisting in the diversification of the rural economy and in sustaining the County's historic town centres.
- Visitor numbers in Monmouthshire over the 2016-17 period are set out in Figure 11 below. Visitor numbers to both serviced and non-serviced accommodation are significantly higher in Monmouthshire compared to the South East Wales average and have increased by 14.5% since 2012. Staying visitors generate a higher economic

impact than day visitors i.e. £146 million compared to £58 million in 2017 (Monmouthshire STEAM Report 2017) highlighting the continued need for visitor accommodation.

- Visitor numbers to serviced accommodation increased by 8.1% and those to non-serviced accommodation by 7.0% - both of these are significantly higher than the South East Wales averages of 3.4% for serviced and 5.1% for non-serviced accommodation. Since 2012, the annual number of staying visitors to Monmouthshire has increased by 14.5% - over 64,000 extra visitors in 2017 compared with 2012 (Monmouthshire STEAM Report 2017).
- Day visitors continue to be important to Monmouthshire, with the 1.8 million day visits accounting for 78% of all visits to the County in 2017. Day visits decreased by 0.1% from 2016 levels, but 2016 was a particularly strong year for day visitors and the 2017 figure is still 6.0% higher than that for 2015 (Monmouthshire STEAM Report 2017).

Figure 11: Monmouthshire Visitor Numbers 2016-17

Visitor Numbers		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2017 (Millions)	M	0.287	0.077	0.143	0.507	1.798	2.304
2016 (Millions)	M	0.265	0.072	0.143	0.480	0.800	2.280
Change 16/17 (%)	%	+8.1	+7.0	+0.4	+5.7	-0.1	+1.1
Share of Total (%)	%	12.5	3.3	6.2	22.0	78.0	100.0

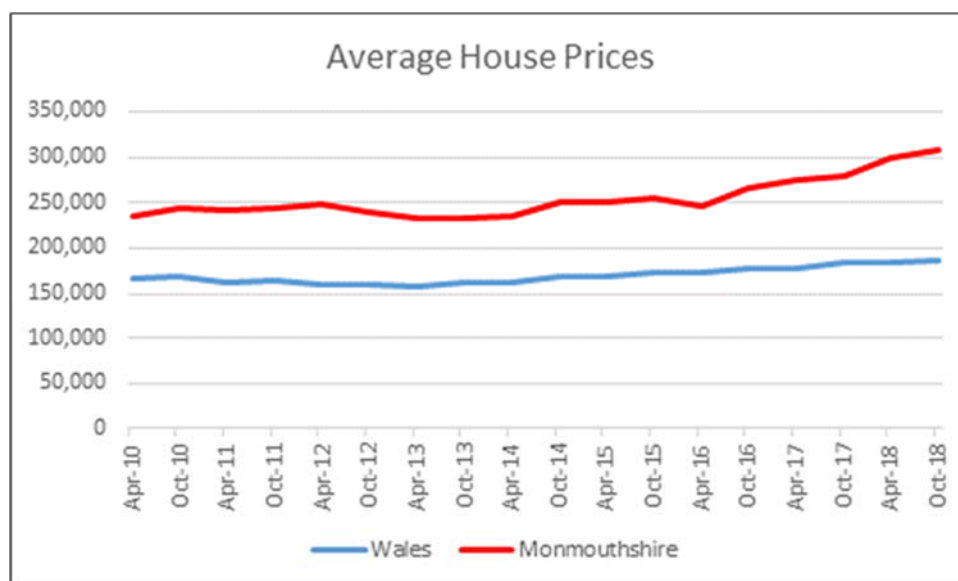
Data Source: Monmouthshire STEAM Tourism Economic Impacts 2017 Year in Review Summary

HOUSING

Housing Market and House Prices

- Average house prices in the County are high at £302,229 when compared to the Welsh average of £186,256 (Hometrack October 2018). The most significant increases have been experienced in recent years as indicated in figure 12.

Figure 12: Average House Prices in Monmouthshire and Wales March 2010 – October 2018



Source: Hometrack

- House prices are also high in relation to earnings. The lower quartile house price to income ratio in the County is 9:1 (Hometrack, September 2018). This ratio varies across Monmouthshire and is significantly higher in some rural areas, as indicated in Figure 13.

Figure 13: Lower Quartile House Price to Income Ratios for a Sample of Rural Wards

Ward	Lower Quartile House Price to Income Ratio
Crucorney	10:1
Llanbadoc	6:1
Raglan	7:1
Mitchel Troy	16:1
Trellech	11:1
St Arvans	9:1
Portskewett	6:1
Goytre	7:1
Llanfoist	7:1
Llanelly Hill	7:1

- The number of households in affordable housing need (Bands 1-4) currently stands at 2,021 (Monmouthshire Common Housing Register, January 2019). There is a pressing need for additional affordable housing in the County in both urban and rural areas to assist in ensuring a more balanced population.
- There is a need to consider the potential impact on house prices arising from the recent removal of the Severn Bridge Tolls, the ambitions and opportunities associated with the Cardiff Capital Region City Deal and the South East Wales Metro.
- To address the demographic imbalance in the County and support economic prosperity a range and choice of housing is needed to both meet the needs of an ageing population and to attract and retain the younger age groups.
- There is limited scope for significant or long term expansion of the existing urban areas within the County due to a mix of physical, environmental and policy constraints.

ENVIRONMENT

Green Infrastructure, Biodiversity & Landscape

- Monmouthshire is renowned for its beautiful landscapes and major biodiversity resource that bring wider benefits to the local economy particularly through tourism. Monmouthshire as a whole incorporates parts of the Wye Valley Area of Outstanding Natural Beauty, the Brecon Beacons National Park and the Blaenavon Industrial Landscape World Heritage Site. The best of these assets must be protected, managed and enhanced for future generations.
- There is a need to improve connectivity within the landscape through protecting and improving existing wildlife networks and corridors, including both green and blue infrastructure, and, creating new linkages to allow species to move and adapt to climate change impacts. Green Infrastructure is also beneficial to human well-being.

Flooding

- Parts of the County are vulnerable to flooding. Climate change is likely to increase the risk of flooding, as well as many other risks, so mitigating climate change and building resilience is crucial.

Minerals & Waste

- Monmouthshire has made good progress in the promotion of the recycling and composting of waste, and the elimination of waste to landfill. Monmouthshire also has to make an appropriate contribution to the regional requirement for waste management.

- Mineral extraction plays a limited role in Monmouthshire's economy but there is a need to safeguard the County's resources in order to make an appropriate contribution to the sustainable supply of aggregates to the South Wales economy as a whole.

Air

- While air pollution is not generally a significant problem in Monmouthshire, there are two Air Quality Management Areas in the County at Usk and Chepstow where there is a link between this issue and traffic congestion.

Land

- There are limited opportunities for brownfield development within the County's existing urban areas. The proportion of land area defined as 'built on' stands at 3% in Monmouthshire (Corine Landcover Inventory, 2018).
- Monmouthshire has a significantly high percentage of best and most versatile agricultural land (Grade 1, 2 and 3) at 69% (Welsh Government – Agricultural Land Classification Maps, November 2017). While there is a need to conserve these resources, there are limited opportunities within the County for brownfield development and development on lower grades of agricultural land (i.e. Grade 3b, 4 and 5).

Climatic Factors

- The volume of traffic in the County has continued to increase, up nearly 10% in the seven years to 2017 (StatsWales, August 2018). There is a pattern of relatively long travel to work distances (as detailed above), high levels of car ownership (45% of households have 2 or more cars (Census 2011)) and reliance on the private car.
- Small Scale and Local Authority wide Renewable Energy schemes are generally supported across Monmouthshire, however, a more proactive approach should be undertaken for schemes of a local authority scale (i.e. 5MW - 25MW).

HEALTH AND WELL-BEING

Human Health

- While Monmouthshire performs relatively well on indicators relating to health, there is a need to promote opportunities for healthy living particularly in the context of an ageing population.
- While an ageing population brings many opportunities, it also brings challenges and increases in the number of people living with long term conditions can create pressures on existing health care provision.

- On the whole Monmouthshire's residents have good access to public open space, however, there are deficiencies in many of the County's communities in relation to community and recreational facilities. This can lead to rural isolation in certain areas.
- Obesity is a growing problem throughout Wales. Although obesity rates in Monmouthshire are below the Welsh average consideration should be given to promoting healthy lifestyles. Figure 14 below sets out key indicators of health related lifestyle which indicates that obesity rates in Monmouthshire are below the Welsh and Aneurin Bevan Health Board figures. However, it should be noted that this is based on a very small sample size and is therefore not entirely representative.

Figure 14: Health Related Lifestyle 2017/18

Health Related Lifestyle Indicator	Monmouthshire %	Aneurin Bevan Health Board %	Wales %
Smoker	13	19	19
E-Cigarette User	5	8	7
Weekly Alcohol Consumption >14 Units	24	18	19
Ate 5 Portions of Fruit & Vegetables	29	21	24
Active <30 Minutes a Week	24	33	33
Overweight or Obese	55	65	60
Obese	17	26	22

Source: National Survey for Wales 2017/18

Infrastructure

- Poor access to community facilities and declining local service provision is a particular issue for rural communities.
- The Welsh Index of Multiple Deprivation (WIMD) 2014 geographical access to services domain captures the accessibility of a range of services for households, looking specifically at inaccessibility of services that are considered key to day to day living. Both tangible (inaccessibility to a supermarket) and social deprivation (isolation from

community activities) are considered. The WIMD shows that of the 56 lower super output areas (LSOAs) in Monmouthshire, 38 fall within the 50% most deprived, with 26 in the 30% most deprived and 12 in the 10% most deprived. Of the 1909 LSOAs in Wales, the lowest ranks recorded in Monmouthshire for access to services were in Llantillio Crosenny (12), Crucorney (43), Llanover 1 (70), and Trellech United 1 and 2 which ranks 82 and 95 respectively (StatsWales).

- Limited public transport, particularly in rural areas makes it harder to access jobs, services and facilities, which could be exacerbated by rising fuel prices. There are nevertheless future opportunities for investment in public transport through the Cardiff Capital Region City Deal and advances in technology.
- There is a need to ensure that adequate physical and digital infrastructure is provided to support new development. This includes:
 - Broadband infrastructure
 - The provision of sufficient water and sewerage infrastructure
 - Transport infrastructure and active travel to support non-car modes of travel.

CULTURAL HERITAGE

- As detailed in Figure 15, Monmouthshire has a significant built heritage resource in terms of scheduled ancient monuments, listed buildings, conservation areas, historic parks and gardens and archaeologically sensitive sites that, together with their settings require protection and enhancement.

Figure 15: Monmouthshire’s Heritage Assets (number)

	2017
Listed Buildings	2152
Scheduled Ancient Monuments	164
Historic Parks and Gardens	45
Archaeologically Sensitive Areas	10
Landscapes of Outstanding Historic Interest	3

Source: MCC Heritage Team/ Cadw

- There is a need to protect, promote and enhance the best of our landscape and heritage which are an important part of our culture and play a key role in tourism and economic growth, along with providing support for the Welsh Language to ensure it is safeguarded and supported.
- The distinctive settlement pattern of Monmouthshire relates to historic towns and villages and their relationship with the surrounding rural areas. There has nevertheless been substantial suburban expansion in the South of the County, particularly adjacent to the M4 corridor. This area is likely to receive further pressure for growth due to the recent removal of the Severn Bridge Tolls and the ambitions and opportunities

associated with the Cardiff Capital Region City Deal and the South East Wales Metro, together with the economic growth of the Bristol/SW region and the opportunities for Monmouthshire as a border county and its location between Bristol and Newport and Cardiff, the 'Great Western Cities'.

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Appendix 2

Replacement LDP Draft Issues, Vision and Objectives Paper Targeted Engagement: Summary of Responses

- 1.1 The Draft Issues, Vision and Objectives Paper was reported to four Area Committees and two Area Cluster meetings¹ held across the County in January 2019. The Draft Paper will be reported to a further two Area Cluster Meetings in February². An Economy and Development Select Member workshop was also held on 22 January 2019 with an open invite to all Members to allow for a more comprehensive attendance. This targeted engagement sought views and enabled discussions on the draft issues, vision and objectives. Additional comments are invited by 13 February 2019.
- 1.2 The comments received to date are grouped under main topic areas for ease of reference in the table below. Any additional responses received by 13th February 2019 will be reported to Economy & Development Select Committee and subsequently incorporated into this appendix.

Table 1: Replacement LDP Draft Issues, Vision and Objectives Paper Targeted Engagement: Summary of Responses

Key Topic Area	Key Points Raised
Population, Housing and Employment Growth	<ul style="list-style-type: none"> ▪ Currently getting the houses but not the jobs to go with them, needs to be included as an issue. Need to relate housing /jobs more closely. ▪ Difficult to retain younger population given high house prices ▪ Recognise this is a chicken and egg situation - housing may be required prior to employment to ensure there is an appropriate labour pool to attract employers. This may have a short term negative impact on commuting. ▪ Objectives could be read as ‘business as usual’. They do not tackle the issue of the appropriate level of growth for Monmouthshire and as drafted do not drive the change needed. ▪ Objectives do not address population growth, unclear from the objectives whether should be accommodating additional growth or allowing for in-migration.
Infrastructure	<ul style="list-style-type: none"> ▪ Infrastructure capacity concerns - infrastructure should be a priority, timing of provision is of importance (infrastructure should be in place prior to development). ▪ Infrastructure capacity issues in Chepstow specifically referenced (road, traffic flows, health care etc.)

¹ Area Committees attended: Chepstow (23 January 2019); Severnside (23 January 2019); Central Monmouthshire (30 January 2019); North Monmouthshire (30 January 2019). Area Cluster Meetings attended: Monmouth (22 January 2019); Usk (24 January 2019)

² Area Cluster Meetings to attend: Chepstow (13 February 2019); Caldicot (date tbc: postponed due to adverse weather)

Key Topic Area	Key Points Raised
	<ul style="list-style-type: none"> ▪ Lack of public transport in rural areas, impacts on workforce and ageing population. ▪ Digital infrastructure – 6,000 residential properties in digital deprivation. A range of solutions needed to tackle this issue. ▪ Social infrastructure must also be considered to ensure the welfare of the population is satisfied, need to ensure there are sufficient GP Surgeries, social workers etc. ▪ Integrated bus services should be considered for new developments, current disjoint for example in Overmonnow. ▪ Need to look at infrastructure surrounding existing settlements. ▪ Deliverability/viability of Sustainable Drainage Systems (SuDs). ▪ Metro should link up with other services to link in with other areas of the County.
Housing/Affordable Housing	<ul style="list-style-type: none"> ▪ Should consider links to neighbouring Local Authorities e.g. housing market areas - look at on a sub-regional/regional basis. ▪ LDP lacks vision about what we're building and how. Type of housing should be considered in order to benefit communities e.g. community land trusts and co-operative housing. What sort of housing is needed for the community? Too many large (e.g. 4 bed) homes, not enough starter homes or bungalows. Vision of different housing priorities. ▪ Role of key worker housing – housing policy alongside planning policy. ▪ Difficulty in providing right type of houses to support needs of population. Need for more bungalows and care homes to support needs of older population. ▪ Design and build - should ensure the lifetime cost of affordable housing is also affordable. ▪ Small developments in villages should be provided, good recent example in Tintern. ▪ Significant need for affordable housing is recognised. ▪ Additional affordable housing will help retain younger population. ▪ Concern that over 2000 people within the County are living in substandard housing. ▪ Numbers on the housing register will continue to grow, particularly due to the potential impact of removal of the Severn Bridge tolls, must be kept under review as this will have an impact on housing. ▪ New developments should include provision of green technologies i.e. electric vehicle charging points. ▪ Brownfield development should be a priority over greenfield development. ▪ Consideration of Compulsory Purchase Orders of land for housing development. ▪ Impact of the tolls is not yet known but seems to be having an impact on private rented accommodation being sold quickly and leaving people homeless (impact on AH waiting list, house prices).

Key Topic Area	Key Points Raised
Economy /Employment	<ul style="list-style-type: none"> ▪ Impact of demography on employment, a diverse workforce attracts employers. ▪ Need for employment as well as housing to retain younger population. ▪ Manufacturing employment not attractive. ▪ Need for small site industries across the County. ▪ Need to retain people in interesting jobs in the County and be able to house them to avoid them leaving. ▪ Policy presumption in favour of business use over residential use in rural areas. ▪ Rural economy – no vision for rural areas. What growth do they need to be sustained? ▪ What will agricultural communities need? Will Brexit mean they need to increase food supply or diversify? ▪ Business needs digital infrastructure
Tourism/Leisure	<ul style="list-style-type: none"> ▪ Need for more hotels/accommodation, tourism industry linked with livelihoods in Monmouthshire. ▪ Role of Monmouthshire as a destination/tourism area (rather than an industrial County)
Retail/High Streets	<ul style="list-style-type: none"> ▪ Current objective relating to town centres is not going to be satisfied solely by retail, should be widened as the future of the high streets will be dependent on a combination of other activities such as leisure uses, markets, events etc. ▪ Improvements needed to boost vacancy rates in Town Centres. Should be reflected in the vision to ensure town centres are made more prosperous. ▪ Make use of empty upper floors in retail centres to provide housing, more attractive to younger population. ▪ Draw of population in the South of the County to Bristol for retail, more attractive since removal of tolls. ▪ Noted Abergavenny is performing well and bucking the trend, what can be learnt from this to help boost other retail centres in our towns? ▪ Additional growth might help sustain towns and amenities
Commuting Patterns	<ul style="list-style-type: none"> ▪ Objectives should be more explicit to ensure commuting levels are reduced by only allowing housing where it is linked to employment opportunities and public transport networks. ▪ Commuting will increase due to the removal of the Severn Bridge Tolls. Threat of becoming a commuter County. ▪ Recognised it is difficult to tackle commuting problem. ▪ Commuting patterns not analysed by mode of transport, potential growth in rail investment/capacity should be considered. ▪ Digital infrastructure could reduce the need for some people to commute ▪ The first phases of the Metro proposals do little to benefit Monmouthshire

Key Topic Area	Key Points Raised
Education	<ul style="list-style-type: none"> ▪ Role of education – need to maintain high standards of education. Contributes to skilled workforce. ▪ Education should meet the needs of existing businesses and help encourage new businesses, particularly start ups. ▪ Provision of higher education facilities required within the County. ▪ The education system should adapt to teach the skills and provide apprenticeships relevant to new economic growth sectors
Climate Change	<ul style="list-style-type: none"> ▪ Carbon reduction should be included - raise awareness of carbon reduction, mitigation and adaptation. This relates both to commuting and what is built ▪ Impact of climate emergency should be included.
Brexit	<ul style="list-style-type: none"> ▪ Could have impacts on employment/tourism industry in the area. ▪ Could bring more of a focus on agricultural diversification due to lack of agricultural subsidies. ▪ Potential impact on future of the agricultural economy and food production within the County.
General Points	<ul style="list-style-type: none"> ▪ Comprehensive set of issues included and presented clearly. ▪ Cross-border working potential with Forest of Dean and Herefordshire. ▪ Wording used could imply that 'issues' are problems, for example the ageing population. This part of the population can also be utilised as a resource. ▪ Query of how the vision for Monmouth/Monmouth Town Council plan will link to LDP. ▪ Could the creationion of a new settlement be an option? ▪ Query regarding whether green wedges will be reviewed in the Replacement LDP. ▪ Need to be realistic about what issues the LDP as a land use plan can actually address.



Future Generations Evaluation (includes Equalities and Sustainability Impact Assessments)

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<p>Name of the Officer completing the evaluation Mark Hand</p> <p>Phone no: 01633 644803 E-mail: markhand@monmouthshire.gov.uk</p>	<p>Please give a brief description of the aims of the proposal</p> <p>To seek the views of Economy and Development Select Committee on the Draft Issues, Vision and Objectives Paper which has been prepared in connection with the Monmouthshire Replacement Local Development Plan (LDP).</p> <p>The preparation of the issues, vision and objectives is one of the first key stages in Replacement Plan preparation process. The Draft Issues, Vision and Objectives Paper sets out the identified issues and proposed vision and objectives for the Replacement LDP. It sets out the key issues, challenges and drivers facing the County informed by a range of evidence, including the Monmouthshire Public Service Board (PSB) Well-being Plan, MCC Corporate Business Plan, LDP Review Report, LDP Annual Monitoring Reports and Replacement LDP Sustainability Appraisal Scoping Report, along with wider contextual factors such as national guidance/legislation and the Cardiff Capital Region City Deal. It also sets out the revised LDP vision and objectives to address the issues/challenges identified. The issues, vision and objectives paper will subsequently inform the Replacement LDP Draft Preferred Strategy which will be subject to statutory consultation towards the end of 2019.</p>
<p>Name of Service</p> <p>Planning (Planning Policy)</p>	<p>Date Future Generations Evaluation form completed</p> <p>01/02/2019</p>

1. Does your proposal deliver any of the well-being goals below? Please explain the impact (positive and negative) you expect, together with suggestions of how to mitigate negative impacts or better contribute to the goal.

Well Being Goal	How does the proposal contribute to this goal? (positive and negative)	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
	<p><i>A full review of the Monmouthshire Local Development Plan (LDP) commenced in 2017, with the final Review Report published in March 2018. Based on the evidence contained in the Review Report, it was concluded that the LDP should be revised and that this should take the form of a full revision procedure. The publication of the LDP Review Report triggered the process through which a replacement LDP will be prepared and adopted for the County.</i></p> <p><i>The Council is currently in the process of preparing a Replacement Local Development Plan (LDP) for the County (excluding the area within the Brecon Beacons National Park) which will cover the period 2018-2033. The Replacement LDP will set out land use development proposals for the County and will identify where and how much new development will take place over the replacement plan period. It will also identify areas to be protected from development.</i></p> <p><i>The Replacement LDP is being prepared in accordance with the Delivery Agreement (DA) which was agreed by WG in May 2018. The DA sets out the proposed approach, timescales and consultation arrangements for the Replacement LDP. The agreed timetable will see the Replacement LDP being adopted at the end of 2021/early 2022. Work has commenced on the replacement LDP with the initial call for Candidate Sites and a targeted consultation on the draft Sustainability Appraisal (SA) Scoping Report having recently closed.</i></p> <p><i>The preparation of the issues, vision and objectives is one of the first key stages in the Replacement Plan preparation process. The Draft Issues, Vision and Objectives Paper sets out the identified issues and proposed vision and objectives for the Replacement LDP. It sets out the key issues, challenges and drivers facing the County informed by a range of evidence, including the Monmouthshire Public Service Board (PSB) Well-being Plan, MCC Corporate Business Plan, LDP Review Report, LDP Annual Monitoring Reports and Replacement LDP Sustainability Appraisal Scoping Report, along with wider contextual factors such as national guidance/legislation and the Cardiff Capital Region City Deal. It also sets out the revised LDP vision and objectives to address the issues/challenges identified. The issues, vision and</i></p>	

Well Being Goal	How does the proposal contribute to this goal? (positive and negative)	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
	<p><i>objectives paper will subsequently inform the Replacement LDP Draft Preferred Strategy which will be subject to statutory consultation towards the end of 2019.</i></p> <p><i>The draft issues, relate to the key issues, challenges and drivers for the area that the Replacement LDP is seeking to address (economic, environmental, social and cultural aspects) and form the basis of the LDP objectives. The draft issues have been informed by a wide range of evidence and are grouped in accordance with the Seven Well-being Goals as set out in the Well Being of Future Generations (Wales) Act 2015. The Vision will set the overarching context for Monmouthshire for the period up to 2033. The LDP Objectives reflect and elaborate on the Plan's Vision and set out how the issues/challenges identified as facing the area will be addressed through the Replacement LDP.</i></p>	
<p>A prosperous Wales Efficient use of resources, skilled, educated people, generates wealth, provides jobs</p>	<p>Positive: The Draft Issues, Vision and Objectives Paper identifies the key issues, challenges and drivers the Replacement Plan is seeking to address including; employment growth, job creation, the dual economy, wage levels, retail centres and the rural economy.</p> <p>Negative: None.</p>	<p>The Draft Vision includes reference to communities and businesses being part of an economically thriving and well-connected County. Draft Objectives relating to economic growth/employment and retail centres have been set in order to address the identified issues relating to creating a prosperous Wales.</p>
<p>A resilient Wales Maintain and enhance biodiversity and ecosystems that support resilience and can adapt to change (e.g. climate change)</p>	<p>Positive: The Draft Issues, Vision and Objectives Paper identifies the key issues, challenges and drivers the Replacement Plan is seeking to address including; air pollution, wildlife networks and importance of green and blue infrastructure in the adaptation of climate change, building resilience to flooding and mitigation of climate change, along with, safeguarding of minerals resources. The limited supply of brownfield land within the County is also highlighted as an issue. The paper also</p>	<p>The Draft Vision includes reference to the protection and enhancement of the countryside, landscape and environmental assets. Draft Objectives relating to Green Infrastructure, Biodiversity and Landscape, Flood risk, Minerals and Waste, Land and Natural Resources have been set in order to address the identified issues relating to creating a resilient Wales.</p>



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Well Being Goal	How does the proposal contribute to this goal? (positive and negative)	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
	<p>recognise the continued good progress with recycling and waste.</p> <p>Negative: None.</p>	
<p>A healthier Wales People's physical and mental wellbeing is maximized and health impacts are understood</p>	<p>Positive: The Draft Issues, Vision and Objectives Paper identifies the key issues, challenges and drivers the Replacement Plan is seeking to address including; healthy living, obesity and the promotion of healthy lifestyles, the opportunities and challenges associated with an ageing population, accessibility to community, and, recreational facilities and rural isolation.</p> <p>Negative: None.</p>	<p>The Draft Vision includes reference to people enjoying healthier, more sustainable lifestyles. A Draft Objective relating to human health has been set in order to address the identified issues relating to creating a healthier Wales.</p>
<p>A more equal Wales People can fulfil their potential no matter what their background or circumstances</p>	<p>Positive: The Draft Issues, Vision and Objectives Paper identifies the key issues, challenges and drivers the Replacement Plan is seeking to address including; the rural nature of the County, and, the steady increase in population predominately fuelled by in-migration. Reference is also made to the demography of the County, particularly the higher proportion of older age groups and lower proportion of young adults compared to the Welsh average.</p> <p>Negative: None.</p>	<p>The Draft Vision includes reference to people living in sustainable, resilient communities to support the well-being of current and future generations and are more inclusive, cohesive, prosperous, vibrant and balanced demographically. A Draft Objective relating to demography has been set in order to address the identified issues relating to creating a more equal Wales.</p>
<p>A Wales of cohesive communities Communities are attractive, viable, safe and well connected</p>	<p>Positive: The Draft Issues, Vision and Objectives Paper identifies the key issues, challenges and drivers the Replacement Plan is seeking to address including; the effect of high house prices within the</p>	<p>The Draft Vision includes reference to people living in sustainable, resilient communities that support the well-being of current and future generations and are more inclusive, cohesive, prosperous, vibrant and</p>

Well Being Goal	How does the proposal contribute to this goal? (positive and negative)	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
	<p>County, impact of the recent removal of the Severn Bridge Tolls, along with ambitions and opportunities associated with the Cardiff Capital Region City Deal and South East Wales Metro. It also refers to the range and choice of housing required to meet the needs of the population, limited public transport within the area, declining local service provision and physical/digital infrastructure requirements.</p> <p>Negative: None.</p>	<p>balanced demographically. It also provides reference to Monmouthshire being a well-connected County. Draft Objectives have been set in relation to; housing, place-making, communities, rural communities, infrastructure and accessibility in order to address the identified issues relating to creating a Wales of cohesive communities.</p>
<p>A Wales of vibrant culture and thriving Welsh language Culture, heritage and Welsh language are promoted and protected. People are encouraged to do sport, art and recreation</p>	<p>Positive: The Draft Issues, Vision and Objectives Paper identifies the key issues, challenges and drivers the Replacement Plan is seeking to address including; the protection and enhancement required for the County's significant built heritage resource and landscape, support of the Welsh Language, distinctive settlement pattern of Monmouthshire and links between the heritage/diverse landscape to tourism and the local economy.</p> <p>Negative: None.</p>	<p>The Draft Vision includes reference to the protection and enhancement of the County's built heritage and landscape in order to retain its distinctive character. A Draft Objective relating to culture, heritage and the Welsh Language has been set in order to address the identified issues relating to creating a Wales of vibrant culture and thriving Welsh Language.</p>
<p>A globally responsible Wales Taking account of impact on global well-being when considering local social, economic and environmental wellbeing</p>	<p>Positive: The Draft Issues, Vision and Objectives Paper identifies the key issues, challenges and drivers the Replacement Plan is seeking to address including; climatic factors, high levels of car ownership, reliance on the private car and different scales of renewable energy schemes.</p>	<p>The Draft Vision includes reference to more sustainable lifestyles with improved access to public transport and active travel opportunities with a minimised impact on the global environment. A Draft Objective relating to climate change has been set in</p>

Well Being Goal	How does the proposal contribute to this goal? (positive and negative)	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
	Negative: None.	order to address the identified issues relating to creating a globally responsible Wales

2. How has your proposal embedded and prioritised the sustainable governance principles in its development?

Sustainable Development Principle	How does your proposal demonstrate you have met this principle?	What has been done to better to meet this principle?
 <p>Balancing short term need with long term and planning for the future</p>	<p>The Draft Issues, Vision and Objectives Paper sets out the identified issues and proposed vision and objectives for the Replacement LDP which will cover the period 2018-2033. It sets out the key issues, challenges and drivers facing the County revised LDP vision and objectives to address the issues/challenges identified. The role of the LDP vision is to clarify the core purpose of the Replacement Plan and provide a framework for developing the Preferred Strategy and future detailed policies. The Vision will set the overarching context for Monmouthshire for the period up to 2033. The issues, vision and objectives will help to shape the replacement plan.</p>	<p>The vision and objectives set out in the adopted LDP have been reviewed and updated to take account of the issues, challenges and drivers facing the County and reflect key elements of the PSB Well-being Plan and MCC Corporate Business Plan.</p>
 <p>Working together with other partners to deliver objectives</p>	<p>The draft issues, vision and objectives are heavily drawn from/reflect the PSB Well-being Plan which was extensively consulted on in 2017 and resulted in contributions from more than 1,400 people. They have also been subject to targeted engagement with Members, Area Cluster Groups and Area Committees. The issues, vision and objectives will help to shape the replacement plan.</p>	<p>The refined Issues, Vision and Objectives will be incorporated into the Preferred Strategy, which will be made available for engagement/consultation with a wide range of internal and external stakeholders towards the end of 2019.</p>

Sustainable Development Principle	How does your proposal demonstrate you have met this principle?	What has been done to better to meet this principle?
 <p>Involving those with an interest and seeking their views</p>	<p>The draft issues, vision and objectives are heavily drawn from/reflect the PSB Well-being Plan which was extensively consulted on in 2017 and resulted in contributions from more than 1,400 people. They have also been subject to targeted engagement with Members, Area Cluster Groups and Area Committees. The issues, vision and objectives will help to shape the replacement plan.</p>	<p>There is no requirement to undertake formal consultation on the Issues, Vision and Objectives. The results of the consultation will nevertheless be considered and, where appropriate, incorporated into the Preferred Strategy which will be made available for engagement/consultation with a wide range of internal and external stakeholders towards the end of 2019.</p>
 <p>Putting resources into preventing problems occurring or getting worse</p>	<p>The key issues, challenges and drivers facing the County are set out within the Draft Issues, Vision and Objectives Paper have been informed by a range of evidence, including the Monmouthshire Public Service Board (PSB) Well-being Plan, Monmouthshire Corporate Business Plan, LDP Review Report, LDP Annual Monitoring Reports and Replacement LDP Sustainability Appraisal Scoping Report, along with wider contextual factors such as national guidance/legislation and the Cardiff Capital Region City Deal. The Draft Paper also sets out the revised LDP vision and objectives to address the issues/challenges identified. The issues, vision and objectives will help to shape the replacement plan.</p>	<p>The Draft Issues, Vision and Objectives Paper will inform the Replacement LDP Preferred Strategy which will be subject to statutory consultation towards the end of 2019.</p>
 <p>Positively impacting on people, economy and environment and trying to benefit all three</p>	<p>The Draft Paper identifies the key issues, challenges and drivers for the Monmouthshire area that the Replacement LDP is seeking to address covering economic, environmental, social and cultural aspects. It also sets out the draft vision and objectives to address the issues/challenges identified. The Vision sets the overarching context for Monmouthshire for the period up to 2033 and aims to positively impact on both the current and future populations of Monmouthshire. The issues, vision and objectives will help to shape the replacement plan.</p>	<p>The Draft Issues, Vision and Objectives Paper will inform the Replacement LDP Preferred Strategy which will be subject to statutory consultation towards the end of 2019.</p>

3. Are your proposals going to affect any people or groups of people with protected characteristics? Please explain the impact, the evidence you have used and any action you are taking below.

Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
Age	The Draft Issues, Vision and Objectives Paper considers the demographic profile of Monmouthshire and aims to have a positive impact on people of all ages, particularly through increasing opportunities for the younger population to both live and work with Monmouthshire to assist in ensuring a balanced demography whilst also supporting the needs of the older population.	None	The Draft Vision and Objectives aim to provide a more balanced demographic profile for Monmouthshire. The issues, vision and objectives will help to shape the replacement plan.
Disability	The Draft Issues, Vision and Objectives paper includes reflect the need to ensure the provision of a wide-ranging choice of homes including meeting affordable and accessible housing needs as far as possible. The Draft Issues, Vision and Objectives recognise the importance of the health and well-being of people and aims to create attractive, safe and accessible places to live, work and visit.	None	The Draft Vision and Objectives aim to support the well-being of current and future generations that are more inclusive, cohesive, prosperous and vibrant. The issues, vision and objectives will help to shape the replacement plan.
Gender reassignment	None	None	N/A
Marriage or civil partnership	None	None	N/A
Race	None	None	N/A
Religion or Belief	None	None	N/A

Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
Sex	None	None	N/A
Sexual Orientation	One of the challenges facing the County is the imbalance between male and female earnings, although this situation is improving. The Draft Issues, Vision and Objectives include reference to economic growth and employment provision, which could indirectly impact on wage equality.	None	The Draft Vision and Objectives aim to support economic growth and prosperity. The issues, vision and objectives will help to shape the replacement plan.
Welsh Language	The Welsh Language is a material planning consideration. The Draft Issues, Vision and Objectives include reference to supporting and safeguarding the Welsh Language.	None	The Draft Vision and Objectives aim to support culture and the Welsh Language. The issues, vision and objectives will help to shape the replacement plan.

4. Council has agreed the need to consider the impact its decisions has on important responsibilities of Corporate Parenting and safeguarding. Are your proposals going to affect either of these responsibilities? For more information please see the guidance note <http://hub/corporatedocs/Democratic%20Services/Equality%20impact%20assessment%20and%20safeguarding.docx> and for more on Monmouthshire's Corporate Parenting Strategy see <http://hub/corporatedocs/SitePages/Corporate%20Parenting%20Strategy.aspx>

	Describe any positive impacts your proposal has on safeguarding and corporate parenting	Describe any negative impacts your proposal has on safeguarding and corporate parenting	What will you do/ have you done to mitigate any negative impacts or better contribute to positive impacts?
Safeguarding	None	None	N/A
Corporate Parenting	None	None	N/A

5. What evidence and data has informed the development of your proposal?

An extensive range of data sets have been used to prepare the Draft Issues, Vision and Objectives Paper, from a wide range of sources both internal and external to the Council. These are clearly referenced in the Paper and appendices, but include:

- Monmouthshire Public Service Board Well-being Plan (April 2018) https://www.monmouthshire.gov.uk/app/uploads/2017/10/Monmouthshire-PSB_well-being-plan_3.0.pdf
- Monmouthshire County Council Corporate Business Plan 2017 – 2022 (February 2018) https://www.monmouthshire.gov.uk/app/uploads/2018/03/Monmouthshire-Council_Corporate-Plan_1.0.pdf
- Monmouthshire Local Development Plan Review Report (March 2018) <https://www.monmouthshire.gov.uk/app/uploads/2018/03/Final-Review-Report-1.pdf>
- Monmouthshire Local Development Plan Annual Monitoring Reports (2015- 2018) <https://www.monmouthshire.gov.uk/planning-policy/annual-monitoring/ldp-annual-monitoring-report>
- Replacement LDP Sustainability Appraisal Scoping Report (December 2018) <https://www.monmouthshire.gov.uk/planning-policy/pre-deposit-ldp-documents/sustainability-appraisal-sa>
- Monmouthshire LDP 'Retail Background Paper', October 2018. <https://www.monmouthshire.gov.uk/app/uploads/2018/12/Employment-Land-Study-October-2018-reduced.pdf>
- Monmouthshire LDP 'Employment Background Paper', October 2018. <https://www.monmouthshire.gov.uk/app/uploads/2018/12/Employment-Land-Study-October-2018-reduced.pdf>
- Monmouthshire 'Joint Housing Land Availability Study', June 2018. <http://www.monmouthshire.gov.uk/app/uploads/2018/06/Monmouthshire-JHLAS-Report-2018.pdf>

External sources of data include Welsh Government, Cadw, Natural Resources Wales, Hometrack, Office for National Statistics and Stats Wales.

6. SUMMARY: As a result of completing this form, what are the main positive and negative impacts of your proposal, how have they informed/changed the development of the proposal so far and what will you be doing in future?

This section should give the key issues arising from the evaluation which will be included in the Committee report template.

Positive -

The issues, vision and objectives will help to shape the Replacement LDP. The preparation of the issues, vision and objectives is one of the first key stages in Replacement Plan preparation process and will inform the Preferred Strategy. The Draft Issues, Vision and Objectives Paper sets the key issues, challenges and drivers facing the County. It also sets out the draft LDP vision and objectives to address the issues/challenges identified.

The Replacement LDP vision and objectives will continue to be refined, as appropriate, prior to inclusion in the Preferred Strategy (autumn 2019) to reflect the outcomes of further stakeholder engagement/consultation in relation to the growth options and a revised evidence base. The spatial element of the vision will also need to be determined following consultation on the LDP growth options and will be set out in the Preferred Strategy.

Negative – None. There are no implications, positive or negative, for corporate parenting or safeguarding.

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7. Actions. As a result of completing this form are there any further actions you will be undertaking? Please detail them below, if applicable.

What are you going to do	When are you going to do it?	Who is responsible	Progress
Seek Economy & Development Select Committee’s endorsement on the issues, vision and objectives, having regard to the comments received from the targeted engagement to date. Refine the issues, vision and objectives, as appropriate, prior to inclusion in the Preferred Strategy.	Summer to Autumn 2019.	Head of Planning, Housing and Place-Shaping Planning Policy Team	Preferred Strategy (Autumn 2019)

8. Monitoring: The impacts of this proposal will need to be monitored and reviewed. Please specify the date at which you will evaluate the impact, and where you will report the results of the review.

The impacts of this proposal will be evaluated on:

The Draft Issues, Vision and Objectives will be revised, as appropriate, prior to inclusion in the Preferred Strategy in Autumn 2019 to reflect the outcomes of stakeholder engagement and a revised evidence base.

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MONMOUTHSHIRE COUNTY COUNCIL

**Minutes of the meeting of Economy and Development Select Committee held
at The Council Chamber, County Hall, Rhadyr, Usk, NP15 1GA on Tuesday, 18th
December, 2018 at 2.00 pm**

PRESENT: County Councillor P.Pavia (Chairman)
County Councillor A.Davies (Vice Chairman)

County Councillors: J.Becker, A.Davies, D. Dovey and R.Roden

Also in attendance County Councillors: J. Pratt and V. Smith

OFFICERS IN ATTENDANCE:

Peter Davies	Chief Officer, Resources
Hazel Ilett	Scrutiny Manager
Wendy Barnard	Democratic Services Officer
Ian Kennet	Head of Outdoor Education Centres
Ian Saunders	Head of Tourism, Leisure, Culture and Youth
Tom Burrett	Site Co-Ordinator, Hilston Park OEC
Stuart Lovell	Site Co-Ordinator, Gilwern OEC

APOLOGIES:

County Councillors M.Feakins and B. Strong

1. Declarations of Interest

No declarations of interest were made.

2. Procurement: Scrutiny of a performance report on Procurement and the Council's strategic direction

The Chief Officer, Resources provided a presentation entitled "Delivering the initial phase of the Procurement Strategy – A Case for Investment" to convey the substance of a report for Cabinet. Following the presentation, comments and questions were invited:

- A Member suggested that independent assessment would be beneficial, and also that there should only be reports following notable change to save Officer time and assist progress. It was also suggested that everyone should have a target to encourage better efficiency and responded that arbitrary targets won't achieve ownership by departments. Instead, by working with the local authority partner to gain a good level of insight and data will lead to well-informed targets to enable Chief Officers to be challenged. Responsibility will be transferred to the Head of Transformation for phase 1. Additional resource and expertise will be brought in on an informed basis based on outcomes after the 3 month period.
- Members praised the thorough and measured presentation. Concern about cultural shift was expressed seeking a tighter bond between Enterprise and Procurement. It was stressed that a pathway of training and feedback of information is key.
- In response to a question, it was explained that the change will be "sold" to staff by starting early with good data to produce a better understanding of future procurement

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work. The importance of working with staff, training and engaging with suppliers was agreed as key.

Committee Conclusions:

The Chair summed up that the Select Committee has explored the cultural change associated with the new Procurement Strategy and had considered who will drive it in the future referring to the need for independent assessment .

Members commended the measured and informed approach. The Select Committee was assured that the early engagement of staff would be an important step in introducing the new strategy

The Chief Officer, Resources was thanked for his presentation. The Select Committee Members looked forward to progress and requested an update on in April.

3. Outdoor Education: Scrutiny of the service re-provision proposals.

Purpose:

1. To consider the dissolution of the Gwent Outdoor Education Service partnership for which the Council is the lead partner, working with Blaenau Gwent County Borough Council (BGCBC), Newport City Council (NCC) and Torfaen County Borough Council (TCBC) further to the withdrawal of partner subsidy.
2. To consider the closure of the Talybont Site, returning the site to Newport City Council for disposal, and subsequently to consider the associated staff redundancies if suitable redeployment cannot be found.
3. To engage Select Committee Members in initial ideas on future opportunities for service delivery and to receive a presentation from the Service with a view to return when detailed plans are complete.

Key Issues:

1. Gwent Outdoor Education Service (GOES) has three residential centres at Hilston Park near Monmouth, Gilwern and Talybont (in Powys). The Council operates and manages GOES on behalf of the partner authorities i.e. BGCBC, NCC and TCBC, the Council own the Hilston Park and Gilwern sites whilst NCC own the Talybont centre. The service currently provides around 20,000 visitor days annually, the vast majority being residential school groups from South East Wales.
2. Post local government reorganisation in 1996, the joint service was supported by annual subsidies from the four Local Authority partners. NCC, in 2013 withdrew from the Shared Service Agreement and subsidy arrangements due to financial reasons. In 2016, TCBC decided to apply a tapering reduction in subsidy for 2016/17 reducing to nil subsidy in 2017/18. BGCBC also reduced their subsidy and are considering withdrawal.
3. Since 2013/14 the Service made a small profit until 2017/18 when income levels dropped slightly. This does not include the cost of building maintenance, grounds maintenance or insurances. If included in the costs of delivering the service, it has operated at a deficit for four

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of the last five years. A net overspend of £50,000 is predicted for 2018/19. Reasonable income has been maintained and future operation needs to be reviewed. The Shared Service Agreement needs to be ended and subject to approval, this will be terminated from 31st March 2019.

4. Hilston and Gilwern sites are owned by the Council and will remain with the Authority. Talybont will be returned to NCC. The return of the Talybont site to NCC will result in the loss of two posts at Talybont and subsequently, redundancy costs. The Agreement states that if the host authority has to make a redundancy payment, the Authorities should make a fair and reasonable contribution but it is anticipated that this be met from the service budget.

5. There will be new possibilities for service design and delivery particularly if the proposed new Alternative Delivery Model, MonLife, is approved by Council in 2019. Efforts will be concentrated on two Council owned sites by reviewing staff structures, improving efficiency, increasing income and identifying potential new markets.

Member Scrutiny

Following a presentation from the Head of Tourism, Leisure, Culture and Youth and Gwent Outdoor Education Centre Officers, questions were invited from Select Committee Members:

- Given the regional drive for educational achievement and innovative curriculum, regional working on health and social care and the pressures on Child and Adolescent Mental Health Services (CAMHS), it was asked why partner authorities wished to withdraw. It was responded that the reasons are mainly financial and reflect many years of budget cuts. The service has continued due to schools' and/or parents' funding for what is viewed as a valued service.
- Other similar facilities are available at Storey Arms, Swansea and Carmarthen. All Powys CC facilities have been closed. 6 authorities in North Wales funds a shared service.
- A Member asked why the Talybont site is being closed. It was explained that prices have risen and it is the most difficult site to fill. Schools tend to choose 2 ½ day visits instead of 5 day visits; there is a drop off in winter bookings. A large extension provided new accommodation but the money was not available to complete the project to upgrade the Grade 2 listed building and consequently there are lower standard facilities there albeit in a great location. It was confirmed that it is owned by Newport CC and administered by Monmouthshire CC. Both Gilwern and Hilston Park sites cater for larger numbers.
- It is unclear if Monmouthshire would have any portion of the capital receipt if the site was sold.
- A Member shared his very positive experience of a visit with a school commenting on the impressive quality of instruction and the contribution to the health and wellbeing agenda but also recognised that school budgets are under huge pressure. Opportunities exist but with cross border schools and diversification e.g. for Management training. Officers confirmed that the priority is to provide services for Monmouthshire schools.
- A Member asked if there are any unique features at Talybont and it was responded that the location is the best aspect. Lack of investment, however, has meant operating the service from steel containers, additionally there are licenses for basic activities only.
- Regarding leadership, the Head of Tourism, Leisure, Culture and Youth confirmed that there are excellent, well qualified staff capable of providing the skills and leadership for the other two sites going forward.
- Regarding bookings in the school holidays, it was explained that there is work all year round with e.g. the National Citizen Service
- Regarding diversification, it was confirmed that any new markets would not take precedence over schools.

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- Sales and Marketing posts have been added to publicise and sell services throughout Tourism, Leisure, Culture and Youth. Partnership with students of video marketing was offered. The importance of careful research was emphasised.
- A Member supported opportunities to improve outcomes for children especially those from a deprived background. Work with the international student and schools market was suggested. Investment and working better together was also supported e.g. making better use of underused facilities like Clydach Village Hall for persons caving and walking in Clydach Gorge. A question was raised about surplus S106 money for Gilwern and plans for its expenditure. It was explained that £12,000 will be used by the Youth Service, the remainder is for improvements to Gilwern Village Hall and an update on progress was provided.
- A Member supported that other facilities in the County could complement future services. It was strongly suggested that the Select Committee scrutinises proposals going forward.
- In response to a question about parental contribution, it was explained that the highest charge is £286 per 5 days with reductions in winter and for Free School Meals pupils. Subsidised places are not offered to pupils from the other authorities that have withdrawn funding. A Member stressed that the main purpose should be confirmed as providing better education for young people.

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Committee Conclusions:

The Chair, on behalf of the Economy and Development Select Committee, summarised views as follows:

1. The Select Committee explored some of the reasons why the other authorities had disinvested in the service and recognised the pressure this placed on the Council.
2. The Select Committee fully explored the issues pertaining to the Talybont Centre.
3. The Committee considered the opportunities for diversification at the Hilston Park and Gilwern Centres including accessing the private sector market for example in respect of business management training and development. In doing so, the Select Committee was clear that research must be robust and welcomed future opportunities for scrutiny. The Committee advocated the use of key data to ensure a good response to the commercial market and to shape future services.
4. The Select Committee were pleased to hear the praise of the leadership and management team; Members shared personal and positive feedback.
5. The Committee considered staffing levels and particularly recognised the importance of sales and marketing going forward to ensure information is efficiently promulgated throughout South Wales, the South West and West Midlands.
6. Whilst seeking new funding streams, the Select Committee wished to ensure that the improved services mainly benefitted children from this and other authorities.
7. The Select Committee questioned use of Section 106 funding and noted that it will be used to double glaze a community facility – more information was to be sought.

The Select Committee voted on the recommendations to Cabinet contained in the report and unanimously supported:

1. The approval of the dissolution of the Gwent Outdoor Education Service Partnership with effect from 31st March 2019.
2. The formal closure of the Talybont site on 1st Feb 2019 returning the site to Newport City Council with effect from 28th Feb 2019.
3. The approval of the deletion of two posts i.e. Talybont Site Co-ordinator – Staffing and Environment Education and the site Cook and to approve corresponding redundancy payments, if suitable redeployment cannot be found.

The Officers were thanked for their attendance at the meeting.

MONMOUTHSHIRE COUNTY COUNCIL

Minutes of the meeting of Economy and Development Select Committee held at The Council Chamber, County Hall, Rhadyr, Usk, NP15 1GA on Tuesday, 18th December, 2018 at 2.00 pm

4. To confirm the date and time of the next meeting as Thursday 10th January 2019 at 10.00am

Members' Seminar on Brexit: 15th January 2019, 2.00pm. The Scrutiny Manager has circulated some information to all Members to assist development of questions.

A series of Local Development Plan workshops have been arranged as follows:

1. 22nd January 2019 at 2.00pm – Vision and future economies workshop
2. Members seminar: 28th January 10.00am – To discuss potential candidate sites
3. 25th March 2019 at 10.00am: Workshop on Planning Policy Wales v.10 and its implications.

The Chair, Vice Chair, Scrutiny Manager and Head of Planning and Place will meet to prepare for the above workshops to ensure there is clear purpose and clear outcomes.

In discussing infrastructure and the removal of the tolls on the Severn Bridge, the Chair agreed to chase progress on publication of the Weltag Stage 1 report on the Chepstow Transport Study.

The meeting ended at 4.30 pm

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MONMOUTHSHIRE COUNTY COUNCIL

Minutes of the meeting of Economy and Development Select Committee held
at Council Chamber, County Hall, The Rhadyr USK - County Hall on Thursday, 10th
January, 2019 at 10.00 am

PRESENT: County Councillor P.Pavia (Chairman)

County Councillors: A.Davies, D. Dovey, M.Feakins, R.Roden and
A. Watts

Also in attendance County Councillor(s): A. Easson and P. Murphy

OFFICERS IN ATTENDANCE:

Frances Williams	Chief Officer, Enterprise
Peter Davies	Chief Officer, Resources
Mark Howcroft	Assistant Head of Finance
Hazel Ilett	Scrutiny Manager
Nicola Perry	Senior Democracy Officer
Rob O'Dwyer	Head of Property Services and Facilities Management

APOLOGIES:

Councillors J.Becker and B. Strong

1. Declarations of Interest

There were no declaration of interest.

2. Public Open Forum

There were no matters for the public open forum.

3. CAPITAL STRATEGY ASSESSMENT 2018-19 and DRAFT CAPITAL BUDGET PROPOSALS 2019-20 to 2022-23

Context:

Chartered institute of Public Finance and Accountancy (CIPFA) produced a revised regulatory Code in December 2017, which included a need for local authorities to produce a Capital Strategy. The requirements were staggered with an aim for reporting compliance during 2018/19 with a full Capital Strategy implemented for 2019/20. This report concentrates on the former in evaluating the governance, planning and priority setting involved in presenting 2019-20 capital budget proposals and the 3 years thereafter making up the collective capital medium term financial plan.

The overall purpose of a capital strategy being to provide opportunity for engagement with Full Council to ensure overall strategy, governance procedures and risk appetite are fully understood by all elected members

The code, in describing the Capital Strategy, reports it can be delegated to

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Minutes of the meeting of Economy and Development Select Committee held at Council Chamber, County Hall, The Rhadyr USK - County Hall on Thursday, 10th January, 2019 at 10.00 am

Cabinet (or similar body) with Full Council being responsible. MCC's approach is to report budget setting process through Cabinet, with consideration and approval of the future capital programmes resting with full Council. The Council's Constitution is consistent with compliance requirements. It is anticipated that the actual resulting capital strategy will be reconciled and consistent with a wider financial strategy and both available for consideration during the spring cycle of meetings.

Member Scrutiny:

A Member referred to Sections 4.7 and 4.10 and raised concerns regarding the formation of a housing company which the Council has already mandated, but acknowledged the lack of provision for this within the report. The need for housing and business generation would suggest that the housing company would be a priority. The Assistant Head of Finance explained he realised the importance of affordable housing and looked towards the administration involved in setting up a company in relation to how it applies to the need to set up a capital strategy. This report was not seeking approval for such a company to be set up.

Concerns around affordable housing continued to be expressed, particularly the lack of emphasis on this within the Capital reports. The Cabinet Member for Resources explained that, with regards to Housing Development Company, a report will be brought to Council in April 2019. Research is underway regarding the setting up of a development company, not necessarily specifically a housing development company. The report to Council will clearly set out the proposals.

Councillor Watts advised that representatives of Bristol City Council are willing to discuss the pitfalls they had experienced through the same process, which he considered a better resource than the use of consultants. The Cabinet Member assured that there would be a meeting with Bristol, as well as Welsh authorities.

The Chief Officer for Resources understood the concerns and agreed that forming a housing company today would not solve all problems, so he aims to balance our resource to make sure we are getting the acquisitions through to deal with our commercial strategy; making sure we are making suitable and adequate progress on our strategic sites; making sure we are doing all the groundwork to be well placed to move forward when proposals are brought to Council.

Councillor Watts added that 33% of the children in his ward live in deprivation, due to families being susceptible to disproportionately high rental charges. He was keen to express the urgency of the matter.

The Cabinet Member advised the purpose of a development company rather than a housing company would be to avoid complications around the terms of the housing stock transfer.

The Chair highlighted upcoming workshops around the LDP.

MONMOUTHSHIRE COUNTY COUNCIL

Minutes of the meeting of Economy and Development Select Committee held at Council Chamber, County Hall, The Rhadyr USK - County Hall on Thursday, 10th January, 2019 at 10.00 am

Recommendations:

The Economy and Development Select Committee resolved to agree the recommendation:

To consider and provide feedback upon the budget assumptions, pressures and savings proformas affecting this Select portfolio area.

Committee Conclusion:

The Chair summarised that the Committee had exhausted a number of areas including the importance of housing as the Authority moves forward, ensuring affordability for our resident and attracting new people.

The Committee touched on the impact of Raglan and what that means for unallocated sites. Members were reminded of upcoming LDP workshops where this will be explored in further detail.

Members pushed the point that we need to look at exemplar councils, taking advice where available, understanding the Council's need to balance and resource with commercial acquisitions.

The Committee looked at risk in relation to the capital investment and trying to understand the public sector and the commercial contractor.

The Committee touched on concerns around the reserve strategy, in terms of being flexible around investor models.

The Committee looked at external risk in terms of Brexit, and the vulnerability of some of the major contractors we work with.

The Committee had received assurance from the Assistant Head of Finance that the way we are moving forward with our portfolio is in a balanced way. An upcoming Brexit Workshop will look to address some of the issues discussed.

4. REVENUE BUDGET PROPOSALS 2019/20 FOR CONSULTATION

Purpose and Context:

To set out a budget proposal for financial year 2019/20.

To commence a period of consultation on the budget proposal that will remain open until 31st January 2019.

To consider the 2019/20 budget proposal within the context of the 4 year Medium Term Financial Plan (MTFP) and the Corporate Plan.

MONMOUTHSHIRE COUNTY COUNCIL

Minutes of the meeting of Economy and Development Select Committee held at Council Chamber, County Hall, The Rhadyr USK - County Hall on Thursday, 10th January, 2019 at 10.00 am

Member Scrutiny:

A Member sought clarity regarding the failure to reduce costs relating to agencies. This referred to social care agency staff to supplement our existing establishments. Work is in place to build in-house resilience to reduce reliance on agencies.

With regards to harmonisation of finance relating to foster care, the five authorities across Wales in relation to foster care have differing rates and it is more equitable to apply a rate across Gwent that is the same. It will incur a pressure because the harmonised rate is more than what would have traditionally been paid. It does mean that we potentially have access to a wider pool of foster carers.

It was questioned if raising car parking charges was a sensible strategy, and would it make a significant difference to the operations budget. Concerns were this could prove to have a negative impact on businesses in those areas. The Chief Officer for Enterprise responded that this would also be for consideration under the Strong Communities Select remit. She explained the charges to go back in to the highways infrastructure, and those service areas. The effect of charges on town centre footfall and activity would be monitored.

With regards to retaining resources, a question was raised around a change to the recharge from selling properties after people have gone into respite, and the impact on budgets. It was agreed that this should be brought to Adults Select Committee.

Pressures around energy and fuel, and procurement of fuel were discussed. A cost pressure is included within the portfolio as we struggle to absorb annual increases in fuel costs. Currently it is understood that we will be affected by £40,000 per annum. Fuel and energy contracts are assisted through a regional procurement.

A Member questioned if there had been feedback on the introduction of Hydrogen fuel for commercial vehicles, to which the Chief Officer advised that a car trial is hoped to take place in the next few months. An update would be welcomed by Members.

In view of the current performance of Tourism and Enterprise, and the failure to meet targets, it was questioned how a £331,000 benefit was predicted in relation to ADM Mon Life. The Chief Officer for Resources explained that the saving was a consequence of the current draft business plan being scrutinised ahead of a future decision around moving services to the ADM. Some of the savings are consequential to business rate, VAT, gift aid savings.

Members recognised the importance of engaging with Town and Community Councils in the consultation process.

Recommendations:

MONMOUTHSHIRE COUNTY COUNCIL

Minutes of the meeting of Economy and Development Select Committee held at Council Chamber, County Hall, The Rhadyr USK - County Hall on Thursday, 10th January, 2019 at 10.00 am

The Economy and Development Select Committee resolved to agree the recommendation:

To consider and provide feedback upon the budget assumptions, pressures and savings proformas affecting this Select portfolio area.

Committee Conclusion:

The Chair concluded the item and summarised that the Committee have looked at the pressures around fuel and energy costs, recognising potential opportunity to work alone, and understanding innovations such as hydrogen and electricity models for our fleets.

The Committee looked at staffing pressures, in agency working, and the potential to grow our workforce.

Car Parking charges were discussed thoroughly.

The Committee resolved to accept the recommendation in the report

5. REVENUE & CAPITAL MONITORING 2018/19 OUTTURN STATEMENT

Purpose and Context:

The purpose of this report is to provide Members with information on the revenue and capital outturn position of the Authority at the end of reporting period 2 which represents the financial outturn position for the 2018/19 financial year based on October inclusive activities.

This report will also be considered by Select Committees as part of their responsibility to,

- assess whether effective budget monitoring is taking place,
- monitor the extent to which budgets are spent in accordance with agreed budget and policy framework,
- challenge the reasonableness of projected over or underspends, and
- monitor the achievement of predicted efficiency gains or progress in relation to savings proposals.

Member Scrutiny:

Concerns around the level of deficit in schools were raised, to which the Assistant Head of Finance explained that collectively the draw on reserves is predicted to exhaust the collective level of reserve this year, and the authority is bearing the cash flow consequence in the short term. This has an impact on the Council fund levels. It was recognised that this would fall under the remit of Children and Young People Select.

The 21st Century Schools programme was commended on the minimum overspend.

MONMOUTHSHIRE COUNTY COUNCIL

Minutes of the meeting of Economy and Development Select Committee held at Council Chamber, County Hall, The Rhadyr USK - County Hall on Thursday, 10th January, 2019 at 10.00 am

It was questioned that with the increase in Council Tax, would spreading payments over 12 months rather than 10 be an option, and would there be any implications to cash flow? In response we heard that 10 months is part of the Council's requirement that it has to offer. Further information would be sought and fed back.

An update on the overall collection rates across authorities was requested.

A typographical error was noted on 79 of the report. This should read a net overspend for the directorate.

In terms of winter pressures, the Highways Maintenance Department are currently forecasting a breakeven position but a deterioration in the weather could have an impact on expenditure. Last year Welsh Government supported local authorities which funded part of that expenditure but not all of it.

Officers agreed to take on board comments and concerns regarding car parking charges.

A Member expressed concern around the extra pressure on MCC officers, a suggested utilising the experience of Members where appropriate.

Committee Conclusion:

The Committee resolved to agree the recommendation to note the report.

6. To confirm the following minutes:

7. Special Meeting 19th October 2018

The minutes of the special meeting held on 19th October 2019 were confirmed and signed by the Chair.

8. Ordinary Meeting 22nd November 2018

The minutes of the meeting held on 22nd November were confirmed and signed by the Chair.

9. Actions arising from previous meeting

Noted.

10. Economy and Development Select Committee Forward Workplan

Noted.

11. To confirm the date and time of the next meeting as Thursday 14th February 2019 at 10am

Noted.

The meeting ended at 12.55 pm

MONMOUTHSHIRE COUNTY COUNCIL

**Minutes of the meeting of Economy and Development Select Committee held
at Council Chamber, County Hall, The Rhadyr USK - County Hall on Thursday, 10th
January, 2019 at 10.00 am**

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Economy and Development Select Committee

Action List

18th December 2018 (Special)

Minute Item:	Subject	Officer	Outcome
2.	Procurement	Peter Davies	Independent assessment and early engagement with staff to aid the introduction of the new strategy.
3.	Outdoor Education		<p>The Committee considered the opportunities for diversification at the Hilston Park and Gilwern Centres including accessing the private sector market for example in respect of business management training and development. In doing so, the Select Committee was clear that research must be robust and welcomed future opportunities for scrutiny.</p> <p>2. Whilst seeking new funding streams, the Select Committee wished to ensure that the improved services mainly benefitted children from this and other authorities.</p> <p>3. More information sought on the use of Section 106 funding.</p> <p>4. The approval of the dissolution of the Gwent Outdoor Education Service</p>

			<p>Partnership with effect from 31st March 2019.</p> <p>5.. The formal closure of the Talybont site on 1st Feb 2019 returning the site to Newport City Council with effect from 28th Feb 2019.</p> <p>6.. The approval of the deletion of two posts i.e. Talybont Site Co-ordinator – Staffing and Environment Education and the site Cook and to approve corresponding redundancy payments, if suitable redeployment cannot be found.</p>
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Economy and Development Select Committee

Action List

10th January 2019 - BUDGET

Minute Item:	Subject	Officer	Outcome
6.	Monitoring Report	Mark Howcroft	Further information on the implications of spreading Council Tax payments over a 12 month period. Information on collection rates – best/worse authorities

Monmouthshire's Scrutiny Forward Work Programme 2019

Economy Select Committee				
Meeting Date	Subject	Purpose of Scrutiny	Responsibility	Type of Scrutiny
10 th January 2019	Budget Scrutiny	Pre-decision Scrutiny of the draft budget proposals for 2019-20 in line with the Corporate Plan.	Mark Howcroft Peter Davies	Budget Scrutiny
Tuesday 22 nd January 2019	Local Development Plan WORKSHOP 1	<p><u>Discussion on 3 interrelated Issues:</u></p> <p>1) Local Development Plan ~ understanding the issues, the objectives, the risks and the vision (with clarity on measures needed to achieve this vision). <u>Outcome:</u> Provide a clear steer from the workshop on the strategic direction, which will inform the content of the final reports to the Economy and Development Select Committee (together with feedback from the Clusters and Area Committees).</p> <p>2) Economies of the Future Final report ~ has direct relevance to the issues, objectives and vision of the Local Development Plan (to be formally reported to the Economy and Development Select Committee). <u>Outcome:</u> To offer support to the direction of this work which will underpin the strategic direction of the Local Development Plan.</p>	Mark Hand Rachel Lewis Bob Greenland	Policy Development

Monmouthshire's Scrutiny Forward Work Programme 2019

28 th January 2019	Local Development Plan MEMBERS SEMINAR	To understand the candidate site register /sites for possible conclusion into the LDP	Mark Hand Rachel Lewis	Members Seminar
14 th February 2019	Economies of the Future	To understand the implications of this work for the council's future economic development strategy and make recommendations to inform the development of future policy	Cath Fallon	Policy Development
	LDP: Vision, Issues and Objectives	To scrutinise the draft vision and objectives to inform the development of future policy.	Mark Hand Rachel Lewis	Policy Development
February/March 2019 Page 158	Future Economies WORKSHOP 2	Discussion with the Forest of Dean Council on issues of mutual interest: <ul style="list-style-type: none"> ✓ Impact of the removal of the Severn Tolls ✓ Tourism and enterprise ✓ Affordable housing, transport 	Mark Hand Cath Fallon James Woodhouse	Action Learning
28 th March 2019	Broadband	update on the Superfast Cymru 2 broadband procurement and future plans (post announcement in December of the future funding for Monmouthshire). Digital Deprivation Action Plan	Cath Fallon Bob Greenland	Performance Monitoring
9 th May 2019	No specific items scheduled at this stage			

Future Meeting Items: Agreed Scrutiny Focus for 2018-19

- Affordable housing, transport and the LDP

Monmouthshire's Scrutiny Forward Work Programme 2019

- **Impact of the removal of the Severn Tolls**
- **Tourism and enterprise**
- **ICT in Schools** ~ scrutinise jointly with CYP Select ~ Post Evaluation Review to return. Joint scrutiny of the outcomes for young people: Implementing the technology → delivering the teaching and learning → digital attainment levels.
- **Marketing Monmouthshire for Business** ~ potential workshop
- **Business and Enterprise Strategy**
- **Asset Investment Strategy and progress of projects**

Date to be confirmed

Alternative Delivery Model - Outcome on the due diligence undertaken with regard to the business plan and associated documents.
(Performance monitoring/Policy development)

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Cabinet, Council and Individual Cabinet Member Decisions (ICMD) Forward Plan

Monmouthshire County Council is required to publish a forward plan of all key decisions to be taken. Council and Cabinet items will only be considered for decision if they have been included on the planner no later than the month preceding the meeting, unless the item is considered urgent.

Committee / Decision Maker	Meeting date / Decision due	Subject	Purpose	Author	Date item added to the planner	Date item originally scheduled for decision
Council	07/03/19	Road Safety Strategy		Rogger Hoggins	29/01/19	
Cabinet	06/11/19	Long Term Household Recycling		Roger Hoggins	29/01/19	
Cabinet	02/10/19	Usk Town Strategy		Frances Williams	29/01/19	
Cabinet	03/04/19	Speed Management		Roger Hoggins	29/01/19	
Cabinet	03/04/19	LPD issues objectives and vision		Mark Hand	29/01/19	
Cabinet	03/04/19	Digital Deprivation			29/01/19	
ICMD	13/03/19	Restructure of Housing Options Scheme		Ian Bakewell	04/02/19	
ICMD	02/04/19	Consolidated Traffic Order		Roger Hoggins	29/01/19	

ICMD	13/03/19	Restructure of Housing Options Scheme		Ian Bakewell	04/02/19	
ICMD	27/03/19	Weekend Traffic Orders		Roger Hoggins	29/01/19	
Council	07/03/19	Update of Due Diligence Exercise & Final Decision		Frances Williams	29/01/19	
Council	21/02/19	Household Waste Recycling Centre Policy		Roger Hoggins	29/01/19	
Council	21/02/19	Addressing our lack of a five year housing land supply: a review of Monmouthshire's approach to unallocated housing sites		Mark Hand	29/01/19	
Council	21/02/19	REGENERATION OF SEVERNSIDE & THE FUTURE ROLE OF CALDICOT TOWN TEAM.		Cath Fallon	29/01/19	
Council	21/02/18	Widening of Investment definition		Mark Howcroft	29/01/19	
Council	21/02/19	Capitalisation of Revenue Costs		Mark Howcroft	29/01/19	
Cabinet - Special	20/02/19	ESTABLISHMENT OF URBAN AND PHYSICAL REGENERATION TEAM		Cath Fallon	29/01/19	
Cabinet	06/02/19	Local Housing Market Assessment		Mark Hand	29/01/19	

Cabinet		Play Efficiency			29/01/19	
		Museums (need workshop first)		Frances Williams	29/01/19	
		LDP		Mark Hand	29/01/19	
Council		Growth Option		Mark Hand	29/01/19	
Council		Future Econ			29/01/19	
ICMD	27/03/19	Future Housing Management Register		Mark Hard	29/01/19	
ICMD	27/03/19	Youth Support Grant Additional Funding	Cllr Richard John	Hannah Jones	21/01/19	
ICMD	13/02/19	Lido facility in Bailey Park		Deb Hill Howells	21/01/19	

ICMD	13/02/19	Prohibition of waiting at anytime, Lansdown Road, Abergavenny		Paul Keeble	15/01/19	
ICMD	13/03/19	PSPO Consider Condition of all MCC car parks		Andrew Mason	08/01/19	
ICMD	16/01/19	IN-HOUSE SENIOR CARE & SUPPORT WORKER RE-GRADING		Colin Richings	31/12/18	
ICMD	16/01/19	DOMESTIC ASSISTANT POST RE-GRADE		Sian Gardner	31/12/18	
ICMD	16/01/19	Monmouthshire LDP Sustainability Appraisal Scoping Report and Habitats Regulations Appraisal Initial Screening		Mark Hand/Rachel Lewis	21/12/18	
ICMD	16/01/19	LOCAL GOVERNMENT (WALES) ACT 1994	THE LOCAL AUTHORITIES (PRECEPTS) (WALES) REGULATIONS 1995	Jonathan S Davies	18/12/18	
ICMD	12/12/18	PROHIBITION OF WAITING AT ANY TIME (CHAPEL ROAD, STANHOPE STREET, CANTREF ROAD, AVENUE ROAD, HAROLD ROAD) ABERGAVENNY		Paul Keeble	21/11/18	

ICMD	12/12/18	Local Government (Wales) Act 1994 The Local Authorities (Precepts)9wlaes) Regulations 1995		Jonathan S Davies	20/11/18	
Council	13/12/18	Gwent Homelessness Strategy		Steve Griffiths	13/11/18	
Cabinet	19/12/18	Gwent Homelessness Strategy	Moved to Council 13 December	Steve Griffiths	05/11/18	
ICMD	14/11/18	Review of Mardy Local Lettings Policy		Ian Bakewell	24/10/18	
ICMD	14/11/18	Rural Allocations Policy		Shirley Wiggam	23/10/18	
ICMD	14/11/18	Social Housing Grant Programme		Shirley Wiggam	23/10/18	
ICMD	28/11/18	Panel Fees for Foster Carers		Jane Rodgers	17/10/18	

ICMD	14/11/18	Family Support within 'Statutory' Children's Services - Re-design of the Contact Service		Jane Rodgers	17/10/18	
Cabinet	07/11/18	Targeted Regeneration Investment Programme, The Cross, Caldicot		Cath Fallon	12/10/18	
Cabinet	07/11/18	21st Century Schools - Band B project Team		Will Mclean	12/10/18	
Cabinet	05/12/18	Implementation of NJC revised payspine April 2019			09/10/18	
Council	17/09/18	Monmouthshire Citizen Advice Bureau Annual Report	To provide members with an opportunity to discuss the work and ask questions of the Chief Executive of CAB Monmouthshire which provides advice to local people and its contribution to the council's purpose of building sustainable and resilient communities.	Matt Gatehouse	05/10/18	
ICMD	24/10/18	Additional Service Offer at Usk Hub	To seek approval for the development of a business case to site a Post Office within Usk Hub following the announcement of the planned closure of the current facility on Bridge Street	Matt Gatehouse / Richard Drinkwater	04/10/18	
Cabinet	06/02/18	Future Options for Mounton House School		Will Mclean	27/09/18	
Cabinet	05/12/18	LA and Schools Partnership Agreement		Cath Saunders	26/09/18	
Cabinet - Special	20/02/19	Final Revenue and Capital Budget Proposals		Peter Davies	20/09/18	

Council	13/12/18	Capital Budget Report on 3rd Lane on Wye Bridge	Defer to December	Paul Keeble	20/09/18	
Cabinet	07/11/18	Cadetship Programme		Tracey Harry	20/09/18	
Cabinet	07/11/18	Structure Report		Roger Hoggins	20/09/18	
Cabinet	19/12/18	Draft Revenue Capital Budget Proposals	To outline the proposed capital budget for 2019/20 and indicative capital budgets for the 3 years 2020/21 to 2022/23	Joy Robson/Peter Davies	19/09/18	
ICMD	10/10/18	Register of Priority Services		Ian Hardman	18/09/18	
Council	07/03/19	Final Budget Proposals		Joy Robson	11/09/18	
Council	07/03/19	Treasury Management Strategy 2019/20	To accept the annual treasury Management	Joy Robson	11/09/18	
Council	07/03/19	Council Tax Resolution 2019/20	To set budget and Council tax for 2019/20	Ruth Donovan	11/09/18	
Council	17/01/19	Council Tax Reduction Scheme 2018/19		Ruth Donovan	11/09/18	
ICMD	14/11/18	Proposal to extend supporting people contracts in 2019/20		Chris Robinson	10/09/18	

Council	25/10/18	Statement of Gambling Policy and proposals for Casinos		Linda O'Gorman	10/09/18	
ICMD	10/10/18	Joint Heritage Services with Torfaen		Mark Hand	05/09/18	
ICMD	26/09/18	Joint Heritage Services with Torfaen	DEFERRED TO 10 OCTOBER	Mark Hand	05/09/18	
Cabinet	07/11/18	Project 5: Development of a Therapeutic Foster Care Service for Complex Young People		Jane Rodgers	30/08/18	
Council	13/12/18	Final approval of MonLife and MonLife Plus		Tracey Thomas	09/08/18	
Cabinet	05/09/18	NEET		Hannah Jones	09/08/18	
Cabinet	05/09/18	Management of obstructions in the public highway	For Cabinet to approve recommendations made by Strong Communities Select on 30th July	Roger Hoggins	09/08/18	
ICMD	10/10/18	Extension of Lease for Gilwern Library	To seek approval to extend the council's lease of space within Gilwern Community Centre for the continued provision of a library service beyond the end of the current agreement which expires in March 2019	Matthew Gatehouse	03/08/18	
ICMD	22/08/18	Anti-Social Behaviour, Crime and Policing Act 2014		Andrew Mason	03/08/18	
Cabinet	05/09/18	ICM Phase 2 Implementation of Family Support Services - post statutory threshold		Jane Rodgers	01/08/18	

ICMD	08/08/18	Children's Services – Supporting First Years in Practice		Jane Rodgers	19/07/18	
ICMD	08/08/18	Safeguarding Business Support Update		Diane Corrister	19/07/18	
Council	25/10/18	County Hall Accommodation	Seeking approval to undertake borrowing to fund the refurbishment works to County Hall	Deb Hill-Howells	17/07/18	
ICMD	26/09/18	Amendments to cemeteries management practice to withdraw burial plot reservations.		Deb Hill-Howells	17/07/18	12/09/18
Council	20/09/18	Abergavenny Hub	Final business case to proceed with the creation of a Hub at Abergavenny Town Hall	Deb Hill Howells	17/07/18	
Cabinet	05/09/18	Targeted Regeneration Investment - South Monmouthshire		Cath Fallon	13/07/18	
Council	20/09/18	A40 Wyebridge Highway Improvement Scheme		Paul Keeble	12/07/18	
Cabinet	05/12/18	Corporate Plan: Progress Report		Matthew Gatehouse	10/07/18	
ICMD	08/08/18	Financial Systems support team - change of role and job description		Ruth Donovan	03/07/18	
ICMD	11/07/18	FLOOD and Water Management Act 2010 - Schedule 3 IMPLEMENTATION of the Sustainable Drainage Systems (SuDS) Approving Body (SAB)		Paul Keeble	22/06/18	

ICMD	11/07/18	RECRUITMENT OF BSSG ADMIN OFFICER		Christian Schmidt	22/06/18	
ICMD	25/07/18	Private Sector Housing Loan Schemes - Change of Terms.		Steve Griffiths	21/06/18	
Cabinet	25/07/18	Youth Enterprise			20/06/18	
Cabinet	25/07/18	Borough Theatre			20/06/18	
Cabinet	25/07/18	Events			20/06/18	
Cabinet	25/07/18	Month 2 Budget Report			20/06/18	
Council	26/07/18	Shadow Board recruitment for the ADM		Cath Fallon	15/06/18	
Cabinet	04/07/18	Disposal of Land between Llanishen and Trellech	To declare approx 36 acres of land between Llanishen and Trellech surplus to requirements and to seek consent for its disposal	Gareth King	15/06/18	
Cabinet	05/09/18	Childcare Offer		Rebecca Davis	12/06/18	
Council	26/07/18	Stock Transfer – Promises Kept/Missed & Added Value	PRESENTATION ONLY	Ian Bakewell	08/06/18	

ICMD	27/06/18	REALLOCATION OF SECTION 106 FUNDING, MONMOUTH		Mike Moran	08/06/18	
ICMD	11/07/18	Workforce Update Report - Children's Services	DEFERRED	Claire Robins	07/06/18	
Cabinet	04/07/18	Care Leavers Report		Ruth Donovan	07/06/18	
Cabinet	04/07/18	Restructure of attractions services in TLCY		Tracey Thomas	07/06/18	
Council	21/06/18	Corporate Parenting Strategy		Claire Marchant	07/06/18	
ICMD	27/06/18	Definitive Map Modification Order Section 53 (C) (i) Wildlife & Countryside Act 1981 Restricted Byway (53-16) Great Panta Devauden		Paul Keeble/Cllr B Jones	31/05/18	
Council	20/09/18	Well-being Objectives and Statement Annual Report 2017/18	For Council to approve the Annual Report 2107/18 on MCCs wellbeing objectives and statement	Richard Jones	30/05/18	
Cabinet	05/12/18	Reorganisation of ALN and Inclusion Services update	Cabinet consider objections received on the Reorganis	Debbie Morgan	25/05/18	
Cabinet	04/07/18	Review of ALN & Inclusion Services	Cabinet to consider the results of the statutory consulta	Debbie Morgan	25/05/18	
Council	20/09/18	Fairtrade		Hazel Clatworthy	24/05/18	

Council	26/07/18	Audit Committee Annual Report		Wendy Barnard	24/05/18	
ICMD	27/06/18	Planning advice charges for LDP candidate sites.		Mark Hand	24/05/18	Report deleted from Planner 7/6/18
ICMD	27/06/18	Early help Duty and Assessment – Hierarchy Update – Service Manager		Claire Robins	24/05/18	
Council	21/06/18	Plastic Free County		Hazel Clatworthy	24/05/18	
Cabinet	06/06/18	Twr Mihangel Section 106 Funding		Mike Moran	18/05/18	
Cabinet	06/06/18	Section 106 Off-Site Play Contributions		Mike Moran	18/05/18	
Cabinet	06/06/18	ADM Update		Tracey Thomas	18/05/18	
ICMD	25/07/18	Housing Renewal Policy		Ian Bakewell	17/05/18	
ICMD	25/07/18	B&B Policy		Ian Bakewell	17/05/18	
Cabinet	04/07/18	School Meal Debt Management		Roger Hoggins	17/05/18	

ICMD	13/06/18	Housing Restructure		Ian Bakewell	17/05/18	
Cabinet	06/06/18	Proposed 25 year lease of Former Park Primary , Abergavenny, to Abergavenny Community Trust		Nicola Howells	15/05/18	
Cabinet	06/06/18	Council Response to the LGR Green Paper		Matt Gatehouse	14/05/18	
ICMD	13/06/18	Re-fit Cymru programme	To seek approval to enter into a contract with Local Partnerships to utilise their framework to access energy efficient technologies.	Deb Hill Howells/Phil Murphy	10/05/18	
Council	26/07/18	Strategic Development Plan (SDP) Responsibilioie Au	DEFERRED	Mark Hand	09/05/18	
Cabinet	04/07/18	Draft NEET Reduction Strategy		Hannah Jones	08/05/18	
Cabinet	04/07/18	Inspire Programmes (Inspire2Achieve and Inspire2W	DEFERRED	Hannah Jones	08/05/18	
ICMD	25/07/18	'Disposal of land adjacent to A40 at Monmouth for highway improvements'	DEFERRED from June	Gareth King/Cllr P Murphy	03/05/18	13/06/18
ICMD	23/05/18	Creation of an Asset Officer Post, Estates		Deb Hill Howells/Cllr P Murphy	03/05/18	
ICMD	23/05/18	Letting of Penarth Farm, Llanishen		Gareth King/Cllr P Murphy	03/05/18	

Council	21/06/18	Joint Scrutiny of the City Deal		Hazel Ilett	30/04/18	
ICMD	23/05/18	High Street Rate Relief Scheme for 2018/19	To adopt the scheme of 2018/19 in accordance with Welsh Government Guidance	Ruth Donovan	26/04/18	07/03/18
ICMD	23/05/18	Proposed 30mph Speed Limit, Llandeenny Road, Llandeenny, Mill		Paul Keeble/Cllr B Jones	25/04/18	
Cabinet	25/07/18	Resource Strategy	To comprise Commercial; Procurement; People; Digital; Financial strategies	Peter Davies	23/04/18	
Council	10/05/18	Strategic Asset Management Plan		Peter Davies	23/04/18	
ICMD	09/05/18	Rural Programmes Team – ICT and Finance Apprentice Post		Michael Powell	23/04/18	
ICMD	09/05/18	GDPR Data Protection Policy		Rachel Trusler	20/04/18	
ICMD	09/05/18	Trellech Speed Limits		Paul Keeble	18/04/18	
Cabinet	06/06/19	Budget Monitoring report - month 12 (period 3) - outturn	The purpose of this report is to provide Members with information on the forecast outturn position of the Authority at end of month reporting for 2018/19 financial year.	Joy Robson/Mark Howcroft	17/04/18	
Cabinet	03/04/19	Welsh Church Fund Working Group	The purpose of this report is to make recommendations to Cabinet on the Schedule of Applications 2018/19, meeting 9 held on the 7th March 2019.	Dave Jarrett	17/04/18	

Cabinet	06/03/19	2019/20 Education and Welsh Church Trust Funds Investment and Fund Strategies	The purpose of this report is to present to Cabinet for approval the 2019/20 Investment and Fund Strategy for Trust Funds for which the Authority acts as sole or custodian trustee for adoption and to approve the 2018/19 grant allocation to Local Authority beneficiaries of the Welsh Church Fund.	Dave Jarrett	17/04/18	
Cabinet	06/02/19	Welsh Church Fund Working Group	The purpose of this report is to make recommendations to Cabinet on the Schedule of Applications 2018/19, meeting 8 held on the 17th January 2019.	Dave Jarrett	17/04/18	
Cabinet	09/01/19	Final Draft Budget Proposals or recommendation to Council.		Joy Robson	17/04/18	
Cabinet	09/01/19	Welsh Church Fund Working Group	The purpose of this report is to make recommendations to Cabinet on the Schedule of Applications 2018/19, meeting 7 held on the 13th December 2018.	Dave Jarrett	17/04/18	
Cabinet	09/01/19	Budget Monitoring report - month 7 (period 2)	The purpose of this report is to provide Members with information on the forecast outturn position of the Authority at end of month reporting for 2018/19 financial year.	Joy Robson/Mark Howcroft	17/04/18	
Cabinet	05/12/18	Welsh Church Fund Working Group	The purpose of this report is to make recommendations to Cabinet on the Schedule of Applications 2018/19, meeting 6 held on the 25th October 2018.	Dave Jarrett	17/04/18	
Cabinet	05/12/18	Council Tax Base 2019/20 and associated matters	To agree the Council Tax Base figure for submission to the Welsh Government, together with the collection rate to be applied for 2019/20 and to make other necessary related statutory decisions	Sue Deacy/Ruth Donovan	17/04/18	
Cabinet	05/12/18	Reviews of Fees and Charges	To review all fees and charges made for services across the Council and identify proposals for increasing them in 2019/20	Mark Howcroft	17/04/18	
Cabinet	07/11/18	MTFP and Budget Process for 2019/20 to 2022/23	To outline the context and process within which the MTFP over the next 4 years and the budget for 2019/20 will be developed.	Joy Robson	17/04/18	
Cabinet	03/10/18	Welsh Church Funding Working Group	The purpose of this report is to make recommendations to Cabinet on the Schedule of applications 2018/19, Meeting 5 held on the 20th September 2018.	Dave Jarrett	17/04/18	

Cabinet	05/09/18	Welsh Church Fund Working Group	The purpose of this report is to make recommendations to Cabinet on the Schedule of Applications 2018/19, meeting 4 held on the 26th July 2018	Dave Jarrett	17/04/18	
Cabinet	25/07/18	Budget Monitoring report - Month 2 (period 1)	The purpose of this report is to provide Members with information on the forecast outturn position of the Authority at end of month reporting for 2018/19 financial year.	Joy Robson/Mark Howcroft	17/04/18	
Cabinet	04/07/18	Welsh Church Fund Working Group	The purpose of this report is to make recommendations to Cabinet on the Schedule of Applications 2018/19, meeting 3 held on the 21st June 2018.	Dave Jarrett	17/04/2018	
Cabinet	06/06/18	Revenue and Capital Monitoring 2017/18 Outturn Forecast Statement	To provide Members with information on the outturn position of the Authority for the 2017/18 year.	Mark Howcroft	17/04/18	09/03/18
Cabinet	06/06/18	Welsh Church Fund Working Group	The purpose of this combined report is to make recommendations to Cabinet on the Schedule of Applications 2018/19, meeting 1 held on 19th April and meeting 2 held on 10th May 2018	Dave Jarrett	17/04/18	
Council	10/05/18	To agree update on the Safeguarding Policy		Cath Sheen	16/04/18	
Cabinet	25/07/18	The delivery of budget savings for 2018/19.	To provide Cabinet with a level of comfort and reassurance around the delivery of Budget savings for 2108/19	Peter Davies	15/04/18	
ICMD	09/05/18	Civil Parking Enforcements	Moved from Cabinet 11/04/18	Paul Keeble	13/04/18	
ICMD	09/05/18	PROHIBITION OF WAITING AT ANY TIME (CHAPEL ROAD, STANHOPE STREET, CANTREF ROAD, AVENUE ROAD, HAROLD ROAD) ABERGAVENNY		Paul Keeble/Cllr B Jones	13/04/18	
ICMD	09/05/18	Creation of fixed term Senior Planning Policy Officer Post for 3.5 years		Mark Hand/Cllr Greenland	12/04/18	

ICMD	09/05/18	Amendment to existing fixed term Senior Landscape and Urban Design Officer post to make it a permanent post;		Mark Hand/Cllr Greenland	12/04/18	
ICMD	09/05/18	Creation of fixed term Apprentice Planner post (exact job title tbc)		Mark Hand/Cllr Greenland	12/04/18	
Council	10/05/18	Local Development Plan Delivery Agreement		Mark Hand	11/04/18	
ICMD	13/06/18	Supporting People contract procurement exemptions		Chris Robinson	10/04/18	
ICMD	23/05/18	Transfer to Torfaen - Assessment of free school meal entitlement for MCC		Nikki Wellington/Cllr Murphy	10/04/18	
ICMD	09/05/18	Re-evaluation of Post of Lead - Community Improvement Supervisor		Nigel Leaworthy	10/04/18	
Cabinet	06/06/18	Corporate Parenting Strategy		Jane Rodgers	22/03/18	
ICMD	18/04/18	Communities for Work		Hannah Jones	22/03/18	
Council	19/04/18	Bryn Y Cwm Change of name		Matt Gatehouse	21/03/18	
ICMD	18/04/18	Disposal of easement at Wonastow Road		Ben Winstanley	14/03/18	

Council	19/04/18	Council Diary 2018/19		John Pearson	12/03/18	12/03/18
ICMD	28/03/18	Property Maintenance Framework Agreement		Phil Kenney/P Murphy	06/03/18	
ICMD	13/06/18	Children with Disability - Hierachy Update		Claire Robins	05/03/18	15/02/2018 Report deleted from planner
ICMD	28/03/18	Children's Services Business Support Team - Hierachy Update		Claire Robins	05/03/18	
ICMD	28/03/18	Social Care & Health - Business Support Post		Claire Robins	05/03/18	
ICMD	28/03/18	Staffing Restructure of SCH Workforce Development Team		Sian Sexton	05/03/18	
ICMD	28/03/18	Operational Changes to Trading Standards		Gareth Walters/Sara Jones	27/02/18	
Cabinet	11/04/18	Tree Policy		Roger Hoggins	19/02/18	
Cabinet	28/02/18	Borough Theatre		Tracey Thomas	19/02/18	
Council	19/04/18	Sale of old County Hall Site		Roger Hoggins	16/02/18	

ICMD	09/05/18	Supporting People contract procurement exemptions	DEFERRED TO 13 JUNE	Chris Robinson	15/02/18	
ICMD	14/03/18	Future of Melin Private Leasing Scheme		Ian Bakewell	15/02/18	
Cabinet	11/04/18	VAWDASV		Joe Skidmore	08/02/18	
Council	01/03/18	Treasury Strategy		Peter Davies	08/02/18	
ICMD	28/02/18	Recruitment for Maternity Cover: Development Management Team		Phil Thomas	08/02/18	
ICMD	28/02/18	Restructure of Mental health Social Work Staffing		John Woods	08/02/18	
ICMD	28/02/18	Staffing Restructure of Adult Disability Service		John Woods	08/02/18	
Council	19/04/18	Chief Officer Report CYP		Will Mclean	25/01/18	
Cabinet	05/09/18	Recommendations on the review of ALN & Inclusion Services	Cabinet to receive recommendations based on the con	Debbie Morgan	25/05/01	
ICMD	30/01/19	Data Protection & GDPR Officer for Schools		Sian Hawyard		

ICMD	30/01/19	Social Care & Health Senior Leadership Review Follow up		Tyrone Stokes		
Council	25/10/18	Proposal to create a development company		Deb Hill-Howells		
Council	20/09/18	MCC Audited Accounts 2017/18 (formal approval)	To present the audited Statement of Accounts for 2017/18 for approval by Council	Joy Robson/Mark Howcroft		
Council	20/09/18	ISA 260 report - MCC Accounts - attachment above	To provide external audits repor on the Statement of Accounts 2017/18	WAO		
Council	20/09/18	J Block Proposals		Deb Hill-Howells		
ICMD	12/09/18	Colleague Volunteering Pilot	To seek approval to establish a Colleague Volunteering Pilot for 30 staff across directorates.	Owen Wilce		
Cabinet	05/09/18	Regional Safeguarding Board Annual Report	Deferred	Claire Marchant		
Cabinet	05/09/18	S106 Procedure Note and S106 Guidance Note	DEFERRED from May	Mark Hand		
Council	26/07/18	Chief Officer Annual Report		Claire Marchant		
Council	26/07/18	Safeguarding Evaluative Report		Claire Marchant		

ICMD	25/07/18	Care Homes Fees – Fair Rate for Care Exercise	Cllr P Jones	Nicola Venus- Balgobin		
Cabinet	04/07/18	Crick Road Business Case	ITEM DEFERRED	Colin Richings		
Cabinet	04/07/18	The Knoll, Section 106 funding, Abergavenny	DEFERRED from June	Mike Moran		07/03/18
Cabinet	04/07/18	Chippenham Mead Play Area	DEFERRED from 6/6/18	Mike Moran		
Cabinet	06/06/18	Welsh Language Monitoring Report	Moved to Strong Communities Select	Alan Burkitt		07/03/18
Cabinet	06/06/18	Kerbcraft Update	DEFERRED from May			
Council	10/05/18	Boundary Review		John Pearson		
ICMD	09/05/18	Adoption of highway management plan including appointment of Highway Asset inspector and changes to Asset Planning Officer posts		Paul Keeble		09/03/18
Cabinet	02/05/18	Adoption of Road Safety Strategy		Paul Keeble		
Cabinet	02/05/18	Social Justice Srtategy		Cath Fallon		

Cabinet	11/04/18	Disposal of County Hall		Roger Hoggins		
Cabinet	11/04/18	Welsh Church Fund Working Group	The purpose of this report is to make recommendations to Cabinet on the Schedule of Applications 2017/18, meeting 6 held on the 22nd February 2018	Dave Jarrett		
ICMD	28/03/18	Section 106 Major Maintenance Capital for the repairs to the footbridge over the Gavenny at Penyval,		Nigel Leaworthy		
Council	19/03/18	City Deal Business Plan		Paul Matthews		
Council	19/03/18	LDP		Mark Hand		
ICMD	14/03/18	2nd Phase Families Support Review		Claire Marchant		
ICMD	14/03/18	Award Garden Waste Contract		Carl Touhig		
ICMD	14/03/18	S106 Transport Projects		Richard Cope		
Cabinet	07/03/18	2018/19 Education and Welsh Church Trust Funds Investment and Fund strategies	To present to Cabinet for approval the 2018/19 Investment Fund Strategy for Trust Funds for which the authority acts as sole or custodian trustee for adoption and to approve the 2017/18 grant allocation to LA beneficiaries of the Welsh Church Fund	Dave Jarrett		
Cabinet	07/03/18	Corporate Parenting Strategy		Claire Marchant		

Cabinet	07/03/18	EAS Business Plan		Will Mclean		
Cabinet	07/03/18	Proposed changes to the schools mfunding formulafor the funding of building maintenance costs	To seek approval to reduce the funding of building maintenance costs for our new schools	Nikki Wellington		
Cabinet	07/03/18	Replacement document management system for revenues		Ruth Donovan		
Cabinet	07/03/18	Review of Additional Learning Needs and inclusion services	To seek cabinet approval to commence the statutory consultation process associated with proposed changes to ALN and Inclusion Services	Matthew Jones		
Cabinet	07/03/18	Turning the World Upside Down	DEFERRED	Claire Marchant		
Cabinet	07/03/18	Whole Authority Risk Assessment		Richard Jones		
Council	01/03/18	Approval of public service board well-being plan		Matt Gatehouse		
Council	01/03/18	Area Plan - Population Needs Assessment		Claire Marchant		
Council	01/03/18	Council Tax Resolution 2018/19		Ruth Donovan		
Council	01/03/18	Pooled fund for care homes		Claire Marchant		

Council	01/03/18	Social Justice Policy	ITEM DEFERRED	Cath Fallon		
Cabinet	28/02/18	Final Budget Proposals		Peter Davies		
ICMD	28/02/18	Charges in relation to the delivery of the auths private water supply responsibilities		Huw Owen		
ICMD	28/02/18	Fixed Penalty Notice charges for fly tipping offences		Huw Owen/Sara Jones		
ICMD	28/02/18	Gypsy and Traveller Pitch allocation policy report		Steve Griffiths		
ICMD	28/02/18	Re-designation of Shared Housing		Ian Bakewell/Greenland		
ICMD	28/02/18	Removal of under 18 burial charges		Deb Hill Howells		
Council	15/02/18	Active Travel Plan and Civil Parking Enforcement		Roger Hoggins		
Council	15/02/18	Corporate Plan		Kellie Beirne		
Council	15/02/18	Pay Policy		Sally Thomas		

ICMD	14/02/18	All Wales Play opportunities grant		Matthew Lewis/Cllr Greenland		
ICMD	14/02/18	Development Management Enhanced Services proposals		Phil Thomas		
ICMD	14/02/18	Loan to Foster Carers		Jane Rodgers		
ICMD	14/02/18	Personal Transport Budgets		Roger Hoggins		
ICMD	14/02/18	Public Health Wales Act - Intimate Piercing		David Jones		
ICMD	14/02/18	Residents only parking permit scheme Usk View, Merthyr Road, Abergavenny		Paul Keeble		
ICMD	14/02/18	Usk in Bloom		Cath Fallon		
ICMD	08/02/18	Fixed Penalty Notice charges for fly tipping offences		Huw Owen		03/01/18
ICMD	31/01/18	Seasonal Garden Waste Collections		Carl Touhig		
ICMD	31/01/18	Staffing changes in Policy and Governance		Matt Gatehouse		

Cabinet	29/01/18	ADM		Kellie Beirne		
Cabinet	29/01/18	Corporate Plan		Kellie Beirne		
Council	18/01/18	Council Tax Reduction Scheme 2018/19		Ruth Donovan		
Council	18/01/18	Response to Older Adults Mental Health Consultation		Claire Marchant		
ICMD	17/01/18	Local Government (Wales) Act 1994 The Local Authorities (Precepts) Regulations 1995		Joy Robson/Mark Howcroft		
ICMD	17/01/18	Supporting People Programme Grant Spendplan 2018-19		Chris Robinson		03/01/18
ICMD	17/01/18	Trainee Accountant Regrade		Tyrone Stokes		
Cabinet	10/01/18	Budget Monitoring Report	The purpose of this report is to provide members with information on the forecast outturn position of the authority at end of month reporting for 2016/17 financial year	Joy Robson/Mark Howcroft		
Cabinet	10/01/18	Chepstow Cluster - proposed distribution of Section 106 monies	To agree the distribution of section 106 to the cluster	Nikki Wellington		
Cabinet	10/01/18	Re-Use Shop at Ilanfoist Household Recycling Centre		Roger Hoggins		

Cabinet	10/01/18	Management of obstructions in the public highway		Roger Hoggins		
Cabinet	10/01/18	Welsh Church Fund Working Group	The purpose of this report is to make recommendations to Cabinet on the Schedule of Applications 2017/18, meeting 5 held on the 14th December 2017	Dave Jarrett		

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