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15 Socio-economics

15.1 Introduction

15.1.1. This chapter presents the preliminary assessment of the likely significant effects of the Proposed Development with respect to socio-economics, including tourism and recreation and land use. The preliminary assessment is based on information obtained to date. It should be read in conjunction with the Proposed Development description provided in **Chapter 4: Development Description** and with respect to relevant parts of the following chapters:

- **Chapter 6: Landscape and Visual Impact Assessment** which assesses the visual effects on tourism and recreational receptors including Public Rights of Way (PRoW).

15.1.2. This chapter describes:

- the legislation, policy and technical guidance that has informed the assessment (**Section 15.2**);
- consultation and engagement that has been undertaken and how comments from consultees relating to socio-economics have been addressed (**Section 15.3**);
- the methods used for baseline data gathering (**Section 15.4**);
- overall baseline (**Section 15.5**);
- embedded measures relevant to socio-economics (**Section 15.6**);
- the scope of the assessment for socio-economics (**Section 15.7**);
- the methods used for the assessment (**Section 15.8**);
- the preliminary assessment of socio-economic effects: climate change and energy security (**Section 15.9**);
- The preliminary assessment of socio-economic effects: economy and community (**Section 15.10**);
- the preliminary assessment of socio-economic effects: tourism and recreation (**Section 15.11**);
- the preliminary assessment of socio-economic effects: land use (**Section 15.12**);
- preliminary assessment of cumulative (inter-project) effects (**Section 15.13**);
- a summary of the preliminary significance conclusions (**Section 15.14**);
- an outline of further work to be undertaken for the Final Environmental Statement (ES) (**Section 15.15**).

- **Limitations and assumptions**

15.1.3. The information provided in this Draft ES is preliminary, the final assessment of likely significant Noise and Vibration effects will be reported in the Final ES. This Draft ES has been produced to fulfil the Applicants Pre-Application Consultation (PAC) responsibilities and enable consultees to develop an informed view of the likely significant effects of the Proposed Development based on latest current information.

- 15.1.4. There are no limitations relating to socio-economics that affect the robustness of the preliminary assessment of the potential likely significant effects of the Proposed Development.

15.2 Relevant legislation, planning policy and technical guidance

- 15.2.1. This section identifies the legislation, planning policy and technical guidance that has informed the assessment of effects with respect to socio-economics. Further information on policies relevant to the Proposed Development is provided in **Chapter 5: Legislation and policy overview**.

Legislation

- 15.2.2. A summary of the relevant legislation is given in **Table 15.1**

Table 15.1 Legislation relevant to the Socio-economics assessment.

| Legislation | Context |
|--|--|
| Countryside and Rights of Way (CRoW) Act 2000 | The CRoW Act outlines the principal legislation governing the registration and protection of public footpaths, bridleways, byways open to all traffic and restricted byways. |
| Climate Change Act 2008 (as amended) | The Climate Change Act 2008 (as amended) introduces a clear, credible, long-term framework for the UK to achieve its goals of reducing carbon dioxide emissions and for adapting to the impacts of climate change. One of the key provisions of the amended Act is the introduction of legally binding targets on greenhouse gas emissions comprising reductions of at least 100% greenhouse gas emissions by 2050, against a 1990 baseline. The generation of electricity by renewable means such as wind energy is considered to be a key contributor towards meeting these targets. |
| Well-being of Future Generations (Wales) Act 2015 | This Act places a duty on public bodies (including Welsh Ministers) to carry out sustainable development through their decision making. The Act puts in place seven well-being goals to help ensure that public bodies are all working towards the same vision of a sustainable Wales. The wellbeing goals act together to ensure outcomes across economic, environmental and social sustainability strands. |
| Environment (Wales) Act 2016 (as amended) | The Environment (Wales) Act 2016 (as amended), under Part 2, places a duty on the Welsh Ministers to ensure that the net Welsh greenhouse gas emissions account in 2050 is at least 100% lower than the 1990 baseline. |

Planning Policy

15.2.3. A summary of the relevant national and local planning policy is given in **Table 15.2**.

Table 15.2 Planning policy relevant to the Socio-economics assessment.

| Policy | Context |
|--|--|
| National Planning Policy Future Wales: The National Plan 2040¹ | <p>Policy 17 Renewable and Low Carbon Energy and Associated Infrastructure states that decision makers must give significant weight to the need to meet international climate change commitments and Welsh Government targets to generate 70% of consumed energy by renewable means by 2030. The policy sets a presumption in favour of large-scale wind farms being developed in Pre-Assessed Areas for Wind (the Proposed Development Site is within PAA 10).</p> <p>Policy 18 Renewable and Low Carbon Energy Developments of National Significance states that proposals qualifying as Developments of National Significance will be permitted subject to Policy 17 and the criteria listed under Policy 18. Criteria 2 requires that there are no unacceptable adverse visual impacts on nearby communities and individual dwellings. The cumulative impacts of existing and consented renewable energy schemes should also be considered.</p> <p>Policy 33 National Growth Area – Cardiff, Newport and the Valleys set out the overall strategic view for development in the southeast which includes the area covered by Blaenau Gwent County Borough Council. Amongst other provisions, the Policy sets out support for investment in the Valleys that improves well-being, increases prosperity and addresses social inequalities.</p> |
| Planning Policy Wales, Edition 12, (2024)² | <p>Paragraph 5.5.1 states that tourism can be a catalyst for investment, growth and job creation whilst 5.5.2 states that the planning system should encourage sustainable tourism where it contributes to economic regeneration.</p> <p>Paragraph 5.5.5 states that (inter alia) rights of way are important tourism and recreation assets both in their own right and as part of linking other attractions.</p> <p>Paragraph 6.3.18 states that Common Land is a finite resource that should not be developed unnecessarily, that it is important for a number of reasons and that access should not be impeded unnecessarily.</p> |
| TAN 16: Sport, Recreation and Open Space (2009)³ | <p>TAN 16 sets out the importance to Public Rights of Way (PROW) and their ability to connect wider open space and recreational corridors.</p> |

¹ Welsh Government (2021) Future Wales: The National Plan 2040 (Online) available at: <https://gov.wales/future-wales-national-plan-2040> (Accessed October 2025).

² Welsh Government (2024) Planning Policy Wales, Edition 12. (Online) Available at: https://www.gov.wales/sites/default/files/publications/2024-02/planning-policy-wales-edition-12_1.pdf (Accessed October 2025)

³ Welsh Government (2009) TAN 16: Sport, Recreation and Open Space. (Online) Available at: <https://gov.wales/sites/default/files/publications/2018-09/tan16-sport-recreation-open-space.pdf> (Accessed October 2025).

| | |
|---|---|
| TAN 23: Economic Development (2014) ⁴ | TAN 23 supports the economic development of Wales and highlights the importance of delivering sustainable growth in rural areas. |
| Common Land Consents Guidance (2014) ⁵ | Guidance sets out how the Welsh Ministers and PINS Wales will process and determine applications under section 38(1) and section 16(1) and, so far as is relevant, in relation to other statutory provisions. It notes that every application to the Welsh Ministers must, however, be considered on its own merits and that a determination may, in exceptional circumstances, depart from the guidance if it appears appropriate to do so. |
| Local Planning Policy | |
| Caerphilly County Borough Local Development Plan up to 2021 ⁶ (adopted November 2010) | <p>Policy SP2 Development Strategy – Development in the cern Connections Corridor provides criteria that ensures development is sustainable and well sited, alongside being accessible and not compromising the accessibility of its surroundings.</p> <p>Policy SP3 Development Strategy – Development in the Southern Connection Corridor ensures development encourages sustainable forms of travel, improves the accessibility of an area, well designed and does not compromise the social, economic and heritage functions/character of the area.</p> <p>Policy SP6 Place Making seeks to ensure development contributes positively to an area through the creation of sustainable places that have regard to the local natural, Historic and current Built Environment. The policy contains eight criteria to help ensure development is sustainable and range in their scope from a criteria relating to developments being a high standard of design to the efficient use of resources.</p> <p>Policy CW2 Amenity ensures that development is in accordance with its neighbouring land uses. Development cannot result in unacceptable impacts upon the amenity and function of neighbouring land uses or constrain their future development.</p> <p>Policy CW22 Minerals seeks to prevent development which may impact on minerals safeguarding areas.</p> <p>Policy TM1 Tourism allocates Nantcarn Valley, Cwmcarn for tourism related activities.</p> |
| Torfaen County Borough Local Development Plan up to 2021 ⁷ (adopted December 2013) | <p>Policy BW1 Development Proposals requires development to not have an unacceptable impact upon the amenities of the occupiers of adjoining or neighbouring properties.</p> <p>Policy C3 Rural Development and Diversification this policy concerns applications for rural development and farm diversification and supports such schemes, subject to caveats that they are complimentary to the agricultural operations of the farm and do not prejudice the operation of existing businesses.</p> |

⁴ Welsh Government (2014) TAN 23: Economic Development (Online). Available at: <https://gov.wales/sites/default/files/publications/2018-09/tan23-economic-development.pdf> (Accessed October 2025).

⁵ Welsh Government (2014): Common Land Consents Guidance (Online) Available at: <https://gov.wales/sites/default/files/publications/2018-01/common-land-consents-guidance.pdf> (Accessed October 2025).

⁶ Caerphilly County Borough Council (2010) Caerphilly County Borough Local Development Plan up to 2021. (Online) Available at: [https://www.caerphilly.gov.uk/business/planning-and-building-control-for-business/local-development-plan/local-development-plan-2010-\(adopted\)/the-adopted-ldp](https://www.caerphilly.gov.uk/business/planning-and-building-control-for-business/local-development-plan/local-development-plan-2010-(adopted)/the-adopted-ldp) (Accessed October 2025).

⁷ Torfaen County Borough Council (2013) Torfaen County Borough Council Local Development Plan. (Online) Available at: <https://www.torfaen.gov.uk/en/Related-Documents/Forward-Planning/Adopted-Torfaen-LDP-Written-Statement.pdf> (Accessed September 2025).

Policy S2 Sustainable Development requires development proposals to demonstrate they have taken into account eight principles, where they are relevant which include the conservation and enhancement of the natural environment, promotion of economic growth.

Policy S3 Climate Change encourages development proposals to mitigate the cause of climate change and provides support where they demonstrate consideration of a hierarchy of criteria.

Policy M1 Mineral Safeguarding outlines that development proposals that would permanently sterilise minerals and aggregates will not be permitted unless the mineral has already been recovered or the developer has satisfactorily demonstrated that the extraction of the mineral is impracticable, uneconomic or environmentally unacceptable.

Technical Guidance

- 15.2.4. There is no specific guidance for undertaking an assessment of socio-economic effects and no prescribed method for determining either the sensitivity of socio-economic receptors or the significance of effects on receptors. However, the guidance in National Policy Statement (NPS) EN1 section 5.13 (DESNZ, 2024))⁸ has been considered in forming the scope of the assessment which focuses on the number of jobs created, the economic value of the Proposed Development, effects on tourism and cumulative effects. The NPS also notes that socio-economic impacts may be linked to other impacts (notably visual impacts on tourism).

15.3 Consultation and Engagement

Overview

- 15.3.1. The assessment has been informed by consultation responses and ongoing stakeholder engagement. An overview of the approach to consultation is provided in **Section 2.4 of Chapter 2: Approach to Environmental Impact Assessment.**

Scoping Opinion

- 15.3.2. A Scoping Direction was issued by the Planning and Environmental Decisions Wales (PEDW, formerly Planning Inspectorate Wales), on behalf of the Welsh Ministers, on 04 December 2024 (reference DNS CAS-03701-H3V4Y3: Rhyswg Wind Farm). A summary of the relevant responses received in the Scoping Opinion in relation to socio-economics and confirmation of how these have been addressed within the assessment to date is presented in **Table 15.3.**

Table 15.3 Summary of EIA Scoping Direction Responses for Socio-economics.

| Consultee | Consideration | How addressed in this Draft ES |
|-----------|---------------|--------------------------------|
|-----------|---------------|--------------------------------|

⁸ Department for Energy Security & Net Zero (2024) Overarching National Policy Statement for Energy (EN-1). It is recognised that the NPS no longer forms part of the policy provisions against which the Proposed Development will be assessed however the guidance on assessment of socio-economics is considered relevant as an approach.

| | | |
|---|---|---|
| Planning and Environment Decisions Wales (PEDW) ID.8 | The impact on any Public Right of Way (PRoW) and respective users must be fully addressed in the ES. The applicant's attention is drawn to comments from CCBC's Rights of Way Officer and the Open Spaces Society within which it is recommend turbines are located a distance greater than their tip height from any PRoW. | The direct impacts on PRoW within the Proposed Development Site is addressed in Sections 15.6, 15.11 and 15.13 of this chapter. Visual effects on users of PRoWs are considered in Chapter 6: Landscape and Visual Impact Assessment . |
| PEDW ID.51 | PEDW concur with the approach set out in the Scoping Report for the socio-economic assessment. | This Chapter assesses socio-economics in line with the proposed approach set out in the Scoping Report. |
| PEDW ID.52 | The intention to cover aspects of population and human health within relevant technical chapters rather than as a standalone chapter is welcomed. | Aspects of population and health within the context of socio-economic factors are considered in Sections 15.5 and 15.9 to 15.12 of this ES chapter. Other aspects are considered in other chapters of the Draft ES where relevant. |
| Caerphilly County Borough Council (CCBC) | CCBC note concerns about over sail of Public Rights of Way (PRoW) for equestrian users. | This chapter considers the potential effects on recreational users of PRoW, including equestrians. Further consultation with CCBC officers will take place as part of the statutory consultation prior to finalising the Final ES. Visual effects on users are considered in Chapter 6: Landscape and Visual Impact Assessment . |

Technical Engagement

- 15.3.3. To date no specific engagement has taken place with consultees in relation to socio-economics. However, engagement will take place with officers of CCBC to consider the proposed approach to the embedded measures to avoid or reduce effects on users of PRoW.

15.4 Data gathering methodology

- 15.4.1. There is no prescribed methodology or standard guidance for this aspect of an EIA. The method adopted is therefore one of determining the existing circumstances (the baseline) through desk-based analysis, utilising a range of statistical information. This statistical information has been drawn from a number of sources and covers various geographies, from ward level through to the national level.

Study Area

- 15.4.2. The study Area for baseline data covers the Site contained within the EIA Assessment Area, together with the wider county borough, regional and national context.

Climate change and energy security

15.4.3. The baseline study covers the national (Wales) area as a whole.

Economy and Community

15.4.4. The baseline study covers Wales, CCBC, Torfaen County Borough Council (TCBC) and Blaenau Gwent County Borough Council (BGCBC) areas and the wards of:

- Abercarn (CCBC);
- Crosskeys (CCBC);
- Crumin (CCBC);
- Newbridge (CCBC);
- Upper Cwmbran (TCBC);
- Pontypool Fawr (TCBC) (or the Former Wainfelin (TCBC) and Former Cwmyrnyscoy (TCBC));⁹
- Green Meadows (TCBC);
- Two Locks (TCBC); and
- Llanhilleth (BGCBC).

Tourism and recreation

15.4.5. The tourism baseline study considers tourism at local (CCBC and TCBC), regional (Southeast Wales) and national (Wales) level. The recreation baseline, related to PRoW and open access land, has focussed on the local context within 5km and 5km-10km as informed by the LVIA in **Chapter 6: Landscape and Visual Impact Assessment**.

Land use

15.4.6. Consideration of potential effects upon land use includes for land directly affected (within the Site) and the wider Mynydd Maen Common. With regard to minerals (aggregates) this is extended to consider the County Borough level as the Study Area.

Desk Study

15.4.7. A summary of the organisations that have supplied data, together with the nature of that data is outlined in **Table 15.4**.

Table 15.4 Data sources used to inform the Socio-economics assessment.

| Organisation | Data source | Data provided |
|--------------|-------------|---------------|
|--------------|-------------|---------------|

⁹ The former wards of Wainfelin and Cwmyrnyscoy are sometimes used as these wards have only recently been replaced with the wider Pontypool Fawr ward, which comprises a considerably larger area, following a Boundary Commission review. The baseline has been informed by the best available information.

| | | |
|--|--|--|
| Department for Energy Security and Net Zero | Renewable electricity by local authority 2014-2024 ¹⁰ | Installed capacity of renewable energy for CCBC and TCBC. |
| Welsh Government | The Energy Generation in Wales 2021 report ¹¹ The Energy Generation in Wales 2023 report ¹² | Renewable energy generation statistics. |
| Nomisweb StatsWales | Local Authority Profile ¹³ Population estimates by local authority, region, and age ¹⁴ | Data related to demography, occupations, employment/unemployment, out-of-work benefits for CCBC, TCBC, BGCBC and at ward level. |
| Welsh Government StatsWales | Welsh Index of Multiple Deprivation 2019 ¹⁵ | Data for measures of deprivation by Lower Super Output Area (LSOA) and district level. |
| Welsh Government | Welsh Government Tourism profiles for southeast Wales Region ¹⁶ and Local Authorities ¹⁷ Welsh Government Visit Wales Tourism Market Demand Report (2023) ¹⁸ | Data for spend and visitor trips by region and local authority area. Data for visitor trips in 2022 and forecasted visitor trips and movements in 2023. |
| Natural Resources Wales/CCBC | GIS of PRow | The location of PRow was confirmed using the Definitive maps. The presence or absence of Open Access areas designated under the Countryside and Rights of Way Act 2000 were obtained from Natural Resources Wales website. |

¹⁰ DESNZ (2025) Renewable electricity by local authority 2014-2024. (Online) Available at: <https://www.gov.uk/government/statistics/regional-renewable-statistics> (Accessed October 2025).

¹¹ Welsh Government (2022) Energy Generation in Wales 2021. (Online) Available at: <https://www.gov.wales/sites/default/files/publications/2022-12/energy-generation-in-wales-2021.pdf> (Accessed October 2025).

¹² Welsh Government (2025) Energy Generation in Wales 2023. (Online) Available at: <https://www.gov.wales/sites/default/files/publications/2025-02/energy-generation-in-wales-2023.pdf> (Accessed October 2025).

¹³ Nomis (2025) Local Authority Profiles (Online). Available at: <https://www.nomisweb.co.uk/reports/lmp/la/contents.aspx> (Accessed September 2025).

¹⁴ StatsWales (2020) Population estimates by local authority, region and age. (Online) Available at: <https://statswales.gov.wales/Catalogue/Population-and-Migration/Population/Estimates/Local-Authority/populationestimates-by-localauthority-region-age> (Accessed October 2025).

¹⁵ Welsh Government (2019) Welsh Index of Multiple Deprivation (Online). Available at: <https://statswales.gov.wales/Catalogue/Community-Safety-and-Social-Inclusion/Welsh-Index-of-Multiple-Deprivation/WIMD-2019#:~:text=The%20Welsh%20Index%20of%20Multiple.several%20different%20types%20of%20deprivation.> (Accessed October 2025).

¹⁶ Welsh Government (2021) Tourism profile – Southeast Wales 2017-2019 (Online). Available at: <https://gov.wales/sites/default/files/statistics-and-research/2021-03/tourism-profile-south-east-wales-2017-2019.pdf> (Accessed October 2025).

¹⁷ Welsh Government (2021) Tourism profile – Wales Local Authorities 2011-19 (Online). Available at: <https://gov.wales/sites/default/files/statistics-and-research/2021-03/tourism-profile-wales-local-authorities-2011-19.pdf> (Accessed October 2025).

¹⁸ Welsh Government (2023) Visit Wales Tourism Market Demand Report – UK January 2023. (Online) Available at: <https://www.gov.wales/sites/default/files/statistics-and-research/2023-02/visit-wales-tourism-market-demand-report-uk-january-2023.pdf> (Accessed September 2025).

Survey work

- 15.4.8. No survey work has been undertaken to inform the assessment of potentially significant effects related to socio-economics. The assessment is based on published data sources.

15.5 Overall baseline

Current baseline

Renewable energy – economic value in Wales

- 15.5.1. A study of the economic opportunities from onshore wind development in Wales was undertaken in 2013 for the Welsh Government (Regeneris Consulting Ltd and Welsh Economy Research Unit, 2013)¹⁹. The research highlighted the potential economic benefits from onshore wind development which may be felt in the local areas in which wind farms are developed and within the wider Welsh economy. Economic benefits derive from investment involved in the planning and development of schemes, construction of the turbines and in operation through ongoing maintenance. The research noted that the extent to which economic benefits from construction will flow directly into the Welsh economy will partly depend on the availability of skilled labour and manufacturing capacity, but that local suppliers are often well placed to supply some types of goods, such as aggregates and non-specialist engineering services. There are generally greater opportunities for investment in operations and maintenance to remain in the Welsh economy, including opportunities for locally-based maintenance staff.
- 15.5.2. Overall, the study concluded that there is an opportunity for Wales to secure gross value added (GVA) of £2.3 billion between 2012 and 2050, with over 2,000 full time equivalent (FTE) jobs created in this period based on delivering 2GW of onshore wind capacity by 2025. It was noted that this would require measures to overcome barriers in the planning system and in the grid and road infrastructure, as well as a proactive approach to supply chain development. It was also noted that those local economies that stood to gain the most from development were those with a strong presence of construction and manufacturing firms.
- 15.5.3. A RenewableUK²⁰ report in 2021, estimated that if Wales built an additional 2.2GW to reach 3.5GW of onshore wind before 2030, Wales could see significant economic benefits with an expected £4.4 billion in GVA and 3,000 jobs by 2030. The report considered that onshore wind could help incubate skills, capacity and business growth.

Renewable energy – capacity in Wales

- 15.5.4. Welsh Government Ministers have a duty to ensure the Welsh carbon emissions in 2050 are 100% lower than the 1990 baseline (alternatively known as ‘net zero’); placed on them by the Environment (Wales) Act 2016 (as amended). Additionally, in September 2017, the Welsh Cabinet

¹⁹ Regeneris Consulting Ltd and Welsh Economy Research Unit, Cardiff Business School for Renewables UK Cymru, Welsh Government (2013) Economic Opportunities for Wales from Future Onshore Wind Development (Online) Available at: <https://www.renewableuk-cymru.com/wp-content/uploads/Wales-Onshore-economic-benefit.pdf> (Accessed October 2025).

²⁰ RenewableUK (2021) The onshore wind industry prospectus years 40 How a partnership between industry and Government can maximise the benefits of the clean power we need https://www.renewableuk.com/media/c55ckdrg/onshore-wind-industry-prospectus_2021.pdf (Accessed October 2025)

Secretary for Energy, Planning and Rural Affairs (Welsh Government, 2017)²¹ proposed the following targets for Wales:

- Wales to generate 70% of its electricity consumption from renewable energy by 2030;
- 1GW of renewable electricity capacity in Wales to be locally owned by 2030; and
- By 2020 all new renewable energy projects to have at least an element of local ownership.

- 15.5.5. In January 2023 the Welsh Government (Welsh Government, 2023a)²² announced an updated target to meet 100% of its electricity needs from renewable sources by 2035 and to achieve 1.5GW of renewable energy capacity within local ownership by 2035. These targets were adopted in July 2023 (Welsh Government, 2023b)²³.
- 15.5.6. The Energy Generation in Wales 2021 report (Welsh Government 2022)²⁴ set out that 7.7TWh of energy in Wales was from renewables and by the end of 2021, Wales had 1,266MW of onshore wind capacity, equivalent to 36% of renewable generation capacity in Wales. The report identified that the Cardiff Capital region contributed 25% of Wales renewable energy generated within 2021, with the CCBC area contributing 2% and TCBC providing less than 1%.
- 15.5.7. The latest Energy Generation in Wales 2023 Report (Welsh Government, 2025)²⁵ provides updated data and highlights that renewable electricity generation comprises 34% of all electricity generated in Wales in 2023, which is a rise of 7% from 2022 (27%) but lower than 2021. Onshore wind capacity was marginally greater than in 2021 (1,267MW). Onshore and offshore wind comprises 68% of the renewable energy generated in Wales in 2023. However, no new onshore wind sites were commissioned in Wales in 2023. The Cardiff Capital region contributed a slightly higher percentage of Wales's renewable energy generated compared to 2021 (26%), with the same contribution from CCBC (2%) and TCBC (less than 1%). The CCBC area had an installed capacity originating from wind farms of 17MW across 21 projects, whilst TCBC had three projects totalling less than 1MW overall. CCBC had an overall installed capacity for renewable energy projects of 74MW and TCBC had 18MW. DESNZ (2025) reports installed figures in 2024 as 94.6MW for CCBC and 22.3MW for TCBC in 2024.
- 15.5.8. The Energy Generation in Wales 2023 Report (Welsh Government 2025) noted that in 2023, renewable electricity generation in Wales was equivalent to 53% of its electricity consumption, including losses, and at 58% without losses, so substantially below the 2035 100% target.

²¹ Welsh Government (2017) Welsh Cabinet Secretary for Energy, Planning and Rural Affairs - Energy Generation Targets for Wales: Statement to Assembly Members (Online) Available at: <https://gov.wales/lesley-griffiths-high-ambition-clean-energy> (Accessed October 2025).

²² Welsh Government (2023a) Climate Change Minister - Wales aims to meet 100% of its electricity needs from renewable sources by 2035 (Online) Available at: <https://www.gov.wales/wales-aims-meet-100-its-electricity-needs-renewable-sources-2035> (Accessed October 2025)

²³ Welsh Government (2023b) Written Statement: Publication of Summary of Responses to the Consultation on Wales' Renewable Energy Targets (Online) Available at: <https://www.gov.wales/written-statement-publication-summary-responses-consultation-wales-renewable-energy-targets> (Accessed October 2025)

²⁴ Welsh Government (2022) Energy Generation in Wales 2021. (Online) Available at: <https://www.gov.wales/sites/default/files/publications/2022-12/energy-generation-in-wales-2021.pdf> (Accessed October 2025).

²⁵ Welsh Government (2025) Energy Generation in Wales 2023. (Online) Available at: <https://www.gov.wales/sites/default/files/publications/2025-02/energy-generation-in-wales-2023.pdf> (Accessed October 2025).

Economy and community – employment and benefit claimant status

- 15.5.9. As described in **Section 15.4** the Study Area includes the ward level geographies that will be used to assess the potential impact of the Proposed Development. The Site boundary is within the CCBC area, which had a population of 176,000 in 2021²⁶. A segment of the Site access (for which planning permission is sought outside of the EIA Assessment Area, described further in **Chapter 2: Section 2.6**) is located within the TCBC area.
- 15.5.10. The Site encompasses parts of the CCBC wards of Abercarn, Crosskeys, Crumlin and Newbridge and TCBC wards of Upper Cwmbran and Pontypool Fawr²⁷. However, consideration has also been given to neighbouring wards in close proximity, given the Proposed Development location (including wards within different local authority areas: TCBC and BGCBC):
- Green Meadows (TCBC);
 - Two Locks (TCBC); and
 - Llanhilleth (BGCBC).
- 15.5.11. The labour market profiles of the wards set out above, the CCBC, TCBC and BGCBC areas as a whole and Wales as a whole, are therefore included in **Table 15.5**

Table 15.5 Labour Market Profiles (Key Statistics).

| Area | | Population age 16-64* | Employed (economically active)*+ | Unemployed *+ | Out of work claimants** (Universal Credit) ²⁸ |
|---|------------|-----------------------|----------------------------------|---------------|--|
| Wales | Total | 1,894,436. | 1,439,771 | 66,305 | 64,411 |
| | Percentage | 61% | 76% | 3.5% | 3.4% |
| Caerphilly County Borough Council | Total | 108,000 | 89,700 | 3,100 | 3,695 |
| | Percentage | 61% | 77% | 3.4% | 3.4% |
| Torfaen County Borough Council | Total | 56,100 | 43,700 | 1,600 | 2,070 |
| | Percentage | 61% | 75% | 3.5% | 3.7% |
| Blaenau Gwent County Borough Council | Total | 41,600 | 31,600 | 1,400 | 1,660 |
| | Percentage | 62% | 71% | 4.6% | 4% |
| Abercarn | Total | 3,476 | 2,703 | 128 | See footnote 28 |
| | Percentage | 63.9% | 77.8% | 2.9% | |
| Crosskeys | Total | 1,937 | 1,499 | 72 | |
| | Percentage | 60.7% | 77.4% | 2.7% | |
| Crumlin | Total | 3,550 | 2,733 | 122 | |
| | Percentage | 61.2% | 77.0% | 2.6% | |
| Newbridge | Total | 3,727 | 2,700 | 125 | |
| | Percentage | 59.7% | 72.4% | 2.4% | |
| Upper Cwmbran | Total | 3,538 | 2,463 | 158 | |
| | Percentage | 60.7% | 69.6% | 3.5% | |
| Pontypool Fawr | Total | 4,463 | 3,261 | 148 | |
| | Percentage | 60.1% | 73.1% | 2.4% | |

²⁶ ONS (2023) Census 2021 – How life has changed in Caerphilly. (Online) Available at: <https://www.ons.gov.uk/visualisations/censusareachanges/W06000018/> (Accessed October 2025).

²⁷ The former wards of Wainfelin and Cwmynyscoy are sometimes used as these wards have only recently been replaced with the wider Pontypool Fawr ward, which comprises a considerably larger area, following Boundary Commission findings. The best available information is used.

²⁸ Nomis has yet to produce Ward Profiles based on the Census 2021 data. Therefore, Out of work claimants (Universal Credit) information on a Ward level is not readily available.

| | | | | |
|---------------------|------------|-------|-------|------|
| Greenmeadows | Total | 1,714 | 1,297 | 79 |
| | Percentage | 61.9% | 75.7% | 3.6% |
| Two Locks | Total | 3,663 | 2,795 | 119 |
| | Percentage | 61.8% | 76.3% | 2.4% |
| Llanhilleth | Total | 2,792 | 1,903 | 121 |
| | Percentage | 63.4% | 68.2% | 3.3% |

Source: Nomisweb (2025) Labour Market Profiles

*2021 ONS Census population data for Wales and LAs.

*+2021 Census data forward data.

** As of September 2025.

- 15.5.12. CCBC and TCBC have a considerably different working age (16-64) population, with CCBC (108,000) having nearly double the working age population of TCBC (56,100) in 2021. BGCBC has the lowest working age population at 41,600, making it similar to TCBC, though the difference between the two area's working age population is still considerable.
- 15.5.13. The number of people who were economically active in the CCBC area was 89,700, which equated to 77% of the population. For TCBC, 43,700 were economically active, which equated to 75% of its population being economically active in 2021, which is similar to CCBC. Within the BGCBC area, 31,600 people were economically active in 2021, which equated to 71% of its population being economically active. This is not dissimilar to CCBC or TCBC, though it does have the lowest number of active workers and percentage of economic activity out of the three areas.
- 15.5.14. These areas have a similar unemployment rate to that of wider Wales in 2021 (3.5%), though CCBC (4.6%) had a higher unemployment rate.
- 15.5.15. The Proposed Development is entirely located across the Caerphilly wards of Abercarn, Newbridge and Crumlin (with a small part of the access track located outside the EIA Assessment Area, running into the TCBC wards of Upper Cwmbran and Pontypool Fawr.) Abercarn has 77.8% of its working age population as economically active, with Newbridge having 72.4% and Crumlin 77.0%. This is not too dissimilar to the economic activity of the other identified wards. The BGCBC ward of Llanhilleth has the lowest economic activity rate, with 68.2% of its working age population being economically active.
- 15.5.16. The economic activity rates of the identified wards are similar to that for the CCBC, TCBC and BGCBC areas, though the wards in general experience a lower level of unemployment than that identified for CCBC and TCBC. BGCBC's 4.6% unemployment rate is the highest identified out of all the comparator areas and is significantly higher than the other comparator areas.
- 15.5.17. Unemployment rates are similar across most of the identified areas, generally ranging from 2.4% (Newbridge Ward) to 3.5% (Wales, TCBC and Upper Cwmbran Ward). The BGCBC area is unique in that it has a much higher rate of unemployment than the other areas (4.6%). Rates of out-of-work claimants are similar across the areas data is available for, though it is noted that BGCBC has the highest rate of such claimants (4%), which is in keeping with its higher unemployment rate.

Economy and community – Local Economic Activity

- 15.5.18. The working age population of the CCBC, TCBC and BGCBC areas is broadly similar to the Welsh average (see **Table 15.5**). However, there are differences in occupation groups (see **Table 15.6**).
- 15.5.19. When compared to Wales (48.7%), CCBC (49.5%) has a slightly higher proportion of its economically active population in management and professional occupations (groups 1-3), whilst

TCBC has a slightly lower proportion (46.3%) and BGCBC (37.2%) has a significantly lower proportion of its economically active population in such occupations.

- 15.5.20. The profile for the remaining occupations in these areas is broadly similar to the Wales average. However, BGCBC has a higher percentage of those employed in process plant and machinery (than across Wales as a whole and the other areas).
- 15.5.21. There are variations across the wards identified. With regards to the percentage of people occupied in professional occupations (group 1-3), Wales (48.7%), CCBC (49.5%), TCBC (46.3%) have the highest within this category and all have a significantly higher proportion of their working age population within professional occupations than BGCBC (37.2%) and the wards.
- 15.5.22. CCBC has the highest rate of its working age population working in administration (group 4) (15.6%) out of the Council areas and Wales, with Abercarn (11.5%) having the highest proportion of its working age population in this group out of the wards identified.
- 15.5.23. BGCBC has the highest proportion of its working age population in skilled trades (group 5) (12.5%) and this type of employment is also common in the wards (highest Pontypool Fawr, 12.4% and lowest in Crosskeys, 10.2%). BGCBC and the wards all have a higher proportion of their working age population in skilled trades (group 5) than in Wales (9.4%), CCBC (8.3%) and TCBC (7.9%).
- 15.5.24. Similarly, caring, leisure and service occupations (group 6) is important to TCBC with 11.7% of its working age population within this occupation group and this occupation group is also prevalent in all of the wards with Two Locks (9.6%) having the lowest percentage. All of the wards besides Two Locks have a higher proportion of their working age population within caring, leisure and service occupations (group 6) than Wales (9%), CCBC (6.6%) and BGCBC (8.3%).
- 15.5.25. The proportion within sales and custom service (group 7) ranges considerably across the comparator areas. Such occupations form 10.7% of employment for BGCBC's working age population, with this being similar to the wards of Crosskeys (10.4%), Newbridge (10%), Upper Cwmbran (10.7%), Greenmeadows (10.1%) and Two Locks (10.2%). CCBC has the lowest proportion of its working age population within sales and customer service occupations (group 6) (5.1%).
- 15.5.26. The wards and BGCBC (10.6%) have a higher proportion of their population working within process plant and machinery occupations (group 8) than Wales (5.8%), CCBC (5.7%) and TCBC (7%), with this being significantly so for the ward of Llanhilleth (18.3%, highest). This is similar for elementary occupations (group 9), with Llanhilleth having a significantly higher proportion of its working age population within these occupations (16.1%), with the next highest being for Upper Cwmbran (13.8%).

Table 15.6 Employment by occupation (percentage).

| Occupation Group | Wales* | Caerphilly County Borough* | Torfaen County Borough* | Blaenau Gwent County Borough* | Abercarn** | Crosskeys** | Crumin** | Newbridge** | Upper Cwmbran** | Pontypool Fawr** | Greenmeadows** | Two Locks** | Llanhilleth** |
|--|--------|----------------------------|-------------------------|-------------------------------|------------|-------------|----------|-------------|-----------------|------------------|----------------|-------------|---------------|
| 1. Managers, directors and senior officials | 10.3 | 9.7 | 8.2 | 6.7 | 7.6 | 9.4 | 9 | 8.9 | 8.2 | 9.1 | 8.7 | 11.6 | 8.1 |
| 2. Professional occupations | 23.3 | 20.4 | 21.2 | 12.2 | 15 | 14.2 | 13 | 14.3 | 9.9 | 14.5 | 12.9 | 16.2 | 9 |
| 3. Associate professional and technical occupations | 15.1 | 19.4 | 16.9 | 18.3 | 13.1 | 13.3 | 11.9 | 11.3 | 10.7 | 11.7 | 10.7 | 11.6 | 8.4 |
| 4. Administrative and secretarial occupations | 10.2 | 15.6 | 11.6 | 10.2 | 11.5 | 10.4 | 10.7 | 8.8 | 8.9 | 9.3 | 9.8 | 10.6 | 7.8 |
| 5. Skilled trades occupations | 9.4 | 8.3 | 7.9 | 12.5 | 11.3 | 10.2 | 12.3 | 11.4 | 12 | 12.4 | 11.4 | 11.2 | 11.7 |
| 6. Caring, leisure and other service occupations | 9 | 6.6 | 11.7 | 8.3 | 10.7 | 10.6 | 10.6 | 11.5 | 12.6 | 11.9 | 13.2 | 9.6 | 12.8 |
| 7. Sales and customer service occupations | 6.9 | 5.1 | 7.9 | 10.7 | 7.5 | 10.4 | 6.7 | 10 | 10.7 | 7.2 | 10.1 | 10.2 | 7.9 |
| 8. Process plant and machine operatives | 5.8 | 5.7 | 7 | 10.6 | 11.8 | 10.2 | 13.5 | 12.6 | 13.2 | 10.5 | 12.3 | 9.7 | 18.3 |
| 9. Elementary Occupations | 9.8 | 8.9 | 6.7 | 10.6 | 11.4 | 11.4 | 12.2 | 11.1 | 13.8 | 13.3 | 10.8 | 9.3 | 16.1 |

* Nomis 2021 – 2021 Census Area Profiles / ** ONS 2021 – 2021 Census Ward Data

Economy and community – Earnings

- 15.5.28. The earnings by place of residence for CCBC, TCBC and BGCBC are shown in **Table 15.7**. The table shows that weekly earnings within CCBC (£666.90) are slightly less than the average for Wales (£674.50), with BGCBC having the lowest weekly earnings (£663.80). TCBC (£728.30) has much higher weekly pay than the other two areas and Wales as a whole.
- 15.5.29. The CCBC area has the lowest hourly pay (£16.44), with the hourly pay for Wales (£17.38), TCBC (£17.94) and BGCBC (£17.26) being broadly similar.

Table 15.7 Earnings by place of residence (2024)²⁹

| | Wales | Caerphilly County Borough | Torfaen County Borough | Blaenau Gwent County Borough |
|-----------------------------|--------|---------------------------|------------------------|------------------------------|
| Gross Weekly Pay (£) | 674.50 | 666.90 | 728.30 | 663.80 |
| Hourly Pay (£) | 17.38 | 16.44 | 17.94 | 17.26 |

Source: StatsWales - Average (median) gross weekly/hourly earnings by Welsh local areas and year (2025)

Economy and community – Business Enterprises

- 15.5.30. The Welsh Government measures active businesses within Wales each year. The percentage increase in the number of active businesses between 2010 and 2021 was highest in CCBC (24.86%), which is a significant increase and significantly higher than that for Wales (17%), BGCBC (16.10%) and TCBC (15.82%, the lowest) (see **Table 15.8**).
- 15.5.31. **Table 15.8** also identifies the number of active businesses in 2023 and the change in the percentage of active businesses between 2021-2023. It identified that for Wales (-3.40%), CCBC (-5.32%) and BGCBC (-2.68%) the number of active businesses has fallen between 2021-2023, whilst they have risen considerably in TCBC (13.87%) over the same period.

Table 15.8 Active business enterprises actual/percentage change (2010-2023)³⁰.

| Location | 2010 | 2015 | 2021 | Percentage increase/decrease 2010-2021 | 2023 | Percentage increase/decrease 2021-2023 |
|--------------|--------|--------|---------|--|---------|--|
| Wales | 90,435 | 95,010 | 105,815 | 17% | 102,215 | -3.40% |
| CCBC | 3,760 | 4,105 | 4,695 | 24.86% | 4,445 | -5.32% |
| TCBC | 2,085 | 2,220 | 2,415 | 15.82% | 2,750 | 13.87% |
| BGCBC | 1,250 | 1,315 | 1,490 | 16.10% | 1,450 | -2.68% |

Source: StatsWales Active Business Enterprises by area and year (2025)

²⁹ StatsWales (2025) Average (median) gross weekly earnings by Welsh local areas and year (£). (Online). Available at: <https://statswales.gov.wales/Catalogue/Business-Economy-and-Labour-Market/People-and-Work/Earnings/medianweeklyearnings-by-welshlocalareas-year> (Accessed September 2025).

³⁰ StatsWales (2025) Active Business Enterprises by area and year. (Online) Available at: <https://statswales.gov.wales/Catalogue/Business-Economy-and-Labour-Market/Businesses/Business-Demography/activebusinessenterprises-by-area-year> (Accessed September 2025).

Economy and community – Deprivation

15.5.32. The Welsh Index of Multiple Deprivation (WIMD, 2019³¹) is an official Welsh Government measure of deprivation in Wales. The WIMD includes a number of different measures in small geographic areas called Lower Super Output Areas (LSOA). The WIMD is designed to allow comparison of deprivation across the country with LSOAs ranked from 1 (most deprived) to 1,909 (least deprived).

15.5.33. As part of the WIMD a ranking for each LSOA is provided for eight measures of deprivation (income, employment, health, education, access to services, community safety, physical environment, and housing). An overall score is also given (the Index). **Table 15.9** sets out the ranking for the LSOAs covering the Site and the LSOAs that are in close proximity to the Proposed Development.

Table 15.9 Welsh Index of Multiple Deprivation (WIMD) Ranking.

| LSOA | Overall | Income | Employment | Health | Education | Access to Services | Community Safety | Physical Environment | Housing |
|-----------------------|---------|--------|------------|--------|-----------|--------------------|------------------|----------------------|---------|
| Abercarn 1 | 1032 | 1241 | 1113 | 900 | 796 | 1321 | 353 | 737 | 378 |
| Abercarn 2 | 718 | 646 | 573 | 643 | 581 | 1108 | 982 | 1413 | 794 |
| Abercarn 3 | 720 | 785 | 822 | 628 | 363 | 1616 | 694 | 1380 | 280 |
| Newbridge 1 | 1242 | 1186 | 1132 | 874 | 995 | 1547 | 781 | 612 | 1007 |
| Newbridge 2 | 214 | 240 | 249 | 171 | 195 | 298 | 502 | 1166 | 1129 |
| Newbridge 4 | 798 | 748 | 873 | 663 | 1108 | 1479 | 317 | 289 | 441 |
| Upper Cwmbran 2 | 1467 | 1453 | 1376 | 897 | 1115 | 1466 | 590 | 1234 | 1623 |
| Greenmeadow 2 | 1597 | 1479 | 1617 | 1490 | 1153 | 1591 | 287 | 1401 | 1665 |
| Two Locks 2 | 1814 | 1825 | 1721 | 1698 | 1751 | 1056 | 1389 | 1160 | 1861 |
| Fairwater (Torfaen) 4 | 1743 | 1801 | 1524 | 1412 | 1586 | 1855 | 1651 | 470 | 1893 |
| Crosskeys 1 | 1275 | 1077 | 1042 | 1152 | 933 | 1340 | 1097 | 1487 | 771 |
| Crumlin 1 | 1448 | 1525 | 1612 | 1230 | 1313 | 1494 | 1518 | 128 | 587 |
| Crumlin 4 | 929 | 993 | 766 | 930 | 827 | 1272 | 656 | 546 | 512 |
| Ynysddu 2 | 1083 | 1097 | 881 | 939 | 1035 | 658 | 804 | 1504 | 962 |
| Pontllanfraith 1 | 664 | 676 | 525 | 767 | 545 | 676 | 648 | 681 | 1355 |
| Upper Cwmbran 2 | 1467 | 1453 | 1376 | 897 | 1115 | 1466 | 590 | 1234 | 1623 |
| Llanhilleth 1 | 215 | 233 | 121 | 187 | 472 | 436 | 822 | 1317 | 596 |
| Wainfelin 2 | 530 | 629 | 732 | 460 | 611 | 335 | 615 | 981 | 316 |
| Cwmynyscoy | 208 | 437 | 352 | 386 | 71 | 288 | 237 | 256 | 290 |

Source: Welsh Index of Multiple Deprivation (2019)

15.5.34. The Proposed Development is located across Crumlin 4, Abercarn 2, Newbridge 2, Upper Cwmbran 2 and Cwmynyscoy LSOAs. There are some considerable variations in terms of deprivation across these LSOAs. Upper Cwmbran 2 scores well in terms of overall deprivation, especially when compared to the Newbridge 2 (214) and Cwmynyscoy LSOAs. Overall, Newbridge 2 or Cwmynyscoy have some of the high levels of deprivation against most of the WIMD categories, though Newbridge 2 scores well against the physical environment (1166) and housing (1129) categories, whilst Cwmynyscoy has high levels of deprivation in all categories.

³¹ Welsh Government (2019) Welsh Index of Multiple Deprivation (WIMD) 2019. (Online) Available at: <https://wimd.gov.wales/explore?lang=en#domain=overall&z=12&lat=51.7260&lng=-3.3471> (Accessed October 2025).

- 15.5.35. Crumlin 4 is identified as having good access to services (1272), but scores poorly with regard to the LSOA's physical environment (546) and access to housing (512).
- 15.5.36. Newbridge 2 is in the top 10-20% most deprived LSOAs within Wales, as are some of the wider LSOA's identified such as Cwmyrnyscoy and Llanhilleth 1. The LSOA's identified therefore have quite a range of overall deprivation and individual issues, with some LSOA's scoring well against the WIMD categories and others being highly deprived.
- 15.5.37. The WIMD health domain covers a number of specific indicators including GP recorded chronic conditions, limiting long term illness, premature deaths and cancer incidence. Within the CCBC area as a whole 12 LSOAs are in the 10% most deprived LSOAs in Wales including Newbridge 2 within the Study Area. Additionally, Llanhilleth 1 in neighbouring BGCB is within the 10% most deprived LSOAs.

Tourism and Recreation – Regional Tourism

- 15.5.38. Tourism is worth around £6.3 billion to the Welsh economy (Welsh Government, 2020)³². The Welsh Government's strategy *Welcome to Wales: Priorities for the visitor economy 2020-25* (Welsh Government, 2020b)³³ sets out the overall approach to promoting and developing the visitor economy to deliver sustainable and ongoing benefits from tourism. Four Regional Tourism Fora have been established to help drive tourism strategies for North, Mid, South-West and South-East Wales to improve the competitive performance of tourism so that it makes a stronger contribution to the economic and social prosperity of Wales working with Visit Wales, local authorities, tourism businesses. In 2023, the Welsh Government considered that historically Wales has not received enough international visitors, as in 2019 it only received 1.02 million international tourists, which is considerably smaller than Scotland (3.46 million) and the wider UK (41 million)³⁴. The Welsh Government is currently in the process of reevaluating how it attracts tourists to Wales, especially international tourists.
- 15.5.39. The tourism sector contributes significantly to the region's economy. The regional tourism data in the Tourism Profile – South-East Wales 2017-2019 (Welsh Government, 2021a)¹⁶ shows that annual average tourism expenditure in South-East Wales stood at £2.17 billion in 2017-19, which was a 6% decrease in expenditure of £2.30 billion in 2016-18. Expenditure in southeast Wales accounted for 35% of tourism expenditure in Wales as a whole. The effects of the Covid-19 are not reflected in these figures.
- 15.5.40. In 2020, during the pandemic, tourism related jobs as a proportion of overall employment within Wales was identified as being 11.3% with the following regional differences:
- North Wales: 13%;
 - Mid Wales: 13.2%;
 - Southwest Wales: 11.6%; and

³² Welsh Government (2020) *Welcome to Wales: Priorities for the visitor economy 2020-2025 Summary of Evidence Base*. (Online) Available at: <https://gov.wales/sites/default/files/publications/2020-01/welcome-to-wales-priorities-for-the-visitor-economy-2020-to-2025-summary.pdf> (Accessed August 2023).

³³ Welsh Government (2020) *Welcome to Wales: Priorities for the visitor economy 2020-2025* (Online) Available at: <https://gov.wales/sites/default/files/publications/2020-02/welcome-to-wales-priorities-for-the-visitor-economy-2020-2025.pdf> (Accessed August 2023).

³⁴ Welsh Government (2023) *Wales as a global tourist destination – Fourth report of session 2022-23*. (Online) Available at: <https://committees.parliament.uk/publications/40824/documents/198909/default/> (Accessed August 2023).

- Southeast Wales: 10%.³⁵

15.5.41. By 2022, employment within tourism industries had risen to 159,000 people, with 11.8% of Wales population being employed within this industry and as shown in **Table 15.10**.³⁶

Table 15.10 Employment in Tourism and Hospitality, Wales 2022.

| Sub Sector | Proportion of all employment in Wales |
|---|---------------------------------------|
| Wales – all tourism | 11.8% |
| Accommodation for visitors | 1.9% |
| Food and beverage service activities | 6.8% |
| Sporting and recreational activities | 1.5% |
| Country specific tourism activities and transport equipment rental | 0.1% |
| Cultural activities | 0.5% |
| Passenger transport | 0.9% |
| Travel agencies and other reservation activities | 0.2% |

Source: Welsh Government analysis of BRES (ONS) data via Nomis

15.5.42. Whilst the median hourly pay in the financial year ending April 2021 was £12.82 within Wales, it is substantially lower in tourism related industries:

- Accommodation and food services median hourly pay: £8.91;
- Arts, entertainment, and recreational jobs median hourly pay: £9.51; and
- Travel agency and tour operator median hourly pay: £9.65³⁷.

15.5.43. By 2023, the median hourly pay in the financial year ending April 2023 was £14.85 within Wales but remained significantly lower in tourism-related industries:

- Accommodation and food services median hourly pay: £10.99; and
- Arts, entertainment, and recreational jobs median hourly pay: £12.83;³⁸

15.5.44. In 2017-2019, southeast Wales accounted for 23% of overnight domestic trips, 50% of international visits and 40% of day visits to Wales. The tourism market indicates:

- The importance of international visitors with the visitor numbers spread evenly across many countries with France (10% of visitors), USA (9%), Ireland (9%) providing the largest percentage of visitors to the southeast.
- The southeast region does not follow a typical high and low seasonal pattern with a larger proportion of overnight domestic trips between January and March than across other regions.
- A large proportion of day visits are made by people living in Wales. The large percentage of day visits compared to other regions (40%) reflects the larger population base in the area.

³⁵ Welsh Government (2022) Wales Visitor Economy Profile 2021. (Online) Available at: <https://www.gov.wales/wales-visitor-economy-profile-2021-html> (Accessed August 2023).

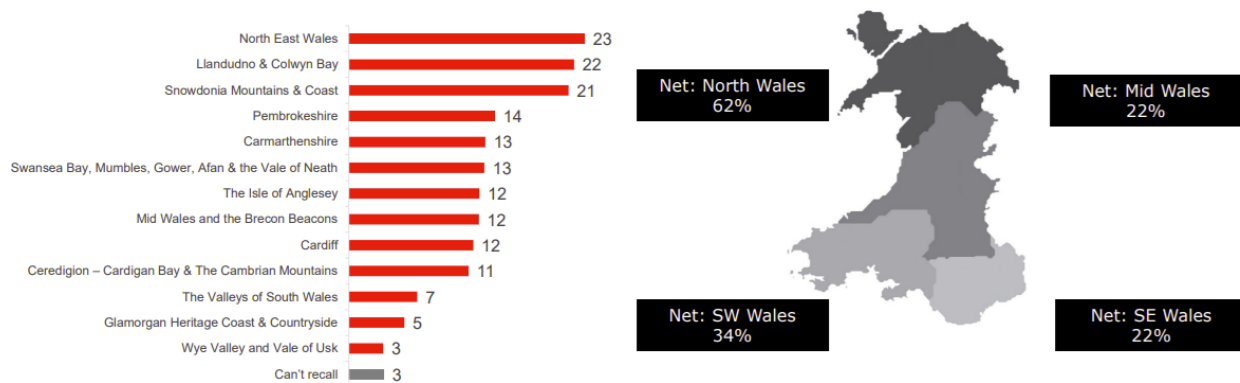
³⁶ Welsh Government (2024) Wales visitor economy profile: 2024. (Online) Available at: <https://www.gov.wales/sites/default/files/pdf-versions/2024/7/1/1721033596/wales-visitor-economy-profile-2024.pdf> (Accessed September 2025).

³⁷ Welsh Government (2022) Wales Visitor Economy Profile 2021. (Online) Available at: <https://www.gov.wales/wales-visitor-economy-profile-2021-html> (Accessed October 2025).

³⁸ Welsh Government (2024) Wales visitor economy profile: 2024. (Online) Available at: <https://www.gov.wales/sites/default/files/pdf-versions/2024/7/1/1721033596/wales-visitor-economy-profile-2024.pdf> (Accessed September 2025).

15.5.45. **Plate 1** outlines data for 2022 and highlights that the north of Wales is a more popular tourist destination (62% of all visitors) when compared to the other regions of Wales (Southeast Wales, 22% of all visitors). It also highlights that the most popular tourist destinations are located within the north of Wales.

Plate 11 Wales destinations visited on trip in 2022, Percentage, All 2022 Wales trip takers³⁹



15.5.46. Tourist related businesses and enterprises accounted for 11.8% (12,625) of all registered enterprises in Wales in 2023. Hospitality associated businesses and enterprises form the largest share of tourist business and enterprises, comprising 80% (10,065), whilst food and beverage service activities comprise 7.3% of enterprises (7,840) and accommodation comprises 1.7% (1,810).

15.5.47. Tourism-related industries accounted for 5.1% (£3.8 billion) of the total Gross Value Added (GVA) generated within Wales in 2023. The largest tourism-related industries that contribute to this are from food and beverage services (2.5% of Wales' GVA, £1.9 billion) and accommodation which accounted for 1.2% (£0.9 billion) GVA.

Tourism and Recreation - Local Tourism

15.5.48. Local tourism data available is set out in the Welsh Government's Tourism Profile – Wales Local Authorities 2011-2019 (Welsh Government, 2021b)⁴⁰. This shows that CCBC experienced a decline in domestic overnight trips, going from 73,000 between 2011-2013 to 50,000 in 2017-2019⁴¹. This also occurred in the TCBC area, which fell from 70,000 domestic overnight trips in 2011-2013 to 43,000 in 2017-2019⁴².

15.5.49. In terms of tourism spend from domestic overnight visitors, this stood at £10million in 2011-2013 and fell to £7million in 2017-2019⁴³. Similarly, TCBC has seen a decline in tourist spending from overnight visitors, going from £9million generated in 2011-2013 to £6million in 2017-2019⁴⁴.

³⁹ Welsh Government (2023) Visit Wales Tourism Market Demand Report – UK January 2023. (Online) Available at: <https://www.gov.wales/sites/default/files/statistics-and-research/2023-02/visit-wales-tourism-market-demand-report-uk-january-2023.pdf> (Accessed September 2025).

⁴⁰ Welsh Government (2021) Tourism profile – Wales local authorities 2011-19. (Online) Available at: <https://www.gov.wales/sites/default/files/statistics-and-research/2021-03/tourism-profile-wales-local-authorities-2011-19.pdf> (Accessed October 2025).

⁴¹ Welsh Government (2021) Tourism profile – Wales local authorities 2011-19. (Online) Available at: <https://www.gov.wales/sites/default/files/statistics-and-research/2021-03/tourism-profile-wales-local-authorities-2011-19.pdf> (Accessed October 2025). Page 7.

⁴² Ibid. Page 7.

⁴³ Ibid. Page 9.

⁴⁴ Ibid. Page 9.

- 15.5.50. International trips to CCBC were steadily rising and falling between 2011 and 2019, starting at 10,000 visitors in 2011-2013, peaking at 15,200 visitors in 2014-2016 and then settling back to 10,500 visitors in 2017-2019⁴⁵. TCBC however, broadly saw a steady increase in the number of international trips to the county, rising from 5,500 visitors in 2011-2013 to a peak of 7,700 visitors in 2015-2017 before falling slightly to 7,500 in 2017-2019⁴⁶.
- 15.5.51. International spend within CCBC in 2011-2013 was £2.7million, peaking at £6.3million 2015-2017, before falling to £4.1million in 2017-2019⁴⁷. Within TCBC, international spend in 2011-2013 was £2.6million, falling to a low of £1.2million in 2012-2014, rising to a high of £2.7million in 2015-2017 and hitting £2.3million in 2017-2019⁴⁸. The figures for the above all pre-date the Covid-19 pandemic.
- 15.5.52. CCBC published the Caerphilly Economic Regeneration Strategy (2025)⁴⁹ in 2025 which highlighted that the CCBC area is underutilising its tourism potential and needs to do more to increase the number of tourists visiting the area and improve how known Caerphilly is as a place to visit. It also identified that the ability of CCBC to invest in tourism is compromised by ongoing budget cuts. In 2025, TCBC highlighted that the BB - Sustainable Tourism Community Interest Company (CIC) was established that seeks to increase tourism within Torfaen, with TCBC identifying that more could be done to attract tourists to the area.⁵⁰

Tourism and Recreation – Recreation

- 15.5.53. There are a number of Public Rights of Way (PRoWs) that cross or are in close proximity to the three turbines, which are illustrated in **Figure 15.1**:
- Footpath ABEC/FP205/1 runs from the south of the Site to the east of Turbine 3 and further into the Site to the north, joining into the restricted byways ABEC/RBW194/1, ABEC/RBW195/1 that are in the centre of the Site;
 - Restricted byways ABEC/RBW191/2 and ABEC/RBW195/2 run into the Site from the west, with ABEC/RBW191/2 running to the north of Turbine 1 and ABEC/RBW195/2 running to the south of Turbine 1;
 - Restricted byway ABEC/RBW192/1 runs from within the Site, close to Turbine 2, to the northeast into the Mynydd Maen Common and parallel to the proposed access track. This restricted byways merges into footpath ABEC/FP188/1 that continues to run parallel to the proposed access track to the northeast. ABEC/FP188/1 merges with restricted byway ABEC/RBW189/1 that crosses the proposed access track;
 - Restricted byway ABEC/RBW193/1 lies north of Turbine 1 and runs from east to west just outside of the Site boundary, before entering the Site and joining into the restricted byway ABEC/RBW191/1;
 - Restricted byway ABEC/RBW191/1 lies in the centre of the Site connecting with ABEC/RBW191/2 and ABEC/RBW192/1;

⁴⁵ Ibid. Page 12.

⁴⁶ Ibid. Page 12.

⁴⁷ Ibid. Page 14.

⁴⁸ Ibid. Page 14.

⁴⁹ CCBC (2025) Caerphilly Economic Regeneration Strategy 2025. (Online) Available at:

<https://democracy.caerphilly.gov.uk/documents/s51705/Updated%20Appendix%201.pdf?LLL=0> (Accessed September 2025).

⁵⁰ TCBC (2025) Tourism boost for town centre. (Online) Available at: <https://www.torfaen.gov.uk/en/News/2025/April/04-Tourism-boost-for-town-centre.aspx> (Accessed September 2025).

- The footpaths of ABEC/FP190/3, ABEC/FP190/2 and ABEC/FP190/1 lie outside of the Site boundary to the southeast of Turbine 3; and
- Restricted byways ABEC/RBW206/1 and ABEC/RBW196/1 lie outside of the Site boundary to the west of Turbine 1.

15.5.54. Beyond the Site lie a number of regional and national recreational trails. Within 10km of the Site are:

- Cambrian Way - the Cambrian Way is a footpath running from Cardiff Castle to Conwy Castle over 478km;
- Celtic Way – a long-distance route connecting Pembrokeshire to the southwest of England;
- Cistercian Way – 969km path that runs through the heart of Wales connecting Cistercian abbeys and other sites of interest;
- Ebbw Valley Walk – identified as a challenging walk through forests and woodlands, exploring the industrial history, farming techniques and local superstitions associated with the valley;
- Raven Walk – The Raven Walk is a ~19KM circular route around the Sirhowy and Ebbw Valleys;
- Rhymney Valley Ridgeway Walk – the walk is 46km taking in the sights of Rhymney Valley;
- Taith Torfaen Anything Challenge - the walk totalling ~80km is split into two sections, southern and northern loops both starting and finishing at Pontypool Active Living Centre in Torfaen;
- Torfaen Trail - the Torfaen Trail is advertised as a 56km figure of eight route, with significant ascents which encompasses the whole of Torfaen, from Cwmbran in the south through Pontypool to Bleanavon in the north;
- Sirhowy Valley Ridgeway Walk - a walk which runs from the southwestern outskirts of Newport north to the eastern edge of Tredegar totalling 42km.

15.5.55. Approximately 6.8km to the northwest is the Pen-y-Fan Pond Country Park with walking routes, recreational activities and visitor facilities. Sirhowy Valley Country Park is located at a minimum distance of ~3.6km at Crosskeys. The Country Park has numerous walking and cycling routes. Parc Coetir Bargod Country Park located ~7.8km from the proposed turbines and includes walking routes along the River Rhymney. Parc Penalta Country Park lies ~8.7km west of the turbine locations and provides a range of paths and three waymarked walking trails. Maes Manor Hotel registered park and garden is located ~6.8km to the northwest of the Proposed Development at its closest point.

15.5.56. CCBC LDP policy TM1 allocates land in the southeastern part of the Site for tourism related activities under TM1.7 Nantcarn Valley, Cwmcarn.

15.5.57. Open Access Land (Open Country) relates to the Countryside and Rights of Way Act (CRoW Act) (2000). A very small area of Access Land (0.08ha) is located on the access route northeast of the turbine locations.

Land Use

15.5.58. The Site is in agricultural use, used predominantly for the grazing of livestock. The whole of the Site is located within a CCBC mineral safeguarding area for sandstone.

Common Land

15.5.59. The proposed access track connecting the Site with the proposed Mynydd Maen wind farm is within Mynydd Maen Common which is designated as common land. Due to works being proposed within this designation the Applicant will be required to prepare and submit an application under the Commons Act 2006. The common land is in agricultural use, with commoners exercising grazing rights for sheep and cattle grazing. The common is also crossed by a network of PRowS which are used for recreation.

Future baseline

15.5.60. It is unlikely that the future socio-economic baseline will alter markedly in the short to medium term. With regards to climate change and renewable energy generation, there can be an expected ongoing gradual shift away from fossil fuels towards renewables.

15.5.61. The economic profile of the CCBC and TCBC areas is expected to be based largely on the same sectors as set out within the current baseline with a high proportion of its workers in managerial and professional roles (Group 1-3) and then a relatively similar dispersion of its workforce across the other sectors. For BGCBC, the percentage of those in groups 1-3 is likely to continue to be lower than CCBC and TCBC with a greater proportion in occupation groups 7-9. The number, and percentage, of those who are economically active is expected to continue as within the existing baseline with no significant changes to demographics or employment activities that would suggest changes to these key baseline statistics.

15.5.62. The wider southeast region draws a number of day visitors and has a high proportion of international visitors (primarily linked to visits to Cardiff). The trend for this type of visit is likely to continue in the medium term. The visitor economy was affected by COVID-19 pandemic with restrictions placed on visitor attraction opening and both domestic and international travel. There was an uptick in internal UK travel following the pandemic, which has decreased over time as people feel safe enough to travel abroad again, though all tourism is curtailed somewhat by the ongoing cost-of-living crisis.

15.5.63. With regards to land use there are not expected to be marked changes in the short to medium term.

15.6 Embedded measures

15.6.1. A range of environmental measures have been embedded into the Proposed Development as outlined in **Chapter 4: Development Description**.

15.6.2. **Table 15.11** outlines how these embedded measures will influence the socio-economics assessment.

Table 15.11 Summary of embedded environmental measures

| Receptor | Potential changes and effects | Embedded measures | Compliance mechanism |
|-------------------------|----------------------------------|--|----------------------------|
| Construction | | | |
| Recreation PRowS | Potential conflict between PRowS | Safety signs will be required during construction alerting | Construction Environmental |

| | users and Site traffic | users to the construction activities being undertaken. Use of Site staff (banksman) to manage deliveries to Site. | Management Plan (CEMP) |
|--|--|---|------------------------|
| Recreation Restricted Byway ABEC/RBW189/1 | Potential conflict between PRow users and Site traffic | The restricted byway will require temporary closure during the access road construction phase only to allow for the creation of the access track between T2 and Mynydd Maen wind farm. Following construction of the road the route would then remain open. This route will also require management with information boards and signage provided to advise recreational users of the construction works taking place. Users may have to wait for a short period of time before crossing the access road (with such restrictions likely to last for minutes rather than hours) when abnormal loads or high traffic loads are expected. At such times staff (a banksman) will manage such temporary restrictions. | CEMP DNS Condition |
| Recreation Restricted Byway ABEC/RBW191/1 ABEC/RBW192/1 ABEC/RBW194/1 | Potential conflict between PRow users and Site traffic | At the intersection of the PRow along the route of the proposed access between T2 and T3 it is envisaged that similar measures outlined above would ensure that access is appropriately managed during construction of the access road and the wind farm development. | CEMP DNS Condition |
| Recreation Restricted Byway ABEC/RBW195/1 | Potential conflict between PRow users and Site traffic | It is envisaged that similar measures to those outlined above would ensure that access is appropriately managed during construction of the access road and the wind farm development. | CEMP DNS Condition |
| Recreation Restricted Byway ABEC/RBW192/1 | Potential conflict between PRow users and construction | Temporary closure will be required in the vicinity of the works to construct T2. It is proposed that a temporary permissive path is provided during construction that connects ABEC/RBW192/1 in the northeast of the Site (east of | CEMP DNS Condition |

| | | | |
|--|---|--|---|
| | | <p>T2) with the intersection of ABEC/RBW194/1 and ABEC/RBW195/1 providing users connectivity during construction. See Figure 15.2.</p> <p>Management measures including signage (as outlined above) will be required to direct users to use the permissive path.</p> | |
| <p>Recreation Restricted Byway</p> <p>ABEC/RBW191/2 ABEC/RBW195/2</p> | <p>Potential conflict between PRow users and Site traffic</p> | <p>These restricted byways are north and south of T1. It is not anticipated that these footpaths will require any temporary closures or diversions.</p> <p>However, appropriate signage will be erected to notify recreational users of the construction works and identify alternative routes (particularly ABEC/RBW193/1 to the north) should users wish to use paths further from construction activities.</p> | <p>CEMP DNS Condition</p> |
| <p>Recreation ABEC/FP205/1</p> | <p>Potential conflict between PRow users and construction</p> | <p>A temporary closure will be required during construction. During construction a permissive path will be provided west of the existing footpath connecting with the line of the existing route of the footpath, enabling users to walk west of the construction activities for T3 and rejoin the existing route of the footpath. See Figure 15.2. Management measures including signage will be required as above.</p> | <p>CEMP DNS Condition</p> |
| <p>Land use - Common Land</p> | <p>Temporary loss of common land as a result of construction activities and potential interaction between commoner's livestock.</p> | <p>Areas of construction activity such as excavations would be fenced off to protect livestock. Plant and machinery removed to construction compound overnight. The temporary loss will be compensated for with a new area of replacement land designated as common.</p> | <p>CEMP and Secondary consent through DNS via powers under section 16 of the Commons Act 2006</p> |
| <p>Land use – Access Land</p> | <p>Changes to access.</p> | <p>The Site will remain open for access. However, temporary measures, such as temporary restriction of access whilst access road is laid and delivered underway, will be required during</p> | <p>CEMP</p> |

| | | | |
|--|------------------------------------|---|----------------------|
| Operation | | construction to restrict access and ensure safety of potential users. | |
| Recreation Restricted Byway ABEC/RBW192/1 | Potential conflict with PRow users | <p>Following construction, the PRow would be fully reinstated and be fully open for users. However, recognising the proximity of the PRow to the T2 location, and that users, particularly equestrians, may wish to use an alternative route further from the turbine, the permissive path established in the construction phase that would connect to ABEC/RBW194/1 and ABEC/RBW195/1 would remain open to users. See Figure 15.2. The path would be located more than 200m from the T2 location.</p> <p>There is no statutory stand off for turbines from PRow routes that could be used by equestrians. However, The British Horse Society (2025) advice⁵¹ identifies a separation distance of tip height plus 10% (198m in the case of 180m tip height turbines) and suggests that definitive or permissive routes should be provided as alternatives for the lifetime of the project and routes should be provided to avoid coming upon turbines within 200m.</p> <p>Signage measures would be required to alert users (particularly equestrians) to the alternative route should they wish to not pass close to the turbines.</p> | Condition of the DNS |
| Recreation Restricted Byway ABEC/RBW191/2 ABEC/RBW195/2 | Potential conflict with PRow users | The signage measures identified above to alert users to the existing alternative route (BEC/RBW193/1) to the north would be applied in the operation phase, should users (particularly equestrians) wish to take a | Condition of the DNS |

⁵¹ The British Horse Society (2025) Advice on Wind turbines and equestrian access. Available via: <https://www.bhs.org.uk/media/lgwdbp/hr/wind-turbines-0525.pdf> (Accessed October 2025)

| | | | |
|---|--|---|----------------------|
| | | route more than 200m from the turbine location, whilst the PRowS would remain fully open for users. | |
| Recreation Footpath ABEC/FP205/1 | Potential conflict with PRow users | In the operation phase the footpath will be fully open, with reinstatement of the footpath after temporary closure during construction. The permissive path at construction would not be required in the operation phase. | Condition of the DNS |
| Land use – Common Land | Permanent loss of common land used for access tracks, turbine pads and on-site substation. Potentially restricting the grazing area available to commoner's livestock. | Compensatory replacement land provided at construction as common land to replace the 2.568 ha of release land. The majority of the 2.568 ha of released land will also be available for use. | |
| Land use – Access Land | Changes to access | In the operational phase access will be permitted. No fencing etc will be used around the access road that could limit access to the Site. | DNS condition |

15.7 Scope of the assessment

The Proposed Development

- 15.7.1. All the activities and consequent environmental changes associated with the construction, operation and decommissioning of the Proposed Development, as set out in **Chapter 4**, have been considered.

Spatial Scope

- 15.7.2. The spatial scope of the assessment of socio-economics covers the area of the Proposed Development contained within the red line boundary, together with the Zones of Influence (Zols) that have formed the basis of the Study Area described in **Section 15.2**.
- **Climate change and energy security** – the assessment covers the national (Wales) area as a whole;
 - **Economy and community** - the assessment covers Wales, CCBC, TCBC and the wards of:
 - ▶ Abercarn (CCBC);
 - ▶ Crosskeys (CCBC);
 - ▶ Crumin (CCBC);
 - ▶ Newbridge (CCBC);

- ▶ Upper Cwmbran (TCBC);
 - ▶ Pontypool Fawr (or the Former Wainfelin (TCBC) and Former Cwmynyscoy (TCBC));⁵²
 - ▶ Green Meadows (TCBC);
 - ▶ Two Locks (TCBC); and
 - ▶ Llanhilleth (BGCBC).
- **Tourism and recreation** – considers tourism at local (CCBC and TCBC), regional (Southeast Wales) and national (Wales) level. The recreation baseline related to Public Rights of Way (PRoW) has focussed on the local context within 5km as informed by the LVIA in **Chapter 6**;
 - **Land use** - considers minerals and common land and considers the Site and County Borough.

Temporal Scope

15.7.3. The temporal scope of the assessment of the socio-economic effects is consistent with the period over which the development would be carried out and therefore covers the construction and operational periods. It is assumed that the construction would take approximately 22 months with the start of development (and therefore completion) dependent on the consenting timescales. The Proposed Development is designed for an operational lifespan of 30 years.

Potential Receptors

15.7.4. The principal Socio-economic receptors that have been identified as being potentially subject to effects are summarised in **Table 15.12**.

Table 15.12 Socio-economic receptors subject to potential effects

| Receptor | Reason for consideration |
|---|--|
| Climate change and energy security | The Proposed Development includes the provision of renewable energy which may have an effect on meeting targets for addressing climate change, renewable energy provision and energy security. |
| Economy and community | There is potential for effects through the provision of jobs and economic benefits for the local area. |
| Tourism and recreation | The Proposed Development has the potential for effects on the visitor economy and recreation, including the network of PRoWs within and close to the Site, access land. |
| Land use | The Proposed Development may have the potential to restrict the ability to access future mineral supplies. The Proposed Development may also have the potential to affect common land. |

⁵² The former wards of Wainfelin and Cwmynyscoy are sometimes used as these wards have only recently been replaced with the wider Pontypool Fawr ward, which comprises a considerably larger area. The best available information is used.

Likely significant effects

- 15.7.5. The effects on Socio-economic receptors which have the potential to be significant and have been taken forward for detailed assessment are summarised in **Table 15.13**.

Table 15.13 Summary of effects scoped into the Socio-economics assessment

| Receptors/potential effects | Justification |
|---|---|
| Climate change and energy security – scoped in for operation | Delivery of national climate change mitigation targets and renewable energy generation targets. |
| Economic and community – scoped in for construction and operation | Potential job creation; impacts on expenditure within the local community, region and nationally; non-domestic rates and community benefits (with regard to operational phase only) accruing from the Proposed Development. |
| Effects on the attractiveness of the area as a tourist destination – scoped in for construction and operation Impacts on Public Rights of Way – scoped in for construction and operation | Potential for impacts on tourism/visitor spend. Impacts on the use of PRoW that cross the Site for recreational purposes and use of open access land. |
| Land use – scoped in for construction and operation | Potential impacts on mineral safeguarding and use of common land. |

15.8 Assessment methodology

- 15.8.1. The generic project-wide approach to the assessment methodology is set out in **Chapter 2: Approach to Environmental Impact Assessment**, and specifically in Section 2.5 to 2.8. However, whilst this has informed the approach that has been used in this socio-economics assessment, it is necessary to set out how this methodology has been applied, and adapted as appropriate, to address the specific needs of this socio-economics assessment.
- 15.8.2. As discussed in **Section 15.5**, the assessment methodology adopted is based on determining potential effects on the baseline conditions using knowledge gained from previous wind farm developments and using professional judgement. Where possible, the significance will be assessed by way of a comparison of the factor (e.g. construction jobs) with the variance of related factors within the local economy. Where effects cannot be quantified, the assessment of significance will be undertaken using professional judgement and experience.

Significance evaluation methodology

- 15.8.3. The EIA Regulations require that a final judgement is made about whether or not each effect is likely to be significant. The effects have been evaluated on the basis of a professional assessment of the magnitude of the effect and the value of the receptor or importance of the policy. In this assessment, effects are considered to be significant or not significant according to the matrix in **Table 15.14**.
- 15.8.4. In respect of the policy context the sensitivity definitions used for the socio-economic assessment are: National (Wales), Regional (Southeast Wales), County (CCBC and TCBC) or local (within the wards identified in **Table 15.14**).

Climate Change and energy security

15.8.5. The impact on climate change is assessed in the context of applicable policy and targets. The significance is based on the magnitude of change towards achievement of the policies and targets that apply to Wales.

Economy and Community

15.8.6. Conclusions on potential effects are reached based upon the magnitude of the predicted change likely to occur to the baseline situation. The sensitivity of the receptor is a further consideration to be taken into account.

Tourism and Recreation

15.8.7. The effect on tourism has been assessed using surveys commissioned by a range of organisations into the public perception of wind turbines both in Wales and other parts of the UK. For this assessment, a 10km Study Area was drawn around the Proposed Development in order to identify the main tourist facilities and recreational locations that have the potential to be affected by the Proposed Development. Effects are most likely to result from the visual impact of the Proposed Development upon tourism receptors. The 10km Study Area is based upon the groups of PRow, open access land, country parks, paths and trails, considered likely or certain to sustain significant visual effects because of operation of the proposed turbines as determined in the LVIA (Chapter 6). This is identified as a conservative buffer in the LVIA. Potential effects have been considered using professional judgement.

Land use

15.8.8. The effect on land uses has been assessed based upon the proportion of land directly or indirectly affected as a percentage of the overall total available and the ability of landowners and occupiers to continue to use the land for its current purposes. With regard to minerals this includes consideration of the extent of safeguarding areas within the CCBC area with the potential for the Proposed Development to affect the aims of this designation.

15.8.9. How this results in a predicted level of significance is set out within **Table 15.14**.

Table 15.14 Matrix of EIA Significance

| | | Magnitude of change | | | |
|-------------|---|---------------------------|----------------------------|---------------------------------|---------------------------------|
| | | High | Medium | Low | Very low |
| Sensitivity | High – Wales | Major (Significant) | Major (Significant) | Moderate (Significant) | Minor (Not significant) |
| | Medium – Regional level (Southeast Wales) | Major (Significant) | Moderate (Significant) | Minor (Not significant) | Negligible (Not significant) |
| | Low – County level (CCBC) | Moderate (Significant) | Minor (Not significant) | Negligible (Not significant) | Negligible (Not significant) |

| | | | | |
|---|-------------------------------|------------------------------------|------------------------------------|------------------------------------|
| Very Low – local (within 10km) | Minor (Not significant) | Negligible (Not significant) | Negligible (Not significant) | Negligible (Not significant) |
|---|-------------------------------|------------------------------------|------------------------------------|------------------------------------|

15.9 Preliminary assessment of socio-economic effects: Climate Change and Energy Security

Predicted effects and their significance

Operation

- 15.9.1. The potential effects on climate change and energy security are confined to the operational phase of the Proposed Development.
- 15.9.2. The Proposed Development has an installed capacity of up to 13.5MW dependent on the final turbine chosen. For the purposes of this assessment a 4.5MW turbine has been used. The annual generation for a three turbine scheme would equate up to 13.5MW and be expected to supply the domestic electricity needs of approximately 9,279 average households^{53,54}. By way of comparison for the potential number of homes to be provided with power in the CCBC in 2023 was estimated at 76,594 households and TCBC 40,728 households (StatsWales, 2025)⁵⁵.
- 15.9.3. In the context of national policy for greater renewable energy, the Proposed Development makes a positive contribution. Future Wales records the Welsh Government's overall target for renewable sources to generate 70% of consumed electrical power by 2030, which was superseded by a target for 100% by 2035 was adopted in July 2023 (Welsh Government, 2023b)⁵⁶. Energy Generation in Wales 2023 (Welsh Government, 2025) estimates the current figure at the time data was collected stood at approximately 58% of energy consumed coming from renewable sources (without losses). The Report (Welsh Government, 2025: 8) states that "*renewable electricity generation in Wales needs to nearly quadruple*" to meet 100% of the projected consumption needs in 2035.
- 15.9.4. Furthermore, it notes that CCBC generates approximately 2% of Wales current total renewable energy generation, with this being 1% in TCBC. In 2023, 40MW of new capacity was added in the

⁵³ Figures are derived as follows: 13.5MW × 8760 hours/year × 0.259 (load factor) = 30,630 MWh. Load factor number was identified from Table 2 of the Regional Renewable Electricity in 2024 document, available here: https://assets.publishing.service.gov.uk/media/68da6dc6ef1c2f72bc1e4b72/Regional_renewable_electricity_in_2024.pdf (Accessed October 2025)

⁵⁴ Homes Equivalent = rated capacity of wind farm (kW) × average load factor for wind × number of hours in a year / average household energy consumption (MWh) (annual UK average domestic household consumption is 3,301 kWh) (9,279 homes)

⁵⁵ StatsWales (2021) Households by Local Authority and Year (Online) Available at: <https://statswales.gov.wales/Catalogue/Housing/Households/Estimates/householdestimates-by-localauthority-year> (Accessed October 2025)

⁵⁶ Welsh Government (2023b) Written Statement: Publication of Summary of Responses to the Consultation on Wales' Renewable Energy Targets(Online) Available at: <https://www.gov.wales/written-statement-publication-summary-responses-consultation-wales-renewable-energy-targets> (Accessed October 2025)

Cardiff Capital Region, though this was predominantly comprised of Solar PV installations on personal homes and other small-scale/domestic projects. No new additional onshore windfarms were commissioned within the Cardiff Capital Region in 2023, and the Proposed Development would help to ensure that new onshore wind development takes place within this Region.

- 15.9.5. In 2023 CCBC had an installed capacity of 74MW and TCBC had 18MW, whilst in 2024 this was 94.6MW for CCBC and 22.3MW for TCBC. Should the Proposed Development be approved, the 13.5MW would provide an 18.2% increase in the total installed capacity of CCBC based on 2023 figures or 14.3% based on 2024 figures.
- 15.9.6. Additionally, Welsh Government has set targets for local ownership of 1.5GW of renewable energy capacity to be in local ownership by 2035 and for new energy projects to have at least an element of local ownership (Welsh Government, 2023b). Wales is 60% of the way towards that target with 0.9GW in local ownership (Welsh Government, 2025). The Applicant is a business registered in Wales and therefore meets the Welsh Government’s definition of local ownership (Welsh Government, 2020⁵⁷). The Proposed Development would contribute to the Welsh Government’s local ownership target.
- 15.9.7. The scale of the Proposed Development would go some way to meeting national wind energy priorities and help ensure that Wales moves towards net zero carbon in 2050, which is a legal duty placed on Ministers under the Environment (Wales) Act 2016 (as amended). The Welsh Government is seeking to ensure 100% of its electricity needs are addressed by renewable energy sources by 2035, which the Proposed Development would aid in achieving.
- 15.9.8. The social and economic benefits that are derived from the Proposed Development would include the strengthening of the nation’s security of supply, the mitigation of climate change and ensuring a degree of local ownership in the nation’s energy supply.
- 15.9.9. The Proposed Development is also relevant in the national and local policy context of action to tackle CO₂ emissions, with its potential to reduce the levels of CO₂ emitted to the air. **Table 15.15** shows how the proposed wind farm could reduce emissions going into the atmosphere by replacing that generated through fossil fuels.

Table 15.15 Emissions to atmosphere if wind farm output replaces fossil fuel output based on a 13.5MW wind farm operating at 25.9% average load factor

| Emissions to atmosphere avoided (tonnes) ⁵⁸ | | |
|--|--------|------------------|
| | Annual | Total (30 years) |
| Carbon dioxide (CO₂) | 13,722 | 411,660 |

Note: Carbon dioxide is the main gas implicated in global warming.

- 15.9.10. Overall, the Proposed Development is considered to have a low magnitude of change on this nationally important receptor resulting in a **moderate beneficial (significant) effect**.

⁵⁷ Welsh Government (2020) Policy Statement: Local ownership of energy generation in Wales – benefitting Wales today and for future generations. (Online) Available at: <https://gov.wales/sites/default/files/publications/2020-02/policy-statement-local-ownership-of-energy-generation-in-wales.pdf> ((Accessed October 2025)).

⁵⁸ Based on BEIS Digest of UK Energy Statistics estimated carbon dioxide emissions per GWh of electricity supplied by all of fossil fuels of 448 tonnes per GWh of electricity supplied. Calculation is 13.5MW x 8760 x 0.259 = 30,629.34MWph, /1,000 = 30.62934GWh. 30.62934 x 448 = 13,722 tonnes.

15.10 Preliminary assessment of socio-economic effects: Economy and Community

Predicted effects and their significance

Construction – Employment and Expenditure

- 15.10.1. The total average construction phase cost for onshore wind farms in Wales has been estimated as £1.13m per MW of installed capacity (Regeneris Consulting Ltd and Welsh Economy Research Unit, 2013⁵⁹). The construction of Rhyswg could therefore involve an investment of approximately £15.26m (based on a maximum output of up to 13.5MW) at 2012 prices.⁶⁰ The study estimated that 35% of the development cost would remain in Wales equating to an estimated £5.34m expenditure in Wales during construction of the Proposed Development.
- 15.10.2. The construction phase would create the opportunity for direct economic benefits to Wales, and in particular the local authority areas of CCBC (hosting the majority of the Project) and TCBC. The wider southeast region would also benefit from opportunities for local firms to bid for mechanical, electrical and civil engineering contracts. Criteria for selecting the wind turbine manufacturer and civil and electrical contractors would be based on price specifications and guarantees to ensure that performance and technical specifications are met in full.
- 15.10.3. The Regeneris Welsh Economic Research Unity Study 2013 recognises that across Wales it is the southeast region with its industrial base which is best suited to take advantage of the opportunities presented by projects such as Rhyswg. Most of the jobs associated with the Proposed Development would occur in the construction phase and there is the strong potential for some of the work to be undertaken by local firms given that the Applicant is part of the wider Walters Group, a civil engineering company with significant experience in Welsh wind farm construction, headquartered in Hirwaun and with an extensive local supply chain.
- 15.10.4. The Proposed Development is expected to involve the creation of up to 23 FTE based upon a study undertaken by Renewables UK (Working for a Green Britain, 2011⁶¹), or 162 FTE direct, indirect and induced jobs during the construction and project development phase based upon the research undertaken by Regeneris and the Welsh Economic Research Unit (2013). In relation to the baseline, which shows a mix of economic performance within the local wards relevant to the Site, the Proposed Development is therefore likely to support some local employment generation.
- 15.10.5. Other indirect benefits to the local economy would come through an increased spend in bed and breakfast and other accommodation and the use of other local services and facilities during the construction phase.

⁵⁹ Regeneris Consulting and the Welsh Economic Research Unit. Economic Opportunities for Wales from Future Onshore Wind Development 2013. <https://studylib.net/doc/18298357/economic-opportunities-for-wales-from-future-onshore-wind> Accessed October 2025.

⁶⁰ Department of Energy Security and Net Zero (2025) Renewable Energy Generation Cost and Technical Assumptions – Onshore Wind and Solar PV Cost of Electricity Report Update 2024 estimates that capital expenditure for onshore ranges from £1.24m to £2.21m per MW. Using these figures would provide a slightly higher overall investment than the Regeneris study. The use of the lower figure effectively represents a worst case in that context. Report available via: <https://assets.publishing.service.gov.uk/media/68ba91f411b4ded2da19fe92/onshore-wind-and-solar-pv-cost-electricity-report-update-2024.pdf> (Accessed October 2025)

⁶¹ Renewables UK (2011) Working for a Greener Britain 2011. Volume 1. https://eprints.staffs.ac.uk/1689/1/Working_for_Green_Britain.pdf (Accessed September 2025).

15.10.6. Overall, the construction of the wind farm is likely to have a minor (not significant) beneficial effect on the socio-economic profile of the area, as there is potential for economic benefit to local construction firms, quarries, accommodation establishments and other local services.

Operation – Employment and Expenditure

15.10.7. It is expected that the Proposed Development would directly employ two FTE for maintenance during the operational phase. Their duties will include compliance with statutory environmental requirements. It has been estimated that the operation and maintenance of an onshore wind farm involves an average expenditure of £38,600 per MW per annum, with 76% of that expected to be retained in Wales (Regeneris Consulting Ltd and Welsh Economy Research Unit, 2013). For a scheme of up to 13.5MW that would result in approximately £521,100 (£0.52m) of expenditure annually, with approximately £396,036 (£0.396m) being retained in Wales. The operation of the wind farm is likely to have a negligible beneficial (not significant) effect on employment and expenditure.

Operation – Business Rates

15.10.8. At present, all Non-Domestic Rates ('business rates') (NDR) are based on the rateable value of properties. The rates are collected by local authorities and are then given to the Welsh Government. The Welsh Government then distributes to the 22 local authorities based on different social and economic. Therefore, the CCBC and TCBC would see no direct financial benefit from the wind farm but would benefit indirectly via the redistribution of rates from Welsh Government. However, it is difficult to quantify any direct benefit that would accrue for each local authority. The operation of the Proposed Development is likely to have a negligible (not significant) effect on business rates.

Operation – Community Benefits

15.10.9. The Applicant is conscious of its role and the Proposed Development's role within the community and wishes to ensure that the local community shares some of the financial benefits of the having the wind farm in the area. This will be implemented by a Community Fund, the mechanism of which will be decided post consent, should the application be permitted, with further detail set out in the accompanying Project Benefits Report, to be submitted with the final application. The Applicant has already provided some £4m in payments to qualifying projects within Wales⁶². The operation of the wind farm is likely to have a negligible beneficial (not significant) effect.

15.11 Preliminary assessment of socio-economic effects: Tourism and recreation

Predicted effects and their significance

Construction

15.11.1. The PRowS that cross the Proposed Development Site are discussed in **Section 15.3**. As outlined in **Section 15.4** there will be a requirement for measures to address any effects on these PRowS,

⁶² See <https://pennantwalters.co.uk/> for details of community funds provided to other schemes.

including via appropriate management and signage, and temporary diversions via permissive routes created by the Applicant (where necessary). There is potential for some disruption to the PRowS, and open access land, although the embedded measures identified should reduce the likelihood of any significant issues for users.

- 15.11.2. Indirect effects resulting from the construction activities, such as the use of the local highway network for deliveries which could potentially affect road users travelling to the area, are discussed within **Chapter 12** of this ES. It is concluded that the Proposed Development would have a negligible (not significant) adverse effect upon tourism and recreation in the construction phase.

Operation

- 15.11.3. Whilst members of the public will still be able to access all current PRowS in the operational phase it is accepted that some may wish to pass by them at a greater distance, particularly in the case of horse riders using restricted byways. Alternative existing restricted byway routes will be promoted through signage. Additionally, a permissive route will be established to the east of T2 leading to and from the existing PRow restricted byway network. The permissive route would cover similar terrain as the existing route and help to maintain the access for users across and around the Site over the operational lifetime. This route would be located over 200m from the turbine in line with The British Horse Society (2025) guidance. The routes would reduce the likelihood of significant issues for user experience over the lifetime of the Proposed Development. The implementation of these measures should ensure no significant effects on these receptors.
- 15.11.4. The Proposed Development would not restrict people's rights to access the open access land with no fencing etc around the development to restrict access.
- 15.11.5. Visual effects upon PRow users have been assessed in the LVIA section of the ES (**Chapter 6**). The assessment considered PRowS and open access land within the Site, and within 5km and 5km to 10km of the turbine locations. Effects within the Site are assessed as being significant given the proximity of the wind turbines to the PRowS with effects ranging from significant to not significant the further the PRow from the Site.
- 15.11.6. Visual effects on tourism and recreational receptors have been assessed in the LVIA section of the ES (**Chapter 6**, and **Appendix 6K**). The assessment has concluded that, from consideration of the extensive network of national and regional trails significant visual effects would be experienced from:
- Regionally promoted footpaths from some locations along: Taith Torfaen Anytime Challenge, Sirhowy Valley Ridgeway Walk, Celtic Way, Raven Walk, Cistercian Way, Cambrian Way, Ebbw Valley Walk and the Rhymney Valley Walk. Many of these routes overlap. The LVIA notes that significant effects would typically occur along short sections of the routes;
 - National Cycle Network (NCN) Route 465: Views from the southern section of the route are indicated for ~ 0.7km to the north of the route at Pontywaun and would be experienced by northbound cyclists;
 - Two outdoor recreational destinations: Maes Manor Hotel where there would be potential views from the wider grounds but not the main building and garden area, and from the Sirhowy Valley Country Park in glimpsed views along the Ebbw Valley from woodland and forest areas south of Crosskeys;
 - Several PRowS, areas of Open Access Land within 5km, and 5km-10km of the Proposed Development. There would be no significant visual effects beyond 10km.

- 15.11.7. Effects on heritage assets that may contribute to the tourism resource are considered in **Chapter 7: Historic Environment**. No significant effects on heritage assets have been identified in the preliminary assessment. There is no possibility for any Shadow Flicker effects on tourist accommodation (mitigation has been identified for residential receptors in **Chapter 14: Shadow Flicker**).
- 15.11.8. A number of studies have in the past been commissioned into the potential effects of wind turbines upon tourists they have demonstrated that the effect of wind farms on tourism is negligible at worst, with many respondents taking a positive view to wind farms. For example, studies undertaken in Scotland and published in 2021 found no correlation between a decrease in tourism numbers and the presence of wind farms, looking at 44 case studies⁶³.
- 15.11.9. With direct reference to Wales, a survey commissioned for RenewableUK Cymru (YouGov, 2013)⁶⁴ in 2013 found 64% of respondents in Wales supported the development of wind power in their local area. For southeast Wales this was higher at 74%. The survey also found that 65% of people said a wind farm would not put them off visiting an area whilst only 26% suggested that it might dissuade them. For southeast Wales, these figures stood at 72% and 19% respectively.
- 15.11.10. Furthermore, a 2014 study for Welsh Government (Regeneris Consulting and The Tourism Company for Welsh Government, 2014)⁶⁵ regarding the impact of wind farms and their associated grid infrastructure on the Welsh tourism sector, found that there is:
- A negligible impact on the national tourism sector from wind farms;
 - Limited evidence of local tourism impacts to date;
 - A clear majority of people that do not react negatively to wind farm developments or change their visiting behaviour as a result;
 - Complex reactions to wind farms which may change over time;
 - Higher sensitivity to wind farms for certain visitor markets;
 - Some potential for positive impacts, often requiring further investment;
 - No evidence that wind farms on visitor routes deter tourists; and
 - No negative impacts during construction.
- 15.11.11. The study found that there was no evidence of significant impacts on tourism to date in areas where wind farms have had an established presence for a number of years (Powys, Anglesey and the South Wales Valleys).
- 15.11.12. Part of the southeast of the Site, on which T3 would be located, is allocated under CCBC LDP Policy TM1 for tourism related proposals under reference TM1.7 Nantcarn Valley, Cwmcarn. This is part of an extensive area of land extending to the northeast and south of the Site. The policy does not restrict other uses coming forward or safeguard the land only for tourism related

⁶³ Biggar Economic Wind Farms & Tourism Trends in Scotland: Evidence from 44 Wind Farms
<https://biggareconomics.co.uk/wp-content/uploads/2021/11/BigGAR-Economics-Wind-Farms-and-Tourism-2021.pdf>
 (Accessed October 2025)

⁶⁴ YouGov (2013) YouGov RenewableUK Cymru Poll Results. Commissioned by RenewableUK Cymru

⁶⁵ Regeneris Consulting and The Tourism Company for Welsh Government (2014) Study into the Potential Economic Impact of Wind Farms and Associated Grid Infrastructure on the Welsh Tourism Sector (Online) Available at:
https://gov.wales/sites/default/files/publications/2019-06/potential-economic-impact-of-wind-farms-on-welsh-tourism_0.pdf (Accessed October 2025).

purposes. The location of a turbine on the edge of this much broader allocation would not unduly restrict the wider use of the area for tourism related uses or provide a conflict to the aims of the policy.

- 15.11.13. Overall, there is no evidence to suggest that the tourism (and recreation) industry has been affected by wind farms operating in Wales or across the UK.
- 15.11.14. It is concluded that the Proposed Development would have a minor (not significant) effect upon tourism and recreation in the operational phase.

15.12 Preliminary assessment of socio-economic effects: Land Use

Predicted effects and their significance

Construction and Operation - Common Land

- 15.12.1. An area of the Site includes the Mynydd Maen Common. Commoners exercise their rights to graze sheep and cattle. Embedded mitigation measures would ensure that livestock is protected from Site access activities through the use of measures applied during construction including use of temporary Site fencing, signage, Site briefings, speed limits, and use of banksmen. Furthermore, the Applicant would liaise with landowners and with commoners in advance of construction commencing to explain the proposed phasing of activities and to provide them with the information they may require ensuring the safety of livestock. The access track between T2 and Mynydd Maen wind farm (where the Proposed Development would connect to existing network of tracks back towards the public highway) would be constructed on the common. In total, the Proposed Development would result in the loss of 2.568ha of common land. The Applicant would provide at least 2.568 ha to compensate with this area of land remaining as common land once the wind farm has been decommissioned. No turbines would be located on the common.
- 15.12.2. In view of the mitigation proposed, the effect of the Proposed Development during its construction and operation is considered to be negligible (not significant). The means of managing the construction interface with the commoners will be set out in the CEMP whilst, for operation, the compensatory land would be delivered via the Commons Act 2006.

Construction and Operation - Minerals

- 15.12.3. The Site Boundary is wholly located in the mineral safeguarding area for sandstone identified in the CCBC LDP. The sandstone safeguarding area covers almost the entirety of CCBC's central area. The land where the Proposed Development would be sited represents a tiny fraction of the overall safeguarded area within the CCBC area (48.78ha within the Site Boundary as a whole). The total area of built development that would be required for the Proposed Development would be substantially lower (**Chapter 11: Ground Conditions** identifies a worst case likely permanent loss or sealing of soils at 4.33ha). Furthermore, the Proposed Development has a finite life of 30 years at which point it may be decommissioned. Minerals would not therefore be sterilised permanently over the vast majority of the Site.
- 15.12.4. Given that the land upon which the Proposed Development would be located presents a very small part of the substantial areas of land safeguarded for mineral extraction, the effects arising from its construction and operation would be negligible (not significant).

15.13 Preliminary assessment of cumulative (inter-project) effects

- 15.13.1. A preliminary cumulative effects assessment (CEA) has been undertaken for the Proposed Development which considers the combined impacts with other developments on the same single receptor or resource (inter-project effects). The detailed method followed in identifying and assessing potential cumulative effects is set out in **Section 2.9 of Chapter 2**.
- 15.13.2. Consideration has been given as to whether any of the socio-economic receptors that have been taken forward for assessment in this chapter are likely to be subject to cumulative socio-economic effects because of socio-economic effects generated by other developments.

Overview

- 15.13.3. The socio-economic cumulative assessment is concerned with the evaluation of the effects that could be generated were the Proposed Development to be constructed and operational along with other wind farm developments in the area.

Cumulative socio-economic effects

- 15.13.4. Cumulative effects can arise from the construction and operation of other wind farms, which can lead to cumulative economic, energy security and climate change benefits. The Proposed Development is located within 20km of three Development of National Significance (DNS) wind farm applications which are consented and potentially have overlapping construction phases:
- Mynydd Y Glyn (7 turbines, consented);
 - Twyn Hywel (14 turbines, consented); and
 - Manmoel (5 turbines, consented).
- 15.13.5. The following six proposed DNS wind farm applications are also either submitted or at scoping stage within 20km:
- Trecelyn (4 turbines, examination);
 - Mynydd Maen (13 turbines, examination);
 - Mynydd Llanhilleth (7 turbines, examination);
 - Abertillery (6 turbines, examination);
 - Mynydd Bedwellte (9 turbines, scoping); and
 - Llanwonno Energy (8 turbines, scoping).
- 15.13.6. These projects, in addition to solar projects such as the Cwm Ifor Solar Farm and Cil-Lonydd at examination, and other wind farm projects further from the Proposed Development would, if consented, contribute further to Welsh Government's target for increasing the amount of electrical power generated by renewable means. Cumulatively they would also create additional local and regional impacts on the economy, which would be beneficial during construction and operation for:
- Employment (directly and indirectly); and
 - The related industries of wind energy and the supply chain.

- 15.13.7. It is also likely that local communities that would surround the wind farms would benefit from the generation of community funds.
- 15.13.8. With regard to land use whilst the named wind farm projects are generally associated with similar landcover and hence similar land use practices, primarily grazing; it is unlikely that cumulatively they would lead to a reduction in the ability of individual businesses to continue their agricultural activities.
- 15.13.9. The proposed Mynydd Maen Wind Farm would also be sited on the Mynydd Maen common land, whilst Trecelyn Wind Farm includes temporary use of the common during the construction period. There is therefore the potential for cumulative effects upon the Mynydd Maen common. The Mynydd Maen Wind Farm would result in the loss of 11.80ha of existing Mynydd Maen Common land but would replace this with the provision of 14.50ha of new common land, resulting in a net increase of 2.7ha.⁶⁶ As the Applicant is seeking rights to use the network of proposed access tracks as part of the Mynydd Maen Wind Farm application, this would minimise disruption with regards to the use of the common. Through the provision of replacement land and embedded measures in the construction phase through the CEMP, cumulative effects above those identified for the Proposed Development alone would not be likely to occur.
- 15.13.10. With regard to mineral sterilisation, significant proportions of the relevant local authority boundaries include areas safeguarded for mineral extraction (aggregate), including land identified for the Abertillery Wind Farm and consented Manmoel Wind Farm, and in the case of Mynydd Maen Wind Farm and Trecelyn Wind Farm, for sandstone. However, should they be consented in addition to Manmoel, this would be for a maximum of 30 years ensuring that longer term access to the aggregate would be possible. There are no known current proposals to extract minerals within or in the vicinity of these wind farms.
- 15.13.11. The cumulative visual effects could dissuade visitors from visiting the area and therefore impact on tourism and recreation. **Chapter 6: Landscape and Visual Impact Assessment- Table 6.6.** sets out the wind turbines that are proposed, consented or operational within the area that have been included in the cumulative assessment of visual effects on recreational receptors. The effects are assessed in **Section 6.13** and **6.14**.
- 15.13.12. The cumulative assessment considers where a magnitude of change could potentially result in a cumulative visual effect that would be significant with the Proposed Development's turbines present that would otherwise be not significant if the Proposed Development's turbines were not to become operational. The key consideration is the additional or incremental effect that would be generated by the introduction of the Proposed Development. The LVIA's cumulative assessment is informed by two scenario-based assessments⁶⁷.
- 15.13.13. Under Scenario One, taking into account operational and consented wind energy schemes, the LVIA concludes that there is no potential for the addition of the Proposed Development to result in significant visual effects where these would not arise in relation to either the Proposed

⁶⁶ Mynydd Maen Wind Farm (2025). Mynydd Maen Wind Farm Design and Access Statement (online). Available from: <https://www.mynyddmaen-windfarm.co.uk/media/2644884/01-2025-01-07-mynydd-maen-wind-farm-design-access-statement.pdf> (Accessed October 2025).

⁶⁷ The Chapter LVIA cumulative assessment is based on two development scenarios as described in Chapter 6 Section 6.13: Scenario One includes other existing (and under construction) and consented wind energy developments, and Scenario Two includes other existing (and under construction), consented and proposed (subject of a formal DNS application and Scoping Opinion) wind energy developments.

Development alone, or arise in relation to one or more of the other wind energy schemes alone, or in combination.

15.13.14. Under Scenario Two (the worst case scenario as in reality not all developments may be granted planning consent), the additional contribution of other proposed wind energy schemes to the overall magnitude of turbines visible from recreational receptors (parts of promoted footpaths and recreational open space predicted to experience Moderate and not significant or Moderate/Minor levels of visual effect) is frequently significant and the addition of the Proposed Development would typically only reinforce an already significant visual effect or make no contribution to a significant visual effect.

15.13.15. Therefore, under both scenarios the visual effects on recreational receptors finds that there are no additional significant effects to those identified for the Proposed Development by itself (as considered in **Section 15.11**). Cumulative, significant visual effects could potentially dissuade recreational users from walking the routes identified. However, the research reported in **Section 15.11** suggests that the response of tourists and visitors to onshore wind farms developments is neutral at worst. In conclusion, cumulative socio-economic effects are considered to be not significant.

15.14 Preliminary significance conclusions

15.14.1. A summary of the results of the preliminary socio-economics assessment is provided in **Table 15.16**.

Table 15.16 Preliminary summary of significance of effects

| Receptor and summary of predicted effects | Sensitivity / importance / value of receptor ¹ | Magnitude of change ² | Significance ³ | Summary rationale |
|---|---|----------------------------------|------------------------------------|---|
| Climate change and energy security – operational phase | National | Low | Moderate beneficial (Significant) | Based on the current turbine model, the Proposed Development would provide 13.5MW of electricity which is enough to power around 9,279 homes. The installation of 13.5MW represents a considerable increase in installed capacity within the CCBC area and would contribute to the achievement of the Welsh Government's target of 100% by 2035, for which Welsh Government estimates a quadrupling of generation by renewable sources is required, and the target for local ownership of renewable energy generation in Wales. |
| Economy and community employment and expenditure – construction phase | Regional | Low | Minor beneficial (Not Significant) | Positive contribution to the Welsh economy with potential investment of £6.66m during the construction phase. Much of this spend would take place in the region. Creation of up to 162 FTE direct, indirect and induced jobs would be expected in the construction phase. |
| Economy and community employment and expenditure – operational phase | Regional | Very low | Negligible (Not Significant) | Expenditure of approximately £0.396m in the Welsh economy. Expected ongoing employment of around two FTE. |

| | | | | |
|--|--------|----------|------------------------------|--|
| Economy and community non domestic rates – operational phase | County | Very Low | Negligible (Not significant) | There is potential for boosts to CCBC funds from redistribution of increased business rate funds via the redistribution of funds by Welsh Government. |
| Economy and community non domestic rates – community benefits | Local | Medium | Negligible (Not significant) | The Proposed Development will be accompanied by a proportionate community fund package. |
| Tourism and recreation - construction | Local | Medium | Minor (Not Significant) | A number of PRoWs cross the Site. The implementation of suitable environmental measures as outlined in Table 15.11 would ensure that no significant effects are experienced by receptors. |
| Tourism and recreation – operational phase | County | Medium | Minor (Not significant) | There would be some impact on the existing PRoWs with management measures required to alert users to the presence of turbines and a new permissive route added to enable equestrians in particular to travel further from T2. Access land will remain open with no fencing etc blocking access to the Site. The embedded environmental measures would ensure that the user experience is not significantly impacted. There would be some visual impacts on some locations of existing recreational receptors including long distance footpaths, a national cycle route, and outdoor recreational destinations. However, overall, given that studies suggest that wind turbines do not dissuade visitors no significant effects are assessed. |

| | | | | |
|---|--------|-----|------------------------------|---|
| Land use – common land – construction phase | County | Low | Negligible (Not significant) | Measures would be put in place via the CEMP to protect grazing animals from construction activities whilst an area of replacement land would be provided, prior to construction commencing, to compensate the loss of the released land. The area of land released to construction would be no greater than the replacement land. |
| Land use – common land – operational phase | County | Low | Negligible (Not significant) | The replacement land will remain a permanent part of the Common. Grazing animals will have full access to the common, including the wind farm. |
| Land use – minerals – construction and operational phase | County | Low | Negligible (Not significant) | A sandstone safeguarding area covers much of the CCBC area. The area of land occupied as a proportion of the whole sandstone safeguarding area is exceptionally small (48.78ha for the Site boundary as a whole). The wind farm is a temporary development (albeit with a lifespan of 30 years). |

1. The sensitivity/importance/value of a receptor is defined using the criteria set out in Section 15.8 and is defined as very low (local), low (county), medium (regional) and high (national).
2. The magnitude of change on a receptor resulting from activities relating to the development is defined using the criteria set out in Section 15.8 and is defined as very low, low, medium, and high.
3. The significance of the environmental effects is based on the combination of the sensitivity/importance/value of a receptor and the magnitude of change and is expressed as major (significant), moderate (potentially significant) or minor/negligible (not significant), subject to the evaluation methodology outlined in Section 15.8.

15.15 Further work to be undertaken

- 15.15.1. The information provided in this Draft ES is preliminary, the final assessment of likely significant effects will be reported in the Final ES. The final ES will be informed by engagement with officers of CCBC to explore the range of mitigation measures proposed to minimise effects on users of the PRow network.