

Monmouthshire Replacement Local Development Plan

GROWTH AND SPATIAL OPTIONS PAPER

June 2019



monmouthshire
sir fynwy

CONTENTS

	Page
Executive Summary	1
1. Introduction	5
2. Replacement LDP Growth Scenarios and Options	9
3. Replacement LDP Spatial Options	62
4. Next Steps	90
 Appendices:	
1. Monmouthshire, Blaenau Gwent and Torfaen LDP Demographic Evidence Executive Summary, Edge Analytics (Draft, June 2019)	91
2. Replacement LDP Draft Objectives	94
3. Long List of Growth Scenarios	97
4. Long List of Spatial Options	102
5. Summary Matrix of Growth Options against Replacement LDP Draft Objectives	107
6. Summary Matrix of Spatial Options against Replacement LDP Draft Objectives	108

Executive Summary

- i. The Council is preparing a new Local Development Plan (LDP) for Monmouthshire (excluding the part of the County that is within the Brecon Beacons National Park). The new LDP will identify where and how much new development will take place during the 'plan period' (2018-2033). It will allocate land for development, identify areas to be protected, and contain policies to guide decisions on applications for planning permission. We aim to adopt the new LDP at the end of 2021/early 2022.
- ii. The LDP will be accompanied by an Integrated Sustainability Appraisal (ISA) which will consider the environmental, equalities, health and well-being impacts of the Plan. The Integrated Sustainability Appraisal is a working document, updated as the LDP progresses. The LDP will include an Infrastructure Plan, setting out what is needed to support the development of the allocated sites, and will sit alongside a Local Transport Plan and Economic Strategy. Together, these Plans will seek to deliver on the Council's economic ambition and its core purpose to build sustainable and resilient communities that support the well-being of current and future generations.
- iii. This Paper sets out alternative growth and spatial options for the Replacement LDP, together with the implications of each option and the extent to which they will achieve the Replacement LDP objectives. At this stage no decision has been made on a preference. The options presented in this Paper provide an indication of the scale of growth (housing and employment) that the Replacement LDP will potentially need to include and broad options of where that growth could be located (spatial option), having regard to the evidence base and policy aspirations.

Growth Options

- iv. Section 2 of the Paper presents a range of alternative housing and economic growth options for consideration to inform the Replacement LDP (2018-2033).
- v. Monmouthshire, Torfaen and Blaenau Gwent County Councils have jointly commissioned Edge Analytics to prepare a range of demographic, housing and employment growth scenarios to inform LDP growth options.
- vi. A total of 20 different scenarios have been generated for Monmouthshire. From these, eight growth options have been selected for consultation (see Table 4). It should be noted that the growth outcomes of each scenario generated includes that part of Monmouthshire that falls within the Brecon Beacons National Park.
- vii. The Paper considers the population, household, dwelling and employment implications associated with each of the alternative growth options set out below, together with their wider implications for the County and the extent to which they will achieve the Replacement LDP's objectives. A summary of the implications associated with each option is provided in Table 14. A number of consultation questions are set out at the end of Section 2.
- viii. To provide an indication of the baseline position, the 2017 Office for National Statistics Mid-Year Estimate gives Monmouthshire a population of 93,590; the 2011 Census recorded 38,233 households in Monmouthshire; and the 2011 Census recorded 40,044 dwellings in Monmouthshire.

Summary of Selected Growth Options

Options (type)		Assumptions	Additional homes by 2033	Additional jobs by 2033
Low Growth Options				
Option 1 (Demographic)	Net Nil Migration	Internal and international migration flows are balanced between in- and out-flows, resulting in zero net migration.	-173 homes	-3990 jobs
Option 2 (Demographic)	WG 2014-based Principal	Replicates the WG 2014-based population projection. Migration assumptions are based on the five-year period prior to 2014 (i.e. 2009/10–2013/14).	+1725 homes	-1499 jobs
Mid Growth Options				
Option 3 (Dwelling)	Dwelling-led 15 year average	Annual dwelling growth is applied from 2019/20 onward, based on the last fifteen years of completions (2004/05–2018/19). This gives an average annual dwelling growth of +287 pa in Monmouthshire.	+4305 homes	+1389 jobs
Option 4 (Employment)	UK Growth Rates	Incorporates uplifts in identified underperforming sectors to match UK growth levels. Estimates employment growth of +2,265 jobs (+151 pa) over the plan period.	+5055 homes	+2265 jobs
Option 5 (Employment)	Radical Structural Change* Lower (CR reducing)	Commuting ratio reduces from 2011 Census value (1.12) to 2001 Census value (1.10) over the plan period. Economic activity rate adjustments in line with the OBR forecast, unemployment rate remains at current value (3.0%).	+5790 homes	+3870 jobs
High Growth Options				
Option 6 (Demographic)	PG Long Term (adjusted)	Internal in-migration rates are adjusted to reflect higher in-migration (based on the last 5-years) from Bristol and South Gloucestershire, following the removal of the Severn Bridge tolls. All other migration flow assumptions are consistent with the PG Long Term scenario.	+8010 homes	+6709 jobs
Option 7 (Employment)	Radical Structural Change Higher (CR reducing)	Commuting ratio reduces from 2011 Census value (1.12) to 2001 Census value (1.10) over the plan period. Economic activity rate adjustments in line with the OBR forecast, unemployment rate remains at current value (3.0%).	+9465 homes	+8280 jobs
Option 8 (Employment)	Radical Structural Change* Higher	Assumes no change in the commuting ratio balance and unemployment rate.	+10,155 homes	+8280 jobs
*‘Radical Structural Change’ (RSC) scenarios consider the potential impact of substantial economic changes in Monmouthshire’s economy, resulting in a significantly higher employment growth range than under the ‘Baseline’ and UK Growth equivalent. Under these scenarios, employment growth ranges from +3,866 to +8,273 jobs over the plan period, averaging +258 and +552 pa respectively.				

Spatial Strategy Options

- ix. Section 3 of the Paper sets out five spatial strategy options for accommodating the housing and employment growth:
- **Option 1: Continuation of the Existing LDP Strategy** – Distribute development around the County with a particular focus on Main Towns, some development in Severnside and some development in the most sustainable rural areas to enable provision of affordable housing throughout the County. New residential development to be accompanied by new employment opportunities, where possible.
 - **Option 2: Dispersed Growth and New Settlement** – Distribute growth across Primary Settlements, Secondary Settlements, Severnside and those Rural Settlements identified as having capacity for growth and/or in need of development to sustain them, including, a small amount of development in the most sustainable Rural Settlements to bring forward affordable housing. Inclusion of a New Settlement within the County to deliver longer term growth providing housing, employment, retail and associated infrastructure. It is recognised a New Settlement will take a long time to progress and cross over into the next plan period, hence additional dispersed growth is required to account for the identified need.
 - **Option 3: Distribute Growth Proportionately Across Rural and Urban Areas** – Distribute growth proportionately across Primary Settlements, Secondary Settlements, Severnside and those Rural Settlements identified as having capacity for growth and/or in need of development to sustain them, including, a small amount of development in the most sustainable Rural Settlements to bring forward affordable housing.
 - **Option 4: New Settlement with Limited Growth in Primary Settlements, Secondary Settlements and Severnside only** - Growth to be predominantly accommodated in a New Settlement. Limited growth in Primary Settlements, Secondary Settlements and Severnside to meet some of the identified need prior to progression of a New Settlement.
 - **Option 5: Focus on M4 Corridor** – Growth to be predominantly located in the South of the County in the Severnside area close to the M4/M48, to capitalise on its strategic links to the Cardiff Capital Region and South West England, existing economic opportunities and regional infrastructure connections.
- x. The advantages and disadvantages of each spatial option and the extent to which they will achieve the Replacement LDP objectives are set out in Section 3, together with an indicative map of each option. A number of consultation questions are set out at the end of Section 3.

Engagement/Consultation

- xi. There is no statutory requirement for consultation on the growth and spatial options, however, in accordance with the LDP Revision Delivery Agreement (May 2018) we are

engaging with consultees at this early stage to help build consensus and to fully understand the pros and cons of the options.

- xii. Non-statutory engagement and consultation on the Growth and Spatial Options Paper will take place for a four week period from 8th July 2019, whereby comments will be invited on the consultation questions set out in Sections 2 and 3. An Easy Read version of this document has also been prepared which is available to view via the Planning Policy pages of the Council's website.
- xiii. Feedback from the consultation/engagement on the Growth and Spatial Options Paper will be considered and, where appropriate, will inform the preferred growth and spatial strategy options which will be set out in the Preferred Strategy. The Replacement LDP Preferred Strategy will be the subject of engagement/consultation towards the end of 2019.

1 Introduction

Purpose of this paper

- 1.1 The Growth and Spatial Options Paper sets out a number of alternative growth and spatial strategy options for consideration as part of the Replacement LDP process, informed by a range of evidence. The consideration of realistic growth and spatial options is an important part of the preparation of the LDP which is intended to facilitate discussion and inform the next key stage of the process, the Preferred Strategy. The Paper will therefore have a key role in informing the Replacement LDP Preferred Strategy which will set out the Council's preferred levels of growth for housing and employment over the plan period and identify broad locations for accommodating this growth in order to ensure the delivery of sustainable resilient places. The Preferred Strategy will be made available for consultation by the end of 2019.

Background

- 1.2 Monmouthshire County Council (MCC) is in the process of preparing a Replacement Local Development Plan (LDP) for the County (excluding the area within the Brecon Beacons National Park). 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.
- 1.3 The Replacement LDP is being prepared in accordance with the Delivery Agreement which sets out the timetable for plan preparation and the approach to community consultation. One of the first key stages of the Replacement LDP process involved the preparation of the Issues, Vision and Objectives. The Issues, Vision and Objectives Paper identifies the key issues, challenges and drivers facing the County and sets out the draft vision and objectives for the Replacement LDP. This paper was subject to targeted engagement in January-February 2019¹.
- 1.4 The next stage of the process involves consideration of how much growth is needed over the Replacement LDP period and where this growth should take place. This paper sets out a number of alternative growth and spatial options for the Replacement LDP, together with the implications of each option and the extent to which they will achieve the Replacement LDP objectives.

¹ The Issues, Vision and Objectives Paper (June 2019) is available to view on the Planning Policy pages of the Council's website

- 1.5 In accordance with Welsh Government guidance² realistic options should be identified. The identified options should be: genuine, reasonable, reflect the evidence and the plan issues/objectives, meet the evidenced needs of the area, deliverable within the plan period, conform to national policy, complement regional or neighbourhood plans/strategies, flexible and sustainable.
- 1.6 The Replacement LDP will be accompanied by an Integrated Sustainability Appraisal (ISA) which will consider the environmental, equalities, health and well-being impacts of the Plan. The Integrated Sustainability Appraisal is a working document, updated as the LDP progresses. The ISA will assess the anticipated impacts of each of the growth and spatial options against the ISA Objectives. The LDP will include an Infrastructure Plan, setting out what is needed to support the development of the allocated sites, and will sit alongside a Local Transport Plan and Economic Strategy. Together, these Plans will seek to deliver on the Council's economic ambition and its core purpose to build sustainable and resilient communities that support the well-being of current and future generations.
- 1.7 At this stage no single growth or spatial strategy option is considered preferable. The options presented in this Paper provide an indication of the scale of growth (housing and employment) that the Replacement LDP will potentially need to address and possible spatial strategy options for accommodating that growth, having regard to the evidence base and policy aspirations.

Evidence Base

- 1.8 This Paper has been informed by a range of background evidence which includes the following:
- Annual Monitoring Reports (AMRs) that monitor the progress of the Adopted LDP; 2014-2015, 2015-2016, 2016-2017, 2017-2018 (work has commenced on the 2018-2019 Report but it is not yet finalised).
 - The Adopted LDP Review Report (March 2018) evaluates the extent to which the adopted LDP is functioning effectively.
 - The Monmouthshire Public Service Board Well-being Plan (February 2018) identifies important issues for the County as a whole that must be considered.
 - Monmouthshire Corporate Business Plan 2017-2022 (Incorporating Well-being Objectives) (February 2018) sets out the Council's four Well-being objectives.
 - The Issues, Vision and Objectives Paper (June 2019) which sets out the key issues, challenges and drivers facing the County along with the Replacement LDP draft vision and objectives to address the issues, challenges and drivers identified.
 - The Draft Monmouthshire, Blaenau Gwent and Torfaen LDP Demographic Evidence produced by Edge Analytics (June 2019) which considers the impact of demographic, housing and employment change and provides growth scenarios for the three Local Authority areas.

² Paragraph 6.2.1.2 Local Development Plan Manual – Edition 2 (August 2015)

- Candidate Site Register (February 2019) which provides a log of the Candidate Sites submitted during the first call, to be considered for inclusion for development, redevelopment and/or protection in the Replacement LDP.
 - MCC Economies of the Future Reports (2018) and associated economic ambition.
 - Wider contextual issues, including the CCR City Deal and the recent removal of the Severn Bridge Tolls.
- 1.9 In particular, this paper should be read alongside the Replacement LDP Issues, Vision and Objectives Paper (June 2019) and the Draft Monmouthshire, Blaenau Gwent and Torfaen LDP Demographic Evidence produced by Edge Analytics (June 2019).
- 1.10 Further data will be collated as part of the LDP Evidence Base and findings will be published at the appropriate times during the preparation of the Replacement LDP. A number of background papers will also be produced as part of the Replacement LDP preparation. Once completed these will provide further detail on the impact and potential policy approaches to the Replacement LDP.

Structure

- 1.11 This Paper is structured as follows:

Section 1 Introduction – outlines the purpose, background, evidence base and consultation arrangements of the Growth and Spatial Options Paper.

Section 2 Growth Scenarios and Options - sets out a range of alternative housing and economic growth options for consideration to inform the Replacement LDP (2018-2033). The population, household, dwelling and employment implications associated with each of the alternative growth options are presented, together with their wider implications for the County and the extent to which they align with the Replacement LDP objectives.

Section 3 Spatial Strategy Options - presents a range of spatial strategy options for accommodating the required level of housing and employment growth in the County. The implications associated with each of the alternative spatial strategy options and the extent to which they align with the Replacement LDP objectives are set out.

Section 4 Next Steps - sets out the next key stages in the Replacement LDP process.

Appendix 1 - Monmouthshire, Blaenau Gwent and Torfaen LDP Demographic Evidence Executive Summary, Edge Analytics (Draft, June 2019)

Appendix 2 – Replacement LDP Draft Objectives

Appendix 3 – Long List of Growth Scenarios

Appendix 4 – Long List of Spatial Options

Appendix 5 – Summary Matrix of Growth Options against the Replacement LDP Draft Objectives

Appendix 6 – Summary Matrix of the Spatial Options against the Replacement LDP Draft Objectives

Consultation on the Replacement LDP Growth and Spatial Options

- 1.12 There is no statutory requirement for consultation on the growth and spatial options, however, in accordance with the LDP Revision Delivery Agreement (May 2018) we are engaging with consultees at this early stage to help build consensus on the growth levels and spatial strategy of the Replacement LDP and to fully understand the pros and cons of the options. Engagement/consultation at this stage of the process will also ensure that the Council accords with two of the five ways of working as set out in the Well-being of Future Generations Act (i.e. involvement and collaboration).
- 1.13 Non-statutory engagement and consultation on the Growth and Spatial Options will take place for a four week period between 8th July and 5th August 2019, whereby comments will be invited on the consultation questions set out in the Paper. Engagement/consultation will also take place via:
- Planning Policy officer attendance at Area Committee and Area Cluster meetings during July 2019;
 - Attendance at the Youth Forum on 5th July 2019;
 - A Members' Workshop on 11th July 2019 (hosted by the Economy & Development Select Committee);
 - LDP Growth and Spatial Options Drop-in Session on 16th July 2019 at County Hall, Usk between 13:00 and 19:00 which is open for all to attend;
 - Scrutiny by Economy & Development Select Committee on 17th July 2019;
 - Internal discussions within the Council through DMT/SLT;
 - Notifying all parties on the LDP database of the consultation.
- 1.14 Feedback from the consultation/engagement on the Growth and Spatial Options Paper will be considered and, where appropriate, will inform the preferred growth and spatial strategy options which will be set out in the Preferred Strategy. The Replacement LDP Preferred Strategy will be the subject of engagement/consultation and political reporting toward the end of 2019.
- 1.15 This paper is available to view on the Council's website and at other locations within the County including County Hall, Usk and the Council's Community HUBs. An Executive Summary and an Easy Read version of this document have been prepared which can also be viewed at the above locations. For details of how to respond to this consultation please see the Planning Policy Current Consultations page on the Council's website.

2 Replacement LDP Growth Scenarios and Options

Purpose

- 2.1 This section of the report presents a range of alternative housing and economic growth options for consideration to inform the Replacement LDP (2018-2033). In order to inform the level of housing and employment provision within the Replacement LDP, a range of scenarios/trend based assumptions need to be considered.
- 2.2 The 2014-based Welsh Government (WG) population and household projection variants form the starting point of the scenario analysis. However, it is important to consider alternative scenarios to test the impacts of different assumptions over the plan period. This approach reflects current national planning policy guidance as set out in PPW10 (December 2018, paragraphs 4.2.6-4.2.7), which requires LPAs to consider and provide for a level of housing that is based on various sources of evidence rather than just the WG projections, including having regard to what the plan is seeking to achieve, links between homes and jobs, affordable housing need as well as deliverability of the plan, in order to identify an appropriate strategy for housing delivery in the area.
- 2.3 The Council, in conjunction with Torfaen County Borough Council and Blaenau Gwent County Borough Council, commissioned Edge Analytics to prepare a range of demographic, housing and employment growth scenarios to inform the growth options/opportunities for the replacement LDPs (the Edge Report Executive Summary is attached at Appendix 1³, the full version can be viewed on the Council's website). In accordance with the requirements of the WG Draft Development Plan Manual (June 2019), the report considers the latest WG projections, as well as the latest available statistics and evidence, including the Monmouthshire Economies of the Future report (2018), to provide a range of growth scenarios for the County. The paper sets out a demographic profile of the County, illustrating the geographical context, components of population change (i.e. births, deaths and migration), housing completions and the changing age profile of the population. It then considers how much housing and employment growth would be needed over the Replacement LDP period for each of the scenarios set out.

Growth Scenarios

- 2.4 A total of 20 different scenarios have been generated by Edge Analytics – the WG 2014-based Principal projection and a 2014-based variant projection, four alternative trend-based demographic scenarios, three dwelling-led scenarios and eleven employment-led scenarios. It should be noted that the growth outcomes of each scenario generated includes that part of Monmouthshire that falls within the Brecon

³ The Draft Report has been amended to remove key references/outcomes relating to Torfaen and Blaenau Gwent as the report is still draft. When finalised, the report will be published in full.

Beacons National Park⁴. This has been done to ensure consistency between the demographic and dwelling-led scenarios and the employment-led scenarios. The employment-led scenarios are based on data which looks at trends for the whole County not just that part which falls outside of the Brecon Beacons National Park.

Demographic and Dwelling-led Scenarios

2.5 The following demographic and dwelling-led scenarios have been generated by Edge Analytics.

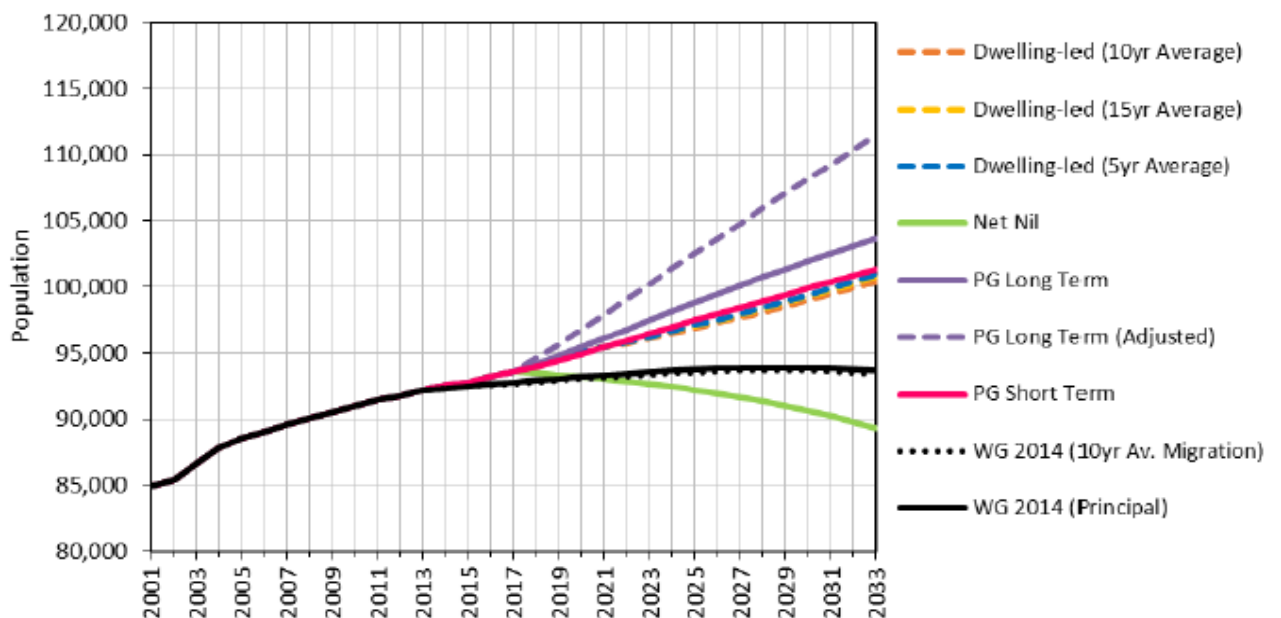
Table 1: Demographic and Dwelling-led Scenarios

Welsh Government 2014-based		Assumptions
WG 2014-based Principal		Replicates the WG 2014-based population projection. Migration assumptions are based on the five-year period prior to 2014 (i.e. 2009/10–2013/14).
WG 2014-based 10 year average migration		Replicates the WG 2014-based ‘10yr Average Migration’ variant population projection. Migration assumptions are based on the ten-year period prior to 2014 (i.e. 2004/05–2013/14).
Trend-based Demographic		Assumptions
POPGROUP Short Term		Internal migration rates and international migration flow assumptions are based on a six-year historical period (2011/12–2016/17). This is a similar time period to the WG ‘Principal’ projection (i.e. 5–6 years), but includes the latest three years of population statistics in the derivation of assumptions
POPGRPOUP Long Term		Internal migration rates and international migration flow assumptions are based on the full sixteen-year historical period (2001/02–2016/17).
POPGROUP Long Term Adjusted		Internal in-migration rates for each authority are adjusted to reflect higher in-migration (based on the last 5-years) from Bristol and South Gloucestershire, following the removal of the Severn Bridge tolls. All other migration flow assumptions are consistent with the PG Long Term scenario.
Net Nil Migration		Internal and international migration flows are balanced between in- and out-flows, resulting in zero net migration.
Dwelling-led		Assumptions
Dwelling-led 5 year average		Annual dwelling growth is applied from 2019/20 onward, based on the last five years of completions (2014/15–2018/19). An annual dwelling growth of +280 pa is applied.
Dwelling-led 10 year average		Annual dwelling growth is applied from 2019/20 onward, based on the last ten years of completions (2009/10–2018/19). An average annual dwelling growth of +265 pa is applied.
Dwelling-led 15 year average		Annual dwelling growth is applied from 2019/20 onward, based on the last fifteen years of completions (2004/05–2018/19). An average annual dwelling growth of +275 pa is applied.

⁴ The population growth outcomes under each of the demographic scenarios excluding that part of the County which falls within the Brecon Beacons National Park are presented in Appendix A of the Edge Report.

- 2.6 The population growth trajectories for these scenarios for the Replacement LDP period 2018-2033 are shown in Chart 1 below. Population growth ranges from -4.0% under the Net Nil scenario to +17.8% under the PG Long Term Adjusted scenario. The 2017 Office for National Statistics mid-year estimate gives Monmouthshire a population of 93,590.
- 2.7 The household and dwelling implications of the demographic projections are evaluated through the application of membership rates, average household size, communal population statistics and a dwelling vacancy rate⁵ of 4.5% based on the 2011 Census. In the dwelling-led scenarios these assumptions are used to determine the level of population growth required by the defined dwelling growth trajectory.

Chart 1: Monmouthshire Population Growth Trajectory 2001–2033



Linking Population, Household and Employment Growth

- 2.8 It is recognised that there is not always a direct relationship between homes and jobs, however, it is important to consider both in tandem in order to assist in determining a sustainable level of growth to underpin the Replacement LDP. Analysis has therefore been undertaken to determine the likely demographic impact of various growth scenarios on homes and jobs with a view to achieving a sustainable balance between the two.
- 2.9 Using key assumptions on economic activity, unemployment and the commuting ratio (as defined in Table 2), the estimated employment growth that could be supported by the WG, dwelling and demographic trend scenarios has been calculated for each

⁵ As defined in the Edge Analytics Demographic Draft Report

scenario as set out in the Edge Report. These assumptions have also been used in the employment-led scenarios.

Table 2: Key Assumptions used in the Employment Growth Scenario Analysis

Economic Activity Rate	This has been adjusted in line with the Office for Budget Responsibility's (OBR) (July 2018) forecast of long-term changes to age-specific labour force participation. This forecast estimates that the aggregate economic activity rate (16-89) is estimated to reduce by approx. 2% points from 61% to 59% over the plan period 2018-2033. More specifically, economic activity rates in the older age groups (55+) are expected to increase over the plan period, especially in the female groups. A small decline in economic activity rates is expected amongst the 35-54 age groups, although an increase is expected in the female equivalent.
Unemployment Rate	Unemployment rate used in the modelling tracks historical data to 2017 and remains fixed thereafter at 3%. However, an alternative unemployment rate has also been considered in the employment-led scenarios which assumes a fall in the unemployment rate to 2%.
Commuting Ratio⁶	The 2011 Census recorded 43,210 workers living in Monmouthshire and 38,458 people working in Monmouthshire, which gives a net out-commuting ratio of 1.12 (i.e. there are more workers living in the County than available employment). However, alternative commuting ratios have also been considered in the employment-led scenarios (i.e. a reduced ratio of 1.10 and a balanced ratio of 1.00)

Employment-led Scenarios

- 2.10 A range of employment-led scenarios have also been generated based on the evidence contained in the Economies of the Future Report which sets out average annual employment growth under Oxford Economics Baseline, UK Growth Rate and Radical Structural Change forecasts. Using an employment-led configuration of the POPGROUP model, the population and housing growth implications of the Baseline, UK Growth Rate, Radical Structure Change Lower and Radical Structural Change Higher economic forecasts have been estimated. All employment forecasts have been run using the economic assumptions outlined in Table 2 above, which are consistent with those applied to the demographic and dwelling-led scenarios (i.e. fixed unemployment rate and commuting ratio). The impact of an alternative unemployment rate and commuting ratio assumptions have also been considered (i.e. unemployment reducing and commuting ratio reducing/balanced). The employment-led scenarios generated are set out in Table 3.

⁶ The Commuting ratio is the balance between local employment and the size of the resident workforce. A commuting ration greater than 1.00 indicates a net out-commute (i.e. number of resident workers in an area is greater than the level of employment), A commuting ration less than 1.00 indicates a net in-commute (i.e. employment total is greater than number of resident workers).

Table 3: Employment-led Scenarios

Employment-led Scenarios	Assumptions
Baseline	Oxford Economics 'Baseline' forecast
Baseline (UR reducing)	Unemployment rate reduces from current levels (3.0%) to 2.0% over the plan period, in line with the underpinning Oxford Economic 'Baseline' forecast. Economic activity rate adjustments in line with the OBR forecast, commuting ratio remains fixed at the 2011 Census value (1.12).
Baseline (CR reducing)	Commuting ratio reduces from 2011 Census value (1.12) to 2001 Census value (1.10) over the plan period. Economic activity rate adjustments in line with the OBR forecast, unemployment rate remains fixed at current value (3.0%).
UK Growth Rate	Incorporates uplifts in identified underperforming sectors to match UK growth levels.
UK Growth Rate (CR reducing)	Commuting ratio reduces from 2011 Census value (1.12) to 2001 Census value (1.10) over the plan period. Economic activity rate adjustments in line with the OBR forecast, unemployment rate remains fixed at current value (3.0%).
Radical Structural Change Lower	Consider the potential impact of substantial economic changes in Monmouthshire's economy, resulting in significantly higher employment growth range than under the 'Baseline' equivalent. Employment growth ranges from +3,866 to +8,273 jobs over the plan period (+258 to +552 pa). This option models the lowest end of the range for radical structural change.
Radical Structural Change Lower (CR reducing)	As above, but commuting ratio reduces from 2011 Census value (1.12) to 2001 Census value (1.10) over the plan period. Economic activity rate adjustments in line with the OBR forecast, unemployment rate remains fixed at current value (3.0%).
Radical Structural Change Lower (CR balanced)	As above, but commuting ratio reduces from 2011 Census value (1.12) to a balanced commuting ratio of 1.00 by the end of the plan period. Economic activity rate adjustments in line with the OBR forecast, unemployment rate remains fixed at current value (3.0%).
Radical Structure Change Higher	Consider the potential impact of substantial economic changes in Monmouthshire's economy, resulting in significantly higher employment growth range than under the 'Baseline' equivalent. Employment growth ranges from +3,866 to +8,273 jobs over the plan period (+258 to +552 pa). This option models the highest end of the range for radical structural change.
Radical Structure Change Higher (CR reducing)	As above, but commuting ratio reduces from 2011 Census value (1.12) to 2001 Census value (1.10) over the plan period. Economic activity rate adjustments in line with the OBR forecast, unemployment rate remains fixed at current value (3.0%).
Radical Structure Change Higher (CR balanced)	As above, but commuting ratio reduces from 2011 Census value (1.12) to a balanced commuting ratio of 1.00 by the end of the plan period. Economic activity rate adjustments in line with the OBR forecast, unemployment rate remains fixed at current value (3.0%).

Selected Alternative Growth Options

- 2.11 The twenty growth outcomes associated with the WG, demographic, dwelling-led and employment-led scenarios listed above are set out in detail in Edge Analytics Demographic Report (Executive Summary attached at Appendix 1). Given the quantum of scenarios generated, it is considered pertinent to condense these into a number of low, mid and high growth options to assist in determining the housing and employment requirements of the Replacement LDP. The options selected are considered to represent a realistic range of low, mid and high growth scenarios. The following options have therefore been selected for consideration as alternative growth options for consultation purposes. These include three demographic, one dwelling-led and four employment-led options as summarised in Table 4. The justification for selecting the alternative options is set out in Appendix 3.

Table 4: Summary of Selected Growth Options

Options (type)		Assumptions
Low Growth Options		
Option 1 (Demographic)	Net Nil Migration	Internal and international migration flows are balanced between in- and out-flows, resulting in zero net migration.
Option 2 (Demographic)	WG 2014-based Principal	Replicates the WG 2014-based population projection. Migration assumptions are based on the five-year period prior to 2014 (i.e. 2009/10–2013/14).
Mid Growth Options		
Option 3 (Dwelling)	Dwelling-led 15 year average	Annual dwelling growth is applied from 2019/20 onward, based on the last fifteen years of completions (2004/05–2018/19). This gives an average annual dwelling growth of +275 pa in Monmouthshire.
Option 4 (Employment)	UK Growth Rates	Incorporates uplifts in identified underperforming sectors to match UK growth levels. Estimates employment growth of +2,265 jobs (+151 pa) over the plan period.
Option 5 (Employment)	Radical Structural Change* Lower (CR reducing)	Commuting ratio reduces from 2011 Census value (1.12) to 2001 Census value (1.10) over the plan period. Economic activity rate adjustments in line with the OBR forecast, unemployment rate remains fixed at current value (3.0%).
High Growth Options		
Option 6 (Demographic)	PG Long Term (adjusted)	Internal in-migration rates are adjusted to reflect higher in-migration (based on the last 5-years) from Bristol and South Gloucestershire, following the removal of the Severn Bridge tolls. All other migration flow assumptions are consistent with the PG Long Term scenario.
Option 7 (Employment)	Radical Structural Change* Higher (CR reducing)	Commuting ratio reduces from 2011 Census value (1.12) to 2001 Census value (1.10) over the plan period.

Options (type)		Assumptions
		Economic activity rate adjustments in line with the OBR forecast, unemployment rate remains fixed at current value (3.0%).
Option 8 (Employment)	Radical Structural Change* Higher	Assumes no change in the commuting ratio balance and unemployment rate.

*'Radical Structural Change' (RSC) scenarios consider the potential impact of substantial economic changes in Monmouthshire's economy, resulting in a significantly higher employment growth range than under the 'Baseline' and UK Growth equivalent. Under these scenarios, employment growth ranges from +3,866 to +8,273 jobs over the plan period, averaging +258 and +552 pa respectively.

- 2.12 The following section considers the population, household, dwelling and employment implications associated with each of the alternative growth options set out in Table 4, together with their wider implications for the County and the extent to which they will achieve the Replacement LDP objectives. The performance of the options in relation to the draft objectives is assessed according to the ratings set out in Table 5. A summary of the implications of the growth options is set out in Table 14.

Table 5: Key to Assessment of Options against Draft Replacement LDP Objectives

Rating	Predicted effect
Green	Helps to achieve the objective.
Amber	Neutral impact on objective.
Red	Unlikely to achieve objective.

- 2.13 At this stage no single growth option is considered preferable. The options presented provide an indication of the scale of growth that the Replacement LDP will potentially need to address having regard to the evidence base and policy aspirations. It should be noted that policy aspirations and economic change can influence the quantum of housing growth. Therefore, in determining the dwelling requirement for the Replacement LDP consideration must be given to various policy aspirations, including economic growth ambitions/strategies that the Council is looking to support. These include the CCR City Deal and the Council's Growth Ambition (based on Economies of the Future work).

Selected Growth Options

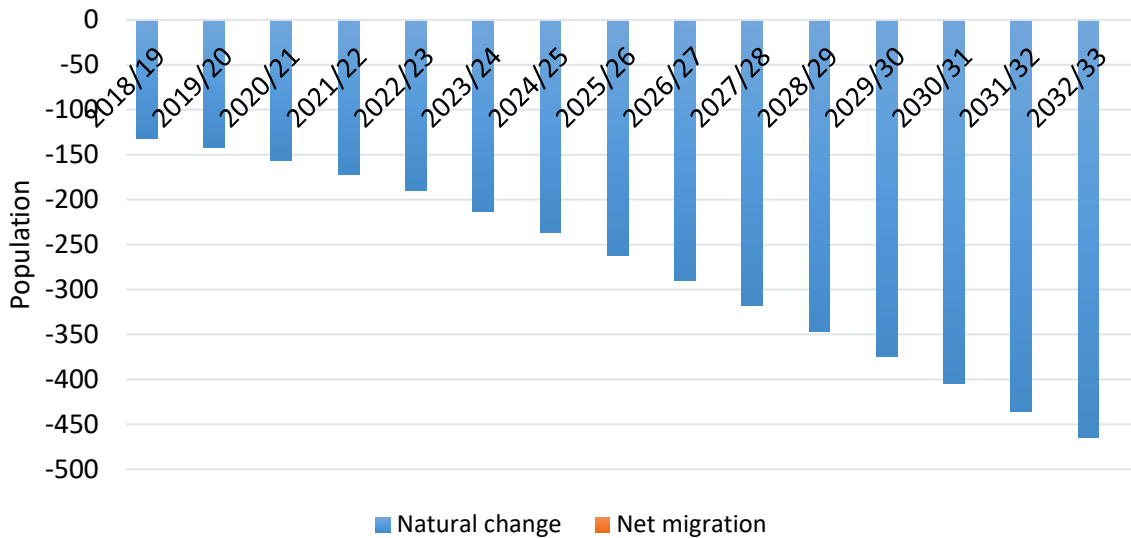
Low Growth Options

Option 1: Net Nil Option

- 2.14 The purpose of this option is to test the impact of zero net migration. Internal and international migration in-flows and out-flows are balanced to depict how natural change (i.e. births and deaths) alone could affect future population and household growth. This option projects a population decline of 4,136 (4.4%) and a decline of 165 (0.4%) in the number of households in the County over the plan period. This level of decline translates into a negative dwelling requirement of 12 dpa (dwellings per annum) between 2018 and 2033.

2.15 Chart 2 below illustrates that under this option, with no net inward migration, there would be an increasing negative level of natural change over the plan period with fewer births than deaths as the population ages. Monmouthshire’s communities would decline.

Chart 2: Components of Population Change



2.16 This option impacts significantly on the age profile of the County leading to an unbalanced demographic, with only the over 60 age group showing any substantial growth over the plan period. The 40-44 age group shows minimal growth, while all other age groups show a decline. (Charts 3 and 4).

Chart 3: Population Growth/Decline by Age Group 2018-2033

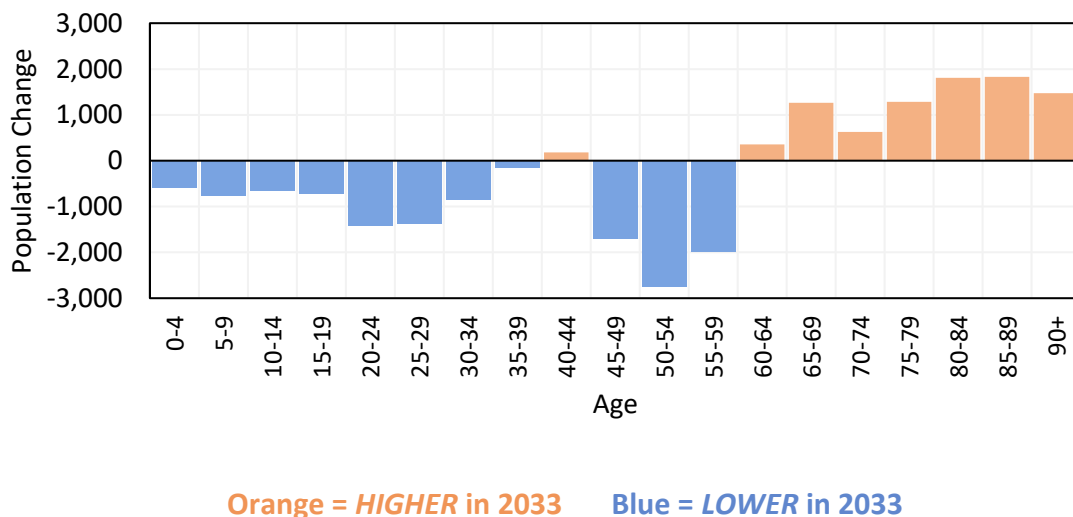
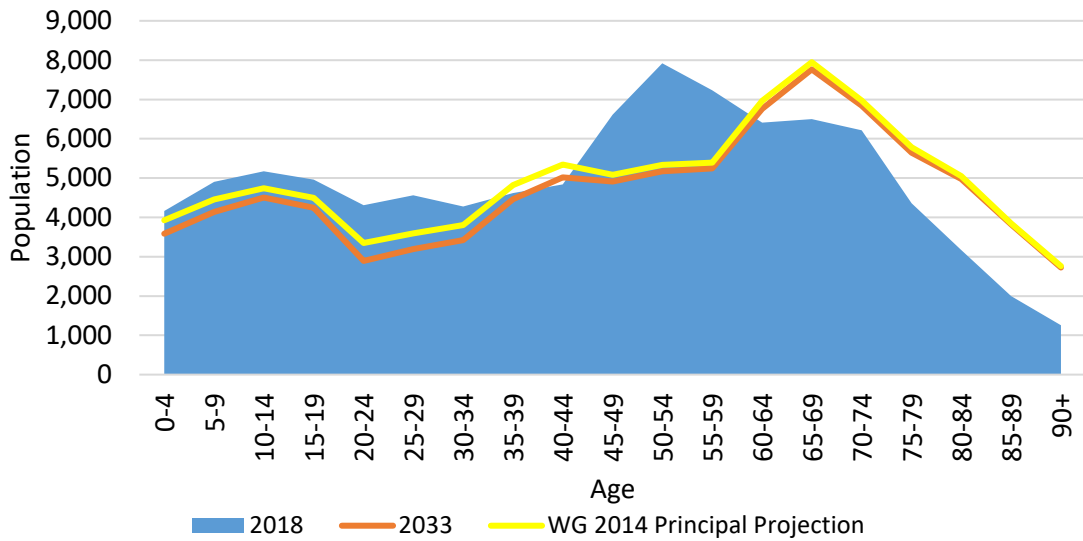
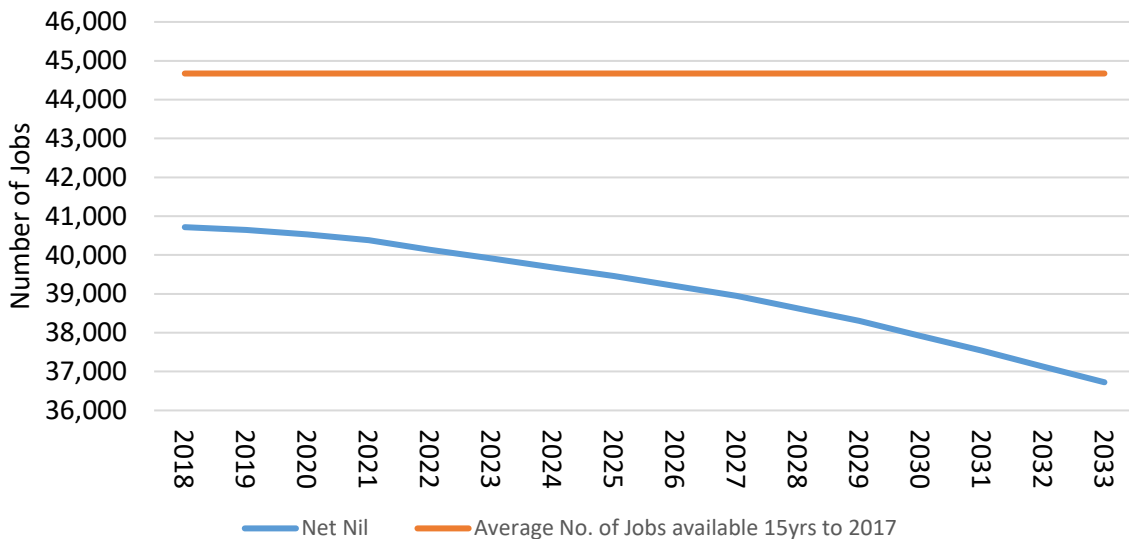


Chart 4: Implications for the Age Profile of Monmouthshire



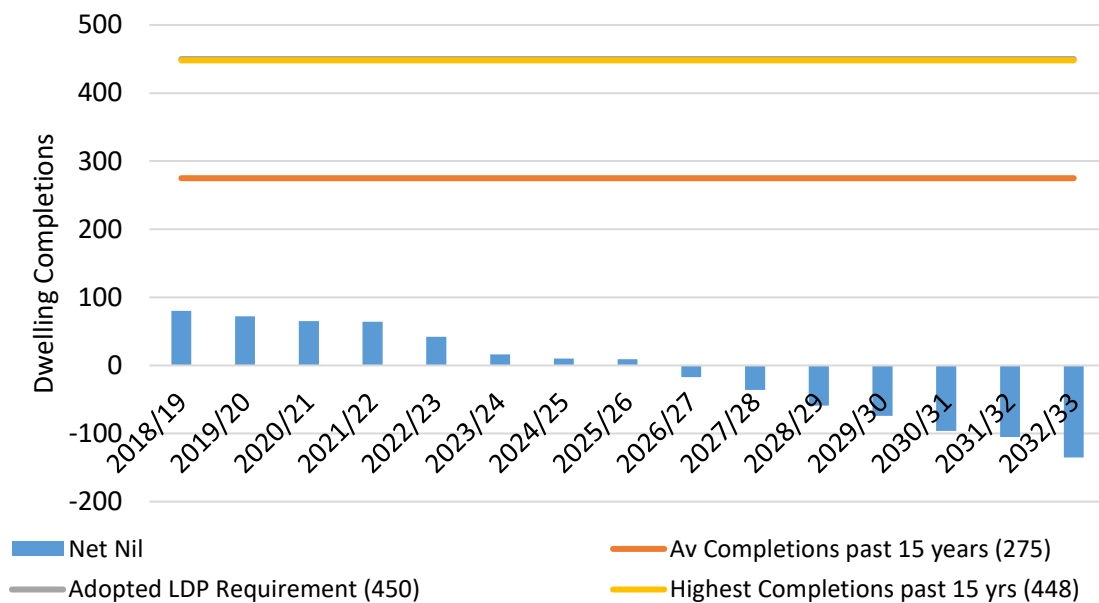
2.17 This option also projects a significant decline in employment over the plan period, 9.8% from 40,718 jobs in 2018 to 36,725 in 2033. The number of job losses per annum is also projected to increase over the plan period, from 74 jobs lost in 2018/19 to over 400 jobs lost in 2032/33. This is due to the lack of any net migration flows coupled with a significantly ageing, economically inactive population profile (Chart 5).

Chart 5: Implications for Employment Growth



2.18 All of these factors impact on the dwelling requirement over the plan period. There is a low level of need during the first half of the plan period, less than 100 dwellings per annum, after which there is a negative need, resulting in an average requirement of -12dpa over the whole plan period (Chart 6).

Chart 6: Dwelling Requirement



2.19 This clearly illustrates the fact that all of the population change and employment growth in Monmouthshire is driven by in-migration and thus this option would not provide a robust basis to inform the replacement LDP’s housing requirement figure.

2.20 The implications associated with this growth option include:

- An increase in the proportion of the older and elderly people living in the County, impacting upon the type of housing required and service providers across public and private sectors.
- A decline in school aged children, placing less pressure on the capacity of existing schools, although it would provide no scope to secure any improvements through planning gain and could lead to potential school closures.
- A decline in the working age population in the County with a declining work force unable to support local employment provision leading to job losses and a negative impact on the local economy.
- With a net loss of dwellings a reduction in the level of affordable housing secured through the planning system and a restricted supply which could lead to higher house prices. Thus making the County even less affordable to the younger working age population and perpetuating the demographic imbalance.
- Any deficiencies in access to good quality open space exacerbated due to no growth to support additional provision and/or upgrades to existing provision.
- Difficulties in sustaining services/facilities across the County with resulting negative impacts e.g. rural isolation etc.
- Inability to secure infrastructure provision/upgrades through planning gain from development.

Table 6: Assessment of Option 1 against the Draft LDP Objectives

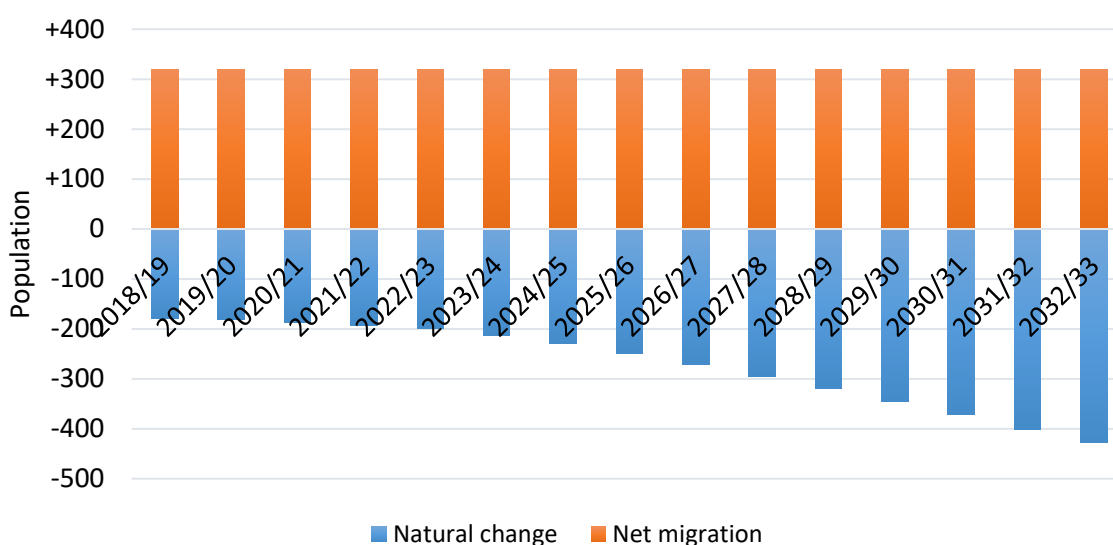
LDP Objective Number	LDP Objective - Headline	Performance of Option 1 against the LDP Objectives
A Prosperous Wales (Well-being Goal 1)		
Objective 1	Economic Growth/ Employment	A declining working age population in the County unable to support local employment provision would lead to job losses and a negative impact on the local economy, a loss of 266 jobs pa. Provides no opportunity to create a thriving, well-connected, diverse economy.
Objective 2	Retail centres	Declining customer base would impact negatively on the viability, vitality and attractiveness of the retail centres in the County's towns.
A Resilient Wales (Well-being Goal 2)		
Objective 3	Green Infrastructure, Biodiversity and Landscape	There would be no negative impact on the natural environment, although at the same time it would provide no opportunities to improve Green Infrastructure and ecological connectivity through opportunities to create new linkages.
Objective 4	Flood risk	There would be no negative impact on areas of flood risk, as there would be no need for additional housing or employment development.
Objective 5	Minerals and Waste	There would be no negative impact on minerals and waste, mineral landbank obligations can be met.
Objective 6	Land	Negative employment and housing growth would not promote the efficient use of land or maximise opportunities for the use of previously developed land. This option could result in more derelict sites being created.
Objective 7	Natural resources	There would be no negative impact on ability to promote the efficient use of natural resources, although at the same time provides no opportunities for improvements.
A Healthier Wales (Well-being Goal 3)		
Objective 8	Health and Well-being	Would have a negative impact on health and well-being with an ageing and declining population and no growth to support additional provision and/or upgrades to existing provision or to sustain existing provision. Any deficiencies in provision of good quality open space would be exacerbated.
A More Equal Wales (Well-being Goal 4)		
Objective 9	Demography	Would result in an increase in the proportion of the older and elderly people living in the County leading to an unbalanced demographic. Very limited opportunities for the younger population to live and work in the County. Difficulties in sustaining services/facilities across the County will exacerbate rural isolation.

LDP Objective Number	LDP Objective Headline	Performance of Option 1 against the LDP Objectives
A Wales of Cohesive Communities (Well-being Goal 5)		
Objective 10	Housing	No requirement for additional housing although an ageing demographic would require a different type of housing to that currently available. With a net loss of dwellings there would be a reduction in the availability of affordable and market housing.
Objective 11	Place-making	No requirement for new housing so provides no opportunity to enhance the character and identity of Monmouthshire's settlements.
Objective 12	Communities	Would impact negatively on communities with an unbalanced demographic, providing no opportunity for job creation or improvements to existing services and facilities.
Objective 13	Rural Communities	Would impact negatively on rural communities by providing no opportunity to strengthen the rural economy or opportunities for people to stay in their local communities. Difficulties in sustaining services/facilities across the County would increase rural isolation.
Objective 14	Infrastructure	Would have a negative impact as unbalanced demographic would result in falling school numbers and could result in school closures. Increased pressure on health care. Difficulties in sustaining services/facilities across the County would increase rural isolation.
Objective 15	Accessibility	Would have a negative impact as loss of employment would limit job opportunities in the County leading to a continuation of out-commuting levels in the short term, reducing as the population ages. Lack of employment opportunities within settlements would not encourage active travel and the use of sustainable transport options.
A Wales of Vibrant Culture & Thriving Welsh Language (Well-being Goal 6)		
Objective 16	Culture, Heritage and Welsh Language	There would be no negative impact on culture and heritage, but at the same time offers no benefits for the economy, tourism and social well-being of communities. No impact on Welsh Language.
A Globally Responsible Wales (Well-being Goal 7)		
Objective 17	Climate Change	There would be no negative impact on climate change, with a reduction in commuting in the long term as the population ages being a positive. At the same time there would be limited opportunities to contribute to minimising carbon by providing opportunities for renewable energy generation, supporting use of ultra-low emission vehicles and public transport, and the provision of quality Green Infrastructure.

Option 2: Welsh Government (WG) 2014-Based Principal Projection.

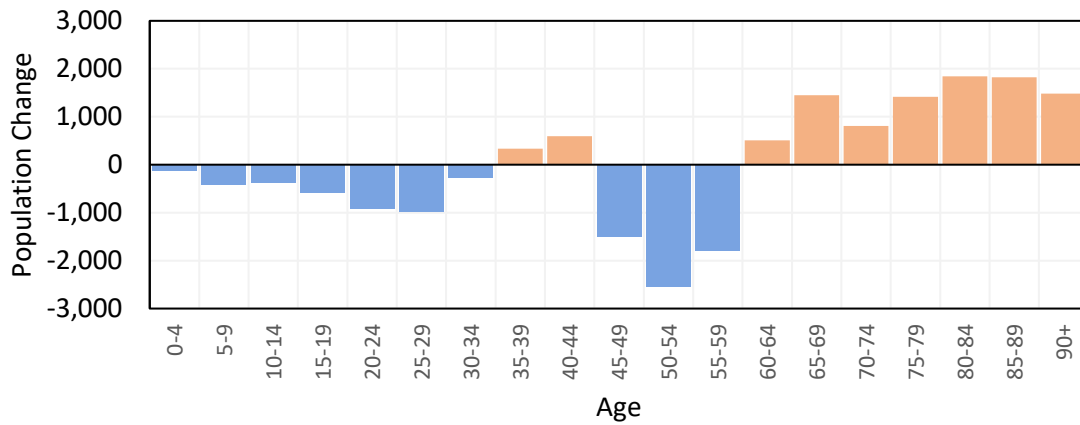
- 2.21 This option replicates the WG 2014-Based Principal Projection, incorporating trends on births, deaths and migration from the preceding five years. This option projects a population increase of 726 (0.8%) with a corresponding increase of 1,641 households (4.1%) in the County over the plan period. This projection is towards the lower end of the household growth range identified in the LDP Demographic Evidence paper, estimating an average annual dwelling growth of 115 dpa over the 2018– 2033 plan period (total 1,725 dwellings). The figure of 115 dpa is lower than the current LDP dwelling requirement of 450 dpa and also well below average completions over the past 5 (280 dpa) and 10 years (265 dpa).

Chart 7: Components of Change



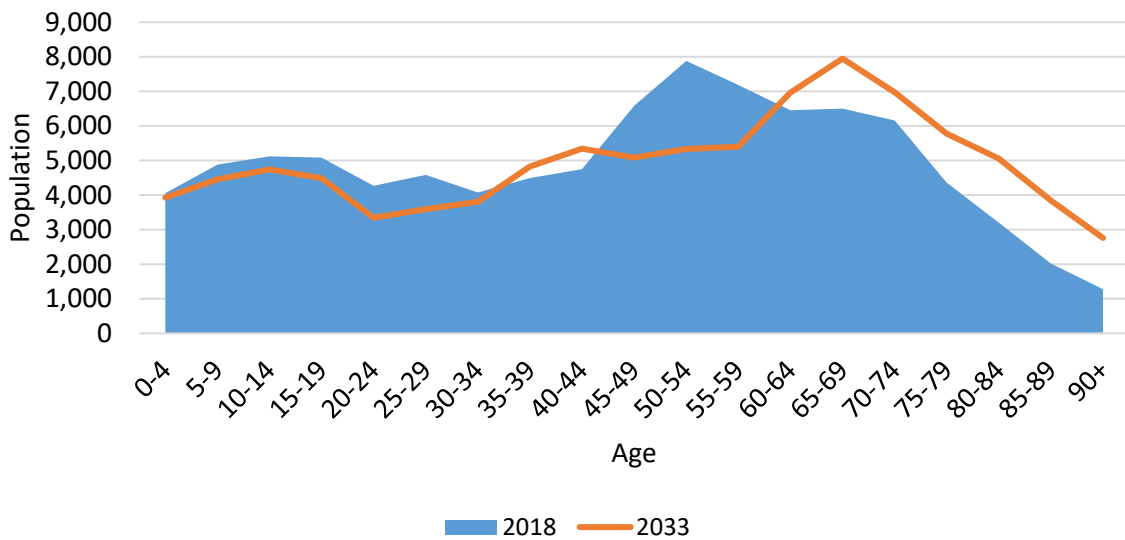
- 2.22 This option projects net in-migration of in the region of 300 persons pa throughout the plan period, however this is out-weighed toward the end of the plan period by increasing negative natural change as the population ages (Chart 7).
- 2.23 As with the net nil option this option has significant implications on the age profile of the County. Whilst there is a low level of growth in the 35-44 age groups the majority of population growth is coming from the over 60 age groups with all other age groups experiencing negative growth, again resulting in an unbalanced demographic (Charts 8 and 9).

Chart 8: Population Growth/Decline by Age Group 2018-2033



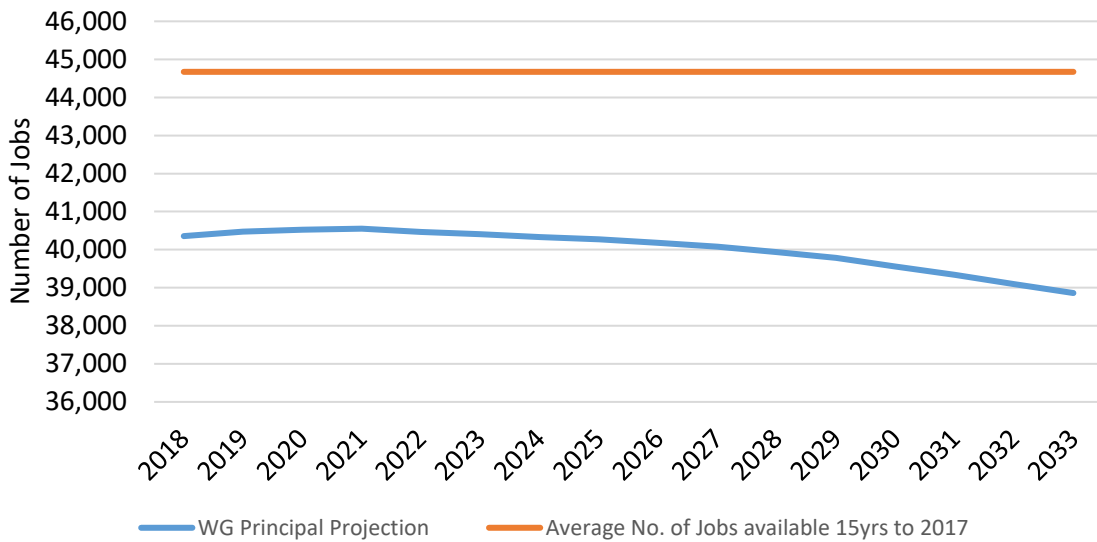
Orange = HIGHER in 2033 Blue = LOWER in 2033

Chart 9: Implications for the Age Profile of Monmouthshire



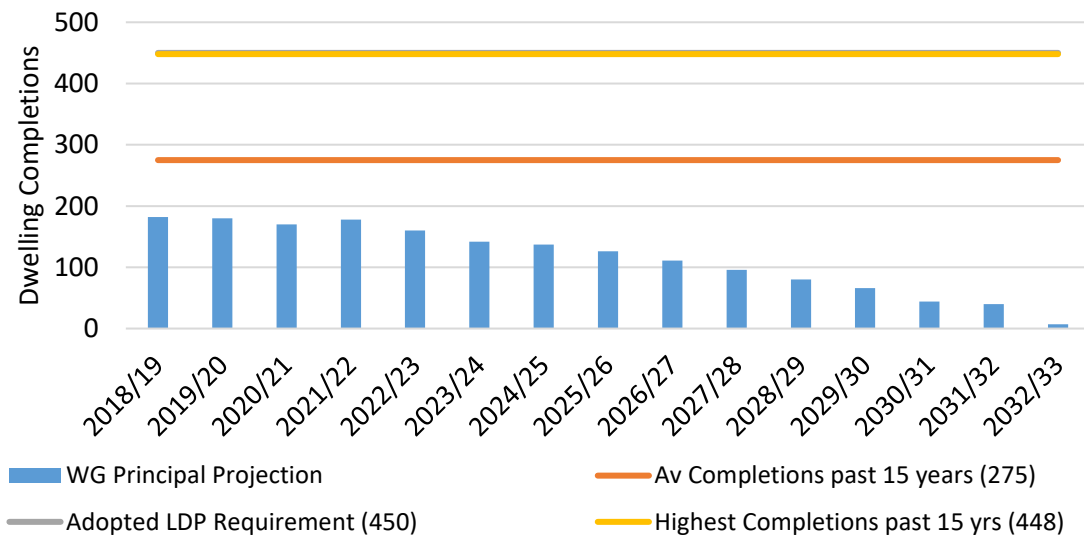
2.24 Whilst this option projects an increase of some 300 jobs over the first three years of the plan period, after this there is a projected decline in the number of jobs in the County, a decline of some 100 jobs pa (Chart 10). As this option would not drive job creation in the long term, it would result in an outflow of workers from the County thus negatively impacting on the local economy and increasing out-commuting. It would also mean that there would again be implications in terms of keeping younger people within the County to both live and work and would therefore be in direct conflict with key objectives of the proposed Replacement LDP Strategy.

Chart 10: Implications for Employment Growth



2.25 All of these factors impact on the dwelling requirement over the plan period. The dwelling requirement within this option equates to an average of 115 per year, much lower than the average build rate over the past 15 years and significantly lower than the adopted LDP requirement (Chart 11).

Chart 11: Dwelling Requirement



2.26 The implications associated with this growth option include:

- An increase in the proportion of the older and elderly people living in the County, impacting upon the type of housing required and service providers across public and private sectors.
- A decline in school aged children, placing less pressure on the capacity of existing schools, although it would provide no scope to secure any improvements through planning gain and could lead to potential school closures.

- A decline in the working age population in the County with a declining work force unable to support local employment provision leading to job losses.
- A reduction in the level of affordable housing secured through the planning system making the County even less affordable to the younger working age population.
- Any deficiencies in access to good quality open space exacerbated due to limited growth to support additional provision and/or upgrades to existing provision.
- Potential difficulties in sustaining services/facilities across the County with resulting negative impacts e.g. rural isolation etc.
- Inability to secure meaningful infrastructure provision/upgrades through planning gain from development.

Table 7: Assessment of Option 2 against LDP Objectives

LDP Objective Number	LDP Objective - Headline	Performance of Option 2 against the LDP Objectives
A Prosperous Wales (Well-being Goal 1)		
Objective 1	Economic Growth/ Employment	A declining working age population in the County unable to support local employment provision would lead to job losses and a negative impact on the local economy, a loss of 100 jobs pa. Provides no opportunity to create a thriving, well-connected, diverse economy.
Objective 2	Retail centres	Limited potential to increase customer base would impact negatively on the vitality, viability and attractiveness of the retail centres in the County's towns.
A Resilient Wales (Well-being Goal 2)		
Objective 3	Green Infrastructure, Biodiversity and Landscape	There would be no negative impact on the natural environment, although at the same time it would provide few opportunities to create new linkages through improvements to Green Infrastructure and ecological connectivity.
Objective 4	Flood risk	There would be no negative impact as the low level of growth can be located away from areas of flood risk and will incorporate SUDs in accordance with National Planning Policy and SUDs legislation.
Objective 5	Minerals and Waste	There would be no negative impact on minerals and waste, mineral landbank obligations can be met.
Objective 6	Land	Negative employment and very limited housing growth would not promote the efficient use of land or maximise opportunities for the use of previously developed land.
Objective 7	Natural resources	There would be no negative impact on ability to promote the efficient use of natural resources. Any developments will be encouraged to be water and energy efficient.

LDP Objective Number	LDP Objective Headline	Performance of Option 2 against the LDP Objectives
A Healthier Wales (Well-being Goal 3)		
Objective 8	Health and Well-being	Would have a negative impact on health and well-being with an ageing population and a very low level of growth to support additional provision and/or upgrades to existing provision. Any deficiencies in provision of good quality open space would be exacerbated.
A More Equal Wales (Well-being Goal 4)		
Objective 9	Demography	Would result in an increase in the proportion of the older and elderly people living in the County leading to an unbalanced demographic. Very limited opportunities for the younger population to live and work in the County.
A Wales of Cohesive Communities (Well-being Goal 5)		
Objective 10	Housing	With a very low build rate would not be able to offer the range of homes that the ageing demographic would require. Very limited opportunity to secure additional market and affordable housing.
Objective 11	Place-making	Low requirement for new housing so provides very limited opportunity to enhance the character and identity of Monmouthshire's settlements.
Objective 12	Communities	Would impact negatively on communities with an unbalanced demographic, providing few opportunities for job creation or improvements to existing services and facilities.
Objective 13	Rural Communities	Would impact negatively on rural communities by providing few opportunities to strengthen the rural economy or opportunities for people to stay in their local communities. Difficulties in sustaining services/facilities across the County will result in rural isolation.
Objective 14	Infrastructure	Would have a negative impact as unbalanced demographic would result in falling school numbers and increased pressure on health care. However appropriate infrastructure could be provided to accommodate any new development.
Objective 15	Accessibility	Would have a negative impact as loss of employment would limit job opportunities in the County leading to a continuation of out-commuting levels in the short term, reducing as the population ages. Lack of employment opportunities within settlements would not encourage active travel and the use of sustainable transport options.

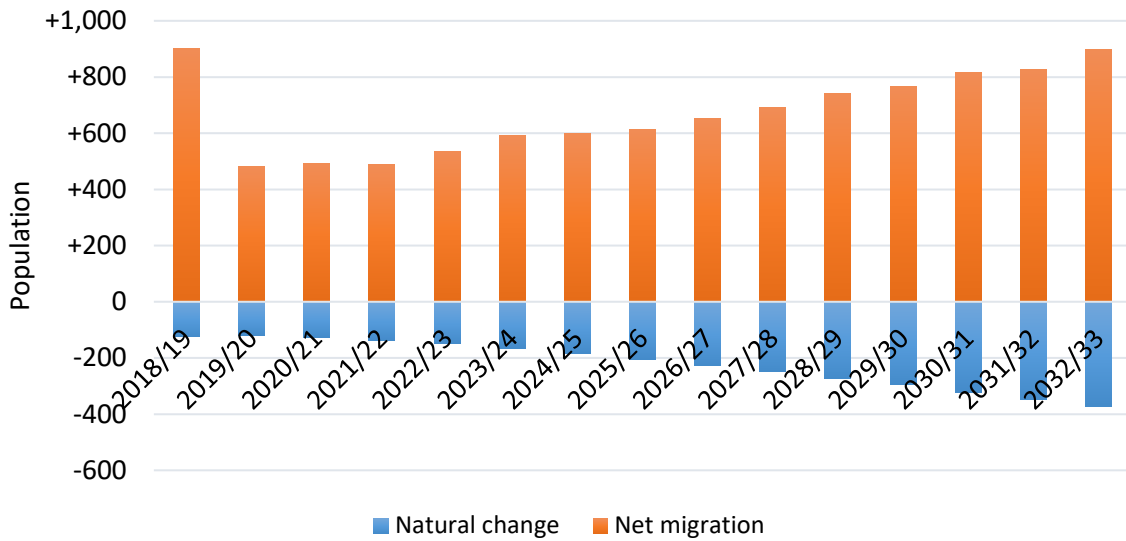
LDP Objective Number	LDP Objective Headline	Performance of Option 2 against the LDP Objectives
A Wales of Vibrant Culture & Thriving Welsh Language (Well-being Goal 6)		
Objective 16	Culture, Heritage and Welsh Language	There would be no negative impact on culture and heritage, but at the same time offers few benefits for the economy, tourism and social well-being of communities. No impact on Welsh Language.
A Globally Responsible Wales (Well-being Goal 7)		
Objective 17	Climate Change	There would be no negative impact on climate change, with a reduction in commuting in the long term as the population ages being a positive. At the same time there would be limited opportunities to contribute to minimising carbon by providing opportunities for renewable energy generation, supporting use of ultra-low emission vehicles and public transport, and the provision of quality Green Infrastructure.

Mid Growth Options

Option 3: Dwelling-led (15yr Average).

2.27 The 15 Year dwelling-led option is based on residential completions in the Monmouthshire County Council planning area from 2004 to 2018/19 and assumes an average annual dwelling growth rate of 275 per annum during this period. This produces a dwelling growth of 4,305, an average of 287 dpa over the new plan period. This level of dwelling growth would result in a population increase of 6,800 persons (7.2%) with a corresponding increase of 4,105 (10.2%) in the number of households in the County over the plan period. A key benefit of considering this level of growth is that it is based on actual past delivery rates and takes account of local socio-economic conditions. However, it needs to be borne in mind that this would represent a continuation of past dwelling completion rates and so would not address the demographic and economic challenges that we are seeking to address and doesn't take account of Council ambitions or aspirations: it simply replicates what has happened previously.

Chart 12: Components of Population Change



2.28 This option projects net average in-migration of around 670 persons pa throughout the plan period, out-weighing the negative impact of natural change, leading to a net growth in the population (Chart 12).

2.29 As with the previous options, this option also impacts on the age profile of the County. Whilst there is a higher level of growth in the 35-44 age groups, the majority of population growth is still coming from the over 60 age groups, with the 5-29 and 45-59 age groups declining, again resulting in an unbalanced demographic (Charts 13 and 14).

Chart 13: Population Growth/Decline by Age Group 2018-2033

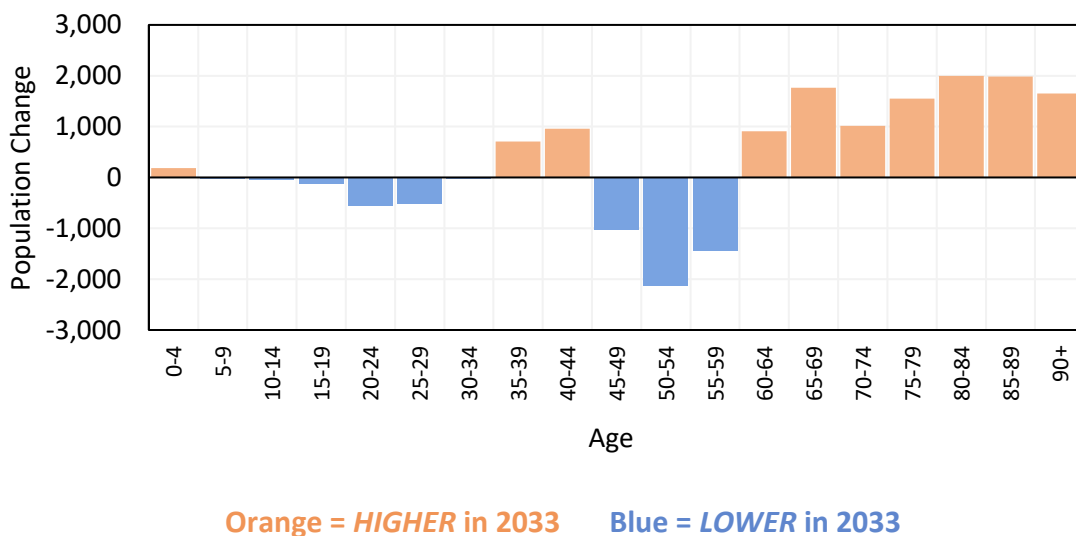
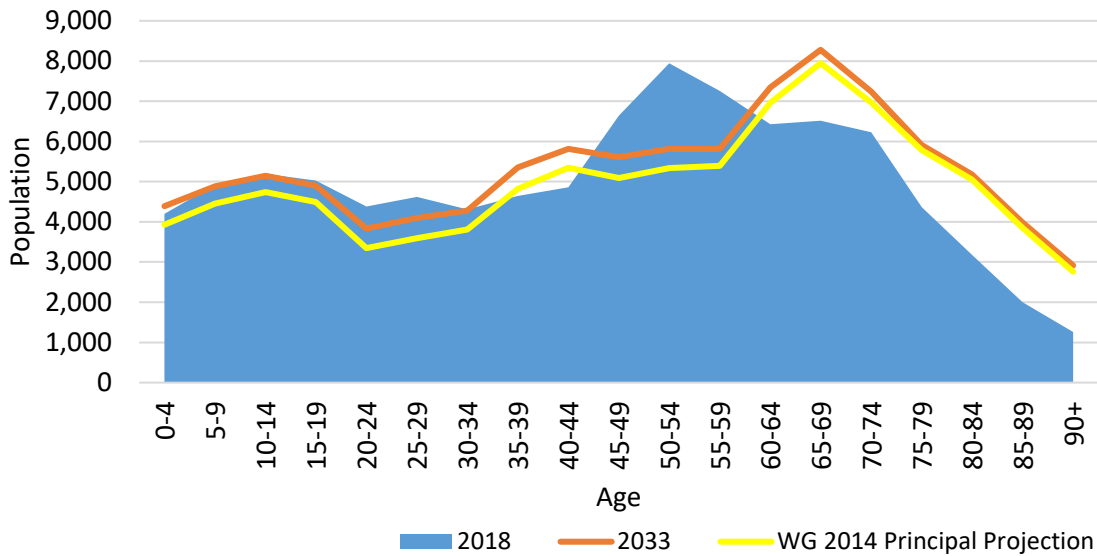
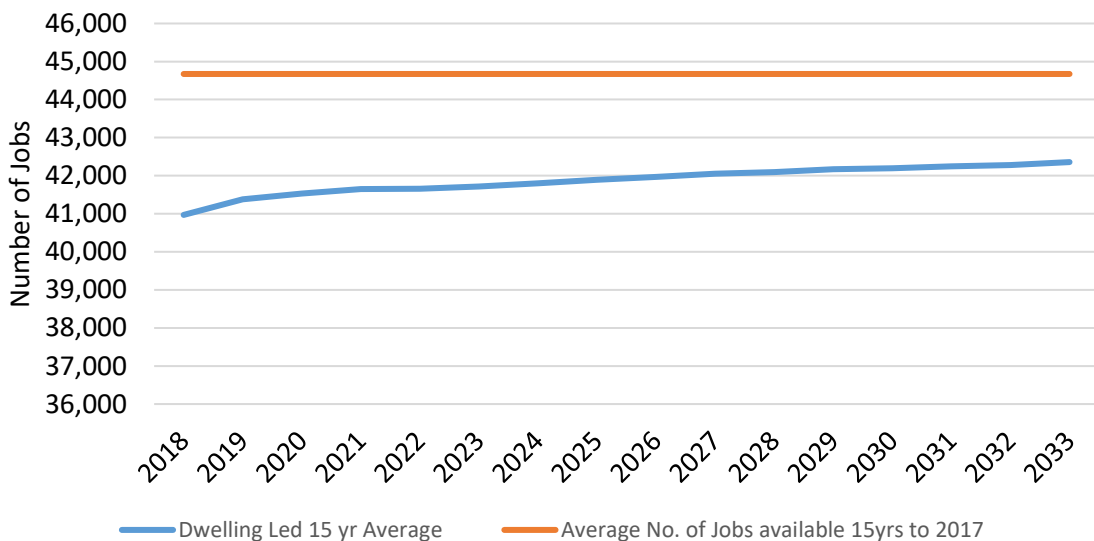


Chart 14: Implications for the Age Profile of Monmouthshire



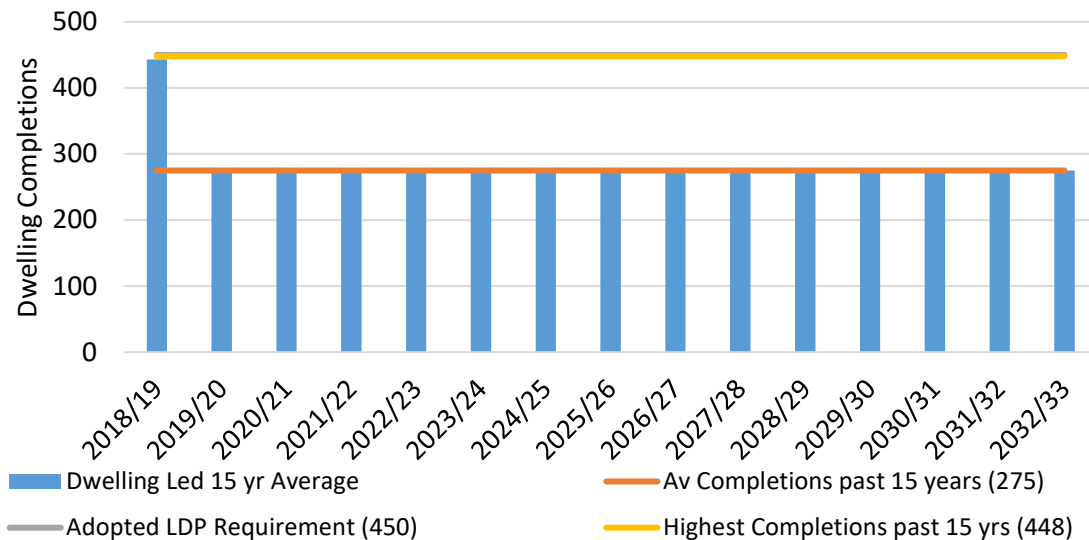
2.30 In contrast to the previous options, this option projects a growth of 90 jobs pa, a total of 1,389 jobs over the plan period. However, in terms of the average number of jobs in the County this option predicts a lower level than in the previous 15 years. In the 15 years to 2017 there were an average of 44,700 jobs available within the County, under this option there is projected to be an average of 41,900 jobs available. As this option would not drive job creation in the long term, it would result in an outflow of workers from the County thus impacting on the local economy and having no beneficial impact on the level of out-commuting. It would also mean that there would again be implications in terms of keeping younger people within the County to both live and work and thus would be in direct conflict with key objectives of the proposed Replacement LDP Strategy (Chart 15).

Chart 15: Implications for Employment Growth



2.31 This option simply represents a continuation of the dwelling growth rates from the past 15 years, i.e. ‘business as usual’, so would entail a continuation of the average dwelling completions of 275 dpa over the plan period which is significantly below the adopted LDP dwelling requirement of 450 dpa (Chart 16).

Chart 16: Dwelling Requirement



2.32 The implications associated with this growth option include:

- An increase in the proportion of the older and elderly people living in the County, impacting upon the type of housing required and service providers across public and private sectors.
- A stable number of school aged children, placing no pressure on the capacity of existing schools, but with limited opportunities to secure improvements to existing schools through planning gain.
- Some growth in established households around the 35-44 age group, which could fuel some employment growth, although the overall number of jobs is projected to be at a lower level than in the previous 15 years, indicating that people will still need to leave the County to access employment. This would not reduce levels of out-commuting or promote sustainable travel to work patterns.
- Opportunities to secure affordable housing through the planning system.
- Opportunities to secure and/or enhance green infrastructure, public open space and recreation provision through planning gain.
- Opportunities to secure infrastructure provision/upgrades through planning gain from development.

Table 8: Assessment of Option 3 against LDP Objectives

LDP Objective Number	LDP Objective - Headline	Performance of Option 3 against the LDP Objectives
A Prosperous Wales (Well-being Goal 1)		
Objective 1	Economic Growth/ Employment	Would result in a low level of employment growth (93 jobs pa) but would not provide enough impetus to encourage greater indigenous business growth or encourage inward investment. Provides limited opportunity to create a thriving, well-connected, diverse economy.
Objective 2	Retail centres	Would provide opportunity to add to the customer base in existing centres but would be unlikely to address the pressures the retail centres in the County's towns are currently facing.
A Resilient Wales (Well-being Goal 2)		
Objective 3	Green Infrastructure, Biodiversity and Landscape	Likely to result in further pressure on the natural environment. New developments could nevertheless improve Green Infrastructure and ecological connectivity through opportunities to create new linkages.
Objective 4	Flood risk	Level of development likely to result in development in areas which have floodplains. Developments can nevertheless be located away from areas at risk of flooding and will incorporate SUDs in accordance with National Planning Policy and SUDs legislation.
Objective 5	Minerals and Waste	There would be no negative impact on minerals and waste, mineral landbank obligations can be met.
Objective 6	Land	Limited opportunities for brownfield development, likely to be predominately greenfield development.
Objective 7	Natural resources	There would be no negative impact on ability to promote the efficient use of natural resources. Any developments will be encouraged to be water and energy efficient.
A Healthier Wales (Well-being Goal 3)		
Objective 8	Health and Well-being	There would be no negative impact on health and well-being. Any developments would be encouraged to support healthier lifestyles and provide sufficient open space.
A More Equal Wales (Well-being Goal 4)		
Objective 9	Demography	Would result in an increase in the proportion of the older and elderly people living in the County leading to an unbalanced demographic. Limited opportunities for the younger population to live and work in the County.
A Wales of Cohesive Communities (Well-being Goal 5)		
Objective 10	Housing	Would provide opportunity to offer the range of homes that the ageing demographic would require. Level of development would provide opportunity to secure market and affordable homes.

LDP Objective Number	LDP Objective Headline	Performance of Option 3 against the LDP Objectives
Objective 11	Place-making	Any developments will need to enhance the character and identity of the settlements and be in accordance with national sustainable place-making principles.
Objective 12	Communities	Could impact negatively on communities with an unbalanced demographic. New development however will provide opportunities for job creation and improvements to existing services and facilities.
Objective 13	Rural Communities	Could impact negatively on communities with an unbalanced demographic. New development however could help strengthen the rural economy and address rural isolation. Assisting in building sustainable rural communities.
Objective 14	Infrastructure	Appropriate infrastructure could be provided to accommodate any new development.
Objective 15	Accessibility	Would result in a low level of employment growth, so would be unlikely to lead to a significant reduction in commuting. On the other hand any new developments will need to consider active travel and integrated sustainable transport.
A Wales of Vibrant Culture & Thriving Welsh Language (Well-being Goal 6)		
Objective 16	Culture, Heritage and Welsh Language	Has the potential to impact on the heritage of a number of settlements in Monmouthshire. On the other hand through design developments can protect and enhance the built environment as well as provide benefits for the economy, tourism and well-being of communities. No impact on Welsh Language.
A Globally Responsible Wales (Well-being Goal 7)		
Objective 17	Climate Change	There would be no negative impact on climate change as the resilience of new development to aspects of climate change can be achieved via the design and location of new developments. Developments can provide opportunities to minimise carbon by providing opportunities for renewable energy generation, seeking to reduce commuting, supporting use of ultra-low emission vehicles and public transport, and the provision of quality Green Infrastructure.

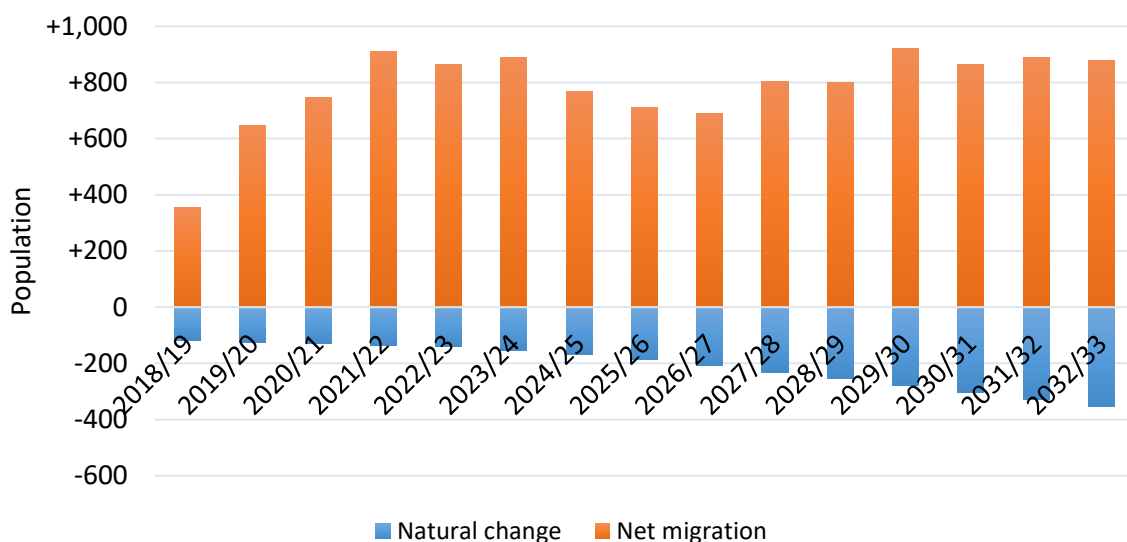
Option 4: Matching UK Growth Rate

- 2.33 This option differs to the previous options in that it is employment-led. Therefore, instead of estimating the level of employment that the relevant forecast population or housing growth trajectory could support, it considers the potential impact of employment change on population and housing growth. The underlying data for this

projection is taken from the baseline projections on employment growth produced by Oxford Economics for the Council’s Future Monmouthshire: Economies of the Future Economic Baseline Report (March 2018).

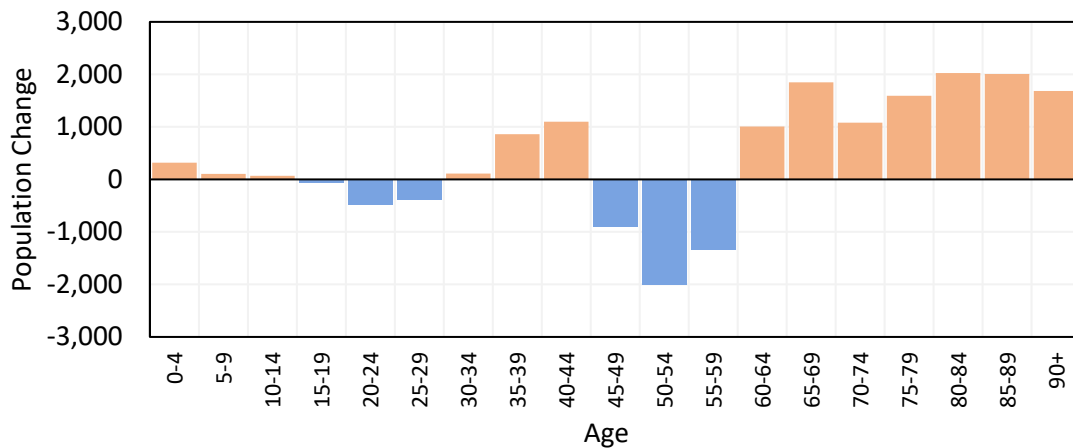
- 2.34 To match the UK growth rate this option would require annual employment growth of 151 jobs, equating to 2,265 jobs over the plan period. Further provision of employment opportunities requires additional labour, which can be brought in from elsewhere (in-commuting or migration) or provided by the spare capacity within Monmouthshire itself or as a result of reduced out-commuting.
- 2.35 This option uses economic assumptions that are consistent with those applied to Monmouthshire’s demographic and dwelling-led scenarios as set out in Table 2 above. By applying these principles this employment-led option projects a population increase of 8,616 (9.1%) with a corresponding increase of 4,820 (12%) in the number of households in the County over the plan period. This represents a projected dwelling growth rate of 5,055 (337 dpa) to support this level of employment growth.

Chart 17: Components of Population Change



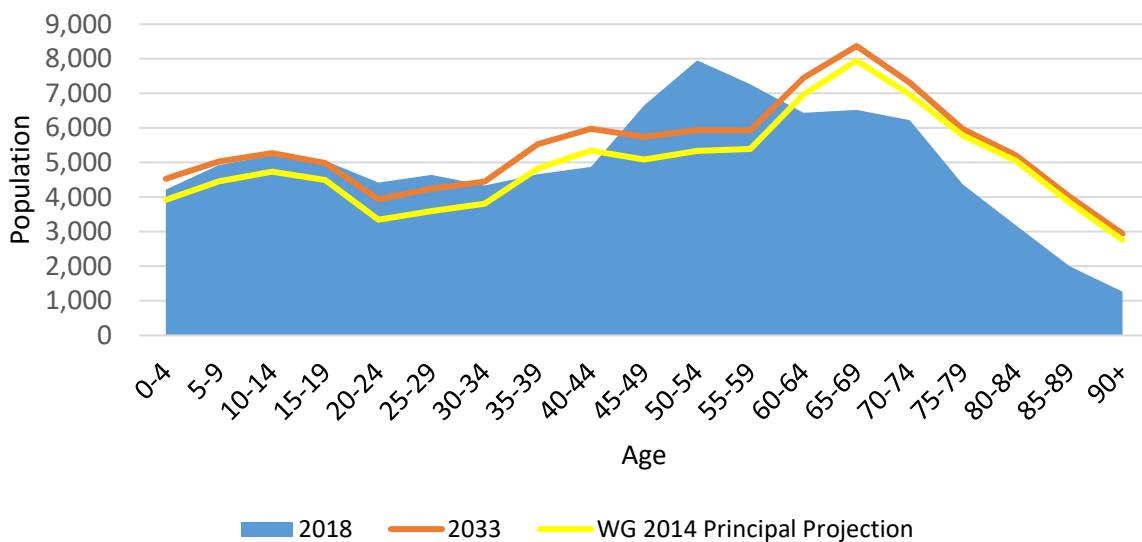
- 2.36 This option projects net average in-migration of 780 persons pa throughout the plan period, out-weighting the negative impact of natural change, leading to a net growth in the population (Chart 17).
- 2.37 Whilst there is a higher level of growth in the 35-44 age groups the majority of population growth is still coming from the over 60 age groups. The 15-29 and 45-59 age groups are declining, resulting in an unbalanced demographic (Charts 18 and 19).

Chart 18: Population Growth/Decline by Age Group 2018-2033



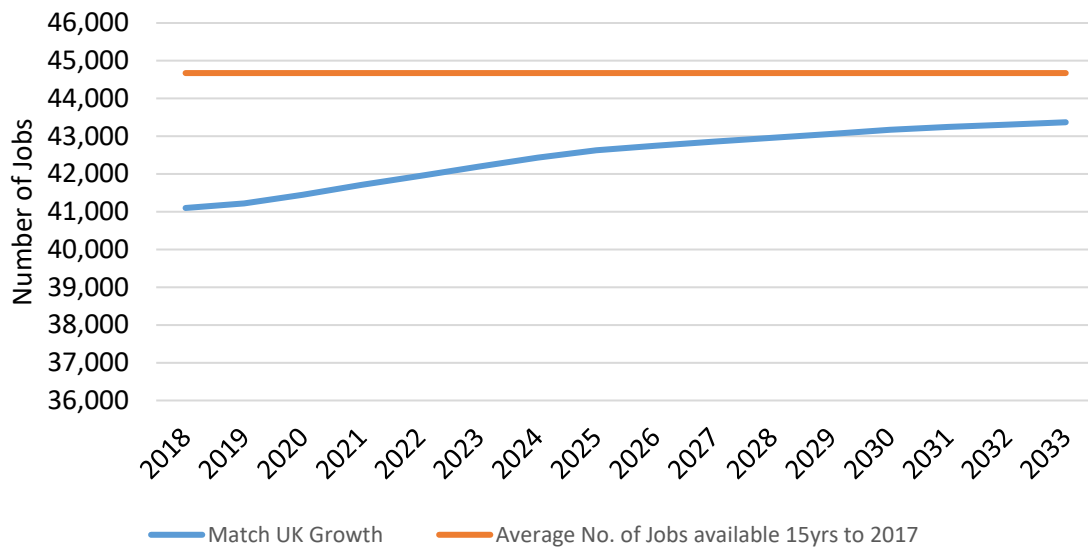
Orange = HIGHER in 2033 Blue = LOWER in 2033

Chart 19: Implications for the Age Profile of Monmouthshire



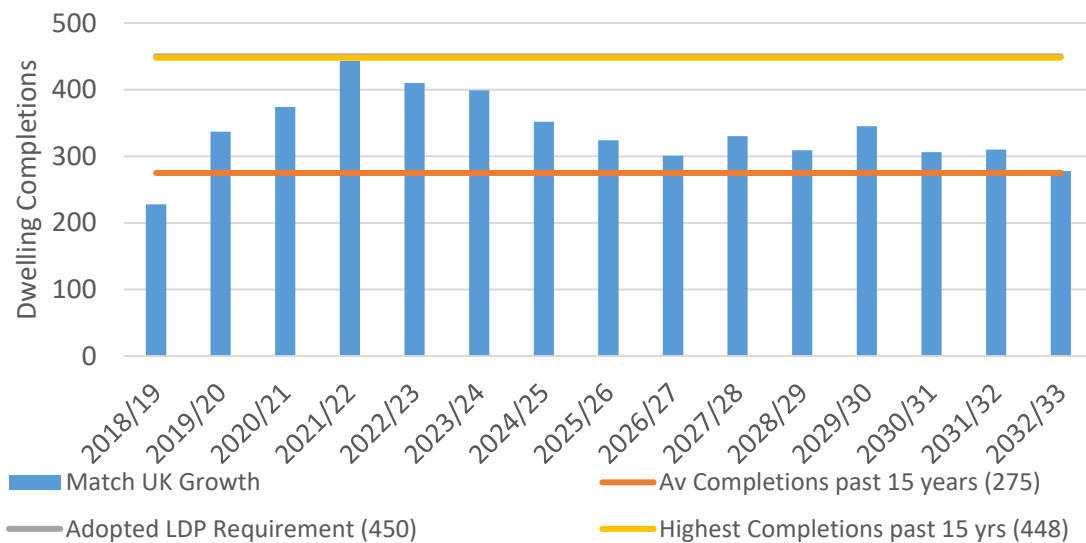
2.38 As with option 3, this option also projects a growth in jobs with an increase of 151 jobs pa, a total of 2,265 jobs over the plan period (Chart 20). However, in terms of the average number of jobs in the County this option again projects a lower level than over the previous 15 years. In the 15 years to 2017 there were an average of 44,700 jobs available within the County, under this option there is projected to be an average of 42,500 jobs available. As this option would not drive job creation in the long term, it would still result in an outflow of workers from the County thus impacting on the local economy and levels of out-commuting. It would also mean that there would again be implications in terms of keeping younger people within the County to both live and work and thus would fail to deliver key objectives of the proposed Replacement LDP Strategy.

Chart 20: Implications for Employment Growth



2.39 This option represents a dwelling growth rate of 337 dpa over the plan period. This is a higher level than that experienced over the previous 15 years but falls short of the adopted LDP requirement (Chart 21).

Chart 21: Dwelling Requirement



2.40 The implications associated with this growth option include:

- An increase in the proportion of the older and elderly people living in the County, impacting upon the type of housing required and service providers across public and private sectors.
- A stable number of school aged children, placing no pressure on the capacity of existing schools.
- Some growth in established households around the 35-44 age group, which could fuel some employment growth, although the overall number of jobs is projected

to be at a lower level than in the previous 15 years, indicating that people will still need to leave the County to access employment. This would not reduce levels of out-commuting or promote sustainable travel to work patterns.

- Opportunities to secure affordable housing through the planning system.
- Opportunities to secure and/or enhance green infrastructure public open space and recreation provision through planning gain.
- Opportunities to secure infrastructure provision/upgrades through planning gain from development.

Table 9: Assessment of Option 4 against LDP Objectives

LDP Objective Number	LDP Objective - Headline	Performance of Option 4 against the LDP Objectives
A Prosperous Wales (Well-being Goal 1)		
Objective 1	Economic Growth/ Employment	Would result in employment growth in key sectors, but still results in a lower number of jobs in the County than in the previous 15 years. Would be unlikely to provide enough impetus to encourage greater indigenous business growth or encourage inward investment. Provides some opportunity to create a thriving, well-connected, diverse economy.
Objective 2	Retail centres	Would provide opportunity to add to the customer base in existing centres but would be unlikely to address the pressures the retail centres in the County's towns are currently facing.
A Resilient Wales (Well-being Goal 2)		
Objective 3	Green Infrastructure, Biodiversity and Landscape	Likely to result in further pressure on the natural environment. New developments could nevertheless improve Green Infrastructure and ecological connectivity through opportunities to create new linkages.
Objective 4	Flood risk	Level of development likely to result in development in areas which have floodplains. Developments can nevertheless be located away from areas at risk of flooding and will incorporate SUDs in accordance with National Planning Policy and SUDs legislation.
Objective 5	Minerals and Waste	Levels of housing and employment development could impact on the safeguarding of the County's mineral resource. Developments can nevertheless be located away from safeguarded areas.
Objective 6	Land	Limited opportunities for brownfield development, likely to be predominately greenfield development.
Objective 7	Natural resources	There would be no negative impact on ability to promote the efficient use of natural resources. Any developments will be encouraged to be water and energy efficient.

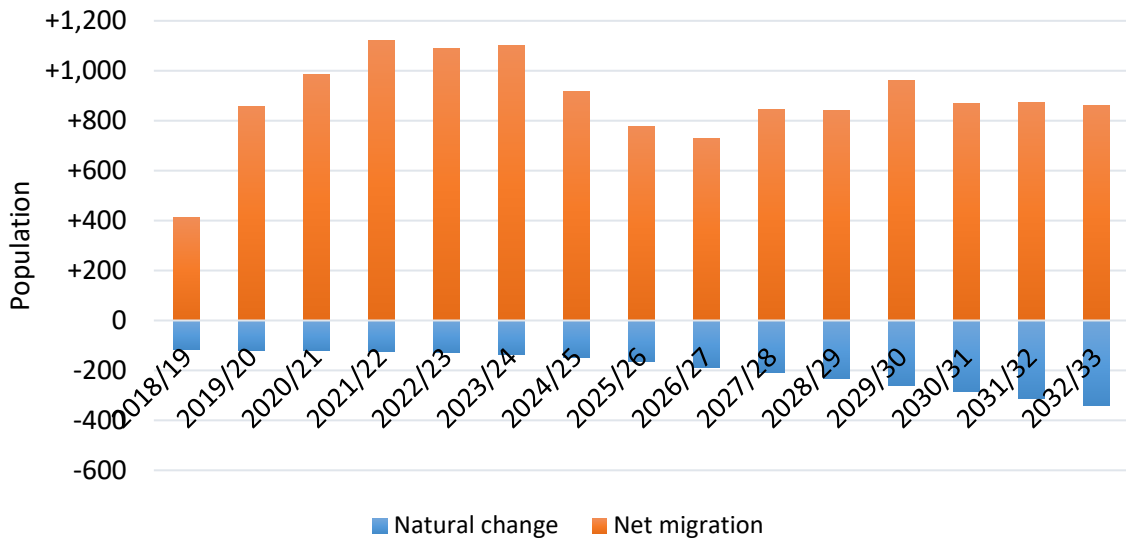
LDP Objective Number	LDP Objective Headline	Performance of Option 2 against the LDP Objectives
A Healthier Wales (Well-being Goal 3)		
Objective 8	Health and Well-being	There would be no negative impact on health and well-being. Any developments would be encouraged to support healthier lifestyles and provide sufficient open space.
A More Equal Wales (Well-being Goal 4)		
Objective 9	Demography	Some growth in established households but not sufficient to address the unbalanced demographic, would still result in an increase in the proportion of the older and elderly people living in the County.
A Wales of Cohesive Communities (Well-being Goal 5)		
Objective 10	Housing	Would provide opportunity to offer the range of homes that the ageing demographic would require. Level of development would provide opportunity to secure market and affordable homes.
Objective 11	Place-making	Any developments will need to enhance the character and identity of the settlements and be in accordance with national sustainable place-making principles.
Objective 12	Communities	Could impact negatively on communities with an unbalanced demographic. New development however will provide opportunities for job creation and improvements to existing services and facilities.
Objective 13	Rural Communities	Could impact negatively on communities with an unbalanced demographic. New development however could help strengthen the rural economy and address rural isolation. Assisting in building sustainable rural communities.
Objective 14	Infrastructure	Appropriate infrastructure could be provided to accommodate any new development.
Objective 15	Accessibility	The level of employment growth would be unlikely to lead to a significant reduction in commuting. On the other hand any new developments will need to consider active travel and integrated sustainable transport.
A Wales of Vibrant Culture & Thriving Welsh Language (Well-being Goal 6)		
Objective 16	Culture, Heritage and Welsh Language	Has the potential to impact on the heritage of a number of settlements in Monmouthshire. On the other hand through design developments can protect and enhance the built environment as well as provide benefits for the economy, tourism and well-being of communities. No impact on Welsh Language.

LDP Objective Number	LDP Objective Headline	- Performance of Option 2 against the LDP Objectives
A Globally Responsible Wales (Well-being Goal 7)		
Objective 17	Climate Change	There would be no negative impact on climate change as the resilience of new development to aspects of climate change can be achieved via the design and location of new developments. Developments can provide opportunities to minimise carbon by providing opportunities for renewable energy generation, seeking to reduce commuting, supporting use of ultra-low emission vehicles and public transport, and the provision of quality Green Infrastructure.

Option 5: Radical Structural Change Lower (Commuting Ratio Reducing)

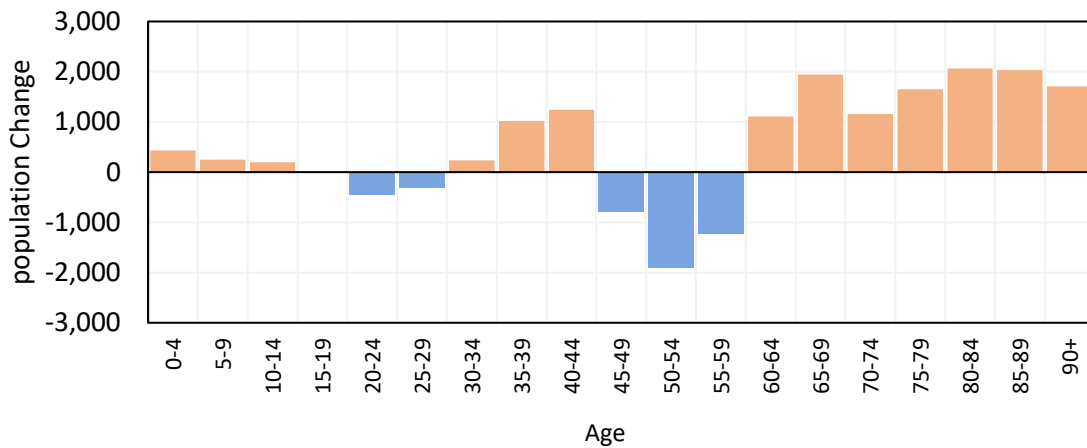
- 2.41 This option, as with the previous option, is also employment-led. As a starting point it takes the lower level of job creation under the radical structural change option of the Economies of the Future Report. This estimates an additional 5,000 jobs above the 2017 level by 2037. This equates to an annual growth of some 258 jobs or a total of 3,870 jobs over the plan period.
- 2.42 Employment growth is higher under this option than the matching UK growth option. With the provision of more jobs in the County it is realistic to assume that the commuting ratio would reduce, that is to say that Monmouthshire would retain more of its own workers rather than them commuting elsewhere to work. This option takes this into account and assumes a smaller net out-commute by the end of the plan period. In turn, this reduces population growth as fewer people are estimated to commute out of the authority, thus reducing the need for in-migration to support the employment growth. For this option the unemployment rate remains fixed.
- 2.43 By applying these principles this employment-led option projects a population increase of 10,375 (11.0%) with a corresponding increase of 5,523 (13.7%) in the number of households in the County over the plan period. This represents a projected dwelling growth rate of 5,790 over the plan period, or 386 dpa, to support this level of employment growth.
- 2.44 This option projects net average in-migration of 880 persons pa throughout the plan period, out-weighting the negative impact of natural change, leading to a net growth in the population (Chart 22).

Chart 22: Components of Population Change



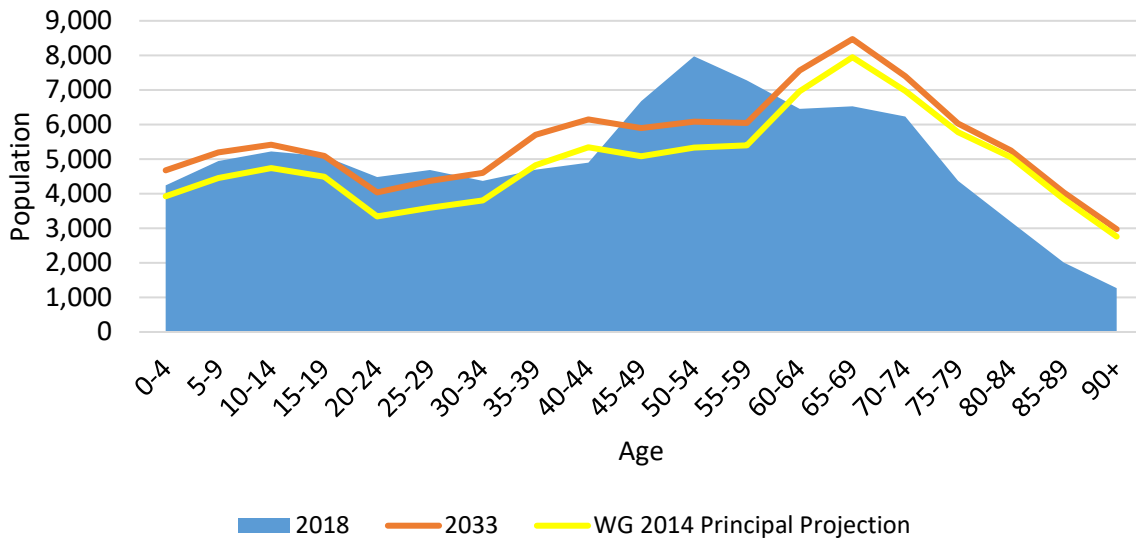
2.45 As with the previous options, this scenario has implications for the age profile of the County. Whilst the majority of population growth is still coming from the over 60 age groups, there is some evening out of the age profile with growth coming from a broader cross section of the demographic, including young families, the 30 – 44 age group and thus also in the under 14 age groups. However, the 20-29 and 45-59 age groups still record a decline in numbers (Charts 23 and 24).

Chart 23: Population Growth/Decline by Age Group 2018-2033



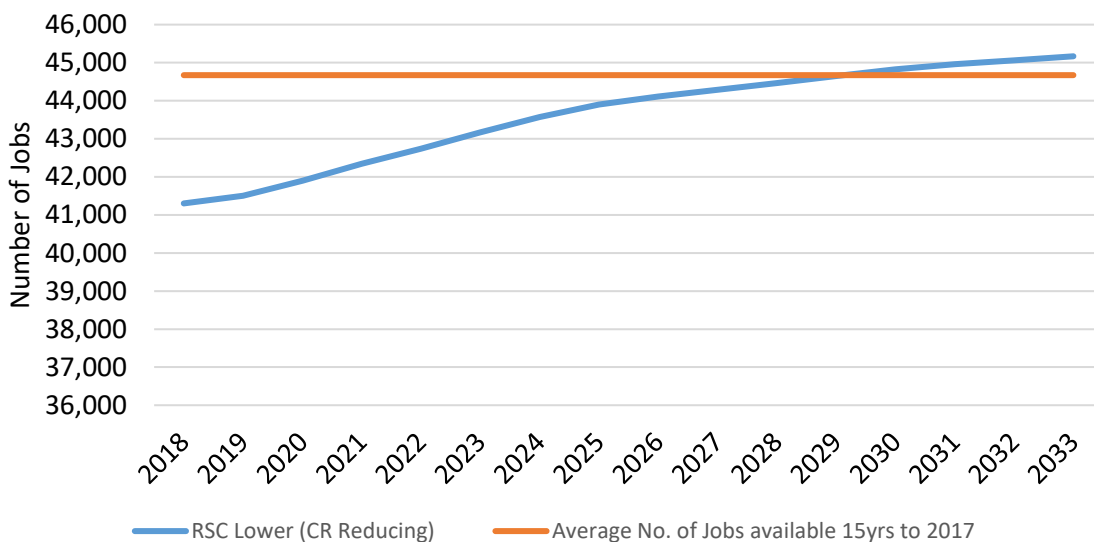
Orange = HIGHER in 2033 Blue = LOWER in 2033

Chart 24: Implications for the Age Profile of Monmouthshire



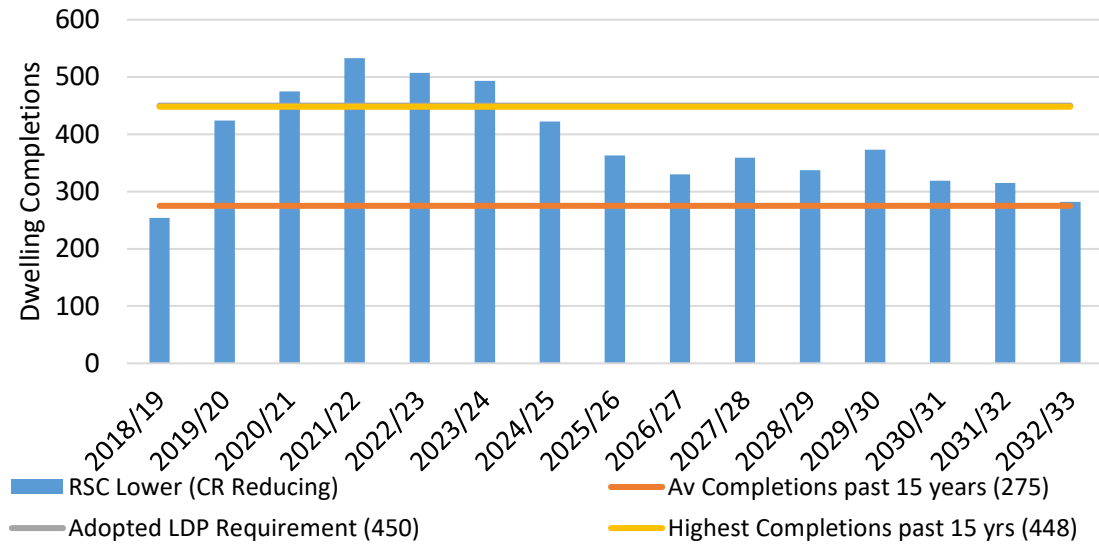
2.46 As with option 3, this option also projects a growth in jobs with an increase of 3,870 jobs, an increase of 258 jobs pa over the plan period. However, in terms of the average number of jobs in the County this option again projects a lower level than over the previous 15 years. In the 15 years to 2017 there was an average of 44,700 jobs available within the County, under this option there is projected to be an average of 43,600 jobs available. This option projects a greater growth in job numbers for the first half of the plan period with this levelling off during the second half, however by 2030 the number of jobs are projected to exceed the 15 year average to 2017. As this option models a commuting ratio that reduces from the 2011 Census value (1.12) to 1.10 over the plan period, population and dwelling growth is not as high as it might have been as Monmouthshire would be retaining more of its own population to maintain the job growth (Chart 25).

Chart 25: Implications for Employment Growth



2.47 This option represents an average dwelling growth rate of 386 dpa over the plan period. This is a higher level than the average dwelling completion rate experienced over the previous 15 years but falls short of the adopted LDP requirement (Chart 26).

Chart 26: Dwelling Requirement



2.48 The implications associated with this growth option include:

- An increase in the proportion of the older and elderly people living in the County, impacting upon the type of housing required and service providers across public and private sectors.
- A growth in the number of school aged children, placing some pressure on the capacity of existing schools, however, the level of housing delivery would provide scope to secure improvements through planning gain.
- Growth in established households around the 30-44 age group, which could fuel employment growth, although the overall number of jobs is projected to be at a lower level than in the previous 15 years, indicating that whilst the commuting levels will reduce people will still need to leave the County to access employment.
- Opportunities to secure affordable housing through the planning system.
- Opportunities to sustain services /facilities.
- Opportunities to secure meaningful infrastructure provision/upgrades through planning gain from development.
- Opportunities to secure and/or enhance green infrastructure, public open space and recreation provision through planning gain.

Table 10: Assessment of Option 5 against LDP Objectives

LDP Objective Number	LDP Objective - Headline	Performance of Option 5 against the LDP Objectives
A Prosperous Wales (Well-being Goal 1)		
Objective 1	Economic Growth/ Employment	Would result in a growth in jobs of 258 pa. This level of growth would encourage greater indigenous business growth and encourage inward investment. Provides opportunity to create a thriving, well-connected, diverse economy.
Objective 2	Retail centres	Would provide opportunity to add to the customer base in retail centres in the County's towns, benefiting from indigenous employment growth and fostering the vitality, viability and attractiveness of the centres.
A Resilient Wales (Well-being Goal 2)		
Objective 3	Green Infrastructure, Biodiversity and Landscape	Likely to result in further pressure on the natural environment. New developments could nevertheless improve Green Infrastructure and ecological connectivity through opportunities to create new linkages.
Objective 4	Flood risk	Level of development likely to result in development in areas which have floodplains. Developments can nevertheless be located away from areas at risk of flooding and will incorporate SUDs in accordance with National Planning Policy and SUDs legislation.
Objective 5	Minerals and Waste	Levels of housing and employment development could impact on the safeguarding of the County's mineral resource. Developments can nevertheless be located away from safeguarded areas.
Objective 6	Land	The provision of employment alongside housing could promote the efficient use of land. Recognising that there are limited opportunities for brownfield development
Objective 7	Natural resources	There would be no negative impact on ability to promote the efficient use of natural resources. Any developments will be encouraged to be water and energy efficient.
A Healthier Wales (Well-being Goal 3)		
Objective 8	Health and Well-being	There would be no negative impact on health and well-being. Any developments would be encouraged to support healthier lifestyles and provide sufficient open space.
A More Equal Wales (Well-being Goal 4)		
Objective 9	Demography	Begins to address the unbalanced demographic, whilst the over 60 age groups continue to grow there is also growth in the populations of the established families and under 14 age groups. Increased opportunities through job and housing provision for the younger population to live and work in Monmouthshire.

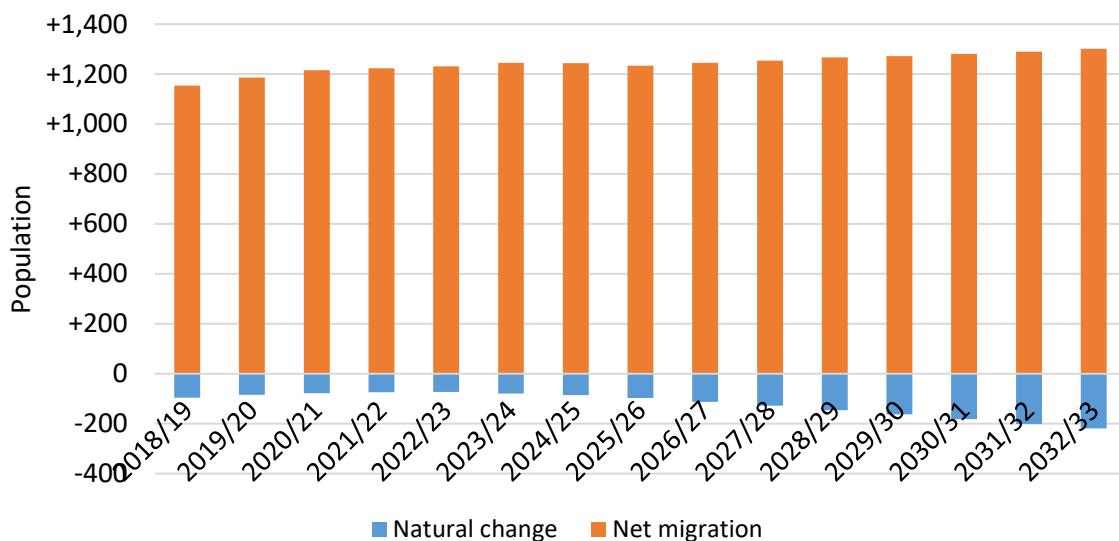
LDP Objective Number	LDP Objective Headline	Performance of Option 5 against the LDP Objectives
A Wales of Cohesive Communities (Well-being Goal 5)		
Objective 10	Housing	Would provide a level of housing that is sufficient to provide a wide ranging choice of homes for both existing and future residents. Level of development would provide opportunity to secure affordable and market homes.
Objective 11	Place-making	Any developments will need to enhance the character and identity of the settlements and be in accordance with national sustainable place-making principles. Growth in employment alongside housing would create more sustainable places.
Objective 12	Communities	A more balanced demographic with new development providing opportunities for job creation and improvements to existing services and facilities.
Objective 13	Rural Communities	A more balanced demographic with new development providing opportunities which could help support the rural economy and address rural isolation.
Objective 14	Infrastructure	Appropriate infrastructure could be provided to accommodate any new development.
Objective 15	Accessibility	The level of employment growth alongside the housing development would be likely to reduce the need to travel. Any new developments will need to consider active travel and integrated sustainable transport.
A Wales of Vibrant Culture & Thriving Welsh Language (Well-being Goal 6)		
Objective 16	Culture, Heritage and Welsh Language	Has the potential to impact on the heritage of a number of settlements in Monmouthshire. On the other hand through design developments can protect and enhance the built environment as well as provide benefits for the economy, tourism and well-being of communities. No impact on Welsh Language.
A Globally Responsible Wales (Well-being Goal 7)		
Objective 17	Climate Change	There would be no negative impact on climate change as the resilience of new development to aspects of climate change can be achieved via the design and location of new developments. Developments can provide opportunities to minimise carbon by providing opportunities for renewable energy generation, seeking to reduce commuting, supporting use of ultra-low emission vehicles and public transport, and the provision of quality Green Infrastructure.

High Growth Options

Option 6: PG Long Term (Adjusted)

- 2.49 This option uses the POPGROUP forecasting model to develop a trend-based demographic option. This uses migration flow assumptions based on a sixteen-year historical period from 2001/02 to 2016/17 but adjusted by an uplift to the internal in-migration rates to reflect higher in-migration (based on the last 5 years) from Bristol and South Gloucestershire. This option has been modelled to reflect the possible impact of the removal of the Severn Bridge toll. This differs to the WG 2014-Based Principal Projection which bases all of its migration assumptions on the five-year period prior to 2014 (i.e. 2009/10 to 2013/14).
- 2.50 This option results in the highest net migration rates of any of the demographic or dwelling-led scenarios with only the radical structural change employment-led scenarios resulting in a higher level. By applying the adjustment to the internal in-migration rates this scenario projects an increase of 16,825 (17.8%) in the population with a corresponding increase of 7,652 (19%) in the number of households in the County over the plan period. This represents a projected dwelling growth of 8,010 over the plan period, 534dpa.

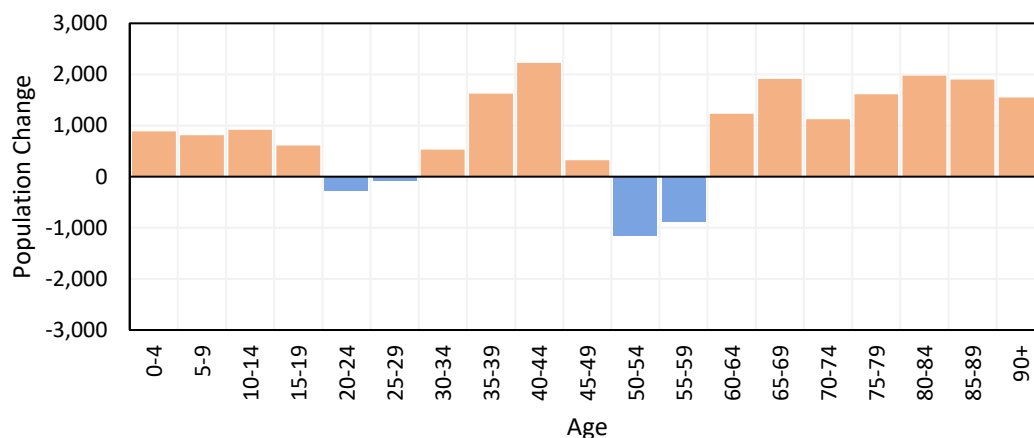
Chart 27: Components of Population Change



- 2.51 This option projects net average in-migration of 1,200 persons pa throughout the plan period, significantly out-weighting the negative impact of natural change, leading to a net growth in the population. This option shows the highest migration levels of any of the demographic or dwelling-led options (Chart 27).
- 2.52 This level of migration results in a significant impact on the age profile of the County, and whilst there continues to be growth in the over 60 age groups there is a corresponding growth in the key 30-49 age groups with growth mirrored in the 0-19

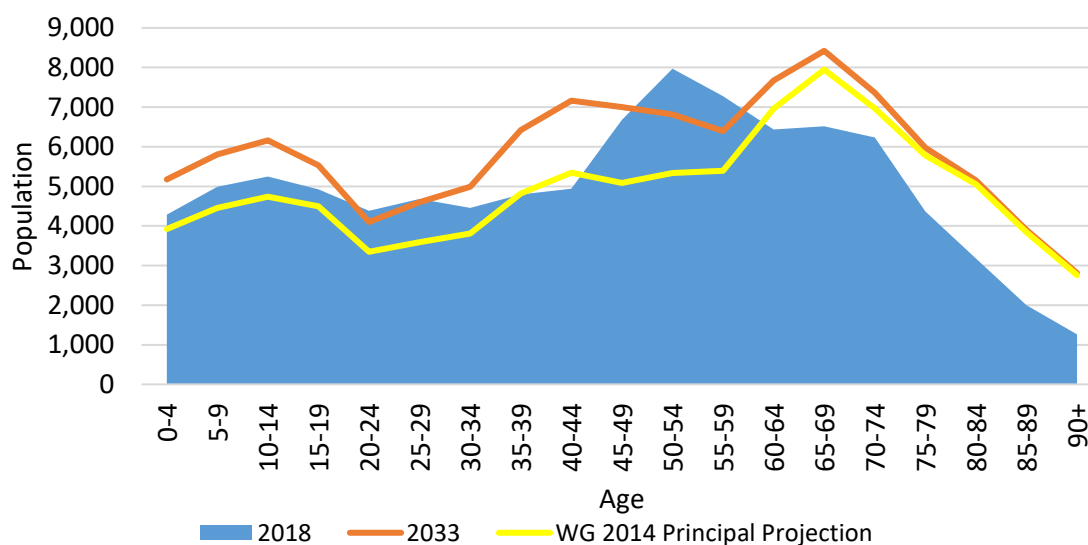
age groups. This option captures increased in-migration in the key 25-45 labour force age groups (Charts 28 and 29).

Chart 28: Population Growth/Decline by Age Group 2018-2033



Orange = HIGHER in 2033 Blue = LOWER in 2033

Chart 29: Implications for the Age Profile of Monmouthshire



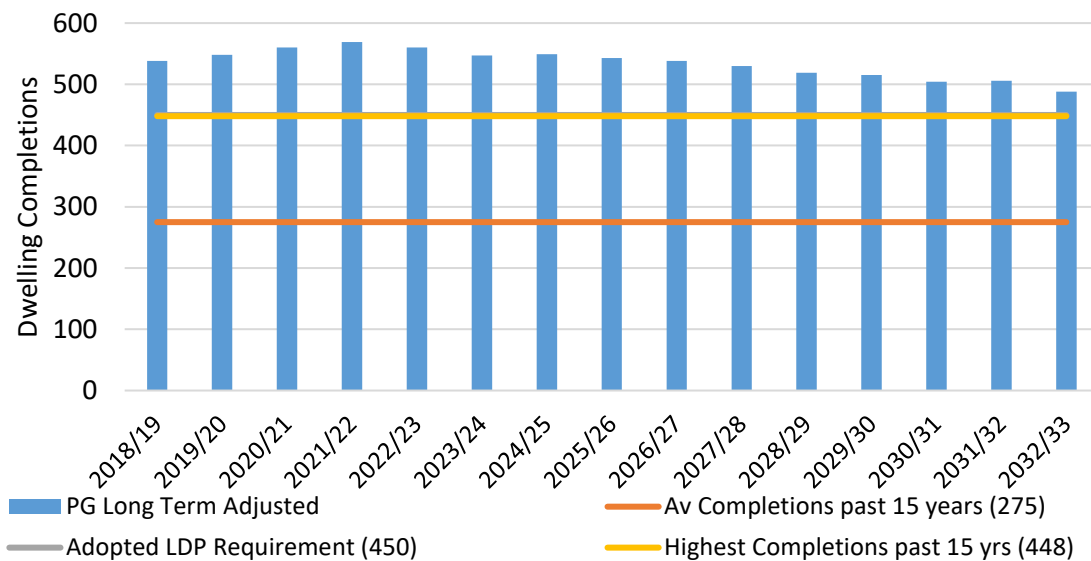
2.53 The growth in jobs under this scenario is significantly higher than that achieved under the employment-led Radical Structural Change Lower (CR Reducing) option with an increase of 6,709 jobs, 447 jobs pa over the plan period (Chart 30). It also leads to a higher average number of jobs within the county than the 44,700 available per annum over the 15 years to 2017, with an average of 44,851 available per annum over the plan period. The number of jobs available rises significantly towards the end of the plan period, with 48,000 jobs available in the County by 2033. This option maintains commuting levels at the 2011 level thus increased in-migration of the key labour force age groups fuels the employment growth.

Chart 30: Implications for Employment Growth



2.54 This option represents a dwelling growth rate of some 534 dpa over the plan period. This is a higher level than any experienced over the past 15 years and is higher than the current LDP requirement (Chart 31).

Chart 31: Dwelling Requirement



2.55 The implications associated with this growth option include:

- A more balance demography, although the increase in the number of older and elderly people living in the County would still impact upon the type of housing required and service providers across public and private sectors.
- Significant growth in the number of school aged children, placing more pressure on the capacity of existing schools. However, the level of housing delivery would provide a substantial opportunity to secure additional provision through planning gain to fund extensions and/or new schools.

- Growth in the number of working aged people living in Monmouthshire, with a notable increase in established households around the 35-44 age group, fuelling growth in employment provision.
- Opportunities to secure more significant affordable housing through the planning system.
- Opportunities to sustain services /facilities.
- Opportunities to secure meaningful infrastructure provision/upgrades through planning gain from development.
- Increased opportunities to secure and/or enhance green infrastructure, public open space and recreation provision through planning gain.

Table 11: Assessment of Option 6 against LDP Objectives

LDP Objective Number	LDP Objective - Headline	Performance of Option 6 against the LDP Objectives
A Prosperous Wales (Well-being Goal 1)		
Objective 1	Economic Growth/ Employment	Would result in a growth in jobs of 447 pa. This level of growth would encourage greater indigenous business growth and encourage inward investment. Provides opportunity to create a thriving, well-connected, diverse economy.
Objective 2	Retail centres	Would provide increased opportunities to add to the customer base in retail centres in the County's towns, with a 17.8% increase in the population. There would be benefits arising from indigenous employment growth in the County, fostering the vitality, viability and attractiveness of the centres.
A Resilient Wales (Well-being Goal 2)		
Objective 3	Green Infrastructure, Biodiversity and Landscape	Levels of housing and employment development likely to result in further pressure on the natural environment. New developments could nevertheless improve Green Infrastructure and ecological connectivity through opportunities to create new linkages.
Objective 4	Flood risk	Level of development likely to result in development in areas which have floodplains. Developments can nevertheless be located away from areas at risk of flooding and will incorporate SUDs in accordance with National Planning Policy and SUDs legislation.
Objective 5	Minerals and Waste	Higher levels of housing and employment development may impact on the safeguarding of the County's mineral resource. Additional waste infrastructure may be required for this level of growth.
Objective 6	Land	Higher levels of development likely to be predominately greenfield, recognising that brownfield opportunities are limited in Monmouthshire.

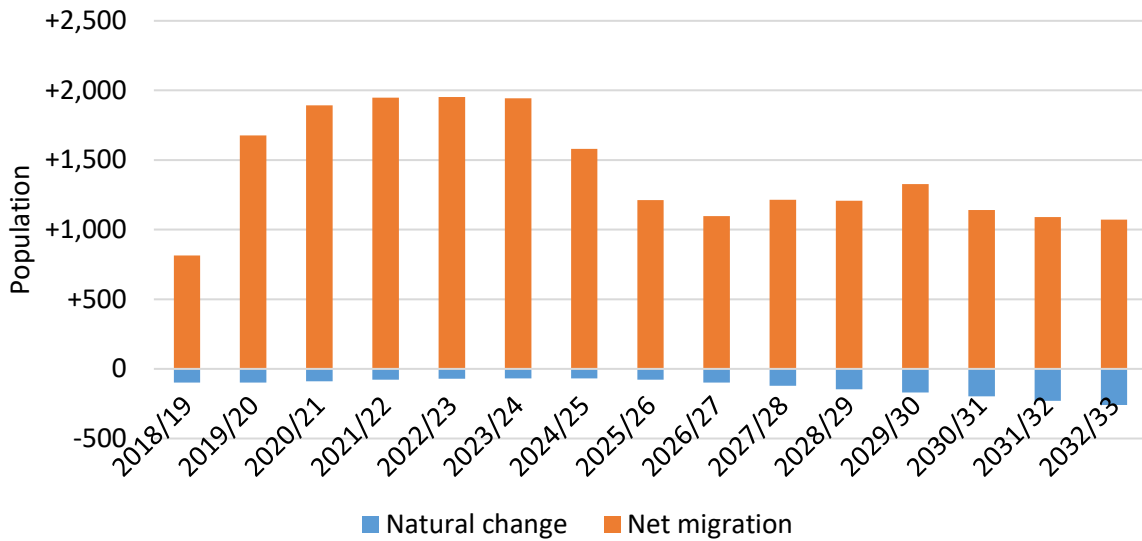
LDP Objective Number	LDP Objective Headline	Performance of Option 6 against the LDP Objectives
Objective 7	Natural resources	There would be no negative impact on ability to promote the efficient use of natural resources. Any developments will be encouraged to be water and energy efficient.
A Healthier Wales (Well-being Goal 3)		
Objective 8	Health and Well-being	There would be no negative impact on health and well-being. Any developments would be encouraged to support healthier lifestyles and provide sufficient open space.
A More Equal Wales (Well-being Goal 4)		
Objective 9	Demography	There would be a positive impact on the demography of the County, with a more balanced and greater provision of dwellings and jobs increasing the opportunities for the younger population to both live and work in Monmouthshire.
A Wales of Cohesive Communities (Well-being Goal 5)		
Objective 10	Housing	Would provide a level of housing that is sufficient to provide a wide ranging choice of homes for both existing and future residents. Level of development would provide opportunity to secure affordable and market homes.
Objective 11	Place-making	Any developments will need to enhance the character and identity of the settlements and be in accordance with national sustainable place-making principles. Growth in employment alongside housing would create more sustainable places.
Objective 12	Communities	A more balanced demographic with new development providing opportunities for job creation alongside housing and improvements to existing services and facilities.
Objective 13	Rural Communities	A more balanced demographic with new development providing opportunities which could help support the rural economy and address rural isolation.
Objective 14	Infrastructure	Appropriate infrastructure could be provided to accommodate any new development.
Objective 15	Accessibility	Whilst there is a more balanced provision of jobs and housing, the commuting ratio is not likely to reduce, with a higher level of in-migration expected in response to the removal of the tolls. Any new developments will need to consider active travel and integrated sustainable transport.

LDP Objective Number	LDP Objective Headline	Performance of Option 2 against the LDP Objectives
A Wales of Vibrant Culture & Thriving Welsh Language (Well-being Goal 6)		
Objective 16	Culture, Heritage and Welsh Language	Has the potential to impact on the heritage of a number of settlements in Monmouthshire. On the other hand through design developments can protect and enhance the built environment as well as provide benefits for the economy, tourism and well-being of communities. No impact on Welsh Language.
A Globally Responsible Wales (Well-being Goal 7)		
Objective 17	Climate Change	There could be a negative impact on climate change as despite promoting a balance between job creation and housing development, with these developments providing opportunities to minimise carbon there is likely to still be unsustainable commuting patterns due to the increase in the resident working population.

Option 7: Radical Structural Change Higher (Commuting Ratio Reducing)

- 2.56 This option, as with options 4 and 5 is employment-led. As a starting point it takes the higher level of job creation under the radical structural change option of the Economies of the Future Report. This estimates an additional 10,000 jobs above the 2017 level by 2037. This equates to an annual growth of 552 jobs or a total of 8,280 jobs over the plan period.
- 2.57 This option in common with the other employment-led scenarios uses economic assumptions that are consistent with those applied to Monmouthshire’s demographic and dwelling-led scenarios. That is a fixed unemployment rate which tracks historical data to 2017 and thereafter remains fixed and consistent employment growth and economic activity rate assumptions over the plan period. However, unlike option 8 which has the same starting point, it assumes that the commuting ratio will reduce. With the provision of more jobs in the County it is realistic to assume that the commuting ratio would reduce, i.e. Monmouthshire would retain more of its own workers rather than them commuting elsewhere to work. This option takes this into account and assumes a smaller net out-commute by the end of the plan period. Whilst not impacting on the overall growth of employment, this reduces population growth and thus the dwelling requirement as fewer people are estimated to commute out of the authority, thus reducing the need for in-migration to support the employment and dwelling growth.
- 2.58 By applying these principles this employment-led option projects an increase of 19,308 (20.2%) in the population with a corresponding increase of 9,037 (22.2%) in the number of households in the County over the plan period. This represents a projected dwelling growth rate of 9,465, 631 dpa, to support this level of employment growth.

Chart 32: Components of Population Change



2.59 This option projects net average in-migration of 1,400 persons pa throughout the plan period, significantly out-weighting the negative impact of natural change, leading to a net growth in the population (Chart 32).

2.60 This results in a significant impact on the age profile of the County, and whilst there continues to be growth in the over 60 age groups there is a corresponding growth in the key labour force age groups with this growth mirrored in the 0-19 age groups. This scenario captures increased in-migration in all of these groups (Charts 33 and 34).

Chart 33: Population Growth/Decline by Age Group 2018-2033

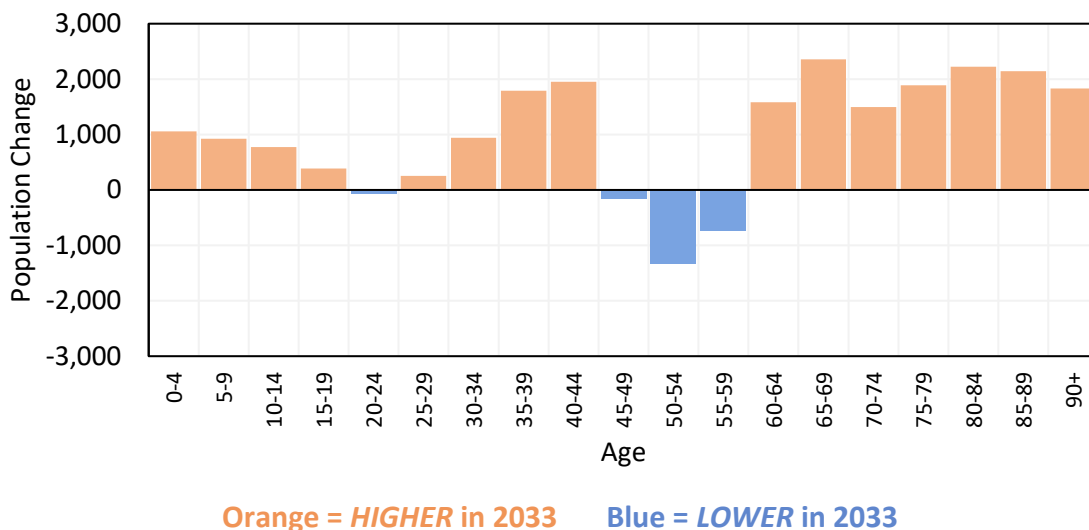
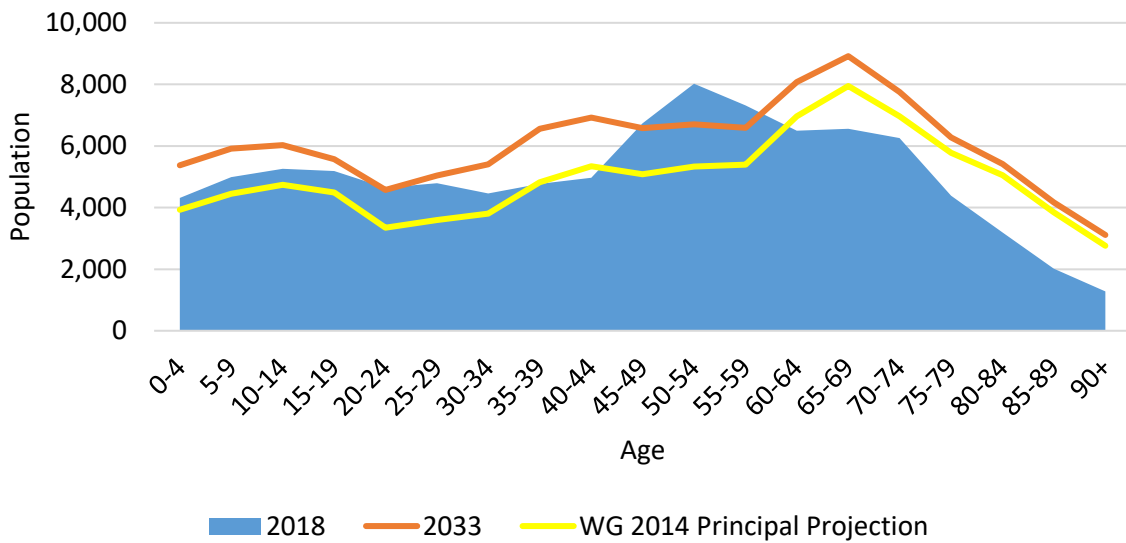
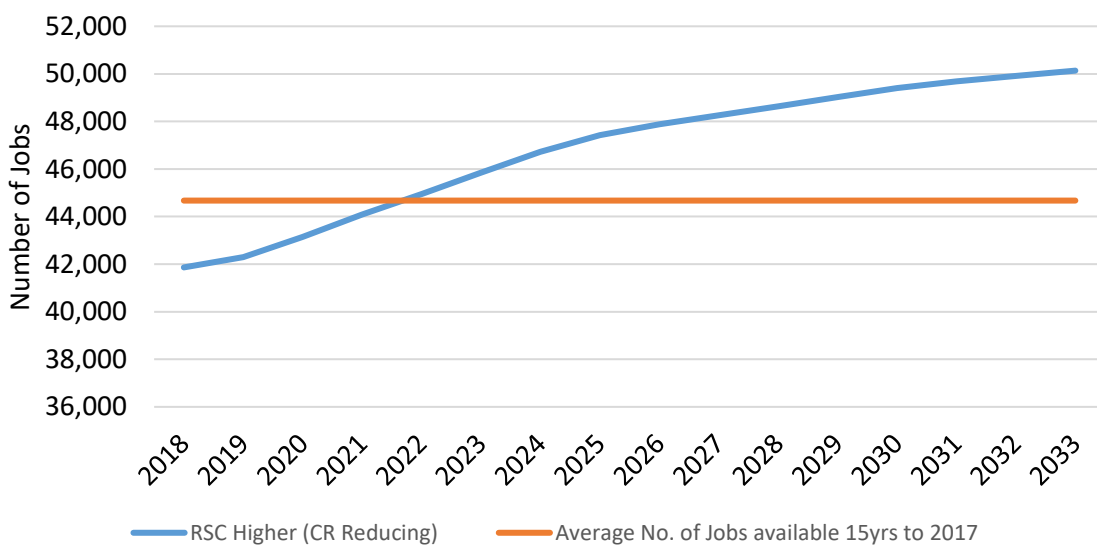


Chart 34: Implications for the Age Profile of Monmouthshire



2.61 The growth in jobs under this option is significantly higher than that achieved under the employment-led Radical Structural Change Lower (CR Reducing) scenario or the Matching UK Growth scenario with an increase of 552 jobs pa over the plan period, which matches that achieved under the Radical Structural Change Higher option (Option 8). It also leads to a higher average number of jobs within the county than the 44,700 available pa over the 15 years to 2017 at some 46,800. As this option models a commuting ratio that reduces from the 2011 Census value (1.12) to 1.10 over the plan period, population and dwelling growth is not as high as under the Radical Structural Change Higher scenario as Monmouthshire would be retaining more of its own population to maintain the job growth (Chart 35).

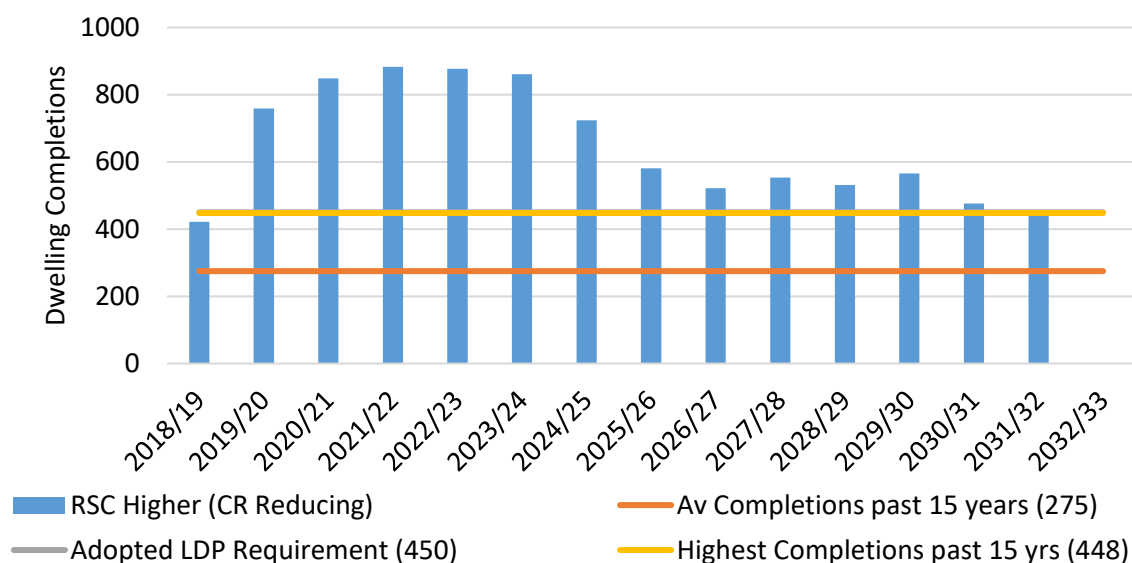
Chart 35: Implications for Employment Growth



2.62 This option represents a dwelling growth rate of 631 dpa over the plan period. This is higher than any level of dwelling growth experienced over the past 15 years and is

significantly higher than the adopted LDP requirement. This is a level of dwelling growth that has never been achieved in the County (Chart 36).

Chart 36: Dwelling Requirement



2.63 The implications associated with this growth option include:

- A more balanced demography with an increase in the number of older and elderly people living in the County balanced against an increase in the younger age groups, impacting upon the type of housing required and service providers across public and private sectors.
- Significant growth in the number of school aged children, placing more pressure on the capacity of existing schools. However, the level of housing delivery would provide a substantial opportunity to secure additional provision through planning gain to fund extensions and/or new schools.
- Growth in the number of working aged people living in Monmouthshire, with a notable increase in established households around the 35-44 age group, fuelling growth in employment provision.
- A reduction in out-commuting likely to lead to more sustainable travel patterns.
- Opportunities to secure more significant affordable housing through the planning system.
- Opportunities to sustain/enhance services and facilities.
- Increased pressure on the County’s landscape and biodiversity interests but potential to maximise opportunities to secure and/or enhance green infrastructure, public open space and recreation provision through planning gain.
- Increased demands on infrastructure, but potential to deliver infrastructure improvement through increased planning gain from development.

Table 12: Assessment of Option 7 against LDP Objectives

LDP Objective Number	LDP Objective - Headline	Performance of Option 7 against the LDP Objectives
A Prosperous Wales (Well-being Goal 1)		
Objective 1	Economic Growth/ Employment	Would result in a growth in jobs of 552 pa. This level of growth would encourage greater indigenous business growth and encourage inward investment. Provides opportunity to create a thriving, well-connected, diverse economy.
Objective 2	Retail centres	Would provide increased opportunities to add to the customer base in retail centres in the County's towns, with a 20.2% increase in the population. There would be benefits arising from indigenous employment growth in the County, fostering the vitality, viability and attractiveness of the centres.
A Resilient Wales (Well-being Goal 2)		
Objective 3	Green Infrastructure, Biodiversity and Landscape	Levels of housing and employment development likely to result in further pressure on the natural environment. New developments could nevertheless improve Green Infrastructure and ecological connectivity through opportunities to create new linkages.
Objective 4	Flood risk	Level of development likely to result in development in areas which have floodplains. Developments can nevertheless be located away from areas at risk of flooding and will incorporate SUDs in accordance with National Planning Policy and SUDs legislation.
Objective 5	Minerals and Waste	Higher levels of housing and employment development may impact on the safeguarding of the County's mineral resource. Additional waste infrastructure may be required for this level of growth.
Objective 6	Land	Higher levels of development likely to be predominately greenfield. Recognising that brownfield opportunities are limited in Monmouthshire.
Objective 7	Natural resources	There would be no negative impact on ability to promote the efficient use of natural resources. Any developments will be encouraged to be water and energy efficient.
A Healthier Wales (Well-being Goal 3)		
Objective 8	Health and Well-being	There would be no negative impact on health and well-being. Any developments would be encouraged to support healthier lifestyles and provide sufficient open space.

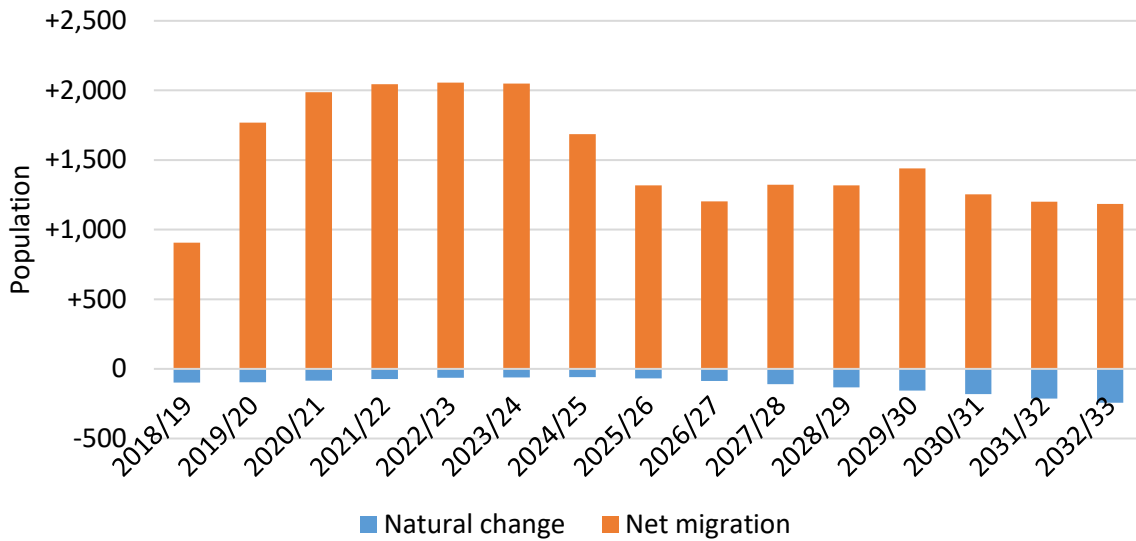
LDP Objective Number	LDP Objective Headline	Performance of Option 2 against the LDP Objectives
A More Equal Wales (Well-being Goal 4)		
Objective 9	Demography	There would be a positive impact on the demography of the County, with a more balanced and greater provision of dwellings and jobs increasing the opportunities for the younger population to both live and work in Monmouthshire.
A Wales of Cohesive Communities (Well-being Goal 5)		
Objective 10	Housing	Would provide a level of housing that is sufficient to provide a wide ranging choice of homes for both existing and future residents. Level of development would provide opportunity to secure affordable and market homes.
Objective 11	Place-making	Any developments will need to enhance the character and identity of the settlements and be in accordance with national sustainable place-making principles. Growth in employment alongside housing would create more sustainable places.
Objective 12	Communities	A more balanced demographic with new development providing opportunities for job creation alongside housing and improvements to existing services and facilities.
Objective 13	Rural Communities	A more balanced demographic with new development providing opportunities which could help support the rural economy and address rural isolation.
Objective 14	Infrastructure	Appropriate infrastructure could be provided to accommodate any new development.
Objective 15	Accessibility	Promotes a more balanced provision of jobs and housing, reducing the need to travel. Any new developments will need to consider active travel and integrated sustainable transport.
A Wales of Vibrant Culture & Thriving Welsh Language (Well-being Goal 6)		
Objective 16	Culture, Heritage and Welsh Language	Has the potential to impact on the heritage of a number of settlements in Monmouthshire. On the other hand through design developments can protect and enhance the built environment as well as provide benefits for the economy, tourism and well-being of communities. No impact on Welsh Language.

LDP Objective Number	LDP Objective Headline	- Performance of Option 2 against the LDP Objectives
A Globally Responsible Wales (Well-being Goal 7)		
Objective 17	Climate Change	There would be no negative impact on climate change as the resilience of new development to aspects of climate change can be achieved via the design and location of new developments. Developments can provide opportunities to minimise carbon by providing opportunities for renewable energy generation, seeking to reduce commuting, supporting use of ultra-low emission vehicles and public transport, and the provision of quality Green Infrastructure.

Option 8: Radical Structural Change Higher

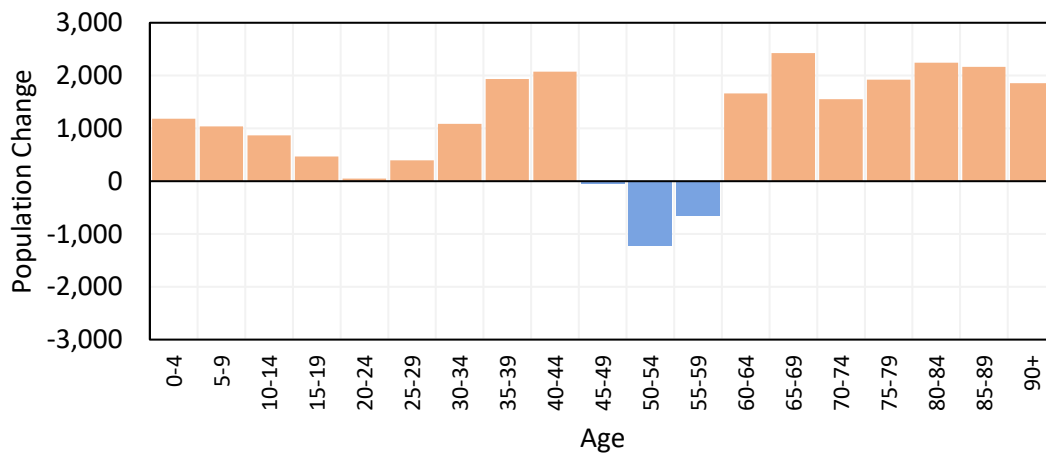
- 2.64 This option, as with options 4, 5 and 7 is employment-led. As a starting point it takes the higher level of job creation under the radical structural change option of the Economies of the Future Report. This estimates an additional 10,000 jobs above the 2017 level by 2037. This equates to an annual growth of some 552 jobs or a total of 8,280 jobs over the plan period.
- 2.65 This option in common with scenario 4, uses economic assumptions that are consistent with those applied to Monmouthshire’s demographic and dwelling-led scenarios as set out in Table 2 above. By applying these principles this employment-led option projects an increase of 21,009 (22.0%) in the population with a corresponding increase of 9,693 (23.8%) in the number of households in the County over the plan period. This represents a projected dwelling growth of 10,155, a rate of 677 dpa, to support this level of employment growth. This level of employment growth requires the highest level of net in-migration per year of all of the options presented, at 1,516 persons per annum, as it assumes that the same number of people will be commuting out to work more of the working age resident population will be needed to fill the jobs.

Chart 37: Components of Population Change



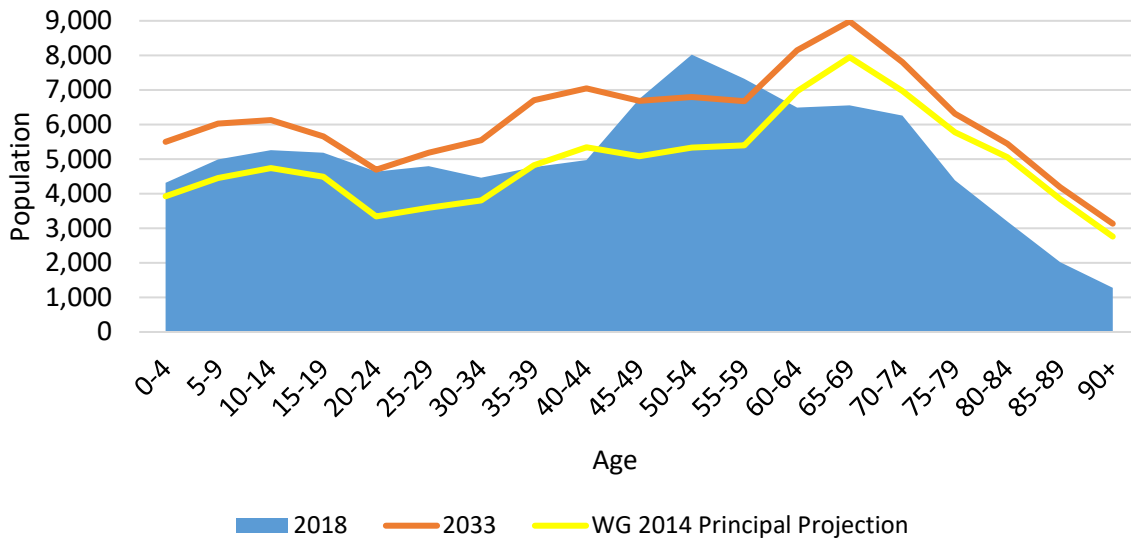
- 2.66 This option projects net average in-migration of approximately 1,500 persons pa throughout the plan period, significantly out-weighing the negative impact of natural change, leading to a net growth in the population. This option shows the highest migration levels of any of the employment-led options (Chart 37).
- 2.67 This results in a significant impact on the age profile of the County, and whilst there continues to be growth in the over 60 age groups there is a corresponding growth in the key labour force age groups with this growth mirrored in the 0-19 age groups. This scenario captures increased in-migration in all of these groups (Chart 38 and 39).

Chart 38: Population Growth/Decline by Age Group 2018-2033



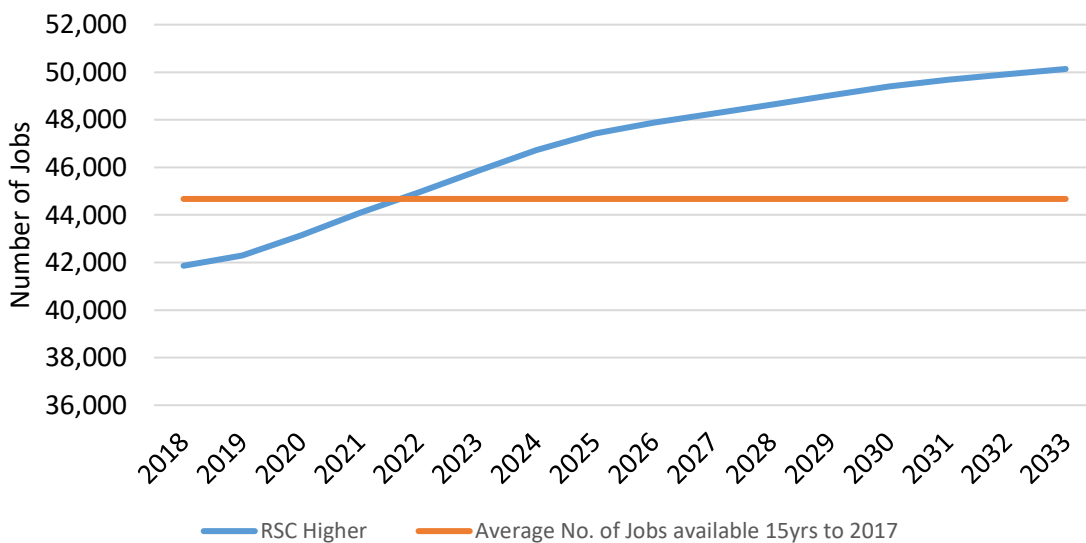
Orange = HIGHER in 2033 Blue = LOWER in 2033

Chart 39: Implications for the Age Profile of Monmouthshire



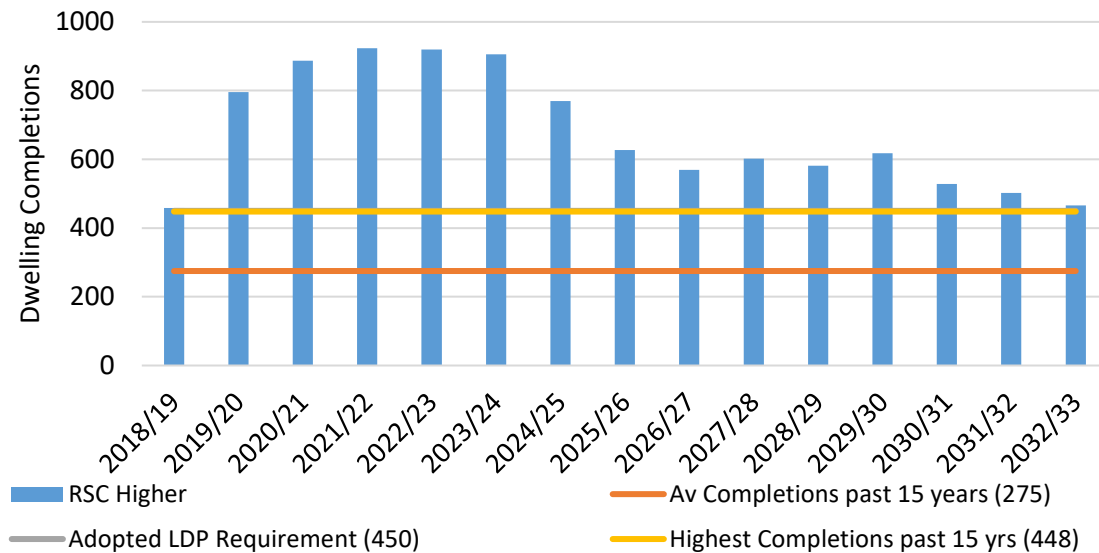
2.68 The growth in jobs under this option is significantly higher than that achieved under the employment-led Radical Structural Change Lower (CR Reducing) option or the Matching UK Growth option with an increase of 552 jobs pa over the plan period. It also leads to a higher average number of jobs within the county than the 44,700 available pa over the 15 years to 2017 at some 46,800. The number of jobs available rises significantly towards the end of the plan period, with over 50,000 jobs available in the County by 2033. This option maintains commuting levels at the 2011 level thus increased in-migration of the key labour force age groups is needed to fuel the employment growth (Chart 40).

Chart 40: Implications for Employment Growth



2.69 This option represents a dwelling growth rate of 677 dpa over the plan period. This is higher than any level of dwelling growth experienced over the past 15 years and is significantly higher than the current LDP requirement. This is a level of dwelling growth that has never been achieved in the County (Chart 41).

Chart 41: Dwelling Requirement



2.70 The implications associated with this growth option include:

- A more balanced demography with an increase in the number of older and elderly people living in the County balanced against an increase in the younger age groups, impacting upon the type of housing required and service providers across public and private sectors.
- Significant growth in the number of school aged children, placing more pressure on the capacity of existing schools. However, the level of housing delivery would provide a substantial opportunity to secure additional provision through planning gain to fund extensions and/or new schools.
- Growth in the number of working aged people living in Monmouthshire, with a notable increase in established households around the 35-44 age group, fuelling growth in employment provision.
- Increased numbers of people commuting out of the County for work, as the commuting ratio remains fixed at the 2011 level, leading to unsustainable travel patterns.
- Opportunities to secure more significant affordable housing through the planning system.
- Opportunities to sustain/enhance services and facilities.
- Increased pressure on the County’s landscape and biodiversity interests but potential to maximise opportunities to secure and/or enhance green infrastructure, public open space and recreation provision through planning gain.
- Increased demands on infrastructure, but potential to deliver infrastructure improvement through increased planning gain from development.

Table 13: Assessment of Option 8 against LDP Objectives

LDP Objective Number	LDP Objective - Headline	Performance of Option 8 against the LDP Objectives
A Prosperous Wales (Well-being Goal 1)		
Objective 1	Economic Growth/ Employment	Would result in a growth in jobs of 552 pa. This level of growth would encourage greater indigenous business growth and encourage inward investment. Provides opportunity to create a thriving, well-connected, diverse economy.
Objective 2	Retail centres	Would provide increased opportunities to add to the customer base in retail centres in the County's towns, with a 22% increase in the population. There would be benefits arising from indigenous employment growth in the County, fostering the vitality, viability and attractiveness of the centres.
A Resilient Wales (Well-being Goal 2)		
Objective 3	Green Infrastructure, Biodiversity and Landscape	Levels of housing and employment development likely to result in further pressure on the natural environment. New developments could nevertheless improve Green Infrastructure and ecological connectivity through opportunities to create new linkages.
Objective 4	Flood risk	Level of development likely to result in development in areas which have floodplains. Developments can nevertheless be located away from areas at risk of flooding and will incorporate SUDs in accordance with National Planning Policy and SUDs legislation.
Objective 5	Minerals and Waste	Higher levels of housing and employment development may impact on the safeguarding of the County's mineral resource. Additional waste infrastructure may be required for this level of growth.
Objective 6	Land	Higher levels of development likely to be predominately greenfield. Recognising that brownfield opportunities are limited in Monmouthshire.
Objective 7	Natural resources	There would be no negative impact on ability to promote the efficient use of natural resources. Any developments will be encouraged to be water and energy efficient.
A Healthier Wales (Well-being Goal 3)		
Objective 8	Health and Well-being	There would be no negative impact on health and well-being. Any developments would be encouraged to support healthier lifestyles and provide sufficient open space.

LDP Objective Number	LDP Objective Headline	Performance of Option 2 against the LDP Objectives
A More Equal Wales (Well-being Goal 4)		
Objective 9	Demography	There would be a positive impact on the demography of the County, with a more balanced and greater provision of dwellings and jobs increasing the opportunities for the younger population to both live and work in Monmouthshire.
A Wales of Cohesive Communities (Well-being Goal 5)		
Objective 10	Housing	Would provide a level of housing that is sufficient to provide a wide ranging choice of homes for both existing and future residents. Level of development would provide opportunity to secure affordable and market homes.
Objective 11	Place-making	Any developments will need to enhance the character and identity of the settlements and be in accordance with national sustainable place-making principles. Growth in employment alongside housing would create more sustainable places.
Objective 12	Communities	A more balanced demographic with new development providing opportunities for job creation alongside housing and improvements to existing services and facilities.
Objective 13	Rural Communities	A more balanced demographic with new development providing opportunities which could help support the rural economy and address rural isolation.
Objective 14	Infrastructure	Appropriate infrastructure could be provided to accommodate any new development.
Objective 15	Accessibility	Promotes a balanced provision of jobs and housing, but with an increase in population commuting ratio predicted to stay the same, a continuation of unsustainable travel patterns. Any new developments will need to consider active travel and integrated sustainable transport.
A Wales of Vibrant Culture & Thriving Welsh Language (Well-being Goal 6)		
Objective 16	Culture, Heritage and Welsh Language	Has the potential to impact on the heritage of a number of settlements in Monmouthshire. On the other hand through design developments can protect and enhance the built environment as well as provide benefits for the economy, tourism and well-being of communities. No impact on Welsh Language.

LDP Objective Number	LDP Objective Headline	Performance of Option 2 against the LDP Objectives
A Globally Responsible Wales (Well-being Goal 7)		
Objective 17	Climate Change	There could be a negative impact on climate change as despite promoting a balance between job creation and housing development, with these developments providing opportunities to minimise carbon there is likely to still be unsustainable commuting patterns due to the increase in the resident working population.

Consultation Questions

- What is your preferred growth option and why?
- How will this option address the issues/challenges Monmouthshire is facing?

Table 14: Summary of the Implications of Selected Growth Options

Growth Option	Type of Scenario	Population Change 2018-2033	Population Change %	Average Net Migration per annum	Household Change 2018-2033	Household Change %	Dwellings per annum	Dwellings 2018-2033	Jobs per annum	Jobs 2018-2033
1. Net Nil Migration	Demographic	-4,136	-4.4%	0	-165	-0.4%	-12	-	-266	-3,990
2. WG 2014-Based Principal Projection	Demographic	726	0.8%	319	1,641	4.1%	115	1,725	-100	-1,499
3. Dwelling-led (15yr Average)	Dwelling	6,800	7.2%	673	4,105	10.2%	287	4,305	93	1,389
4. Matching UK Growth rate	Employment	8,616	9.1%	782	4,820	12.0%	337	5,055	151	2,265
5. Radical Structural Change Lower (Commuting Ratio reducing)	Employment	10,375	11.0%	883	5,523	13.7%	386	5,790	258	3,870
6. PG Long Term Adjusted	Demographic	16,825	17.8%	1,243	7,652	19.0%	534	8,010	447	6,709
7. Radical Structural Change Higher (Commuting Ratio reducing)	Employment	19,308	20.2%	1,412	9,037	22.2%	631	9,465	552	8,280
8. Radical Structural Change Higher	Employment	21,009	22.0%	1,516	9,693	23.8%	677	10,155	552	8,280

3 Spatial Strategy Options

- 3.1 In addition to setting out options for the level of growth needed over the plan period (set out in Section 2), the Replacement LDP must put forward a clear spatial strategy for where this development should take place within the County. This section of the report presents a range of spatial strategy options for accommodating housing and employment growth. A total of 5 broad Spatial Distribution Options have been considered.
- 3.2 It is important to note that the Spatial Distribution Options for Growth put forward are not intended to define precise boundaries, sites or land use allocations at this stage. Further detail will be provided as part of the Preferred Strategy and Deposit LDP.
- 3.3 Any new growth areas must be served or be capable of being served, by appropriate infrastructure. This includes physical, digital and social infrastructure including; community and recreational facilities, sewerage, water, transport, schools, health care and broadband. The delivery of new infrastructure in association with development will depend on a number of factors; securing funding for such infrastructure is of particular importance. While consideration of funding opportunities for new infrastructure to support sites is key to the deliverability of sites, not all of the evidence is available at present. This will nevertheless be updated throughout the process as this evidence is prepared. An infrastructure plan will be delivered alongside the Deposit LDP.
- 3.4 The consideration of realistic⁷ growth and spatial options is an important part in the preparation of the Replacement LDP, the purpose of which is to facilitate discussion and inform the Preferred Strategy consultation. Each spatial option will need to have regard to legislation, national planning policy, local and regional strategies, as well as, wider contextual issues such as the Cardiff Capital Region City Deal and the removal of the Severn Bridge Tolls. Furthermore, the options must take account of the specific characteristics, assets and issues prevalent in Monmouthshire to guide development in order to promote and deliver sustainable, resilient communities. A number of spatial options have been identified. However, it is considered pertinent to condense these into a number of realistic options for consultation purposes and having regard to the aforementioned issues. An initial assessment of all options has been undertaken as set out in Appendix 3, which includes an assessment of the appropriateness of options previously considered in the Adopted LDP (Para 6.2.1.2 LDP Manual Edition 2, 2015). A total of 5 spatial options, as set out below, have been selected for consideration as spatial options for further assessment and consultation purposes.
- 3.5 The options identified assume that new development will provide the necessary infrastructure improvements, for example to transport networks, utilities, green infrastructure, health, education and social facilities.

⁷ Paragraph 6.2.1.1 LDP Manual - Edition 2 (August 2015)

3.6 A summary table showing how each option performs against the draft Replacement LDP objectives is provided in each of the assessments. The performance is assessed according to the ratings set out in Table 15. A summary of the advantages and disadvantages for each of the options is provided along with a map to portray a spatial illustration. As noted in paragraph 3.2 the individual maps do not identify precise boundaries, sites or land use allocations at this stage.

Table 15 – Key to Assessment of Options against Draft Replacement LDP Objectives

Rating	Predicted effect
Green	Helps to achieve the objective.
Amber	Neutral impact on objective.
Red	Unlikely to achieve objective.

3.7 At this stage no single spatial strategy option is considered preferable. The alternatives presented provide spatial strategy options for accommodating growth, having regard to the evidence base and policy aspirations.

Settlement Hierarchy

3.8 A Sustainable Settlements Appraisal has been undertaken as part of the evidence base to support the Replacement LDP. Its purpose is to identify those settlements which are potentially suitable to accommodate future growth in terms of their location, role and function. This paper provides valuable information to allow a settlement hierarchy to be established to indicate a settlement’s potential for accommodating development, and, the hierarchy in relation to other settlements in Monmouthshire. A final decision on how much development a settlement can accommodate will nevertheless depend on a wide range of other factors, such as impact on the character of the settlement along with consideration of its environmental, physical and policy constraints and its location in relation to other settlements.

3.9 Utilising the approach based on the initial findings of the Sustainable Settlements Appraisal as a starting point, it is considered that the Primary, Secondary and Severnside Settlements in the County can be identified as below. This settlement hierarchy is nevertheless subject to change following completion of the Sustainable Settlements Appraisal and additional evidence to support the Replacement LDP is progressed.

Draft Sustainable Settlement Hierarchy

Primary Settlements:	Secondary Settlements:	Severnside:	Rural Settlements:
Abergavenny (including Llanfoist)	Penperlleni	Caerwent	To be defined at a later stage ⁸ .
Chepstow	Raglan	Caldicot	
Monmouth (including Wyesham)	Usk	Crick	
		Magor/Undy	
		Portskewett	
		Rogiet	
		Sudbrook	

Spatial Strategy Options for the Distribution of Growth

3.10 A total of 5 broad Spatial Distribution Options have been identified as below:

- **Option 1: Continuation of the existing LDP Strategy** – Distribute development around the County with a particular focus on Main Towns⁹, some development in Severnside¹⁰ and some development in the most sustainable rural areas to enable provision of affordable housing throughout the County. New residential development to be accompanied by new employment opportunities, where possible.
- **Option 2: Dispersed growth and New Settlement** – Distribute growth across Primary Settlements, Secondary Settlements, Severnside and those Rural Settlements identified as having capacity for growth and/or in need of development to sustain them, including, a small amount of development in the most sustainable Rural Settlements to bring forward affordable housing. Inclusion of a New Settlement within the County to deliver longer term growth providing housing, employment, retail and associated infrastructure. It is recognised a New Settlement will take a long time to progress and cross over into next plan period, hence additional dispersed growth is required to account for the identified need.
- **Option 3: Distribute growth proportionately across rural and urban areas** – Distribute growth proportionately across Primary Settlements, Secondary Settlements, Severnside and those Rural Settlements identified as having capacity for growth and/or in need of development to sustain them, including, a small amount of development in the most sustainable Rural Settlements to bring forward affordable housing.
- **Option 4: New Settlement with limited growth in Primary Settlements, Secondary Settlements and Severnside only** - Growth to be predominantly accommodated in a New Settlement. Limited growth in Primary Settlements, Secondary Settlements and Severnside to meet some of the identified need prior to progression of a New Settlement.

⁸ Through the work being undertaken in the Sustainable Settlements Appraisal.

⁹ As identified in Policy S1 of the Adopted Local Development Plan (2014), now renamed to Primary Settlements and includes the addition of Llanfoist.

¹⁰ As identified in Policy S1 of the Adopted Local Development Plan (2014), with the addition of Crick.

- **Option 5: Focus on M4 corridor** – Growth to be predominantly located in the South of the County in the Severnside area close to the M4/M48, to capitalise on its strategic links to the Cardiff Capital Region and South West England, existing economic opportunities and regional infrastructure connections.

Option 1 Continuation of the Existing LDP Strategy

Table 16 – Option 1

Option 1: Continuation of the Existing LDP Strategy	
<p>Description of Option:</p> <p>This option follows the existing Adopted LDP Strategy through to the Replacement LDP, which distributes development around the County. There would be a particular focus on Main Towns¹¹, some development in Severnside¹² and some development in the most sustainable rural areas to enable provision of affordable housing throughout the County. New residential development would be accompanied by new employment opportunities, where possible.</p>	
<p>Map of Option 1</p>	

¹¹ See paragraph 3.9 for definition of Primary Settlements, Main Towns are now incorporated into Primary Settlements, with the addition of Llanfoist.

¹² See paragraph 3.9 for definition of Primary Settlements, Secondary Settlements and Severnside, with some areas to be identified at a later stage as Rural Settlements.

Option 1: Continuation of the Existing LDP Strategy

Advantages:

- Would provide growth in sustainable areas that have existing access to facilities, public transport links and employment opportunities.
- Would provide affordable housing across the Primary Settlements¹³, Secondary Settlements¹⁴ and Severnside¹⁵ identified in paragraph 3.9 and some rural settlements.
- Could attract additional facilities in Primary Settlements, Secondary Settlements and Severnside.
- Would help support facilities in existing settlements, particularly in those rural areas where facilities are struggling/declining. Growth may also attract additional facilities where they do not currently exist.

Disadvantages:

- Many of the Primary Settlements currently have physical infrastructure capacity issues which would need to be addressed to enable significant growth, for example Monmouth in relation to the provision of mains drainage and Chepstow in relation to capacity of road networks.
- Would result in additional pressure on social infrastructure within Primary Settlements and the Severnside area, such as health care facilities. Additional support for facilities in the Secondary Settlements and Rural Settlements not likely to be achieved due to limited growth in these areas.
- The focus of development in the Primary Settlements will result in further pressure on the environment.
- The provision of employment opportunities together with residential developments has not been fulfilled in all of the Strategic Mixed Use Sites allocated in the adopted LDP. Future employment allocations should be based on the findings of the Employment Land Review.
- Some rural areas could be disadvantaged as they would not all benefit from additional housing to help support and attract additional facilities.
- Preference for brownfield development over greenfield development. Growth would be predominately located on greenfield sites, however it is recognised that there are limited opportunities for brownfield development within the County.

¹³ Main Towns of Abergavenny, Chepstow and Monmouth as identified in Policy S1 of the Adopted LDP

¹⁴ Secondary Settlements of Llanfoist, Penperlleni, Raglan and Usk as identified in Policy S1 of the Adopted LDP

¹⁵ Severnside sub-region consisting of Caerwent, Caldicot, Magor, Portskewett, Rogiet, Sudbrook and Undy

Table 17 – Assessment of Option 1 against Draft LDP Objectives

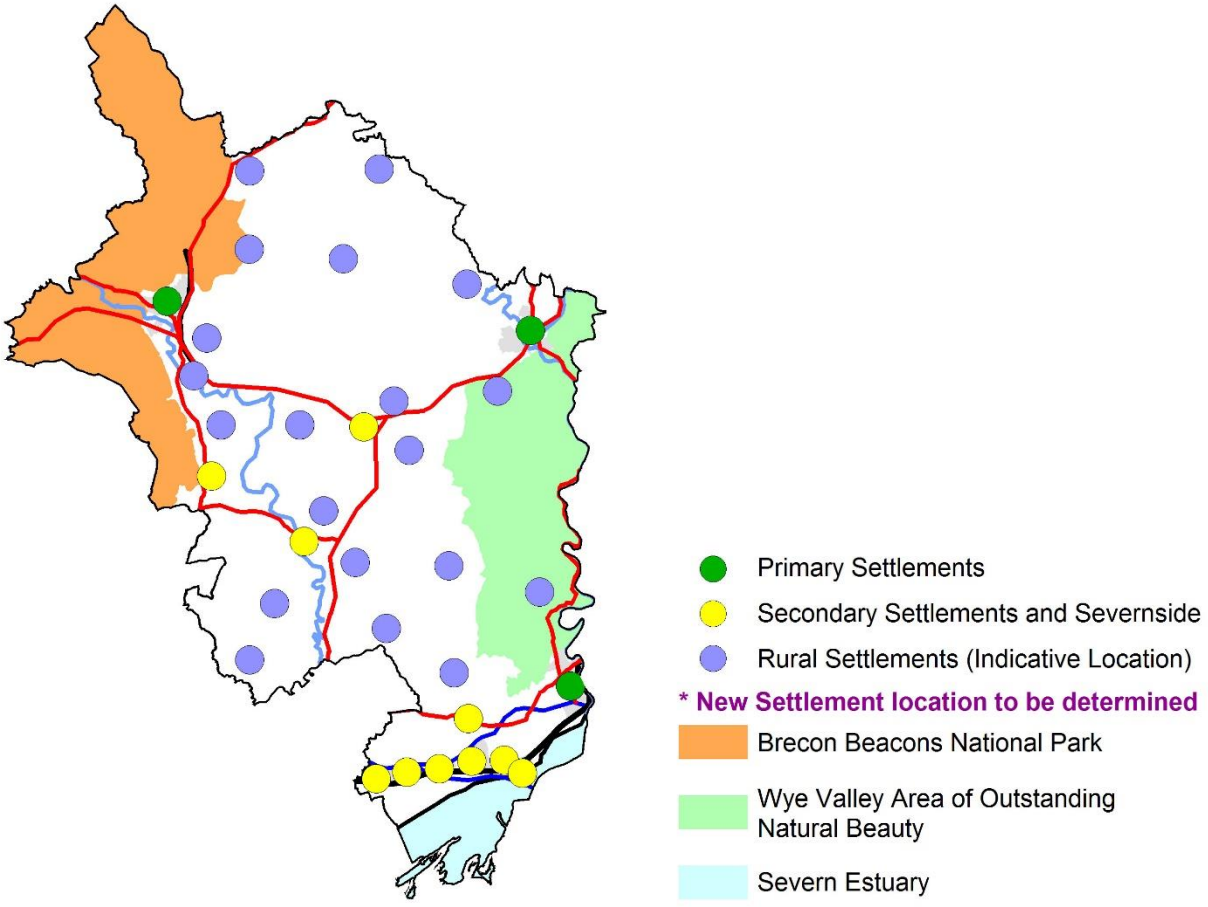
LDP Objective Number	Draft LDP Objective - Headline	Performance of Option 1 against the Draft LDP Objectives
A Prosperous Wales (Well-being Goal 1)		
Objective 1	Economic Growth/ Employment	While new residential development will be accompanied by employment opportunities, where possible, development needs to be in the right locations to attract inward investment. There is a focus on Abergavenny, Chepstow and Monmouth, however some growth in the Secondary Settlements, Severnside area and most sustainable rural areas would encourage greater indigenous business growth across the County as a whole while at the same time encouraging inward investment. Provides opportunity to create a thriving, well-connected, diverse economy.
Objective 2	Retail centres	Would provide the opportunity to add to the customer base/footfall of the main County towns of Abergavenny, Chepstow and Monmouth and support existing/attract additional facilities in these areas. However, limited development in Caldicot, Usk and other rural areas could result in further loss of retail in other areas.
A Resilient Wales (Well-being Goal 2)		
Objective 3	Green Infrastructure, Biodiversity and Landscape	Likely to result in further pressure on the natural environment. New developments in these locations could nevertheless improve Green Infrastructure and ecological connectivity through opportunities to create new linkages.
Objective 4	Flood risk	While Abergavenny, Chepstow and Monmouth have areas of floodplain. Developments can be located away from areas at risk of flooding and will incorporate SUDs in accordance with National Planning Policy and SUDs legislation.
Objective 5	Minerals and Waste	There would be no negative impact on minerals and waste, mineral landbank obligations can be met.
Objective 6	Land	Limited opportunities for brownfield development, however, some opportunities exist within the Primary Settlements. Likely to be predominately greenfield development.
Objective 7	Natural resources	There would be no negative impact on ability to promote the efficient use of natural resources. Any developments will be encouraged to be water and energy efficient.

LDP Objective Number	Draft LDP Objective - Headline	Performance of Option 1 against the Draft LDP Objectives
A Healthier Wales (Well-being Goal 3)		
Objective 8	Health and Well-being	There would be no negative impact on health and well-being. Any developments will be encouraged to support healthier lifestyles and provide sufficient open space.
A More Equal Wales (Well-being Goal 4)		
Objective 9	Demography	While the majority of market and affordable housing provision will be in the Primary Settlements of Abergavenny, Chepstow and Monmouth, housing will also be provided in Secondary Settlements, the Severnside area and some of the Rural Settlements which will assist in ensuring a balanced demography across the County. Would provide increased opportunities through employment and housing provision for the younger population to live and work in Monmouthshire.
A Wales of Cohesive Communities (Well-being Goal 5)		
Objective 10	Housing	Would provide opportunity for sufficient homes, although recognise this is dependent on the level of growth. Affordable housing will be provided in Primary Settlements, Secondary Settlements, Severnside and some of the Rural Settlements. This will enable provision of market and affordable homes across all housing market areas.
Objective 11	Place-making	Any developments will need to enhance the character and identity of the Primary and Secondary Settlements, Severnside and Rural Settlements in accordance with national sustainable place-making principles.
Objective 12	Communities	Developments will be located in those settlements within Monmouthshire with good access to employment, retail, community facilities and social infrastructure. Will also provide opportunities to support/enhance existing community facilities.
Objective 13	Rural Communities	Housing will be distributed in both urban and rural areas, with a focus in rural areas on the most sustainable Rural Settlements. Will help to support those rural areas where facilities are struggling/declining.
Objective 14	Infrastructure	The focus of development in Abergavenny, Chepstow and Monmouth may result in further pressure on social and physical infrastructure in these areas. However, appropriate infrastructure should be in place/can be provided to accommodate any new development in those areas as well as in the Secondary Settlements, Severnside and Rural Settlements.

LDP Objective Number	Draft LDP Objective - Headline	Performance of Option 1 against the Draft LDP Objectives
Objective 15	Accessibility	While new residential development will be accompanied by employment opportunities, where possible, there is no guarantee that residents will live and work in the same area. While many of the settlements already have sustainable travel links in place through existing rail and bus links, any new developments will need to fully consider active travel and integrated sustainable transport opportunities.
A Wales of Vibrant Culture & Thriving Welsh Language (Well-being Goal 6)		
Objective 16	Culture, Heritage and Welsh Language	Consideration will need to be given to ensure there is no adverse impact on the heritage of Abergavenny, Chepstow and Monmouth due to the focus of development in these areas. However, through design developments can protect and enhance the built environment as well as providing benefits for the economy, tourism and well-being of communities. No impact on Welsh Language.
A Globally Responsible Wales (Well-being Goal 7)		
Objective 17	Climate Change	Resilience of new development to aspects of Climate Change can be achieved via the design and location of new developments. Developments can provide opportunities to minimise carbon by providing opportunities for renewable energy generation, seeking to reduce commuting, supporting use of ultra-low emission vehicles and public transport, and the provision of quality Green Infrastructure.

Option 2 Dispersed Growth and New Settlement

Table 18 – Option 2

Option 2: Dispersed Growth and New Settlement
<p>Description of Option:</p> <p>The aim of this option would be to distribute growth across Primary Settlements, Secondary Settlements, Severnside and those Rural Settlements identified as having capacity for growth and/or in need of development to sustain them, including, a small amount of development in the most sustainable Rural Settlements to bring forward affordable housing. The option also includes the addition of a New Settlement within the County to deliver longer term growth providing housing, employment, retail and associated infrastructure. It is recognised a New Settlement will take a long time to progress and cross over into the next plan period, hence additional dispersed growth is required to account for the identified need.</p>
<p>Map of option:</p> 
<p>Advantages:</p> <ul style="list-style-type: none"> • Although a New Settlement could not be considered alone due to protracted delivery timescales, this option would ensure growth in the County across the whole Plan Period and beyond. • Would meet affordable housing needs throughout the County, particularly rural areas where growth has been limited previously.

Option 2: Dispersed Growth and New Settlement

- Would limit the amount of pressure on infrastructure by dispersing development across a range of settlements.
- Would help to support facilities in existing settlements, particularly in those rural areas where facilities are struggling/declining. Growth may also attract additional facilities where they do not currently exist.
- Would provide growth in the most sustainable areas of Monmouthshire whilst at the same time providing opportunities for specific rural areas to become more sustainable.
- The allocation of employment land in line with the findings of the Employment Land Review will ensure employment land is located in the right areas to attract specific sectors/employers.
- A new settlement would be self-contained and provide its own facilities, schools and infrastructure network, resulting in less pressure on existing services and infrastructure.

Disadvantages:

- Preference for brownfield development over greenfield development. Growth would be predominately located on greenfield sites, however it is recognised that there are limited opportunities for brownfield development within the County.
- Small-scale piecemeal development in the short term would not necessarily generate sufficient infrastructure improvements and gains.
- A new settlement has protracted timescales due to the extensive nature of development, which would be delivered towards the latter part of the plan period and would extend into the next Plan period.
- Some rural areas could be disadvantaged as they would not all benefit from additional housing to help support and attract additional facilities.

Table 19 – Assessment of Option 2 against Draft LDP Objectives

LDP Objective Number	Draft LDP Objective - Headline	Performance of Option 2 against the Draft LDP Objectives
A Prosperous Wales (Well-being Goal 1)		
Objective 1	Economic Growth/ Employment	Dispersed growth across the Primary Settlements, Secondary Settlements, Severnside area and most sustainable rural areas would encourage greater indigenous business growth across the County as a whole while at the same time encouraging inward investment. Provides opportunity to create a thriving, well-connected, diverse economy. A new settlement would be self-contained and would include employment uses as appropriate.

LDP Objective Number	Draft LDP Objective - Headline	Performance of Option 2 against the Draft LDP Objectives
Objective 2	Retail centres	Would provide the opportunity to add to the customer base in existing settlements but would be less focus on the main County Towns of Abergavenny, Chepstow and Monmouth, which would offer limited potential to significantly add to footfall/trips. A new settlement would be self-contained and provide its own facilities, including retail. Dispersed growth may also attract additional facilities where they do not currently exist in other areas.
A Resilient Wales (Well-being Goal 2)		
Objective 3	Green Infrastructure, Biodiversity and Landscape	Dispersed development is likely to result in further pressure on the natural environment. New developments in these locations could nevertheless improve Green Infrastructure and ecological connectivity through opportunities to create new linkages. A new settlement presents benefits through new opportunities and linkages.
Objective 4	Flood risk	Dispersed development could result in development in areas such as Abergavenny, Chepstow, Monmouth, Raglan and Usk, which all have areas of floodplain. Developments can nevertheless be located away from areas at risk of flooding, particularly in relation to a new settlement and will incorporate SUDs in accordance with National Planning Policy and SUDs legislation. Specific parts of a new settlement could also be subject to flood risk, however, can steer highly vulnerable development away from such areas.
Objective 5	Minerals and Waste	There would be no negative impact on minerals and waste, mineral landbank obligations can be met. Additional waste infrastructure may be required to support a new settlement.
Objective 6	Land	Limited opportunities for brownfield development, however, some opportunities exist within the Primary Settlements. Likely to be predominately greenfield development, particularly a new settlement.
Objective 7	Natural resources	There would be no negative impact on ability to promote the efficient use of natural resources. Any developments will be encouraged to be water and energy efficient.
A Healthier Wales (Well-being Goal 3)		
Objective 8	Health and Well-being	There would be no negative impact on health and well-being. Any developments will be encouraged to support healthier lifestyles and provide sufficient open space. A new settlement can provide its own facilities to support healthier lifestyles/promote well-being.

LDP Objective Number	Draft LDP Objective - Headline	Performance of Option 2 against the Draft LDP Objectives
A More Equal Wales (Well-being Goal 4)		
Objective 9	Demography	Housing would be distributed across Primary Settlements, Secondary Settlements, Severnside and the most sustainable rural areas to meet housing needs, including the provision of affordable housing in both urban and rural areas, which would assist in ensuring a balanced demography. Would provide increased opportunities through employment and housing provision for the younger population to live and work in Monmouthshire. A new settlement would ensure growth in the County across the Plan Period and beyond.
A Wales of Cohesive Communities (Well-being Goal 5)		
Objective 10	Housing	Would provide opportunity for sufficient homes across the plan period and beyond, although recognise this is dependent on the level of growth. Housing would be distributed to meet housing needs including provision of affordable housing in both urban and rural areas. This will enable provision of market and affordable homes across all housing market areas. A new settlement would provide the opportunity for a wide range and choice of homes in a new community.
Objective 11	Place-making	Any developments would need to enhance the character and identity of the Primary, Secondary and Rural Settlements and Severnside area in accordance with national sustainable place-making principles. A new settlement can ensure all aspects of the place-making agenda are fully considered and achieved.
Objective 12	Communities	Developments would be located in both urban and rural areas in those settlements within Monmouthshire with best access to employment, retail, community facilities and social infrastructure (Primary Settlements, Secondary Settlements, Severnside and Rural Settlements). A new settlement would be self-contained and provide its own facilities, schools and infrastructure network, comprising its own community.
Objective 13	Rural Communities	Housing would be distributed in both urban and rural areas, with a focus on the most sustainable Rural Settlements. Would help support those rural areas where facilities are struggling/declining.

LDP Objective Number	Draft LDP Objective - Headline	Performance of Option 2 against the Draft LDP Objectives
Objective 14	Infrastructure	Pressure on infrastructure will be limited through dispersed development across a range of settlements. However, appropriate infrastructure should be in place/can be provided to accommodate any new development in these areas. A new settlement would be self-contained and provide its own facilities, schools and infrastructure network, resulting in less pressure on existing services and infrastructure.
Objective 15	Accessibility	New residential development would be dispersed, providing more choice of areas for people to live and work, however, there is no guarantee that residents will live and work in the same area. While many of the settlements already have sustainable travel links in place through existing rail and bus links, any new developments will need to fully consider active travel and integrated sustainable transport opportunities. A new settlement could ensure this is in place.
A Wales of Vibrant Culture & Thriving Welsh Language (Well-being Goal 6)		
Objective 16	Culture, Heritage and Welsh Language	Dependent on location of sites, has the potential to impact on the heritage of a number of settlements in Monmouthshire. However, through design developments can protect and enhance the built environment as well as providing benefits for the economy, tourism and well-being of communities. No impact on Welsh Language.
A Globally Responsible Wales (Well-being Goal 7)		
Objective 17	Climate Change	Resilience of new development to aspects of Climate Change can be achieved via the design and location of new developments. Developments can provide opportunities to minimise carbon by providing opportunities for renewable energy generation, seeking to reduce commuting, supporting use of ultra-low emission vehicles and public transport, and the provision of quality Green Infrastructure.

Option 3 Distribute Growth Proportionately across Rural and Urban Areas

Table 20 – Option 3

Option 3: Distribute Growth Proportionately across Rural and Urban Areas
<p>Description of Option: Distribute growth proportionately across Primary Settlements, Secondary Settlements, Severnside and those Rural Settlements identified as having capacity for growth and/or in need of development to sustain them, including, a small amount of development in the most sustainable Rural Settlements to bring forward affordable housing.</p>
<p>Map of option:</p>
<p>Advantages:</p> <ul style="list-style-type: none"> • Would meet housing needs, including affordable housing, throughout the County, particularly in rural areas where growth has been limited previously. • Would limit the amount of pressure on infrastructure, particularly in the Primary Settlements, by distributing development across a range of settlements. • Would help to support facilities in existing settlements, particularly in those rural areas where facilities are struggling/declining. Proportionate growth may also attract additional facilities where they do not currently exist.

Option 3: Distribute Growth Proportionately across Rural and Urban Areas

- Would provide growth in the most sustainable areas of Monmouthshire whilst at the same time providing opportunities for specific rural areas to become more sustainable.
- The allocation of employment land in line with the findings of the Employment Land Review will ensure employment land is located in the right areas to attract specific sectors/employers.

Disadvantages:

- While the pressure on existing infrastructure in Primary Settlements, Secondary Settlements and Severnside would be limited, small-scale piecemeal development would not necessarily generate sufficient infrastructure improvements and gains.
- Some rural areas could be disadvantaged as they would not all benefit from additional housing to help support existing facilities or attract additional facilities.
- Preference for brownfield development over greenfield development. Growth would be predominately located on greenfield sites, however, it is recognised that there are limited opportunities for brownfield development within the County.

Table 21 – Assessment of Option 3 against Draft LDP Objectives

LDP Objective Number	Draft LDP Objective - Headline	Performance of Option 3 against the Draft LDP Objectives
A Prosperous Wales (Well-being Goal 1)		
Objective 1	Economic Growth/ Employment	Proportionate growth across the Primary Settlements, Secondary Settlements, Severnside area and most sustainable rural areas would encourage greater indigenous business growth across the County as a whole while at the same time encouraging inward investment. Provides opportunity to create a thriving, well-connected, diverse economy.
Objective 2	Retail centres	Would provide opportunity to add to the customer base in existing settlements through proportionate development. Proportionate growth may also attract additional facilities where they do not currently exist in other areas.
A Resilient Wales (Well-being Goal 2)		
Objective 3	Green Infrastructure, Biodiversity and Landscape	Likely to result in further pressure on the natural environment. New developments in these locations could nevertheless improve Green Infrastructure and Ecological connectivity through opportunities to create new linkages.

LDP Objective Number	Draft LDP Objective - Headline	Performance of Option 3 against the Draft LDP Objectives
Objective 4	Flood risk	Proportionate development could result in development in areas such as Abergavenny, Chepstow, Monmouth, Raglan and Usk, which all have areas of floodplain. Developments can nevertheless be located away from areas at risk of flooding and will incorporate SUDs in accordance with National Planning Policy and SUDs legislation.
Objective 5	Minerals and Waste	There would be no negative impact on minerals and waste, mineral landbank obligations can be met.
Objective 6	Land	Limited opportunities for brownfield development, however, some opportunities exist within the Primary Settlements. Likely to be predominately greenfield development.
Objective 7	Natural resources	There would be no negative impact on ability to promote the efficient use of natural resources. Any developments will be encouraged to be water and energy efficient.
A Healthier Wales (Well-being Goal 3)		
Objective 8	Health and Well-being	There would be no negative impact on health and well-being. Any developments will be encouraged to support healthier lifestyles and provide sufficient open space.
A More Equal Wales (Well-being Goal 4)		
Objective 9	Demography	Housing would be distributed proportionately across all housing market areas to meet housing needs, including provision of affordable housing, which would assist in ensuring a balanced demography. Would provide increased opportunities through employment and housing provision for the younger population to live and work in Monmouthshire.
A Wales of Cohesive Communities (Well-being Goal 5)		
Objective 10	Housing	Would provide opportunity for sufficient homes, although recognise this is dependent on the level of growth. Housing would be distributed proportionately to meet housing needs including provision of affordable housing.
Objective 11	Place-making	Any developments will need to enhance the character and identity of the Primary, Secondary and Rural Settlements in accordance with national sustainable place-making principles.

LDP Objective Number	Draft LDP Objective - Headline	Performance of Option 3 against the Draft LDP Objectives
Objective 12	Communities	Developments would be located in both urban and rural areas in those settlements within Monmouthshire with best access to employment, retail, community facilities and social infrastructure (Primary Settlements, Secondary Settlements, Severnside and Rural Settlements).
Objective 13	Rural Communities	Housing would be distributed in both urban and rural areas, with a focus on the most sustainable Rural Settlements. Would help to support those rural areas where facilities are struggling/declining.
Objective 14	Infrastructure	Pressure on infrastructure would be limited through proportionate development across a range of settlements. However, appropriate infrastructure should be in place/can be provided to accommodate any new development in these areas. Would also provide additional support for facilities in areas where growth has previously been limited.
Objective 15	Accessibility	New residential development would be proportionate, providing more choice of areas for people to live and work, however, there is no guarantee that residents would live and work in the same area. While many of the settlements already have sustainable travel links in place through existing rail and bus links, any new developments will need to fully consider active travel and integrated sustainable transport opportunities.
A Wales of Vibrant Culture & Thriving Welsh Language (Well-being Goal 6)		
Objective 16	Culture, Heritage and Welsh Language	Dependent on location of sites, has the potential to impact on the heritage of a number of settlements in Monmouthshire. However, through design developments can protect and enhance the built environment as well as providing benefits for the economy, tourism and well-being of communities. No impact on Welsh Language.
A Globally Responsible Wales (Well-being Goal 7)		
Objective 17	Climate Change	Resilience of new development to aspects of Climate Change can be achieved via the design and location of new developments. Developments can provide opportunities to minimise carbon by providing opportunities for renewable energy generation, seeking to reduce commuting, supporting use of ultra-low emission vehicles and public transport, and the provision of quality Green Infrastructure.

Option 4 New Settlement with Limited Growth in Primary Settlements, Secondary Settlements and Severnside only

Table 22 – Option 4

<p>Option 4: New Settlement with Limited Growth in Primary Settlements, Secondary Settlements and Severnside only</p>
<p>Description of Option: Growth to be predominantly accommodated in a New Settlement. Limited growth in Primary Settlements, Secondary Settlements and Severnside to meet some of the identified need prior to progression of a New Settlement.</p>
<p>Map of option:</p> <p> ● Primary Settlements ● Secondary Settlements and Severnside ● * New Settlement Location to be determined Brecon Beacons National Park Wye Valley Area of Outstanding Natural Beauty Severn Estuary </p>
<p>Advantages:</p> <ul style="list-style-type: none"> • A new settlement would be self-contained and provide its own facilities, schools and infrastructure network, resulting in less pressure on existing services and infrastructure in other parts of the County. • Less pressure on greenfield edge of settlement sites due to limited growth in these areas. • Would have a limited impact on the environment in the areas outside of a New Settlement.

Option 4: New Settlement with Limited Growth in Primary Settlements, Secondary Settlements and Severnside only

Disadvantages:

- A new settlement would take a long time to progress and development would not likely commence until the latter part of the Replacement Plan Period and would extend into the next plan period. Housing need, both market and affordable, would likely not be met throughout the whole of the Plan Period and as a consequence would not meet the requirements of Welsh Government guidance set out in Technical Advice Note 1 (TAN1) relating to 5 year land supply.
- Would not address market and affordable housing need across all housing market areas as growth would be predominantly focused in one housing market area.
- Places pressure on Primary Settlements, Secondary Settlements and Severnside in the interim until the New Settlement progresses.
- Preference for brownfield development over greenfield development. Growth would be predominately located on a greenfield site, however, it is recognised that there are limited opportunities for brownfield development within the County.
- Would not provide for a choice of location for housing or address housing need in other settlements.
- Affordable housing provision would not be met across rural areas that are currently in need as development would be restricted to a New Settlement with limited growth in Primary Settlements, Secondary Settlements and Severnside.
- Rural areas would be disadvantaged as they would not benefit from additional housing to help support/attract additional facilities and would not meet a key objective of ensuring sustainable resilient communities.

Table 23 – Assessment of Option 4 against Draft LDP Objectives

LDP Objective Number	Draft LDP Objective - Headline	Performance of Option 4 against the Draft LDP Objectives
A Prosperous Wales (Well-being Goal 1)		
Objective 1	Economic Growth/ Employment	Unlikely to have a significant impact on employment growth in short term or across the County as a whole, particularly rural areas as no development will be directed to these areas. A new settlement will however be self-contained and could include employment uses as appropriate in the longer term.
Objective 2	Retail centres	Would provide limited opportunity to add to the customer base/footfall in existing settlements due to limited growth in these areas. A new settlement will be self-contained and provide its own facilities, including retail.

LDP Objective Number	Draft LDP Objective - Headline	Performance of Option 4 against the Draft LDP Objectives
A Resilient Wales (Well-being Goal 2)		
Objective 3	Green Infrastructure, Biodiversity and Landscape	Likely to result in minimal pressure on the natural environment although growth will be limited. Limited growth in these locations could nevertheless improve Green Infrastructure and Ecological connectivity through opportunities to create new linkages. A new settlement would enable benefits through new opportunities and linkages.
Objective 4	Flood risk	Limited development in the Primary Settlements, Secondary Settlements and Severnside area could result in development in areas such as Abergavenny, Caldicot, Chepstow, Monmouth, Raglan and Usk, which all have areas of floodplain. Developments could nevertheless be located away from areas at risk of flooding and will incorporate SUDs in accordance with National Planning Policy and SUDs legislation. Specific parts of a new settlement could also be subject to flood risk, however, can steer highly vulnerable development away from such areas.
Objective 5	Minerals and Waste	There would be no negative impact on minerals and waste, mineral landbank obligations can be met. Additional waste infrastructure may be required to support a new settlement.
Objective 6	Land	Limited opportunities for brownfield development, while some opportunities exist within the Primary Settlements, growth is limited in these locations. Likely to be predominately greenfield development, particularly a new settlement.
Objective 7	Natural resources	There would be no negative impact on ability to promote the efficient use of natural resources. Any developments will be encouraged to be water and energy efficient.
A Healthier Wales (Well-being Goal 3)		
Objective 8	Health and Well-being	There would be no negative impact on health and well-being. Any developments would be encouraged to support healthier lifestyles and provide sufficient open space. A new settlement could provide its own facilities to support healthier lifestyles/promote well-being.

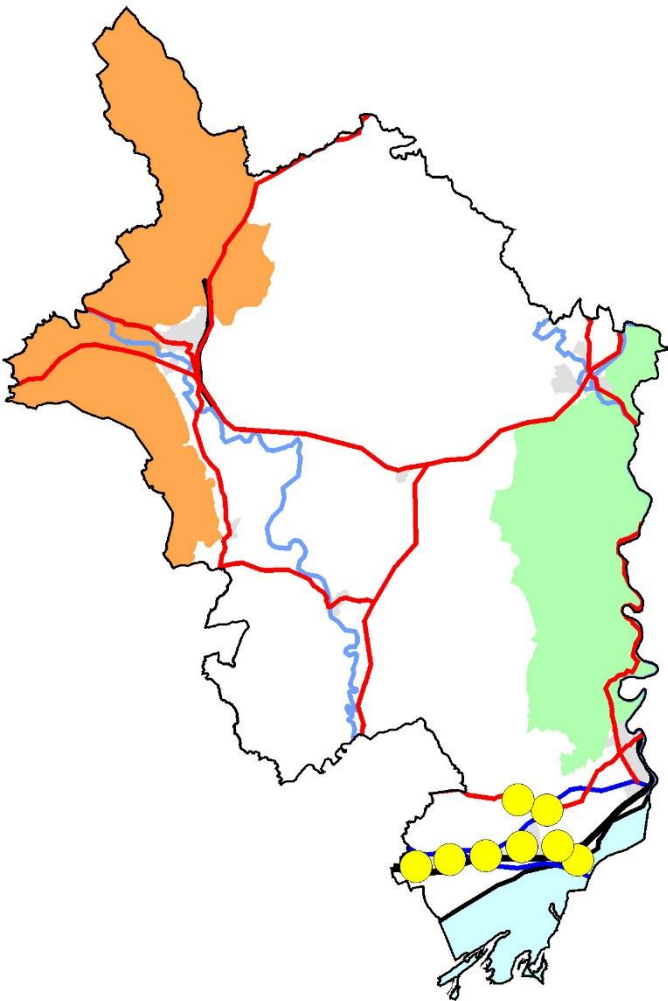
LDP Objective Number	Draft LDP Objective - Headline	Performance of Option 4 against the Draft LDP Objectives
A More Equal Wales (Well-being Goal 4)		
Objective 9	Demography	Some market and affordable housing would be provided in Primary and Secondary Settlements and the Severnside area, although growth would be limited and unlikely to address demographic issues. No growth is proposed in the Rural Settlements impacting on market and affordable housing provision, which would in turn impact on demography as the younger population will be priced out in these areas. This option could also lead to rural isolation. Would provide some opportunities through employment and housing provision for the younger population to live and work in Monmouthshire however, growth would be limited in the short term. A new settlement would nevertheless ensure growth in the County in the latter part of the Plan Period and beyond.
A Wales of Cohesive Communities (Well-being Goal 5)		
Objective 10	Housing	A limited amount of housing would be provided in the Primary Settlements, Secondary Settlements and Severnside area which will not meet housing need across all housing market areas and would negatively impact on the provision of both market and affordable housing. This would in turn impact on demography as the younger population would be priced out of these areas. A new settlement would, however, provide opportunity for a wide range and choice of homes in a new community over the longer term.
Objective 11	Place-making	While growth will be limited, any developments will need to enhance the character and identity of the Primary, Secondary, Severnside area and Rural Settlements in accordance with national sustainable place-making principles. A new settlement can ensure all aspects of the place-making agenda are fully considered and achieved.
Objective 12	Communities	Developments in the short term would only be located in urban areas with the best access to employment, retail, community facilities and social infrastructure and would provide little opportunity to support/enhance existing community facilities. Likely to result in a detrimental impact on rural areas which could lead to rural isolation. However, in the longer term a new settlement would be self-contained and provide its own facilities, schools and infrastructure network.

LDP Objective Number	Draft LDP Objective - Headline	Performance of Option 4 against the Draft LDP Objectives
Objective 13	Rural Communities	Housing would only be directed to Primary Settlements, Secondary Settlements and Severnside area in the short term and would not address rural housing need. This would in turn impact on demography as the younger population will be priced out in these areas and this option could also lead to rural isolation. This would also impact on the sustainability of existing rural areas as there would be no additional support to help maintain rural facilities nor would there be any rural developments to attract additional rural employment opportunities.
Objective 14	Infrastructure	While growth would be limited in Primary Settlements, Secondary Settlements and the Severnside area, appropriate infrastructure should be in place/can be provided to accommodate any new development in these areas. Additional support for facilities in other areas unlikely to be achieved due to limited growth. A new settlement would be self-contained and provide its own facilities, schools and infrastructure network.
Objective 15	Accessibility	Development in the short term, while limited, would be focused in Primary Settlements, Secondary Settlements and the Severnside area where there are existing employment opportunities, however, there is no guarantee that residents will live and work in the same area. While many of the settlements already have sustainable travel links in place through existing rail and bus links, any new developments will need to fully consider active travel and integrated sustainable transport opportunities. A new settlement can ensure this is in place.
A Wales of Vibrant Culture & Thriving Welsh Language (Well-being Goal 6)		
Objective 16	Culture, Heritage and Welsh Language	Dependent on location of sites, has the potential to impact on the heritage of a number of settlements in Monmouthshire, albeit with limited growth, in these areas. However, through design developments can protect and enhance the built environment as well as providing benefits for the economy, tourism and well-being of communities. No impact on Welsh Language.
A Globally Responsible Wales (Well-being Goal 7)		
Objective 17	Climate Change	Resilience of new development to aspects of Climate Change can be achieved via the design and location of new developments. Developments can provide

LDP Objective Number	Draft LDP Objective - Headline	Performance of Option 4 against the Draft LDP Objectives
		opportunities to minimise carbon by providing opportunities for renewable energy generation, seeking to reduce commuting, supporting use of ultra-low emission vehicles and public transport, and the provision of quality Green Infrastructure.

Option 5 Focus on the M4 corridor

Table 24 – Option 5

Option 5: Focus on the M4 corridor
<p>Description of Option: Growth to be predominantly located in the South of the County in the Severnside area close to the M4/M48, to capitalise on its strategic links to the Cardiff Capital Region and South West England, existing economic opportunities and regional infrastructure connections.</p>
<p>Map of option:</p>  <p> Severnside Brecon Beacons National Park Wye Valley Area of Outstanding Natural Beauty Severn Estuary </p>

Option 5: Focus on the M4 corridor

Advantages:

- Would provide opportunity for building more sustainable communities and achieving infrastructure improvements/provision in the South of the County.
- Opportunity to enable investment in public transport and possibly promote a modal shift from car to more sustainable means of travel in the South of the County.
- Less pressure on greenfield edge of settlement sites outside the Severnside area.
- Would provide the potential to link housing and employment growth due to opportunities for a choice and range of employment land with good links to the M4 corridor.

Disadvantages:

- Does not enable opportunities for sustainable development in all of the Primary and Secondary Settlements and runs the risk of perpetuating existing problems of lack of social and community facilities and high levels of out-commuting in Severnside if opportunities to achieve mixed development are not harnessed effectively.
- Lack of employment opportunities outside the Severnside area would exacerbate out-commuting in other areas and would not assist in improving self-containment of the main County towns outside this area (i.e. Abergavenny/Llanfoist, Chepstow and Monmouth).
- Would not support existing facilities or enable provision of additional facilities and infrastructure in areas outside of Severnside. Rural areas outside Severnside in particular will be disadvantaged as they would not benefit from additional housing to help support existing facilities or attract additional facilities.
- Does not directly assist in sustaining rural communities.
- Affordable housing provision would not be met across all areas both urban and rural that are currently in need as it would be limited to the South of the County only.
- Would not address market and affordable housing need across all housing market areas.
- Preference for brownfield development over greenfield development. Growth would be predominately located on greenfield sites, however, it is recognised that there are limited opportunities for brownfield development within the County.

Table 25 – Assessment of Option 5 against Draft LDP Objectives

LDP Objective Number	Draft LDP Objective - Headline	Performance of Option 5 against the Draft LDP Objectives
A Prosperous Wales (Well-being Goal 1)		
Objective 1	Economic Growth/ Employment	While this option would provide the opportunity to link housing and employment growth, particularly due to proximity of the M4, it would be unlikely to have a significant impact on employment growth across the County as a whole as development would be limited to the South of the County in the Severnside area.

LDP Objective Number	Draft LDP Objective - Headline	Performance of Option 5 against the Draft LDP Objectives
Objective 2	Retail centres	Would provide opportunity to add to the customer base/footfall in the Severnside area but would be less of a focus on the main County Towns of Abergavenny, Chepstow and Monmouth. Growth in this area may nevertheless attract additional facilities where they do not currently exist and support regeneration aspirations of Caldicot Town Centre, but would not offer the same to the town of Usk.
A Resilient Wales (Well-being Goal 2)		
Objective 3	Green Infrastructure, Biodiversity and Landscape	Likely to result in further pressure on the natural environment. New developments in these locations could nevertheless improve Green Infrastructure and Ecological connectivity through opportunities to create new linkages.
Objective 4	Flood risk	Development across the Severnside area could result in development in the Gwent Levels, which is designated as floodplain. Developments can nevertheless be located away from areas at risk of flooding and will incorporate SUDs in accordance with National Planning Policy and SUDs legislation.
Objective 5	Minerals and Waste	There could be potential impact on minerals and waste, however, mineral landbank obligations can be met. Due to the focus of development in the South of the County, there could be some impact on the Limestone Mineral Safeguarding Area.
Objective 6	Land	Limited opportunities for brownfield development in the Severnside area, likely to be predominately greenfield development.
Objective 7	Natural resources	There would be no negative impact on ability to promote the efficient use of natural resources. Any developments would be encouraged to be water and energy efficient.
A Healthier Wales (Well-being Goal 3)		
Objective 8	Health and Well-being	There would be no negative impact on health and well-being. Any developments will be encouraged to support healthier lifestyles and provide sufficient open space.
A More Equal Wales (Well-being Goal 4)		
Objective 9	Demography	Market and affordable housing provision would be focussed in the South of the County in the Severnside area. No growth is proposed in other Primary and

LDP Objective Number	Draft LDP Objective - Headline	Performance of Option 5 against the Draft LDP Objectives
		Secondary Settlements outside of this area or the Rural Settlements impacting on both market and affordable housing provision, which would in turn impact on demography as the younger population would be priced out in these areas. This option could also lead to rural isolation. Would provide some opportunities through employment and housing provision for the younger population to live and work in Monmouthshire in the Severnside area only and would not increase opportunities across the County as a whole.
A Wales of Cohesive Communities (Well-being Goal 5)		
Objective 10	Housing	Housing would be provided in the South of the County in the Severnside area and would not meet housing needs across all housing market areas, negatively impacting on the provision of affordable housing. This would in turn impact on demography as the younger population will be priced out in these areas.
Objective 11	Place-making	Any developments would need to enhance the character and identity of the Settlements in the South of the County in accordance with national sustainable place-making principles.
Objective 12	Communities	Developments would only be located in the South of the County in the Severnside area with best access to employment, retail, community facilities and social infrastructure. Likely to result in a detrimental impact on rural areas, particularly in relation to rural isolation and also the Primary and Secondary Settlements as no development would be directed to these locations.
Objective 13	Rural Communities	Housing would only be directed to the South of the County in the Severnside area and would not address rural need in other rural areas across the County. This would in turn impact on demography as the younger population would be priced out in these other rural areas. This would also impact on the sustainability of existing rural areas as there would be no additional support to help maintain rural facilities nor would there be any rural developments to attract additional rural employment opportunities. This option could also lead to rural isolation.
Objective 14	Infrastructure	Pressure on infrastructure would be limited to the South of the County in Severnside, in an area with good links to the M4 and other sustainable travel links including rail at

LDP Objective Number	Draft LDP Objective - Headline	Performance of Option 5 against the Draft LDP Objectives
		Caldicot and Severn Tunnel Junction Train Stations. However, appropriate infrastructure should be in place/can be provided to accommodate for any new development in this area. Lack of development outside this area would not generate sufficient infrastructure improvements and gains in other areas across the County. Would provide additional support for facilities in the Severnside area only, additional support for facilities in other areas unlikely to be achieved.
Objective 15	Accessibility	Development would be focused in the South of the County in the Severnside area where there are existing employment opportunities, however, there is no guarantee that residents will live and work in the same area. While many of the Severnside settlements already have sustainable travel links in place through existing rail and bus links, any new developments will need to fully consider active travel and integrated sustainable transport opportunities. Development in this area benefits from good links to Cardiff Capital Region and the South West via the M4.
A Wales of Vibrant Culture & Thriving Welsh Language (Well-being Goal 6)		
Objective 16	Culture, Heritage and Welsh Language	Dependent on location of sites, has the potential to impact on the heritage of a number of settlements in the South of Monmouthshire, however, would be minimal development in the historic towns of Abergavenny, Chepstow and Monmouth. However, through design developments can protect and enhance the built environment as well as providing benefits for the economy, tourism and well-being of communities. No impact on Welsh Language.
A Globally Responsible Wales (Well-being Goal 7)		
Objective 17	Climate Change	Resilience of new development to aspects of Climate Change can be achieved via the design and location of new developments. Developments can provide opportunities to minimise carbon by providing opportunities for renewable energy generation, seeking to reduce commuting, supporting use of ultra-low emission vehicles and public transport, and the provision of quality Green Infrastructure.

Consultation Questions

- What is your preferred spatial option (as detailed in the options above) and why?
- How will this option address the issues/challenges Monmouthshire is facing?

4 Next Steps

- 4.1 Feedback from the engagement/consultation on the Growth and Spatial Options Paper will be considered and, where appropriate, will inform the preferred growth and spatial strategy options which will be set out in the Preferred Strategy. The Replacement LDP Preferred Strategy will be the subject of engagement/consultation towards the end of 2019.

APPENDIX 1 – Monmouthshire, Blaenau Gwent and Torfaen LDP Demographic Evidence Demographic Report: Executive Summary (Edge Analytics, Draft June 2019)

The full version of the Draft Report can be viewed via the Planning Policy pages of the Council's website. The Draft Report has been amended to remove key references/outcomes relating to Torfaen and Blaenau Gwent as the report is currently draft. When finalised, the report will be published to include key references/outcomes relating to Torfaen and Blaenau Gwent.

Executive Summary to Edge Analytics Report

- E.1 Blaenau Gwent County Borough Council (CBC), Torfaen County Borough Council (CBC) and Monmouthshire County Council are seeking to formulate a new Local Development Plan (LDP), due for adoption in 2021. To inform the emerging LDP, this report has presented a range of demographic and economic evidence, taking account of the latest available statistics and meeting the requirements of the Welsh Government (WG) Draft Development Plan Manual.
- E.2 Since 2001, the three authorities have experienced very different population change profiles, with Monmouthshire recording a growth rate (10%) that is higher than the national rate (7%), whilst Torfaen and Blaenau Gwent are notably lower (+1.5% and -0.6% respectively). Whilst the direction and rate of population change is very different between the authorities, migration has been a key driver of change in each.
- E.3 For Monmouthshire, net migration has been a key driver of population growth, whilst Blaenau Gwent has experienced a predominantly net out-migration flow. Net in-migration to Torfaen has been subject to an annual increase over the last four years, reflecting a rise in housing completions.
- E.4 Whilst all areas have experienced growth in the 65+ age groups, it is Monmouthshire that has seen the highest rate of change, which when coupled with relatively little change in the 'working age' group, has resulted in an increasing imbalance between the two.
- E.5 The latest WG 2014-based population projections capture a period of relatively low migration in its assumptions for all three authorities, resulting in low population change estimated over the plan period. These underpin the WG 2014-based household projections which estimate lower growth than the WG 2008-based equivalent, driven by assumptions on a larger average household size.
- E.6 For comparison with the WG 2014-based principal and variant projections and using the latest statistics available, a range of demographic trend and dwelling-led scenarios have been developed. Under the 'PG' trend-based scenarios, a continuation of alternative migration histories (i.e. short term and long term) would point to higher levels of population and dwelling growth than estimated by the WG projections. Following the recent removal of the Severn Bridge Tolls, the potential implications of increased migration flows to the three authorities would result in notable population growth and a more youthful age profile, particularly in Monmouthshire which has the strongest migration linkages with the South West region.
- E.7 Under the dwelling-led scenarios, the potential implications of a continuation of completion rates is considered. For Monmouthshire a continuation of completions over the last five, ten and fifteen years would result in higher population growth than the WG 2014-based projection but lower than that estimated under a continuation of historical migration trends.
- E.8 In addition, evidence from Monmouthshire's economic growth strategies provides an indication of the range and scale of employment growth that the authority is seeking to achieve over its LDP horizon. The potential population and dwelling growth implications associated with the employment growth has been considered using key assumptions on economic activity rates, unemployment rates and

commuting ratio to link demographic and economic change. Variations in each of these key assumptions influences the relationship between demographic and economic change.

- E.9 The relationship between population change and dwelling growth has been estimated using assumptions from the WG 2014-based household projection model. The potential implications of higher household formation have also been considered using assumptions from the WG 2008-based household model (Figure 1).
- E.10 For Monmouthshire the demographic, dwelling-led and employment-led scenarios result in a population change range of -4% (Net Nil scenario) to +22% (Employment-led RSC Higher scenario). This results in an average annual dwelling change range of -12 dpa to +677 dpa. Under the WG 2008-based household assumptions, the average annual dwelling growth range increases to 76–871 dpa over the plan period. The employment-led Radical Structural Change (RSC) scenarios result in higher population growth, driven by larger net inflows required to support the forecast change in employment. Changes to the commuting ratio ('CR Reducing' and 'CR Balanced' variants) retains more of the resident labour force to fulfil the employment growth, thus resulting in lower net in-migration and population change. The trend-based scenarios sit within the population and dwelling growth range, but remain higher than estimated under the WG 2014 Principal and WG 2014 (10yr Average Migration) variant projections.

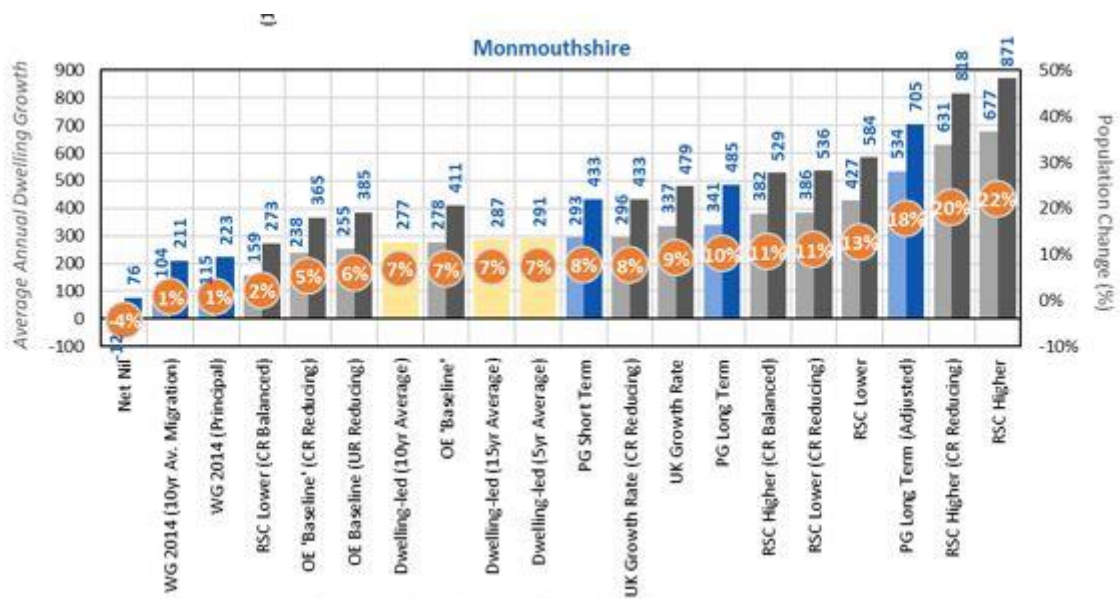


Figure 1: Average annual dwelling growth 2018–2033

APPENDIX 2 – Replacement LDP Draft Objectives

LDP Objective Number	Headline	LDP Objective
A Prosperous Wales (Well-being Goal 1)		
Objective 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.
Objective 2	Retail centres	To sustain and enhance the County towns of Abergavenny, Chepstow, Monmouth, Caldicot and Usk 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.
A Resilient Wales (Well-being Goal 2)		
Objective 3	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.
Objective 4	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.
Objective 5	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.
Objective 6	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.
Objective 7	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.

LDP Objective Number	Headline	LDP Objective
A Healthier Wales (Well-being Goal 3)		
Objective 8	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.
A More Equal Wales (Well-being Goal 4)		
Objective 9	Demography	To increase opportunities for the younger population to both live and work within Monmouthshire to assist in ensuring a balanced demography.
A Wales of Cohesive Communities (Well-being Goal 5)		
Objective 10	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.
Objective 11	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 accessible places to live, work and visit; and promote people's prosperity, health, happiness and well-being.
Objective 12	Communities	To build sustainable resilient communities where people have good access to employment, shops, housing, public transport, active travel, healthcare, community and cultural facilities.
Objective 13	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.
Objective 14	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.
Objective 15	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.

LDP Objective Number	Headline	LDP Objective
A Wales of Vibrant Culture & Thriving Welsh Language (Well-being Goal 6)		
Objective 16	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.
A Globally Responsible Wales (Well-being Goal 7)		
Objective 17	Climate Change	To strive to limit the increase in global temperatures to 1.5oC, supporting carbon reduction through a variety of measures including the use of renewable energy, the design and location of new development, encouraging balanced job and population growth to reduce out-commuting, the provision of broadband connectivity to reduce the need to travel, the provision of ultra-low emission vehicle charging infrastructure to reduce emissions and improve air quality, and the provision of quality Green Infrastructure.

APPENDIX 3 - Long list of Growth Scenarios

Scenario	Description	Initial Assessment	Take Forward
Scenario 1	WG 2014-based (Principal): this replicates the WG 2014-based population projection. Migration assumptions are based on the five-year period prior to 2014 (i.e. 2009/10– 2013/14).	This scenario is included within the options for further consideration in response to Welsh Government guidance which recommends that the latest local authority population and household projections should be used as a fundamental part of the evidence base for development plans. This includes the principal projection.	Yes
Scenario 2	WG 2014-based (10yr Average Migration): replicates the WG 2014-based '10yr Average Migration' variant population projection. Migration assumptions on the ten year period prior to 2014 (i.e. 2004/05–2013/14).	This scenario takes no account of increased migration to the County in more recent years, there is more recent evidence available. This more recent data and the implications of long term migration trends are covered by scenario 5.	No
Scenario 3	PG Short Term ¹⁶ : Internal migration rates and international migration flow assumptions are based on a six-year historical period (2011/12– 2016/17). This is a similar time period to the WG 'Principal' projection (i.e. 5–6 years), but includes the latest three years of population statistics in the derivation of assumptions.	Takes account of increased migration to the County in more recent years, but too short a time period to provide a robust basis for a 15-year plan. The implications of long term migration trends are covered by scenario 5.	No
Scenario 4	PG Long Term: Internal migration rates and international migration	Represents what would happen over the plan period if migration flows remain the same as over the past 16 years, i.e. 'business as usual'. Similar	No

¹⁶ PG refers to POPGROUP forecasting model used to develop the trend-based scenarios.

Scenario	Description	Initial Assessment	Take Forward
	flow assumptions are based on the full sixteen-year historical period (2001/02–2016/17).	approach to scenario 9, but dwelling completions are considered a more robust basis for evaluating this scenario.	
Scenario 5	PG Long Term Adjusted – Internal in-migration rates for each authority are adjusted to reflect higher in-migration (based on the last 5-years) from Bristol and South Gloucestershire, following the removal of the Severn Bridge toll. All other migration flow assumptions are consistent with the PG Long Term scenario.	Based on the same base assumptions as scenario 4 but takes account of the possible increase in in-migration associated with the removal of the Severn Bridge Tolls. This scenario is included within the options for further consideration as it is the only scenario that takes this into account.	Yes
Scenario 6	Net Nil – Internal and international migration flows are balanced between in- and out-flows, resulting in zero net migration.	This scenario is included within the options for further consideration as it provides a baseline of what would happen if there was to be no migration, with all growth reliant on natural change i.e. the balance between births and deaths.	Yes
Scenario 7	Dwelling-led (5yr Average): Annual dwelling growth is applied from 2019/20 onward, based on the last five years of completions (2014/15–2018/19). An annual dwelling growth of +280 is applied.	This scenario is based on data from too short a time period to provide a robust basis for a 15-year plan. Small changes in the recent dwelling delivery rate would impact disproportionately on the projections.	No
Scenario 8	Dwelling-led (10yr Average): Annual dwelling growth is applied from 2019/20 onward, based on the last ten years of completions (2009/10–2018/19). An average annual	This scenario is based on data from too short a time period to provide a robust basis for a 15-year plan. Small changes in the recent dwelling delivery rate would impact disproportionately on the projections.	No

Scenario	Description	Initial Assessment	Take Forward
	dwelling growth of +265 pa is applied.		
Scenario 9	Dwelling-led (15yr Average): Annual dwelling growth is applied from 2019/20 onward, based on the last fifteen years of completions (2004/05–2018/19). An average annual dwelling growth of +275 pa is applied.	This scenario is included within the options for further consideration as it represents what would happen over the plan period if dwelling delivery remains the same as over the past 15 years, i.e. 'business as usual'.	Yes
Scenario 10	Baseline: Oxford Economics 'Baseline' forecast.	The baseline is an employment-led scenario which sets economic growth on a low trajectory in the County, so would not support Council aspirations or meet key LDP objectives.	No
Scenario 11	Baseline (UR reducing): Unemployment rate reduces from current levels (3.0%) to 2.0% over the plan period, in line with the underpinning Oxford Economic 'Baseline' forecast. Economic activity rate adjustments in line with the OBR forecast, commuting ratio remains fixed at the 2011 Census value (1.12).	The baseline is an employment-led scenario which sets economic growth on a low trajectory in the County, so would not support Council aspirations or meet key LDP objectives.	No
Scenario 12	Baseline (CR reducing): Commuting ratio reduces from 2011 Census value (1.12) to 2001 Census value (1.10) over the plan period. Economic activity rate adjustments in line with the OBR forecast, unemployment rate remains fixed at current value (3.0%).	The baseline is an employment-led scenario which sets economic growth on a low trajectory in the County. It is deemed unrealistic to assume that there would be a reduced commuting ratio by the end of the plan period without significant employment growth.	No

Scenario	Description	Initial Assessment	Take Forward
Scenario 13	UK Growth Rate: Incorporates uplifts in identified underperforming sectors to match UK growth levels.	This is considered a realistic scenario to model as it would illustrate the implications of bringing Monmouthshire's employment growth in underperforming sectors in line with that of the UK. This scenario is included within the options for further consideration.	Yes
Scenario 14	UK Growth Rate (CR reducing): Commuting ratio reduces from 2011 Census value (1.12) to 2001 Census value (1.10) over the plan period. Economic activity rate adjustments in line with the OBR forecast, unemployment rate remains fixed at current value (3.0%).	It is deemed unrealistic to assume that there would be a reduced commuting ratio by the end of the plan period without significant employment growth across all sectors.	No
Scenario 15	Radical Structural Change Lower: Consider the potential impact of substantial economic changes in Monmouthshire's economy, resulting in significantly higher employment growth range than under the 'Baseline' equivalent.	This scenario considers the impact of employment growth above the baseline, but takes no account of the impact on commuting of this higher level of job provision.	No
Scenario 16	Radical Structural Change Lower (CR reducing): Commuting ratio reduces from 2011 Census value (1.12) to 2001 Census value (1.10) over the plan period. Economic activity rate adjustments in line with the OBR forecast, unemployment rate remains fixed at current value (3.0%).	This scenario is included within the options for further consideration as with the provision of more jobs in the County it is realistic to assume that the commuting ratio would reduce, with Monmouthshire retaining more of its resident workforce.	Yes
Scenario 17	Radical Structural Change Lower (CR balanced): Commuting ratio reduces from 2011 Census value (1.12) to a	Despite the provision of a higher level of employment it is deemed unrealistic to assume that there would be a balanced commuting ratio by the end of the plan period, i.e. there would be the same number of	No

Scenario	Description	Initial Assessment	Take Forward
	balanced commuting ratio of 1.00 by the end of the plan period. Economic activity rate adjustments in line with the OBR forecast, unemployment rate remains fixed at current value (3.0%).	residents commuting out as employees commuting into the County for work.	
Scenario 18	Radical Structure Change Higher: Considers the potential impact of substantial economic changes in Monmouthshire's economy, resulting in significantly higher employment growth range than under the 'Baseline' equivalent.	This scenario is included within the options for further consideration as it provides a useful scenario of the implications for the Council of going for this high level of growth over the plan period. The inclusion of this scenario provides a complete range of options from the baseline to the option with the highest growth.	Yes
Scenario 19	Radical Structure Change Higher (CR reducing): Assumes the commuting ratio reduces from 2011 Census value (1.12) to 2001 Census value (1.10) over the plan period. Economic activity rate adjustments in line with the OBR forecast, unemployment rate remains fixed at current value (3.0%).	This scenario is included within the options for further consideration as it is realistic to assume that the commuting ratio would reduce if this high level of growth was considered, with more of Monmouthshire's residents employed within the County	Yes
Scenario 20	Radical Structure Change Higher (CR balanced): Commuting ratio reduces from 2011 Census value (1.12) to a balanced commuting ratio of 1.00 by the end of the plan period. Economic activity rate adjustments in line with the OBR forecast, unemployment rate remains fixed at current value (3.0%).	Even with this high level of employment growth it is deemed unrealistic to assume that there would be a balanced commuting ratio by the end of the plan period, i.e. there would be the same number of residents commuting out as employees commuting into the County for work.	No

APPENDIX 4 - Long list of Spatial Options

Option	Description	Initial Assessment	Take Forward
Option 1 – Continuation of existing LDP Strategy	Distribute development around the County with a particular focus on Main Towns ¹⁷ , some development in Severnside ¹⁸ and some development in the most sustainable rural areas to enable provision of affordable housing throughout the County. New residential development to be accompanied by new employment opportunities, where possible.	<p>This option replicates the existing strategy of the Adopted LDP. Evidence from the Annual Monitoring Report’s suggest progress continues to be made towards the implementation of the spatial strategy, however, it does identify that the current housing provision policies are not being delivered as quickly as anticipated which in turn impacts on housing land supply, progress is nevertheless still being made in bringing the strategic sites forward. Further consideration will be given to a range of factors as part of the assessment of the option including infrastructure capacity, policy constraints, affordable housing and employment provision.</p> <p>This option is considered to be realistic and has been selected as an option for consultation purposes.</p>	Yes
Option 2 – Dispersed Growth and New Settlement	Distribute growth across Primary Settlements, Secondary Settlements, Severnside and those Rural Settlements identified as having capacity for growth and/or in need of development to sustain them, including, a	This option would support the delivery of housing land in sustainable locations for development through the distribution of growth in both urban areas and the most sustainable rural areas, in accordance with PPW 10 (December 2018). This combined with a New Settlement would ensure growth across the Plan Period and beyond. Further consideration will be given to a range of factors as part of the assessment of the option including infrastructure capacity, policy constraints, affordable housing and employment provision.	Yes

¹⁷ As identified in Policy S1 of the Adopted Local Development Plan (2014)

¹⁸ As identified in Policy S1 of the Adopted Local Development Plan (2014)

Option	Description	Initial Assessment	Take Forward
	<p>small amount of development in the most sustainable Rural Settlements to bring forward affordable housing. Inclusion of a New Settlement within the County to deliver longer term growth providing housing, employment, retail and associated infrastructure. It is recognised a New Settlement will take a long time to progress and cross over into next plan period, hence additional dispersed growth is required to account for the identified need.</p>	<p>This option is considered to have sufficient merit to warrant being carried forward to a short list of options.</p>	
<p>Option 3 – Distribute growth proportionately across rural and urban areas</p>	<p>Distribute growth proportionately across Primary Settlements, Secondary Settlements, Severnside and those Rural Settlements identified as having capacity for growth and/or in need of development to sustain them, including, a small amount of development in the most</p>	<p>This option would support the delivery of housing land in sustainable locations for development through distribution of growth in both urban areas and the most sustainable rural areas, in accordance with PPW 10. Further consideration will be given to a range of factors as part of the assessment of the option including infrastructure capacity, policy constraints, affordable housing and employment provision.</p> <p>This option is considered to be realistic and has been selected as an option for consultation purposes.</p>	<p>Yes</p>

Option	Description	Initial Assessment	Take Forward
	sustainable Rural Settlements to bring forward affordable housing.		
Option 4 – New Settlement with limited growth in Primary Settlements, Secondary Settlements and Severnside only.	Growth to be predominantly accommodated in a New Settlement. Limited growth in Primary Settlements, Secondary Settlements and Severnside to meet some of the identified need prior to progression of a New Settlement.	<p>This option focusses growth on a New Settlement with a limited amount of growth in sustainable urban areas, in accordance with PPW 10. Further consideration will be given to a range of factors as part of the assessment of the option including infrastructure capacity, policy constraints, affordable housing and employment provision.</p> <p>This option is considered to be realistic and has been selected as an option for consultation purposes.</p>	Yes
Option 5 – Focus on M4 corridor	Growth to be predominantly located in the South of the County in the Severnside area close to the M4/M48, to capitalise on its strategic links to the Cardiff Capital Region and South West England, existing economic opportunities and regional infrastructure connections.	<p>This option focusses growth in areas in Severnside close to the M4/M48 corridor. Impact on housing need across the County as a whole, including, rural areas will need to be factored into a full appraisal.</p> <p>This option is considered to be realistic and has been selected as an option for consultation purposes.</p>	Yes
Option 6 – Former Option A of Adopted	Focus development within or adjoining the three main towns of Abergavenny, Chepstow and	This relates to an option considered previously in the Adopted LDP.	No

Option	Description	Initial Assessment	Take Forward
Local Development Plan	Monmouth where there is the best access to jobs services and public transport.	<p>There is limited scope for significant or long term expansion of the Main Towns within the County due to a mix of physical, environmental and Policy constraints. Further significant or long term expansion in these areas would place additional pressure which outweighs the balance of benefits in terms of accessibility to existing services and jobs. This option would not meet housing or economic need across the County as a whole.</p> <p>This option is not considered to be realistic and as a consequence has not been selected as an option for consultation purposes.</p>	
Option 7 – Former Option D of Adopted Local Development Plan	Focus development on sites and settlements where opportunities exist for large scale mixed development to enable new residential development to be accompanied by an associated increase in employment opportunities.	<p>This relates to an option considered previously in the Adopted LDP. The current LDP Strategy includes a number of Strategic Mixed Use Sites, however the provision of employment opportunities together with residential developments has not been fulfilled in all of the Strategic Mixed Use Sites allocated in the adopted LDP. This option would take this further by only allocating Mixed Use Sites which based on previous experience are likely to be subject to viability and deliverability issues and would not be a realistic option going forward. While a focus on mixed use sites would not be appropriate, where such sites are considered to be viable and deliverable they should be given further consideration. It would nevertheless be more beneficial to allocate Employment land in line with the findings of the Employment Land Review.</p> <p>This option would not meet housing need across Monmouthshire as a whole, particularly in rural areas of need. The inclusion of large scale development would also likely impact build rates, with a preference towards large house builders limiting the amount of small/medium house builders working across the County.</p>	No

Option	Description	Initial Assessment	Take Forward
		This option is not considered to be realistic and as a consequence has not been selected as an option for consultation purposes.	
Option 8 – New Settlement only	New settlement only.	<p>The length of time necessary to deliver a new settlement combined with the lack of other housing allocations in the Plan to support growth would result in limited housing delivery over the entire plan period. A new settlement would take a long time to progress and development would not likely commence until the latter part of the Replacement Plan Period. Housing need – both market and affordable would not likely be met throughout the whole of the Plan Period and as a consequence would not meet the requirements of Welsh Government guidance set out in Technical Advice Note 1 (TAN1) relating to 5 year land supply.</p> <p>This option would not meet housing or employment needs across Monmouthshire as a whole as all growth would be focused in one area. This would have a negative impact on provision of services, facilities and infrastructure in all other areas of the County and would not adequately address the issues and objectives.</p> <p>This option would not provide adequate housing provision over the whole plan period and consequently is not considered to be realistic and has not been selected as an option for consultation purposes.</p>	No

APPENDIX 5 – Summary Matrix of Growth Options against Replacement LDP Draft Objectives

	Option 1 – Net Nil Migration	Option 2 – WG Principal Projection	Option 3 – Dwelling-led (15yr average)	Option 4 – Matching UK Growth	Option 5 _ RSC* Lower (Commuting ratio reducing)	Option 6 – POPGROUP Long Term (Adjusted)	Option 7- RSC* Higher (Commuting ratio reducing)	Option 8 – RSC* Higher
Economic Growth/Employment	Red	Red	Yellow	Yellow	Green	Green	Green	Green
Retail centres	Red	Red	Yellow	Yellow	Green	Green	Green	Green
Green Infrastructure, Biodiversity and Landscape	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow
Flood risk	Green	Green	Green	Green	Green	Green	Green	Green
Minerals and Waste	Green	Green	Green	Yellow	Yellow	Red	Red	Red
Land	Red	Red	Yellow	Yellow	Yellow	Red	Red	Red
Natural resources	Yellow	Green	Green	Green	Green	Green	Green	Green
Health and Well-being	Red	Red	Green	Green	Green	Green	Green	Green
Demography	Red	Red	Red	Red	Yellow	Green	Green	Green
Housing	Red	Red	Green	Green	Green	Green	Green	Green
Place-making	Red	Red	Green	Green	Green	Green	Green	Green
Communities	Red	Red	Yellow	Yellow	Green	Green	Green	Green
Rural Communities	Red	Red	Yellow	Yellow	Green	Green	Green	Green
Infrastructure	Red	Yellow	Green	Green	Green	Green	Green	Green
Accessibility	Red	Red	Yellow	Yellow	Green	Yellow	Green	Yellow
Culture, Heritage and Welsh Language	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow
Climate Change	Yellow	Yellow	Yellow	Yellow	Yellow	Red	Yellow	Red

*Radical Structural Change

APPENDIX 6 – Summary Matrix of Spatial Options against Replacement LDP Draft Objectives

	Option 1 -Continuation of existing LDP Strategy	Option 2 – Dispersed Growth and New Settlement	Option 3 – Distribute growth proportionately across rural and urban areas	Option 4 – New Settlement with limited growth in Primary Settlements, Secondary Settlements and Sevenside only.	Option 5 – Focus on M4 corridor
Economic Growth/Employment	Green	Green	Green	Yellow	Yellow
Retail centres	Green	Green	Green	Red	Red
Green Infrastructure, Biodiversity and Landscape	Yellow	Yellow	Yellow	Yellow	Yellow
Flood risk	Green	Green	Green	Green	Green
Minerals and Waste	Green	Yellow	Green	Yellow	Red
Land	Yellow	Yellow	Yellow	Red	Red
Natural resources	Green	Green	Green	Green	Green
Health and Well-being	Green	Green	Green	Green	Green
Demography	Green	Green	Green	Red	Red
Housing	Green	Green	Green	Red	Red
Place-making	Green	Green	Green	Green	Green
Communities	Green	Green	Green	Yellow	Yellow
Rural Communities	Green	Green	Green	Red	Red
Infrastructure	Green	Green	Green	Yellow	Yellow
Accessibility	Green	Green	Green	Green	Green
Culture, Heritage and Welsh Language	Yellow	Yellow	Yellow	Yellow	Yellow
Climate Change	Yellow	Yellow	Yellow	Yellow	Yellow