

**Summary of response:  
Prepared by Wavehill Ltd.**



Llywodraeth Cymru  
Welsh Government

A scenic landscape of rolling green hills under a blue sky with scattered clouds. In the foreground, three cows (two brown and one white) stand on a grassy slope. A stone wall runs across the middle ground, separating a field with a herd of sheep from the foreground. The background shows more green hills and a small farm building.

# Sustainable Farming and our Land

**May 2020**

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# Executive Summary

This report summarises an independent analysis of responses to the [Sustainable Farming and our Land](#) consultation. It sets out a summary of the views and perspectives offered by respondents with regard to the proposals.

## [Responses](#)

In total, 3,322 responses were received over the course of the consultation. Of these, 508 were unique responses from individuals and organisations, and a further 2,816 responses were submitted across three distinct campaigns. Those submitting individual responses represent a diverse range of voices and perspectives. A significant proportion of respondents reported that they are directly engaged in farming.

## [Campaign Responses](#)

Campaign responses were received from the National Farmers' Union Cymru (NFU), the Royal Society for the Protection of Birds, and Ramblers Cymru, each of which shared distinct views and perspectives on the proposals. The NFU thought that the proposals should seek to maintain stability and continuity, including in the levels and organisation of financial support available to farmers and other land managers.

## [Sustainable Land Management Framework \(SLM\)](#)

Overall, there appears to be broad support for the framework. For many, this support was contingent on a number of factors. Some respondents felt that the framework could include more explicit reference to the specific outcomes, including soil health, or to the promotion of the Welsh language. Others felt that the framework was too prescriptive and needed flexibility in order to ensure that farmers and land managers engaged with the approach. Meanwhile, others felt that the framework did not give due attention or support to ensuring food security by subsidising food production. This perspective informed the strongest opposition to the framework.

There were also respondents who agreed with the focus on supporting activity, as well as those who would like to see a greater emphasis on outcomes. There were overarching concerns surrounding the impact of SLM-based payments upon farmers' profitability. Furthermore, the framework should encourage and ensure accessibility, specifically for tenant farmers and other types of land managers, including those engaged in forestry. In addition, there were implementation concerns, according to which respondents were unsure as to how the proposals would work in practice.

## [Sustainable Farming Scheme](#)

For many, the scheme should reward both the 'creation' and the 'maintenance' of SLM activity and prioritise farmers' financial stability. Some respondents suggested that payments

should be capped in order to ensure a fair distribution of funding, with a focus on supporting small family farms over larger land managers. Some felt that eligibility should be limited to active land management only, and should not include inactive land management, including rewilding. There were mixed opinions regarding farmers being rewarded for providing, and incentivised to provide, public goods.

### Advisory Service

It was widely held that the Advisory Service should not duplicate existing provision and support, including that provided by Farming Connect and Glastir. It was commonly believed amongst respondents that the Advisory Service would be introduced alongside existing provision, where the proposals outline that they would replace existing services. There were concerns with regard to the costs of establishing and maintaining support, and that the service should maintain independence from the Welsh Government and any other regulatory body.

### Industry and Supply Chain

There was broad recognition amongst respondents in respect of the important role that industry and supply chains have in supporting a vibrant agricultural sector. There was broad support for encouraging local partnerships and collaboration. There were, however, concerns that channelling finite resources towards the broader industry and supply chain would dilute the financial support available to farmers and other land managers. Meanwhile, there were mixed opinions regarding whether industry and supply chain support should be subject to the SLM framework.

### Regulatory Framework

There were significant calls for any future regulatory frameworks not to be onerous and increase costs. Moreover, enforcement should be proportionate and work with farmers and land managers to address and resolve issues. There were significant calls for regulation not to impede the competitiveness of farmers in comparison to those in the rest of the UK and in the EU.

### Transition Period

Whilst views varied, there appeared to be greater support for a longer transition period of five years or more. Respondents often cited Brexit uncertainty as presenting challenges in determining the appropriate nature and extent of the transition. Piloting was often suggested as being an important process through which to develop and test aspects of the proposals before they were rolled out more widely. Of the three options presented in the consultation, option A was most commonly referenced in the responses. The vast majority of respondents, however, did not mention or lend support to any of the three options outlined.

## Analytical Approach

Of those respondents who offered their views on the proposals, there was a general consensus that the approach of assessing the impact was an important and valuable exercise. A key point of departure was the specific focus of any impact analyses, with different respondents holding different priorities. One constituency of respondents, for example, wished to see the proposals being assessed against the Well-being of Future Generations Act 2015 and the Environment (Wales) Act 2016. Others highlighted specific issues, such as language or environmental impacts, as being overemphasised or underemphasised within the proposals. Meanwhile, some felt that the proposals were overly complex, and wished to see a more streamlined and simplified approach to understanding and analysing impacts.

## Welsh Language

In commenting on the impact of the proposals upon the Welsh language, there was broad recognition of the importance of healthy rural economies, Welsh agriculture, and small family farms to the use of the Welsh language. There was apparent concern that the proposals do not provide enough support and protection for communities in which Welsh is commonly used. Furthermore, there was broad support for the scheme being delivered bilingually.

## Key Reflections

Overall, there was broad support for the sentiments and direction of the proposals. However, the majority of respondents raised caveats to their support. The issues raised were diverse and tended to focus on the detail of the proposals. Some respondents, for example, felt that the SLM framework should include more specific outcomes, whilst others felt that it should be more flexible and less prescriptive. Meanwhile, others felt that greater thought should be given to how the proposals would work in practice.

Respondents' views and perceptions were driven, in part, by a range of broader concerns and factors. The considerable uncertainty created by Brexit often underscored people's reading of the proposals, as well as the solutions that flowed from them. Ensuring financial security was a key concern for many respondents. In addition, addressing and reversing degradation in the natural environment was a key concern, including underscoring much of the support for the proposals.

It was also evident that there were multiple readings of the substantive content of the proposals. It was commonly believed that the Advisory Service would be introduced alongside existing provision for example, where the proposals suggest that they would replace existing services.

Some of the overarching messages from responses include:

- Greater clarification and communication regarding some of the proposals, including the Sustainable Farming Scheme, as well as the regulatory framework and how the Advisory Service would fit within the existing mix of support.

- A key concern driving responses is financial security, as well as the belief that stability and continuity are important in the face of considerable uncertainty. This view often informed respondents' views on a longer transition period.
- From these perspectives, ensuring that the proposals simplify and reduce the bureaucratic and regulatory burden on farmers is important.
- Respondents broadly welcomed the approach of consultation and co-design as set out by the Welsh Government in the development of the proposals.
- Some respondents felt that piloting aspects of the proposals would also be valuable in developing and implementing robust policy and programming in support of the sector.

# 1 Introduction

This report summarises an independent analysis of responses to the [Sustainable Farming and our Land](#) consultation. It sets out a summary of the views and perspectives offered by respondents with regard to the proposals.

## 1.1 Background

Since the referendum vote to leave the European Union in June 2016, the Welsh Government have been considering the impact of the decision upon communities, farmers and other land managers across Wales.<sup>1</sup> The Welsh Government set out to explore how they could best support farmers and other agricultural stakeholders after leaving the European Union.

The Welsh Government initially developed a new Land Management Programme that would replace the Common Agricultural Policy and the Basic Payment Scheme in its entirety. The proposals consisted of two overarching schemes: an Economic Resilience scheme and a Public Goods scheme.

In the summer and autumn of 2018, the Welsh Government put the proposals to farmers, rural communities, environmental groups, and interested individuals. The [Brexit and our Land](#) consultation sought the views and perspectives of a range of individuals and organisations. A total of 12,203 responses were submitted, including 11,160 responses from seven unique campaigns.

Overall, respondents raised concerns surrounding the proposed Economic Resilience and Public Goods schemes. The removal of the Basic Payment Scheme was a concern to many respondents who recognised the importance of these payments for farm viability and for the ability of farmers to maintain a living. The Welsh Government subsequently published a [Summary of Responses](#) outlining the substantive issues raised in the consultation.

In light of the views and perspectives offered by respondents to *Brexit and our Land*, the Welsh Government revised their proposals. Thereafter, they set out the central ambition to promote sustainable farms producing both food and public goods in a system which enhances the well-being of farmers, communities and all of the people of Wales. Sustainable land management was to be at the heart of Welsh Government policy in support of the sector.

The Welsh Government were keen to explore the views and perspectives of farmers and rural communities with regard to the revised proposals. Those with an interest in agriculture and land management were invited to contribute their views between 9<sup>th</sup> July and 30<sup>th</sup> October 2019. The [Sustainable Farming and our Land](#) consultation asked respondents a range of questions relating to specific aspects of the proposals. A full list of the consultation questions can be found in [Annex 1](#). Responses were received online, via email and by post.

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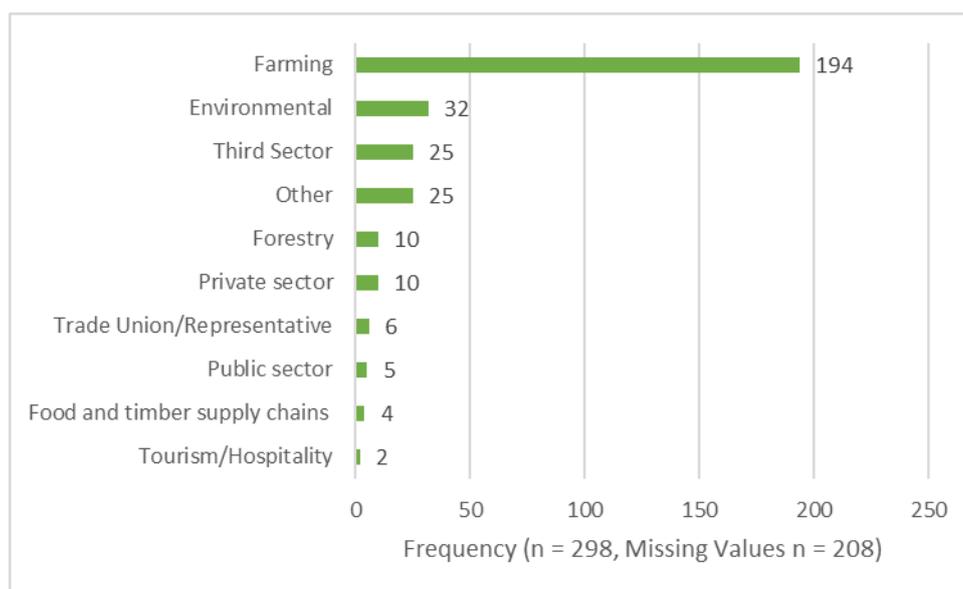
<sup>1</sup> In this document, we use the terms “land manager” and “land management” to mean farmers, foresters and any other activity drawing on non-urban land to produce goods and services.

## 1.2 Responses

Respondents to the consultation represent a broad range of stakeholders with an interest in agriculture, the vibrancy of rural communities, and maintaining and improving the natural environment. In total, 3,322 responses were received over the course of the consultation. Of these, 508 were unique responses from individuals and organisations, and a further 2,816 responses were submitted across three distinct campaigns.

Those submitting individual responses represent a range of voices and perspectives. A significant proportion of respondents reported that they are directly engaged in farming. Of those who provided enough information, 65.1 percent were farmers or businesses directly engaged in agriculture. Moreover, responses were received from environmental interest groups and organisations, third-sector organisations, and other land managers. A small number of responses were received from broader stakeholders, including trade unions, public-sector organisations, and businesses from the broader supply chain:

Figure 1.1: Respondents' Background

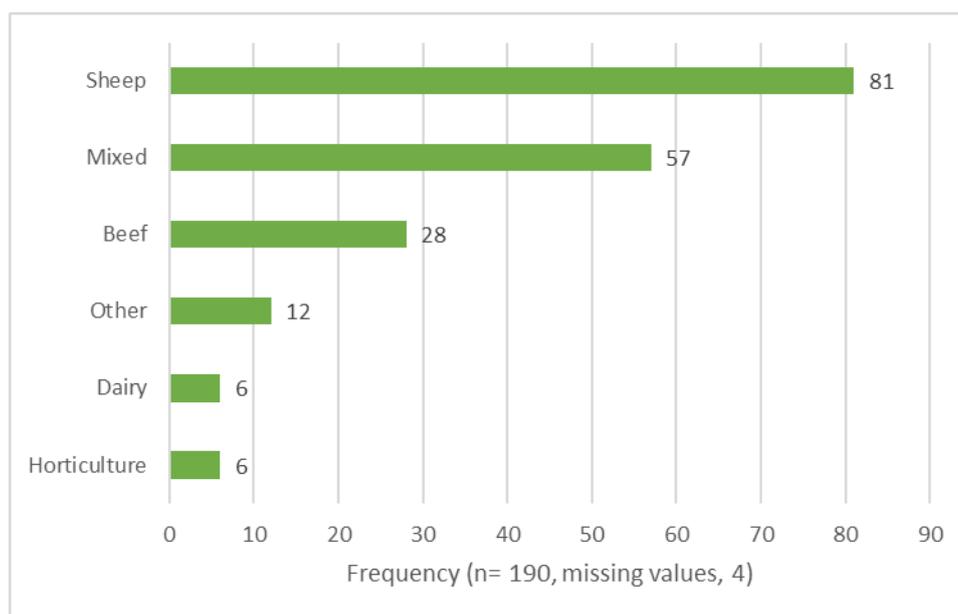


For a full list of organisations that contributed to the consultation, please see [Annex 2](#).

Whilst this information gives us an indication of who responded to the consultation, for a significant number of respondents we were unable to determine their background (41.1 percent, n = 208). This presented challenges in understanding whether respondents to the consultation are broadly representative of the agricultural sector across Wales.

Of those respondents who reported being farmers, 42.6 percent were engaged in maintaining sheep. A further 30.0 percent reported that they were engaged in mixed farming, such as maintaining a mixture of beef, sheep and dairy. Meanwhile, smaller numbers of respondents represented solely beef, other, dairy or horticulture:

**Figure 1.2: Main Farm Activity**



The majority of respondents from the farming community reported claiming the Basic Payment Scheme (85.2 percent, n = 173). One quarter of respondents reported holding rights to graze their stock on common ground (24.9 percent, n = 50), and 19.3 percent reported being a tenant farmer (n = 38).

### 1.3 Campaign Responses

A further 2,816 responses were received from three distinct campaigns. The National Farmers’ Union, the Royal Society for the Protection of Birds, and Ramblers Cymru encouraged their members to submit responses to the consultation. Each organisation developed a standardised response setting out the issues that it wished to raise. We have included the text that each organisation encouraged its members to submit in [Annex 3](#). For a more detailed analysis of the substantive issues raised by campaign responses, please see the [next chapter](#).

**Table 1.1: Campaign Responses**

Campaign	Responses
National Farmers’ Union Cymru	857
Royal Society for the Protection of Birds	1,889
Ramblers Cymru	70

### 1.4 Analytical Approach

In order to understand the issues and themes raised by respondents, in October 2019 the Welsh Government commissioned Wavehill, an independent research organisation, to conduct an analysis of responses. The analysis set out to understand and map the range of views and perspectives held by respondents with regard to the proposals.

Responses generated a range of qualitative information. The online questionnaire, for example, posed eight questions asking respondents for their views on the potential impact of specific proposals. Meanwhile, other respondents submitted their views in letters and via email, summarising their general views on the proposals.

In order to analyse the perspectives expressed by respondents, the authors conducted a detailed content analysis. This approach systematically examines each response and highlights the themes and issues that are raised. From this analysis, the team are then able to explore how widely held particular views and perspectives are.

We have sought to include and summarise the issues raised in campaign responses at relevant points throughout the broader analysis. However, we have not included campaign responses in any analyses of prevalence, such as assessments that enable us to state that ‘the majority of respondents thought this’. This is to ensure that campaign responses have a proportionate influence over judgments concerning the balance of opinion.

## 1.5 Limitations

There are a number of limitations with regard to this analysis that are important to note. The respondents who contributed their views and perspectives are not necessarily representative of the wider community of farmers, organisations or individuals with an interest in the proposals. Together, therefore, the responses should be considered to provide an indication of the views, sentiments and opinions of the community at large, rather than being a definitive statement.

Because of the high likelihood of self-selection, we have not sought to communicate how many respondents held a particular view. The approach taken has been qualitative, with the aim being to communicate an understanding of the range of key themes and issues raised by respondents, as well as the reasons for holding particular views. Such information includes potential areas of agreement and disagreement between the different groups of respondents.

Interpretation of the balance of opinion must also be considered in the context of the questions asked. The respondents did not answer every question, and some did not provide enough information to determine their position accurately. The qualitative terms used to describe the prevalence of views only reflect those who answered a specific question. Therefore, they cannot be assumed to relate numerically back either to the total number of people and organisations that responded or to the broader Welsh community at large.

**Together, this analysis should be interpreted only to offer the range of views held by respondents, and not the prevalence of views held by the community as a whole.**

## 2 Campaign Responses

A total of 2,816 responses were received from across three distinct campaigns. This section briefly outlines the substantive issues highlighted by each campaign. We have included the full text of each campaign response in [Annex 3](#).

### Summary of Issues Raised across Campaign Responses

- The proposals should seek to maintain stability and continuity, including in the levels and organisation of financial support available to farmers and other land managers.
- The focus on promoting sustainability within the proposals is broadly welcomed by those wishing to maintain and improve wildlife habitats, including ecosystems that support bird life.
- For broader land users such as ramblers, future support should be framed in such a way as to encourage farmers to go beyond statutory requirements and provide permanent enhancements to access and paths.
- Campaign responses serve to highlight the diversity of interpretations and implications of the proposals produced by different stakeholder groups.

### 2.1 National Farmers' Union Cymru

The consultation received 857 responses that were coordinated by the NFU. The majority of respondents were based in Wales, and 53 responses were submitted in Welsh. The respondents were encouraged to submit a standardised text with the key issues that the NFU member wished to raise. Moreover, respondents were encouraged to include further information, including what farming means to them and the role that they play in the local community.

#### 2.1.1 Key Messages from the Campaign

The overarching theme raised by this campaign was the importance of stability and continuity for the sector. These would enable farmers to navigate broader uncertainties and risks brought about by the new trading relationships with the rest of the world and a changing climate.

The proposals were seen by this campaign to be potentially compounding, rather than mitigating, increased instability and disruption. The responses emphasised the need for the proposed Sustainable Farming Scheme to be fully evaluated in order to ensure that it 'can deliver the same or better outcomes than [the Basic Payment Scheme]'. From this perspective, the proposals should ensure that farmers receive similar levels of financial support once the Basic Payment Scheme is withdrawn.

Similarly, the campaign saw other aspects of the proposals to be potentially diluting the support and resources available to farmers and land managers. From this perspective, for example, the proposed Advisory Service...

*...would be resource intensive, bureaucratic and cause time delays. It is vital that future schemes are simple and practical for farmers to be able to apply for and deliver. The aim should be to minimise management, administration and advisory costs.*

NFU Campaign Response Template

The campaign was also concerned that the proposals would increase the transactional costs and regulatory burden which farmers would have to navigate and absorb. This would reduce the overall competitiveness of Welsh produce, the campaign believed, not only with the rest of the world but also within the United Kingdom single market:

*Welsh Government policy must be adequately funded to ensure the sustainable growth of the food and farming sector, supporting farmers to produce high quality food to world leading standards whilst maintaining and enhancing our environment and meeting our climate change obligations. Future policy must ensure that Welsh farming remains competitive with farming in the UK, EU and globally.*

NFU Campaign Response Template

## 2.1.2 Additional Information

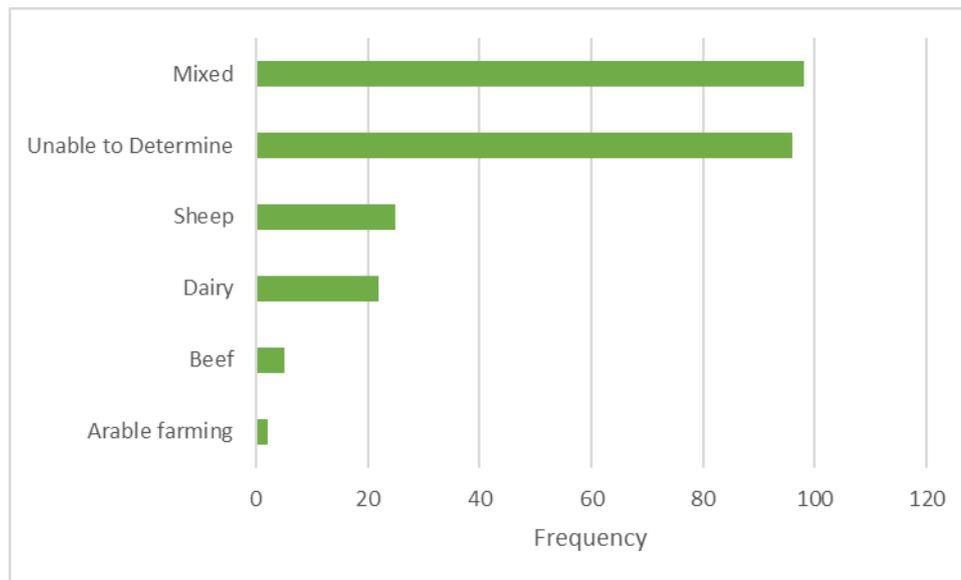
Alongside the standardised text written by the NFU, the respondents were also encouraged to offer further information regarding their views on the role of farming and whether they were engaged in the local community. Respondents often included an unstructured paragraph in correspondence that highlighted the type of farming in which they were involved and that added broader comments or views on the proposals. In order to explore the themes and issues raised, we drew on a random sample of 248 responses.<sup>2</sup> These were analysed systematically, highlighting key information and any additional issues raised.

Respondents often described their main farm activity. The most common response was that it was mixed, in that respondents' farms or businesses engaged in a range of activities (39.5 percent, n = 98). This often included maintaining beef and sheep, but also maintaining pigs or poultry alongside other activities in some cases. A significant proportion of respondents did not provide enough information to determine their main activity (38.7 percent, n = 96). Smaller numbers of respondents highlighted sheep, dairy, beef and arable farming as being their main activity:

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<sup>2</sup> This represents 28.9 percent of the overall responses submitted as part of the campaign. It was deemed that a full survey of the unstructured comments within these responses was not necessary, as a random sample would quickly achieve saturation of the issues raised.

Figure 2.1: NFU Responses' Main Farm Activity



Respondents were also asked to provide further information, including what farming means to them. They often made impassioned statements concerning the important role that agriculture plays in ensuring the vibrancy of rural communities. From these perspectives, the health of the agricultural sector is closely linked to the broader economic fortunes of the rural communities in which they live. Moreover, respondents saw agriculture to be closely intertwined in the social, linguistic and cultural fabric of rural life:

*Welsh farming is the backbone of our beloved principality. It offers so much to not only the Welsh economy but also the cultural identity of who we are as a nation.*

Mixed Farmer

*Thriving rural communities are an essential part of the fabric of rural Wales and agriculture plays an important part in supporting all aspects of these communities. The culture and language of Wales is entwined within these businesses and their support for the rural economy.*

Organic Farmer

There was an underlying concern in unstructured responses, as with the standardised NFU text itself, that if the overall levels of financial support were to diminish, it would have a negative impact on the sector and communities more broadly. Within unstructured comments, respondents were encouraged to state how many people they employ and the number of other businesses with which they work in broader supply chains. Some respondents took the opportunity to highlight the impact that significant drops in support could have upon employees and other businesses:

*We must stress that although our farming business receives the BPS payment, this money does not stay within our business, but is redistributed throughout the local community through the use of contractors, vets and other local suppliers.*

Dairy Farmer

What was evident in the responses was the precarious nature that many felt with regard to the future of their farms and businesses. Some respondents felt concerned that the risks and uncertainties facing their businesses were significant and increasing. Some expressed that they felt that their businesses were already very close to being financially unsustainable, and that the support currently received through the BPS was pivotal to ensuring their financial survival. Closely linked to the theme of precariousness was the impact of uncertainty upon the well-being of farmers, their families, and broader communities:

*Every month we pay cheques to at least 30 other local businesses or service providers and I must be frank and say that I doubt that we will be able to continue to support the local economy in this way [in the future]...*

Mixed Farmer

*The burden of regulation weighs heavily on farmers minds, causing stress and anxiety and undermining business confidence.*

Campaign Response

To address and mitigate the uncertainties and challenges that they face, some respondents highlighted projects with which they had engaged in order to diversify their income. Almost 18 percent of respondents highlighted specific projects, with tourism, renewable energy and branching out into poultry being the most popular approaches. Those respondents who had diversified their income sometimes felt that it was necessary because farming income alone was not sufficient to sustain a living.

The NFU also asked respondents to highlight the role that their family play in the community. One quarter of respondents mentioned that they are currently or have previously been involved in their Young Farmers' Club (YFC). Furthermore, a large proportion of respondents stated that they contributed to their communities in an official capacity, including as school governors or on local councils.

Together, the unstructured views and perspectives offered by individual respondents tended to illustrate and reinforce the issues and concerns raised by the standardised NFU response. The key theme across the majority of unstructured responses was the importance of continuity and stability, a perspective driven for some by concerns surrounding the financial precariousness of farms and businesses.

## 2.2 Royal Society for the Protection of Birds

The consultation also received 1,889 campaign responses from members of the Royal Society for the Protection of Birds (RSPB). These included 788 responses from residents outside of Wales.

This campaign was broadly supportive of the proposals, including the importance placed on promoting sustainability. The campaign highlighted the importance of maintaining and restoring important wildlife habitats and ecosystems. The focus on promoting sustainable food production and the provision of public goods by farmers was welcomed. In addition, the campaign highlighted the value and potential of advisory support in respect of helping farmers and land managers to develop more sustainable practices.

## 2.3 Ramblers Cymru

Seventy responses were received from Ramblers Cymru, which is a charitable organisation. It seeks to protect and enhance public access to land, as well as increasing awareness of the benefits of being outdoors.

The focus of this campaign was upon how the proposals could ensure that farmers and other land managers comply with Rights of Way and Access legislation. Furthermore, it was felt that the proposals could go further, framing support in such a way as to encourage farmers to go beyond current statutory requirements and provide permanent enhancements such as improving paths and access. In addition, the campaign advocated the introduction of a monitoring system which would allow public reporting of non-compliance.

# 3 Sustainable Land Management Framework

## Summary of Proposals

A key element of the proposals is the Sustainable Land Management (SLM) framework. This sets out the principles which inform and underscore the broader proposals, including the Sustainable Farming Scheme. Sustainability encompasses a range of economic, social and environmental factors that are closely linked to land management practice. As an idea, sustainability seeks to ensure that the needs of the present are met without compromising the ability of future generations to meet their own needs.

The Welsh Government propose that future support should be designed around the principle of sustainability. This reflects feedback from the *Brexit and our Land* consultation, whilst also being consistent with Wales' broader legislative framework. This includes the sentiments and provisions contained within the Well-being of Future Generations (Wales) Act 2015 and the Environment (Wales) Act 2016.

## Consultation Question

Respondents were asked for their views on the Sustainable Land Management framework. Moreover, the question asked respondents to consider whether the structure and focus of the framework were useful, and whether they reflected the broad contribution of farmers to environmental, social and economic outcomes. In addition, the consultation was interested in respondents' views on how the SLM outcomes were described, whether it is right to focus an income stream upon environmental outcomes, and whether an alternative policy framework would be more appropriate.

## Summary of Responses

- Some respondents felt that the framework could include more explicit reference to specific outcomes, including soil health, or to the promotion of the Welsh language.
- Others felt that the framework was too prescriptive and needed flexibility in order to ensure that farmers and land managers engaged with the approach.
- Meanwhile, others felt that the framework did not give due attention or support to ensuring food security by subsidising food production. This perspective informed the strongest opposition to the framework.
- There were also respondents who agreed with the focus on supporting activity, as well as those who would like to see a greater emphasis on outcomes.
- There were overarching concerns surrounding the impact of SLM-based payments upon farmers' profitability.
- The framework should also encourage and ensure accessibility, specifically for tenant farmers and other types of land managers, including those engaged in forestry.

- There were also implementation concerns, according to which respondents were unsure as to how the proposals would work in practice.
- Overall, there appears to be broad support for the SLM framework. For many, this support was contingent on a number of factors, including those outlined above.

### 3.1 Framework Approach

Some respondents saw the transition towards the Sustainable Land Management framework as being a positive move. From these perspectives, the emphasis on sustainability was important, and the framework recognised and promoted the important role that farmers and other land managers have in supporting economic, social and environmental outcomes:

*I commend Welsh Government for the proposed move to a subsidy system that rewards provision of public benefits rather than land ownership... I strongly support plans to reward farmers and other land managers for measures to improve ecological benefits with an income stream, rather than simply covering costs. I strongly agree that the Sustainable Land Management scheme should be flexible and focus on outcomes rather than prescription.*

Individual

Within these responses, some respondents felt that the SLM framework did not go far enough. A significant number of respondents, for example, were concerned that the benefits and outcomes of the proposed SLM framework did not encompass the full range of contributions made by the farming community. Areas of focus that were deemed to be important by respondents, but which they felt lacked attention in the framework, included amongst others:

- Soil health
- Biodiversity
- Animal welfare
- Protection of native breeds
- Organic farming
- Community life
- Linguistic benefits
- Broader social, economic and health benefits

From these perspectives, respondents felt that the proposals should include more explicit reference to important issues and practices relating to sustainable land management:

*We do not disagree with the benefits listed, but we feel there are some omissions and missed opportunities here. We would urge those involved in drafting the future policy to specifically mention and support ‘pollinators’ in more detail. We are surprised that soil health and resilience is not a ‘top-level’ land management benefit, given the recent reports that soil degradation is so extensive. Farmers, foresters and other land managers are uniquely positioned to be able to reverse the current decline in our soil’s health.*

Action Plan for Pollinators in Wales Task Force Working Group

Conversely, other respondents were keen to ensure that the SLM framework was not overly prescriptive, as had been their experience with previous schemes including Glastir. Respondents felt that sufficient flexibility within the scheme would be necessary in order to ensure that it could be tailored so as to fit the specific strengths of each farm or area. In conjunction with this, the use of Area Statements for spatial planning was a priority amongst those respondents wanting to see more flexibility built into the scheme:

*The way forward with any scheme is through partnership and cooperation with a scheme which is non-prescriptive and flexible. There will need to be a major shift in mindsets of all involved... Glastir has been prescriptive from the onset and has become more inflexible as the years go by.*

FWAG Cymru

## 3.2 Subsidising Food Production

Many respondents felt that the proposals should include a greater focus on promoting food security and subsidising food production. For these respondents this meant including some form of recognition and payment relating to food production. Some respondents who expressed this view voiced their concerns surrounding the discontinuation of the BPS, arguing that this had underpinned the economic resilience of many Welsh farmers for many years. Without this, many believed that Welsh farming would lose a competitive edge.

Some respondents felt that the proposals did not go far enough in order to ensure that the provision of public goods and food production complement each other. This could result in farmers having to choose between the two. Meanwhile, other respondents were concerned that the shift in focus towards the provision of public goods could make some farms and businesses unviable:

*The farm currently carries 1,100 breeding ewes and 70 suckler cows. These animals create the environment that we work in every day. But without meaningful support I do not think the business will be viable going forward. This scheme will directly affect my future and there has to be some form of meaningful support to keep us farming livestock in the Welsh hills. An environmental scheme on its own without livestock will not work.*

Mixed Farmer

*Focusing an income stream on environmental outcomes will aid sustainability but this needs to be sufficient to balance out the losses from farming in a more environmentally sustainable way. Increasing efficiency of the agricultural business in some areas will not mitigate the losses from a weak market. The SLM principles also needs to recognise the redundancy in the system that stronger environmental legislation results in. I would suggest the original proposal of another income stream to mitigate market failure is a better option than keeping all your eggs in the 'SLM' basket.*

Beef Farmer

### 3.3 Accessibility

A key theme raised by respondents emphasised the importance of accessibility of the proposals by specific groups within the sector. Many respondents were concerned that the proposals should not disadvantage certain groups. Tenant farmers, for example, should not be overlooked whilst directing payments to landowners, or be penalised for historic poor land management by the landowner. Furthermore, addressing the imbalance between landowners and tenant farmers was raised by respondents as being a possible area that the proposals could address.

Another dimension of accessibility raised by respondents related to broadband access. Many respondents commented on the lack of a reliable broadband or mobile signal in rural communities, therefore calling for any approach to incorporating alternative modes of disseminating information, a range of accessible entry points to the scheme, and different channels through which support can be accessed. A significant minority of respondents highlighted the need to consider less digitally active communities in the planning for any new scheme by providing offline methods of entering the scheme and accessing support.

### 3.4 Implementation Concerns

Many respondents raised concerns surrounding how the proposed scheme would work on the ground, citing a lack of practicality throughout the consultation document and an overreliance on abstract, conceptual ideals. Specifically, some respondents questioned how feasible it would be to accurately measure some of the SLM outcomes mentioned in the consultation, including air quality, and therefore on what basis these could justifiably be rewarded.

Related to the previous theme, a significant number of respondents felt that the framework lacked adequate clarity and detail. There was significant confusion surrounding the definitions of key terms and concepts in the consultation, such as 'other land managers' and 'sustainability'. Additionally, the language used to describe the structure of the payment scheme was deemed to be unclear by some respondents, specifically regarding whether 'actions' or 'outcomes' would be the basis on which payments would be made:

*The structure of benefits, outcomes and actions is potentially useful but needs more detailed work, not least because some of the benefits and outcomes are not defined clearly.*

Individual

The length of the consultation document appeared to be a barrier for some respondents in terms of the time needed to read the document. Respondents commenting on the consultation's inaccessibility noted that colleagues in the field were put off with regard to responding to the consultation for these reasons. This raises further concerns surrounding the extent to which responses can be assumed to be representative of the sector:

*The language in the document is inconsistent and at times misleading. Greater clarity is required to ensure that the title 'farmer' includes 'forester' and 'land manager', 'sustainable food production' includes 'timber', and the resulting scheme is written using clear and concise language, ensuring it does not become a barrier to applicants.*

Confor Wales

### 3.5 Rewarding Actions or Outcomes

There was some confusion amongst participants in relation to whether the proposals intended to reward actions or outcomes. A significant minority of participants felt that the basis on which farmers would be rewarded was ambiguous throughout the consultation document, and called for a more concise and definitive description of how SLM would be rewarded under the new scheme.

Furthermore, there was an apparent disagreement between respondents who felt that support should be directed towards actions and those who believed that outcomes should be targeted. Amongst those who responded, the balance of support was in favour of the statement that 'the Welsh Government should bear the risk if agreed actions do not lead to outcomes' (Sustainable Farming and our Land, 2019: 8). Supporters of rewarding actions noted that unpredictable and adverse weather conditions, as well as other factors out of farmers' control, mean that achieving desired outcomes cannot be guaranteed by correctly implementing actions alone, and that any payment scheme which did not reflect this would be unfair.

Conversely, some respondents called for a greater focus on rewarding outcomes. According to these respondents, solely directing support towards actions risks reducing farmers' sense of ownership over outcomes, as well as diminishing innovation to achieve outcomes through new methods. While some of these respondents believed that basing payments exclusively upon achieving outcomes was the way forward, others advocated the adoption of a hybrid approach which targeted both actions and outcomes:

*The consultation indicates tension between risk to the farmer for non-delivery of outcome, from a public-value perspective, and reasonable desire to isolate farmers from risk to payments in the face of non-delivery through reasons beyond the farmer's control. The approach outlined amounts to farmers making the decisions on what options (previously screened on good evidence of delivery) to undertake, and Welsh Government bears the full risk of non-delivery. There is evidence that this approach may not be the best way of fostering ownership of broader outcomes by farmers, and instead shifts towards being action-based rather than outcome-focused. Payment for outcomes and, particularly, payment-for-results systems that use incremental payments provide a strong incentive for a land manager to find the best management to achieve the required outcome. There is potential to consider a hybrid approach that provides assurance of basic management payment alongside a bonus for attainment of measurable outcomes.*

Natural Resources Wales

## 3.6 Other Land Managers

Some respondents felt that there was an overemphasis within the framework and throughout the consultation document upon inadequate attention being paid to foresters and the benefits of sustainable forestry practices. Many respondents who held this view commented on the perceived shift in language from inclusive terms such as 'land management' in *Brexit and our Land* towards a language centred on farming. The name change between the two consultations, from "Brexit and our Land" to "Sustainable Farming and our Land", was highlighted by a number of respondents from the forestry sector who felt largely overlooked. From this perspective, respondents felt that a range of environmental benefits flowing from sustainable forestry were not adequately reflected in the proposals:

*It is quite disappointing that after the Welsh Government's declaration of a climate emergency and commitments to plant more trees, proposals about encouraging and supporting SLM only mention forestry as a secondary activity. The responses to last year's Brexit and our Land consultation clearly made the case for forestry to play a bigger role in SLM and as an opportunity for farmers to diversify and become more resilient economically and environmentally.*

BSW Timber

## 3.7 Importance of Specialist Advice

The need for professionals with specialist knowledge to provide advice was a recurring theme amongst the responses. Respondents called for more specialist input both in the creation of the new Advisory Service and in carrying out Farm Sustainability Reviews. Respondents expressed the view that advisors should possess specific knowledge on the geographical area in which they operate, and that there should be a range of advisor specialities so as to ensure high-quality advice.

## 3.8 Beyond Supporting 'Income Foregone and Costs Incurred'

Respondents strongly agreed that agricultural workers should be 'paid a fair price for delivering positive outcomes' which goes 'beyond the 'income foregone and costs incurred' currently used to calculate Glastir payment' (Sustainable Farming and our Land, 2019: 46). This would contribute to farmers' sense of worth and well-being, according to respondents, and would be a positive step towards better mental health amongst this population.

## 3.9 Improve Public Awareness and Understanding of SLM

A number of participants advocated increasing public engagement and awareness in respect of the benefits of sustainable land management in order to help ensure that consumer behaviour continues to support sustainable Welsh food production and to promote sustainable brand Values to consumers in Wales and more broadly:

*Public engagement should be central to future policy, with the aim of improving public understanding about food, farming and the environment. Farmers should be supported to engage the public, such as through farm visits, which could be supported by central or local government, e.g. with payments per visit and financial support to improve on-farm facilities for visitors. Farmers and land managers should be encouraged to explore innovative ways of engaging the public, including through neighbouring farmers acting together, engagement with the school curriculum, or partnerships with other businesses (such as food processors or retailers).*

Nature Friendly Farming Network

### 3.10 Summary of Views towards SLM

Overall, there appears to be broad support for the SLM framework. For many, this support was contingent on a number of factors, including those outlined above. Depending on the perspective, for example, the outcomes contained within the framework either were too broad and prescriptive or were not comprehensive enough. From these viewpoints, the framework itself and the substantive thrust of the proposals were broadly supported:

*I believe that an income stream based upon Sustainable Land Management is good in principle; however, it needs to be kept as simple as possible.*

Sheep Farmer

*We consider that the Sustainable Land Management (SLM) framework represents an improvement to the proposals presented in the previous Consultation... The focus of payments based on environmental outcomes does have benefits, but again this should not be detrimental to the farm business. There is also a potential for good agricultural land (arable and grazing) to be set aside for environmental gains, which would reduce the amount of land in production.*

Isle of Anglesey Council

Within conditional responses, those who were broadly supportive of the framework but offered reservations tended to focus on concerns surrounding ensuring the competitiveness of the sector. Similarly, those who were the most critical of the framework tended to highlight that they felt as though the focus on environmental outcomes would be detrimental to the competitiveness and financial sustainability of the sector. Whilst other respondents recognised the balance between supporting production and environmental outcomes contained within the framework, these respondents implicitly and explicitly stated that the proposals should move away from environmental outcomes altogether. Whilst these were marginal viewpoints, they were strongly expressed:

*I would totally disagree that focusing on an income stream for environmental results is the way forward. Planting trees everywhere, for example, would depreciate land at unprecedented rates. This would cause damage [to] farmers' profitability...*

Mixed Farmer

*If you are going to focus too much on paying for environmental elements, as opposed to paying for food production, there is a real danger that rural areas will lose the capacity and current farming methods could disappear forever!!*

Sheep Farmer

## 4 Sustainable Farming Scheme

### Summary of Proposals

The Welsh Government are proposing a new payment scheme that will reward farmers for delivering against Sustainable Land Management outcomes. Once a farm has entered the scheme, it will be eligible for the Sustainable Farming Payment, which would, in effect, replace the BPS and Glastir.

The proposals include a number of important features. The scheme will provide a meaningful income stream to farmers, just as the BPS currently does. Payments will be contingent on appropriate actions being implemented; however, the Welsh Government will bear the risk if agreed actions do not lead to positive outcomes. Furthermore, the scheme will reward existing sustainable practice, ensuring that those already supporting broader public goods are recognised for their contribution. Reflecting on feedback from *Brexit and our Land*, the scheme will also include greater flexibility, whereby enabling farmers to implement the most effective approaches that are suitable to their circumstances and local conditions.

### Consultation Question

Respondents were asked for their views on the proposed Sustainable Farming Scheme. Moreover, they were asked how the scheme should operate, the criteria by which payments would be determined, and alternative ideas for supporting farmers.

### Summary of Responses

- The scheme should reward both the ‘creation’ and the ‘maintenance’ of SLM activity.
- The scheme should prioritise farmers’ financial stability.
- Some respondents suggested that payments should be capped in order to ensure a fair distribution of funding, with a focus on supporting small family farms over larger land managers.
- Some felt that eligibility should be limited to active land management only, and should not include inactive land management, including rewilding.
- There were mixed opinions regarding farmers being rewarded for providing, and incentivised to provide, public goods.

### 4.1 Financial Stability and Security

In order to protect the viability of the Welsh agricultural sector, respondents highlighted the need for any scheme to prioritise farmers’ financial stability and security. This point was made by a high proportion of respondents and recurred across almost all consultation questions.

A key concern driving these viewpoints was the perception that the new scheme would not be as generous as the BPS. Some respondents highlighted concerns that the reduced public subsidy would cause them to go out of business. Respondents often highlighted the fact that this would result in not only farmers being affected but also rural communities and broader supply chains, including feed suppliers, contractors, and veterinarians.

This links to respondents' support for the continuation of some form of BPS which acts as a safety net by supplementing the main business income of farmers and crofters. The new scheme should, according to many respondents, provide adequate financial support that ensures the viability of the business, including helping them to navigate risks and uncertainties.

Many respondents suggested that payments should be made on an annual basis, for which farmers can budget, with another pot contributing to initial capital costs, as well as an outcome-based payment. What is more, longer-term, multi-year contracts were requested by respondents who viewed these as being essential for providing security and continuity, though many noted the importance of subjecting these contracts to regular reviews, especially during the initial period of the scheme. Many respondents felt that supporting the economic resilience of small family farms, tenant farmers, and new entrants was of paramount importance. Meanwhile, some respondents suggested that payments should be made on the anniversary of their contract, rather than on a fixed date, in order to spread the administrative load and ensure that a backlog of payments is not generated to the detriment of farmers' financial well-being.

## 4.2 Capped Payments

The majority of substantive responses were in agreement with payments being capped for large landowners in order to ensure a fair distribution of resources to smaller farms. A significant number of respondents in favour of capped payments argued for an absolute cap with no payments on hectares over a certain threshold, with a similar proportion also arguing for a capped payment level per hectare of land:

*Payments must be capped in order to protect the reputation of any plan and to ensure that money is paid to family farms, as opposed to facilitating the type of unlimited payments that investors and companies have taken advantage of in England to the detriment of family farms, communities and the reputation of the PAC in general.*

Sheep Farmer

However, other respondents contended that a per-hectare cap would discourage best practice and would not be a beneficial method for controlling payments:

*We would strongly oppose a per-hectare cap, as this would maintain the status quo in which the more land you own, the more money you get. If a farmer can create multiple benefits on the same piece of land, then they should receive the full payment for it.*

Individual

In addition, a small number of respondents opposed the idea of any form of payment cap, stating instead that payments should reflect actions taken:

*Capping is not necessarily a problem if done on a per-hectare basis, but caution is advised. Funding for woodland establishment will be necessary to kick-start planting, and it is quite feasible that even a relatively small afforestation project could exceed the annual cap.*

Individual

### 4.3 Eligibility Criteria

Respondents were keen to see strict eligibility criteria put in place in order to ensure that the distribution of resources was fair and controlled. In particular, the majority of respondents argued strongly for eligibility to be based on active land management. A limited number of respondents disagreed and raised concerns surrounding restricting eligibility to active land management, stating that this would discourage other beneficial forms of land management such as rewilding:

*It is important that the view on restricting payment to active management only is considered carefully. Land that is allowed to revert to its natural state may require very little management in the long term whilst delivering good public benefit.*

Chartered Institution of Water and Environmental Management

A small number of respondents argued for and against, in roughly equal numbers, an enterprise being of a minimum size in order to be part of any eligibility criteria. The arguments for this proposal mainly referred to questions of funding and affordability, while arguments against the proposal stated that this would discourage horticulture — a form of land use that can deliver multiple benefits for small areas.

### 4.4 Rewarding Creation and Maintenance

Many respondents emphasised the importance of rewarding the creation and maintenance of SLM activity equally:

*We welcome the intention to support maintenance as well as creation. Many farmers have already done a significant amount of habitat creation and it is important to support those farmers who have done the most beneficial work for the environment, as well as to continue to support the creation of new habitat.*

Individual

However, while respondents were largely favourable, some raised concerns surrounding the affordability of supporting both strands, particularly given ongoing uncertainties surrounding the level of funding available after the UK leaves the EU.

## 4.5 Minimising Bureaucracy

Support for minimal bureaucracy and simplification wherever possible was a central theme of consultation responses to multiple questions. A significant proportion of respondents feared that the proposed scheme would substantially increase the burden on farmers in terms of paperwork and other forms of administration:

*Many, especially small-scale, farmers did find the paperwork behind the Basic Payment Scheme and Glastir subsidy schemes daunting. The Sustainable Farming Scheme should be wary of excessive bureaucracy if it is to succeed. Furthermore, the observation/analytical techniques used in the initial Farm Sustainability Review, as well as during follow-on reviews, must be kept simple and manageable if they are not to overwhelm both farmers and advisors.*

Individual

*I am very concerned that the consultation proposes a very bureaucratic plan to take the place of the BPS. It appears that the new plan will depend a great deal on input from external consultants and advisors, which will account for a significant proportion of the cost of the new plan. It appears that the new plan is too bureaucratic. It will be difficult and expensive to administer and it will be complex for farmers to implement, which will place them under additional pressure.*

Individual

Some respondents suggested introducing stepped approaches that have simple routes into the scheme, whereby ensuring that it is accessible to all. This would enable smaller farms to engage with the scheme, whilst also ensuring that the broad range of outcomes are supported across the SLM framework:

*The plan seems to be very complex and it must be simplified. Would it be possible to offer three different levels of the plan, similar in principle to the Glastir schemes, so that the lowest level is basic and very easy to follow, the next level is a little more complex, and the third level is even more complex?*

Individual

*Schemes should be simple and practical to administer, at minimal cost to both Welsh Government and to farmers. Many farmers are capable of preparing expressions of interest or applications without the need for expensive consultancy advice. Providing good explanatory documents and good web-based portals would enable the scheme to be introduced efficiently and cost-effectively. There is a risk that many will see it as too complicated and will not sign up to the new scheme.*

Welsh Mountain Sheep Farmers Association

## 4.6 Investing in Public Goods

A number of respondents, including many organisations such as the National Trust, Ramblers Cymru, and Wildlife Trusts Wales, were largely in favour of the scheme supporting farmers in providing public goods not otherwise rewarded by the market. While attitudes amongst

farmers were largely supportive of this aspect of the scheme, a minority of farmers did not agree that providing public goods should be part of their remit and that this was not their responsibility.

A significant number of farmers felt that not including food as a public good was a serious omission within the consultation, and feared that this would further endanger continued food production within Wales:

*Whilst I believe it is correct to focus on the environment, I still believe a guaranteed supply of safe, high-welfare and local food is a public good, especially as the market doesn't necessarily reward high welfare and traceability, i.e. movements and tagging are a cost to the farmer. Cheaper food can still be imported until a disaster happens, etc.*

Individual

## 4.7 Business Support

A mixture of views were expressed regarding the role of business support within the new scheme. A small number of respondents were keen to see an increased amount of business support available for farmers and other land managers, stating that high-quality advice in this area was essential to the profitability of any agricultural business. These responses were, however, in the minority, and the majority of respondents who expressed a view on this topic felt that introducing additional business support for the new scheme was unnecessary and a drain on finite resources:

*We feel that there is already enough training/business skills development and consultant-led advice available. In fact, we believe that the money would be far more benefit being paid directly to the farmer to help fund his individual business needs and to cushion the blow of dire market prices...*

Individual

Some respondents did favour introducing more business support exclusively for small and/or diverse businesses in rural areas. Respondents offering this view often emphasised that this should be in a limited capacity and should not negatively impact on the amount of resources being targeted towards farmers directly.

## 5 Advisory Service

### Summary of Proposals

Drawing on the responses to *Brexit and our Land*, the Welsh Government recognised the need for a comprehensive Advisory Service that builds on existing good practice, including Farming Connect and Glastir contract managers. The Advisory Service would replace existing provision and support through Farming Connect and Glastir, and not seek to duplicate it. This reflects the challenges of Brexit and the move to a scheme based on outcomes. It is particularly relevant during any transition period.

### Consultation Question

Respondents were asked for their views on the Advisory Service contained within the proposals. In addition, they were asked whether the service should be established, as well as the role and functions of the service. Furthermore, the respondents were asked how they felt the relationship between the Advisory Service and the Welsh Government should be, as well as the appropriate scale of delivery.

### Summary of Responses

- It was widely held that the Advisory Service should not duplicate existing provision, including that provided by Farming Connect and Glastir.
- Respondents often understood that the proposed service would be introduced alongside other services, which was not the intention of the proposals.
- There were concerns surrounding the costs of establishing and maintaining support.
- The Advisory Service should maintain independence from the Welsh Government and any other regulatory body.

### 5.1 Local Knowledge and Areas of Expertise

Respondents felt that the advisors should possess a mix of expertise and experience, including a balance between local and specialist knowledge. Moreover, some felt that identifying farmers who could provide broader peer advice would be a good way in which to deliver and disseminate support and advice:

[Tenant Farmers Association] *Cymru believes that the development of an Advisory Service to ensure the smooth implementation, management and delivery of the new scheme is essential. However, it will be important to ensure that the Advisory Service is publicly run and is not contracted out to individual agents. Advisors will need to display empathy with the farming community, instil trust and have sufficient expertise to work alongside the farming community to fulfil the successful implementation of the new scheme. Advisors should have the ability to make decisions and their recommendations should have authority.*

## 5.2 Funding

A key concern emerging from the responses to this question related to the resources and funding necessary in order to provide a new full-scale Advisory Service. Many respondents questioned the necessity of an additional Advisory Service, given the existence of current bodies such as Farming Connect. Many of those raising this issue appeared to understand that the proposals would introduce the new Advisory Service alongside other provisions. A significant number of respondents believed that the creation of a new Advisory Service would divert limited resources and reduce the amount of direct financial support available to farmers themselves:

*Would be extremely costly, impractical and, given the current problems with the Glastir schemes, it would be disastrous to implement such a bespoke scheme.*

Mixed Farmer

From these perspectives, respondents often suggested that the proposals should primarily focus on devising a simple application process and a concise list of achievable environmental outcomes. This could reduce the need for an additional Advisory Service.

Meanwhile, others believed that there was a definite need for advisor visits and that the development of a relationship between the farm and the advisor was vital to ensuring that the scheme provided meaningful results. Respondents highlighted the fact that each farm could face very unique challenges, that an understanding of those problems was vital to providing a meaningful scheme and that this could be achieved only through a site visit:

*We strongly support the Welsh Government's view that "advice should be seen as an investment in the capacity of farmers rather than a cost to the scheme" (1.48). Evidence from previous agri-environment schemes, notably Tir Gofal, supports the view that improved value for money can be delivered where a good standard of advisory support is part of the scheme.*

Snowdonia Society

## 5.3 Implementation Concerns

Allied with concerns surrounding funding was the perception that an Advisory Service could duplicate existing services, including Farming Connect. Linked to this, respondents were sceptical that a sufficient number of advisors with the required level and range of expertise could be sourced in time for the implementation of the new scheme. Advisors should be fully trained and have suitable experience before the scheme commences, according to respondents, in order to ensure a smooth transition.

## 5.4 Independence of the Service

Some respondents felt that it was vital that the Advisory Service be an independent entity offering impartial advice:

*The service should provide unbiased, general advice on policies and issues associated with the market, as well as animal health and welfare, and advice on environmental/conservation issues. It should also provide specialist advice, or funding to pay for it if it doesn't already exist internally. It should not monopolise the provision of advice.*

Sheep Farmer

## 5.5 Educational Remit

Some respondents felt that a new Advisory Service should perform an educational (or training) function in order to improve farmers' knowledge on new techniques and processes needed so as to benefit from the new scheme.

## 5.6 Accessibility and Responsiveness of Support

The key response from the majority of respondents was that the scheme would need to be accessible and avoid an administration-heavy process that would deter people from signing up and put farmers under additional stress. This would help to reduce inequalities across the agricultural sector, according to respondents.

It was emphasised by respondents that any new Advisory Service should be flexible enough to adapt and respond to changing sectorial requirements. This would include, notably, the need to meet greater demand as the new scheme is introduced, as well as the need for different areas of expertise as the sector moves towards new processes for more sustainable land management.

## 5.7 Accountability

In the new scheme, advisors will play a significant role in directing farmers' activity. This will mean that advisors will have a large impact on the payments that farmers derive from the new scheme. Respondents were therefore keen to ensure that any Advisory Service would be held accountable for the advice that they give. Accountability measures suggested by respondents included regular monitoring of the Advisory Service and the introduction of an appeals service:

*I believe that the advisors and regulation officers could be the same, as they would then know what they are looking for and whether they have met the target. The problem with one person setting the target and another checking if it has been reached is that they will inevitably have different standards and the farmer may believe he has reached the target, going by what the advisor has told him, whereby the regulation officer may not think it is so. Appeals will follow which will only take time, effort and money away from the task in hand.*

Sheep Farmer

## 6 Industry and Supply Chain

### Summary of Proposals

The proposals set out to provide targeted support to the wider industry and supply chain. The Welsh Government recognise that the majority of financial support should be directed towards farmers through the Sustainable Farming Scheme. In some instances, however, it may be fairer and more efficient to provide support to the wider industry and food chain, particularly the agricultural sector.

From this perspective, a thriving Welsh food and drink industry can create greater demand for Welsh primary produce. The Welsh Government therefore propose providing support to the wider industry and supply chain if it is consistent with the SLM objective and, ultimately, benefits Welsh farmers.

### Consultation Question

The respondents were asked for their views on the relative value and importance of supporting broader food and drink industry and supply chains in order to support the sector.

### Summary of Responses

- Broad recognition of the role of broader industry and supply chains in supporting a vibrant agricultural sector.
- Broad support for encouraging local partnerships and collaboration.
- Concerns that channelling finite resources towards the broader industry and supply chains would dilute the financial support available to farmers.
- Mixed opinions on whether industry and supply chain support should be subject to SLM.

### 6.1 Benefits of Industry and Supply Chain Investment

Across the majority of responses was recognition of the important role that broader industry and supply chains have in supporting the agricultural sector. Those respondents who were supportive of giving support to the supply chain, for example, highlighted the benefits of more integrated and local supply chains. Setting up local, small-scale processing plants, for example, could reduce food miles and provide farmers with the capability of lowering costs and increasing margins:

*Investing in an infrastructure to keep more of the supply chain in Wales would multiply any investment in farms and create employment. Slaughterhouses, wool washhouses, mills, dairies and purifiers, alongside product stores, etc., are all important.*

Sheep Farmer

*We accept in principle the case that government investment in the supply chain could help unlock opportunities for sustainable land management. Marginal and upland areas have strong potential to support HNV farming systems, but viability of food production in these areas is challenged by distance to markets, abattoirs and processing plants, for example.*

National Trust

## 6.2 SLM-Based Support

The majority of responses stipulated that any form of support for the rest of the industry must also be subject to SLM standards. If it were not, respondents argued that this would be unfair and that any environmental benefits or gains provided by farmers could be undermined.

A smaller number of respondents felt that support for the industry should not be subject to SLM standards. Responses in favour of this view made the case that a greater focus should be placed upon food security and that the main purpose of the agricultural sector was to provide high-quality food. From this perspective, supporting the development of broader supply chains would increase food security.

## 6.3 Limited Resources

There were concerns that supporting the broader supply chain could diminish the resources available to farmers. From this perspective, some respondents highlighted concerns that there was limited funding and that there was a danger that larger companies with centralised facilities could undermine the broader sustainability objectives. Meanwhile, some highlighted the closure of local processing facilities and the move towards larger, centralised facilities and the detrimental effect that these had upon animal welfare, carbon emissions, and the bargaining power of farmers:

*Targeting investment throughout the supply chain will most likely result in a decrease in on-farm investment. This off-farm investment should be effectively targeted so that farming business are more profitable and resilient. There needs to be an appropriate balance of funding so that farmers are not out of pocket. We therefore believe that the majority of financial support should be directed at farmers and land managers through the SLM scheme.*

Nature Friendly Farming Network

# 7 Regulatory Framework

## Summary of Proposals

An important part of the picture is that of the regulatory standards, monitoring and enforcement which apply to farmers, foresters and other land managers. Effective regulation can provide clarity for farmers and businesses, protect standards and help to maintain our natural resources.

The Welsh Government propose developing a new, streamlined regulatory framework for agriculture in Wales. They propose that it should include clear minimum standards, smarter monitoring and proportionate enforcement. In the interest of fairness, the regulatory framework should apply to all farmers, regardless of whether or not they receive financial support from the Welsh Government.

## Consultation Question

The respondents were asked for their views on how the Welsh Government could improve the current regulatory system and develop a new regulatory framework. Respondents were asked to consider how regulation could be improved and how it should be monitored and enforced.

## Summary of Responses

- There were significant calls for any future regulatory framework not to be onerous and increase costs.
- Enforcement should also be proportionate and work with farmers and land managers to address and resolve issues.
- There were significant calls for regulation not to impede the competitiveness of farmers in comparison to those in the rest of the UK and in the EU.

## 7.1 Simple and Effective Regulation

A key theme running through the responses was the importance of simple and effective regulation. From these perspectives, any regulatory system should not be onerous for farmers to understand and comply with. On the whole, many respondents welcomed the emphasis on seeking to develop a simplified and streamlined framework. This viewpoint was often framed within an understanding that the existing regulatory environment was overly complex:

*The existing regulations certainly need to be simplified, and should only include what is legally required. The regulations should not be overly complex, and additional regulations that are not legally required should not be added.*

Sheep Farmer

*We agree that the current system is overly complex, and would support moves to make it more streamlined and easier for farmers to understand. We welcome moves to bring key legislation together in a single, coherent framework.*

Horticultural Farmer

There were, however, concerns that the broader proposals, with an expansive remit that promotes sustainability and public goods, would themselves generate a complex regulatory framework. From this perspective, the proposals would not reduce the regulatory burden. This could limit the ability of the proposals to address broader issues such as the levels of stress and anxiety felt by farmers:

*NFU Cymru would stress that the requirements placed on farmers to adhere to and demonstrate compliance with ever-increasing levels of complex regulation has long been a source of concern to farming families. Farm businesses in Wales — in the main, SME microbusinesses — find themselves operating in a highly complex, ever-changing regulatory environment across an enormous range of topics and areas... There is good evidence that regulation impacts negatively on farmer confidence, with regulation and legislation consistently highly scoring as a factor influencing farmer confidence in the NFU annual confidence survey. Regulation is a key contributor to stress and anxiety within the sector, as recognised by the Public Health Wales and the Mental Health Foundation.*

National Farmers' Union Cymru

## 7.2 Proportionate Enforcement

Allied with simplified and streamlined regulation, respondents often highlighted that enforcement and penalties should be proportionate and fair. Respondents suggested introducing a system that operates at different levels that are appropriate to the severity of the breach, starting with a warning rather than immediately imposing a sanction or fine. In order to increase compliance rates, other respondents called for penalties to be set at a level which is significantly higher than the cost of compliance. In addition, any penalty should be proportionate to the business size in order to ensure that the impact is felt.

A significant number of respondents were concerned that the existing regulatory system adopted an overly threatening approach which exacerbates stress and anxiety amongst farmers. Some respondents alluded to the mental health impact of intimidating regulatory and enforcement procedures:

*Regulation is currently one of the most worrying and stress-inducing things that farmers have to deal with. The mental health of many people is suffering due to the added pressure that regulation places on them.*

Beef Farmer

Respondents highlighted the importance of reflecting on the mental health impact of any future regulatory system. It was suggested that incorporating a more consultative approach in terms of managing change and enforcement would be helpful in this regard, as well as developing a better relationship between farmers and the Welsh Government. Many cited that the current regulations tended to take punitive actions without discussing possible solutions with farmers.

### 7.3 Maintaining Competitiveness

Concerns surrounding a loss of competitiveness as a result of SLM-based regulations constituted a key theme, with respondents from the farming industry fearing that regulatory divergence from the UK and the rest of the EU would significantly disadvantage Welsh agriculture:

*Competitors in other countries and regions will continue to receive direct support, whereas the current proposals imply that Welsh farmers will have to comply with many times more rules and restrictions, and work harder and lose more agricultural land, to get payments. This would clearly place Welsh farmers at a competitive disadvantage.*

Sheep Farmer

Retaining regulatory alignment with the rest of the UK was a key priority amongst respondents in order to maintain competitiveness, although a small number of respondents suggested that any regulatory framework should align as much as possible with the EU for trade purposes:

*The regulatory framework must also take into consideration standards which are being used in other parts of the UK and internationally, particularly where goods produced under those differing standards find their way in front of Welsh consumers, which not only undermines domestic production but allows poorer standards to prevail in other jurisdictions. If it is felt important to introduce a new level of regulation in respect of agricultural production which is not applied elsewhere, the Welsh farming community would legitimately expect protection against products imported to Wales produced to standards which would be illegal at home.*

Tenant Farmers Association Cymru

### 7.4 Self-Monitoring

There were mixed views regarding the use of self-reporting/assessment within a new regulatory framework. Respondents in favour of incorporating self-assessment argued that this would reduce the number of inspections required and lessen the burden on assessors, thereby freeing up resources. In addition, self-evaluation would increase farmers' understanding of the regulations and, consequently, increase compliance rates, according to these respondents.

A system of earned recognition was suggested by respondents to be a way of further optimising inspection work. However, a smaller number of respondents raised concerns

surrounding the effectiveness of self-evaluation, arguing that it was too subjective and at risk of being abused. Respondents who cautioned against the overreliance on self-monitoring asserted that it would contribute to a lack of regulatory presence and adherence:

*This is no substitute for effective, intelligence-led, risk-based enforcement. The recent case of Southern Water in England is a large-scale demonstration of how self-assessment can be abused. It is as good as the creativity of the author and the rigour of the assessor and it's retrospective, so failings are acknowledged (if at all) post hoc — any damage is already done.*

Environmental Organisation

## 7.5 Broader Scope of Regulation

A number of respondents deemed the scope of the regulatory framework proposed to be too restrictive, and suggested that a number of areas needed greater inclusion. These included animal welfare protection, historic environment protection, and regulation in relation to the processing of slurry, silage, and fuel oil. Respondents argued that improved regulation and enforcement in each of these areas would deliver significant environmental benefits.

## 7.6 Enforcement

Respondents felt strongly that SLM regulations should apply to all farmers and land managers, regardless of whether or not they receive Welsh Government support. This was seen to be critical for achieving environmental benefits which would otherwise risk being undermined if the entire industry were not subject to SLM regulations.

A small number of respondents stipulated that assessment and monitoring must be conducted independently by an impartial organisation. This was seen to be necessary in order to avoid conflicts of interest and ensure a fair assessment of breaches and enforcement of sanctions.

## 7.7 Implementation Concerns

A minority of respondents raised strong concerns surrounding the lack of proper historic enforcement and, consequently, were anxious that a future regulatory framework should comprise stricter and more robust enforcement procedures.

A small number of respondents also questioned the introduction of a new regulatory framework, disagreeing that any changes were needed. Within this group of respondents, some were adamant that farmers undergo a sufficient amount of inspections and are already subject to extensive regulations. Meanwhile, others made the argument that creating a new framework would not be cost-efficient, and that the current framework was sufficient to deliver the objectives of SLM.

## 8 Transition Period

### Summary of Proposals

The Welsh Government are proposing a transition period when moving from existing arrangements to the new scheme proposed. The purpose of a transition period would be to ensure that both farmers and the Welsh Government have the necessary time to prepare and then move from current schemes to new arrangements.

The Welsh Government propose a multi-year transition period. Given the continuing uncertainty surrounding Brexit, they are unable to define the nature and length of the transition period. At this stage, they are seeking views on what the transition period needs to achieve and the options for moving farmers from current schemes to the new scheme proposed.

### Consultation Question

Respondents were asked for their views on the purpose and design of a transition period. Furthermore, they were asked to consider the relative merits of a managed transition, as well as how the CAP could be simplified and improved while still in operation.

### Summary of Responses

- Whilst views varied, there appeared to be greater support for a longer transition period of five years or more.
- Respondents often cited Brexit uncertainty as presenting challenges in determining the appropriate nature and extent of the transition.
- Piloting was often suggested as being an important process through which to develop and test aspects of the proposals before they were rolled out more widely.
- Of the three options presented in the consultation, option A was most commonly referenced in the responses. The vast majority of respondents, however, did not mention or lend support to any of the three options outlined.

### 8.1 Length of Transition Period

Responses varied a great deal with regard to the most appropriate length of a transition period. With some respondents advocating a quick and simple transition, there appeared to be greater support for a more gradual approach in order to allow the Welsh Government and the farming community to prepare for the adjustment. Those in favour of a longer, more gradual transition period varied in their suggested timeframes from five years to 20 years:

*With many of our group members working in advisory capacity to farmers, we are unanimous in asking that there is a clean and simultaneous end of the old scheme and start of the new. Five years would give time for the new scheme to be modelled, trialled and consulted upon, in addition to giving time for the adjustments required within farm and forestry-associated businesses to accommodate the expected changes in focus for delivery.*

Women in Farming

Meanwhile, other respondents advocated a more flexible approach, one which was responsive to potential changes in circumstances:

*We agree that the need to handle the transition requires time and sensitivity. It needs to be gradual, but Brexit is going to be a sudden shock with rapid changes, so we must also be quick and adaptive to minimise the potentially massive impact. It should be considered that we may have to operate in entirely different ways and that the business models that operate will no longer function. Incentives should be designed to stimulate change at a national level to change the structure and nature of the forestry resource in Wales so that it delivers integrated environmental, social and economic outcomes in a cost-effective way.*

Institute of Chartered Foresters

## 8.2 Brexit Uncertainty

Many respondents felt unable to comment on the most appropriate transition period, given the continued uncertainties resulting from Brexit in relation to funding, timing, and trade relations. Some respondents even felt that the timing of the consultation was not helpful, given the lack of progress with respect to Brexit negotiations at the time of publication:

*The transition decision is difficult and hard to comment on without knowing Brexit implications and the amount of funding available, and how prepared WG are for running the scheme... Tools to help businesses become more efficient should be readily available throughout; however, let's be honest: no amount of business efficiencies are going to make up for the huge loss of BPS. Therefore, whilst the message should be clear that the BPS will be finishing, and start steadily being removed, it should be clearly communicated what the alternatives are so that farmers can sign up ASAP to ensure a smooth transition.*

Sheep and Beef Farmer

From this perspective, a few respondents argued that the BPS should be maintained in the immediate future:

*There is no merit in the proposed three transition phases, as it does not take into consideration the extremely bad returns from agriculture at present, the lowest beef price for 10 years, a slump in lamb prices when the world price for lamb has shot up. Nor does it take into consideration the vagaries of Brexit and the effect of tariffs. Therefore, the BPS must be maintained as at present.*

Beef Farmer

## 8.3 Role of Piloting in the Transition

A number of respondents called for pilot tests to be incorporated either before embarking on or during a transition period, rather than replacing the scheme wholesale. This was seen to be an important approach in order to ensure effective implementation of the proposals:

*Considering the fact that we are not yet out of Europe and timescales are unknown, after that a budget is unknown, I think the best way is to continue with BPS whilst developing and testing this new proposed scheme. WAG have an online system and BPS scheme that works, so why change this before a new scheme is fully developed. The new proposed scheme must work equally as well or better when implemented.*

Individual

*The programme is very ambitious and will likely need a cyclical process of planning, implementation, review and revision. The transition period may need to run concurrently with some elements of scheme development.*

Organisation

*Clearly implementing the new scheme in the context of Brexit is a major challenge and presents significant risks, ranging, for example, from low participation due to lack of clarity of the scheme rules through to administrative systems being unable to cope with high participation. While the consultation document refers to being able to draw on the experience of the introduction of Glastir, given the very different overall circumstances, I think a pilot approach (on a geographical basis) to test the full operation of the scheme in the new economic conditions may be prudent. Piloting should cover every aspect of operation: from guidance to payments, and advisory work to regulation and enforcement.*

Auditor General for Wales

## 8.4 Options A, B and C

The vast majority of respondents did not mention or lend support to any of the three options outlined in the consultation. Of those who mentioned an option explicitly, the most frequent response was option A, i.e. the gradual and phased introduction of the proposals.

## 9 Analytical Approach

### Summary of Proposals

The Welsh Government recognised the importance of understanding the potential impacts of significant change to the way in which the agricultural sector is supported. Therefore, they have set out a comprehensive analysis plan to map and understand the possible impacts of the proposals. With the culmination of the development of an Integrated Impact Tool with which to model the impacts of the proposals, the Welsh Government intend to underpin and inform future policy with a comprehensive and rigorous evidence base.

### Consultation Question

The respondents were asked for their views on the analytical approach set out in the consultation document. Moreover, they were asked to consider the range of impacts that should be incorporated into the analysis, as well as the tools and techniques that should be applied in order to understand potential impacts.

### Summary of Responses

- Of those respondents who offered their views, there was a general consensus that the approach of assessing the impact of the proposals was an important and valuable exercise.
- A key point of departure was the specific focus of any impact analyses, with different respondents holding different priorities.
- One constituency of respondents, for example, wished to see the proposals being assessed against the Well-being of Future Generations Act (2015) and the Environment (Wales) Act 2016.
- Others highlighted specific issues, such as language or environmental impacts, as being overemphasised or underemphasised within the proposals.
- Some felt that the proposals were overly complex, and wished to see a more streamlined and simplified approach to understanding and analysing impacts.

This question received the least attention from respondents across the consultation. It was not possible to determine respondents' position 311 times (61.2 percent).

### 9.1 Importance of Comprehensive Analysis

Of those respondents who offered views and perspectives, there was a general agreement that assessing the potential impacts was an important and valuable part of developing the proposals. From these perspectives, rigorously analysing the implications of the proposals was essential in ensuring that the subsequent reforms are effective and efficient:

*Given that the proposal to phase out Direct Payments to farmers and introduce a Sustainable Farming Scheme based on public goods and environmental outcomes represents the most radical changes to the principles underpinning rural support since the 1947 Agriculture Act, it is clear that this warrants detailed and thorough analysis of the potential impacts for Welsh farm businesses, food production, agricultural sectors, local and wider economies, agricultural supply chains, employment and livelihoods, culture, and language.*

Farmers' Union of Wales

*We agree that the outcome of the Brexit negotiations and the final budgetary decision for funding in Wales are the two key points affecting the shape of the Welsh Government's proposal. We also support the modelling and testing proposed in Annex A and the continued work with the Welsh Government in shaping the future for our farmers, landowners and managers...*

Future Farming Wales

Whilst there was broad support for the overall approach outlined in *Sustainability and our Land*, some respondents wished to see a greater emphasis on specific impacts within the proposals. These tended to be informed by respondents' background or their interest in the proposals. Those directly involved in farming, for example, tended to emphasise the importance of understanding the implications of the proposals for farm business revenue, costs, and net farm income. Meanwhile, other stakeholders thought that the proposed approach did not go far enough in understanding specific impacts. The Animal Health and Welfare Framework Group, for example, believed that the proposals were:

*...highly focused on environmental outcomes alone and there is no mention of the analytical approach to assessing impacts on animal health or animal welfare. On page 92 there is a section on valuing environmental outcomes, with no equivalent section on valuing animal health and welfare outcomes.*

Animal Health and Welfare Framework Group

Others wished to see the focus being widened to other areas and activities. A few respondents were concerned that there was no mention of exploring the potential impact of the proposals on the Historic Environment (Wales) Act 2016:

*We consider that the reference to culture and heritage in Annex A represents too narrow a definition of heritage, being entirely focused on recreation. We support the desire to consider how the proposed scheme will impact on heritage, but suggest that this should be broadened to consider the full range of possible impacts on and benefits for the historic environment and, specifically, the economic life of farms and tackling climate change.*

Cadw

Natural Resources Wales also suggested that impact assessments should include a more expansive understanding of the policy and programming landscape when modelling the counterfactual:

*It is important that in understanding the potential post-Brexit economic conditions and spatial modelling (stages 1–3) that an agile framework is developed that allows the rapid assessment of the changing Brexit landscape as it develops... It is suggested that the policy proposals are assessed against the current system (stage 4) of Basic Payment Scheme (BPS). However, policy proposals in this consultation are not limited to replacing BPS system, but will also replace other funding streams and activities that are currently funded under Pillar 2 (Rural Development Plan Funding) of the Common Agricultural Policy. Therefore, it would be useful to consider including these activities (not only Glastir) and funding streams in the 'before scenario' estimation.*

Natural Resources Wales

Whilst the majority of respondents were supportive of the overall approach or wished to see a more comprehensive analysis, some preferred a more streamlined and focused approach to assessing impacts. Those who asked for a more streamlined analysis tended to state that they did not want an overly burdensome analysis to take finite resources away from being targeted directly towards farmers.

## 9.2 Alignment with Broader Legislation

A number of respondents reflected that the proposals aligned well with broader legislation, including the Well-being of Future Generations (2016) Act and the Environment (Wales) Act 2016:

*The Well-being of Future Generations Act is one of the most innovative pieces of national legislation that has been seen in decades. Ensuring that the future of Welsh agriculture is closely aligned with the vision outlined in that ground-breaking piece of legislation is a necessary step and requires adequate and transparent data for an accurate Integrated Impact Assessment. To achieve this, the SFT would suggest that substantial and rigorous modelling needs to be undertaken to comprehensively analyse the potential impact of the policy shift on farmers, businesses and local communities and underpin any decision. This is especially important, given that the decisions will have a long-term impact on farmers and need to be designed in a way to be most effective in order to mitigate risk and protect livelihoods.*

Sustainable Food Trust

## 9.3 The Importance of Co-design

Alongside embedding rigorous impact assessments, respondents broadly welcomed the opportunity to input into the development of the proposals through a broader co-design process. Drawing on the expertise and experience of key stakeholder groups, including farmers and land managers, was seen to be ensuring that the proposals effectively address the challenges facing the sector. It was felt that such an approach would lead to greater ownership and engagement from stakeholders in the process. From this perspective, it could also lead to more effective outcomes, including compliance.

# 10 Welsh Language

## Summary of Proposals

As with all Welsh Government policy and programming, consideration is given to how reforms will impact on the Welsh language. The proposals recognised the important role that the agricultural sector plays in Welsh-speaking communities, including through employment opportunities. The Welsh Government intend to undertake a Welsh Language Impact Assessment in order to consider the implications of the proposals for the Welsh language.

## Consultation Question

Respondents were asked for their views on the impact that the proposals would have upon the Welsh language, specifically on opportunities for people to use Welsh and on treating the Welsh language no less favourably than English.

## Summary of Responses

- Broad recognition of the importance of healthy rural economies, Welsh agriculture, and small family farms to the use of the Welsh language.
- Apparent concern that the proposals do not provide enough support and protection to communities in which Welsh is commonly used.
- Broad support for the scheme to be delivered bilingually.

## 10.1 Importance of Agriculture and the Welsh Language

When asked for their views on the impact of the proposals upon the Welsh language, many respondents drew on the understanding that farming was central to the vibrancy of rural communities, including those that predominantly use Welsh in everyday usage.

There was a general perception from some respondents that the proposals could negatively and disproportionately impact on the Welsh language in the event that future economic arrangements lead to a downturn in Welsh farming. This was driven, in part, by the implicit assumption that future financial support would not be as generous as the current arrangements:

*I do think this could potentially have a negative effect on the Welsh language if it resulted in many smaller farms going out of business. This also could have a knock-on effect on rural businesses, many of which are also Welsh-speaking. If there was migration to other places this would also have a negative effect.*

Individual, Mixed Farm

Respondents also highlighted that the proposals could exacerbate existing issues within rural communities that undermine the Welsh language, including a lack of employment opportunities and rural depopulation. From this perspective, the proposals were therefore vital in ensuring the sustainability of rural and Welsh-speaking communities:

*Any policy change that has the potential to radically reform and challenge the future of Welsh farming will have an inevitable threat to the Welsh language. Welsh language thrives in rural communities in Wales. Therefore, by safeguarding a prosperous future for the industry, the development of the language should be protected; if this is not achieved, then further diminishment of the language in rural communities is likely, as the structure of such communities will fragment.*

Individual Farmer

*Because the Welsh language is stronger in the agricultural sector than any other sector, and English is equally strong in every sector, any negative impact on agriculture as a result of this framework will affect Welsh more than English and, as a result, it is treated less favourably... Without targeted support for small family farms, young farmers, and stability, the Welsh language will suffer.*

Organisation, Sheep Farm, Response OL-184

Some respondents felt that the proposals offered new opportunities to promote the Welsh language. This perspective drew on the importance of ensuring the economic vitality of rural communities, as well as the availability of long-term and attractive employment opportunities:

*Supporting a diverse and vibrant agricultural sector and associated supply chain businesses will encourage young people in rural Welsh-speaking communities — whether from farming families or otherwise — to feel that they can build a good career without needing to leave the countryside.*

Individual, Mixed Farm

More directly, some respondents highlighted the importance of delivering all support and programming bilingually. From this perspective, bilingualism facilitates and promotes use of the Welsh language:

*The current BPS communications are available in Welsh and English and should be used in the new schemes. Although there is no direct evidence linking the BPS to the strength of the Welsh language in rural areas, it is reasonable to suggest the BPS has been a notable factor in protecting the Welsh language. When farmers/landowners/manager wishes to conduct business through the medium of Welsh, this should be encouraged and supported.*

Future Farmers of Wales

## 10.2 Welsh Language Commissioner

These sentiments were acknowledged by the Welsh Language Commissioner. Whilst recognising the important link between the Welsh language and agriculture, the commissioner was keen to highlight that economic growth was itself not sufficient to sustain and strengthen the Welsh language. From this perspective, language planning and the broader sustainability of rural Welsh-speaking communities should be an integral part of Welsh Government planning.

The commissioner offered a detailed assessment of the potential impact of the proposals upon the Welsh language. In their assessment, they understood the limitations of the existing support offered through the BPS in order to promote the Welsh language. They agreed that the proposals offered an important opportunity to address these shortfalls, as well as ensuring that future policy and programming would be more supportive of the Welsh language:

*We agree with this assessment and welcome the recognition given to the importance of the Welsh language in the consultation document. It provides a good basis for introducing improved procedures. However, it is difficult to see from the consultation document how the new policy will deliver where the BPS has failed.*

Welsh Language Commissioner

The commissioner was also unclear as to how broader social outcomes surrounding the Welsh language would be supported through the proposals. The commissioner viewed the SLM framework as not encouraging any specific actions in support of the Welsh language. Beyond targeting funding geographically towards predominantly Welsh-speaking areas, however, the commissioner did not offer concrete proposals as to which actions could address this shortfall. The commissioner suggested that further consideration and research would be needed with respect to how the proposals could bring about positive outcomes for the Welsh language.

# 11 Key Reflections

Respondents to the consultation offered a diverse range of views and perspectives on the proposals. There was considerable variation in the perceptions of different stakeholder groups, including on the potential implications of the proposals.

Overall, there was broad support for the sentiments and direction of the proposals. However, the majority of respondents raised caveats to their support. The issues raised were diverse and tended to focus on the detail of the proposals. Some respondents, for example, felt that the SLM framework should include more specific outcomes, whilst others felt that it should be more flexible and less prescriptive. Meanwhile, others felt that greater thought should be given to how the proposals would work in practice.

Respondents' views and perceptions were driven, in part, by a range of broader concerns and factors. The considerable uncertainty created by Brexit often underscored people's reading of the proposals, as well as the solutions that flowed from them. Respondents often read the proposals from their understanding of the limitations with respect to the current system, mapping concerns from current arrangements onto the proposals. Ensuring financial security was a key concern for many respondents. Moreover, addressing and reversing degradation in the natural environment was a key concern, including much of the support for the proposals.

It was also evident that there were multiple readings of the substantive content of the proposals. It was commonly believed that the Advisory Service would be introduced alongside existing provision, for example, where the proposals outline that they would replace existing services. This suggests that, given their scope and complexity, there may be misunderstandings of some of the more precise details contained within the proposals.

Overall, there does appear to be movement in the general sentiments held by respondents with regard to the revised proposals in comparison to responses to the *Brexit and our Land* consultation. Whilst a few key themes remained, including the view that there should be a greater emphasis on food production, as well as the restated importance of a simpler, more coherent regulatory framework, many of the key concerns raised appear to be less prevalent in the revised proposals.

Some of the overarching messages from responses include:

- Greater clarification and communication regarding some of the proposals, including the Sustainable Farming Scheme, the regulatory framework, and how the Advisory Service would fit within the existing mix of support.
- A key concern driving responses is financial security, as well as the belief that stability and continuity are important in the face of considerable uncertainty. This view often informed respondents' views on a longer transition period.
- From these perspectives, ensuring that the proposals simplify and reduce the bureaucratic and regulatory burden on farmers is important.

- Respondents broadly welcomed the approach of consultation and co-design as set out by the Welsh Government in the development of the proposals.
- Some respondents felt that piloting aspects of the proposals would also be valuable in developing and implementing robust policy and programming in support of the sector.

# Annex 1: Consultation Questions

## **Question 1: Sustainable Land Management (refer to chapter 3)**

What are your views on the Sustainable Land Management framework? You may want to consider:

- whether the structure of benefits, outcomes and actions is a useful tool
- whether the benefits and outcomes sufficiently cover the broad contribution of farmers, foresters and other land managers
- how we have described the Sustainable Land Management outcomes
- whether it is right to focus an income stream on environmental outcomes
- whether an alternative policy framework would be more appropriate

## **Question 2: Sustainable Farming Scheme (refer to chapter 4)**

What are your views on the proposed Sustainable Farming Scheme? You may want to consider:

- how the Farm Sustainability Review and Farm Sustainability Plan could be delivered in a proportionate manner
- how best to reward farmers for outcomes through their actions
- how the Sustainable Farming Payment should operate
- what business support should be offered to farmers
- what eligibility criteria are needed
- whether there is a role for capped or diminished payments
- how best to design the scheme to leverage additional private finance
- alternative ideas for supporting farmers in a manner consistent with Sustainable Land Management

## **Question 3: Advisory Service (refer to chapter 5)**

What are your views on an Advisory Service? You may want to consider:

- whether you agree that an Advisory Service should be established
- the functions of the service
- what the relationship should be between the Advisory Service and the Welsh Government
- the appropriate scale of delivery

## **Question 4: Industry and supply chain (refer to chapter 6)**

What are your views on providing support to the industry and supply chain? You may want to consider:

- whether it is right for support to be subject to Sustainable Land Management
- whether the proposed priorities reflect the right areas of focus
- Consultation questions

#### **Question 5 - Regulatory Framework (refer to chapter 7)**

What are your views on our proposals to improve the current regulatory system and develop a new regulatory framework? You may want to consider:

- how the current regulatory framework can be improved upon
- the scope of a future regulatory framework
- the role a future regulatory framework would play in championing Welsh standards
- how compliance with regulation should be monitored
- how breaches can be fairly and proportionately enforced

#### **Question 6 - Transition and funding (refer to chapter 8)**

What are your views on the purpose and design of a transition period? You may want to consider:

- the proposed principles for transition
- the relative merits of the three transition options
- alternative proposals for transition
- how the CAP can be simplified and improved while it is still in operation

#### **Question 7 - Analytical approach (refer to annex A)**

What are your views on the analytical approach set out? You may want to consider:

- the different stages of analysis
- the different tools and techniques which may be necessary for different aspects of the analysis
- the range of impacts which we propose to consider with the Integrated Impact Assessment

#### **Question 8: Welsh language**

We would like to know your views on the effects the proposals in this document would have on the Welsh language, specifically on opportunities for people to use Welsh and on treating the Welsh language no less favourably than English. What effects do you think there would be? How could any positive effects be increased, or negative effects be mitigated?

#### **Question 9: Other comments**

If you have any related issues that we have not specifically addressed, please let us know.

## Annex 2: Organisational Responses

This section lists the organisations that contributed to the consultation.

Abergavenny Just Food  
Abergavenny Transition Town  
Action Plan for Pollinators in Wales Task Force Working Group  
Afonydd Cymru Cyfyngedig  
Agricultural Advisory Panel for Wales  
Agricultural Law Association  
Agriculture & Horticulture Development Board  
Ancient Cattle of Wales  
Anglesey Young Farmers Federation  
Animal Health and Welfare Framework Group  
Arfon and Dwyfor Local Access Forum  
Association of Local Government Archaeological Officers in Wales  
Auditor General for Wales  
Beacons Water Group  
Black Mountains College  
Brecon Beacons National Park Authority  
Bridgend Local Action Group (LAG)  
British Cattle Veterinary Association (BCVA)  
British Mountaineering Council  
British Trust for Ornithology  
British Veterinary Association  
BSW Timber Group  
Busybees  
Cadw  
Cambrian Mountains Society  
Canoe Wales  
Cardiff University, Sustainable Places Research Institute  
Carmarthenshire Fishermen's Federation  
Carmarthenshire Nature Partnership  
Chartered Institute for Archaeologists and Council for British Archaeology  
Chartered Institute of Ecology and Environmental Management  
Chartered Institution of Water and Environmental Management  
Cilgwyn Community Group  
CLA Cymru  
Clwyd-Powys Archaeological Trust (CPAT)  
Coed Cymru  
Coed Lleol  
Coleg Cambria  
Confor Wales  
Conwy County Borough Council  
Council for Awards of Royal Agricultural Societies  
Countryside Alliance

Cows on Tour  
Curlew Country  
Cymdeithas Adaryddol Cymru/Welsh Ornithological Society  
Denbighshire County Council Communities Scrutiny Committee  
DJP Foundation  
Dŵr Cymru Welsh Water  
Dyfed Archaeological Trust  
Ecodyfi  
Edward Perkins Chartered Surveyors  
Elan Valley Trust  
Farmers Marts (R. G. Jones) Ltd.  
Farmers' Union of Wales  
Food Sense Wales, Paramaethu Cymru, Organic Growers' Alliance, Social Farms & Gardens,  
Landworkers' Alliance Cymru  
Tyfu Cymru  
Friends of the Earth Cymru  
FSC UK  
Future Farmers of Wales  
Future Generations Commissioner for Wales  
FWAG Cymru  
Game & Wildlife Conservation Trust Wales  
Glamorgan-Gwent Archaeological Trust Ltd.  
Growing Mid Wales Partnership  
Gwasanaeth Cynllunio Archaeolegol Gwynedd (Gwynedd Archaeological Planning Service)  
Gwlad Gwlad  
Gwynedd Council  
Henbant Permaculture  
Historic Houses  
Iechyd Da (Gwledig) Ltd. (ID)  
Institute of Chartered Foresters  
Isle of Anglesey County Council  
Landscape Institute  
Language Planning Wales  
Lantra  
Meat Promotion Wales  
Meirionnydd County Member  
Members of the Welsh Government's Young Person in Agriculture Forum  
Menter a Busnes  
Merched y Wawr  
Merthyr Cynog Community Council  
Ministry of Defence (MOD)  
National Association of Agricultural Contractors (NAAC)  
National Office of Animal Health Ltd.  
National Parks Wales  
National Sheep Association  
National Trust  
Natural Resources Wales (NRW)

NFU Cymru  
Northern and Southern Snowdonia Local Access Forums  
Open Spaces Society  
Organic Growers Alliance CIC  
Our Food  
Paramaethu Cymru  
Pembrokeshire Coastal Forum  
Pembrokeshire Machinery Ring Ltd.  
Pembrokeshire Wildfire Group  
Pennal Partners  
Penstrowed Community Council  
Plantlife Cymru  
Powys County Council  
Public Health Wales  
Quality Welsh Food Certification Ltd.  
Ramblers Cymru  
RBST  
Rhug Estate Organic Farm  
RSPB Cymru  
RSPCA Cymru  
Salmon and Trout Conservation Cymru  
School of Law and Politics, Cardiff University  
Sirhowy Hill CIC  
Slade Farm Organics  
Snowdonia Society  
Social Farms & Gardens  
South Wales Outdoor Activity Providers Group  
Sustainable Food Trust  
Sustainable Management Scheme project “Building Resilience in Catchments” (BRICs)  
Sustainable Soils  
Tenant Farmers Association Cymru  
The Alliance for Welsh Designated Landscapes  
The British Association for Shooting and Conservation  
The British Horse Society  
The Campaign for the Protection of Rural Wales  
The Central Association of Agricultural Valuers (CAAV)  
The Friends of Pembrokeshire Coast National Park  
The Landworkers’ Alliance Cymru  
The National Association of Areas of Outstanding Natural Beauty (NAAONB)  
The Nature Friendly Farming Network (NFFN)  
The North East Wales Biodiversity Network (BioNet)  
The Royal Forestry Society  
The Royal Welsh Agricultural Society  
The Vegan Society  
The Wales Adventure Tourism Organisation (WATO)  
The Wye and Usk Foundation  
T. H. Jones & Son

Tilhill Forestry Ltd.  
Troed Y Rhiw Organics  
Union of Welsh Independents  
Unite the Union  
Volac  
W. D. Lewis & Son  
W. E. R. Davies and Partners  
Wales Biodiversity Partnership  
Wales Environment Link  
Wales Federation of Young Farmers' Clubs  
Wales Squirrel Forum  
Waters of Wales (Dyfroedd Cymru)  
Welsh Black Cattle Society  
Welsh Government Flood and Coastal Erosion Committee  
Welsh Lamb and Beef Producers Ltd. (WLBP)  
Welsh Language Commissioner  
Welsh Livestock Auctioneers' Association  
Welsh Local Government Association  
Welsh Mountain Sheep Farmers Association  
Welsh Organic Forum  
Welsh Rights of Way Managers Working Group  
Welsh Upland Sheep Farm  
Wildlife Trusts Wales  
Women in Agriculture (Lampeter)/Merched Mewn Amaeth (Lampeter)  
Woodland Trust

# Annex 3: Campaign Responses

This section outlines the standardised texts submitted by each campaign.

## National Farming Union Cymru (n = 857)

### **Subject: Sustainable Farming and our Land consultation response**

Dear Minister,

This is a period of profound uncertainty for Welsh farming with Brexit, no clarity as to our future trading relationships and the real threat of leaving with 'No deal' on 31st October. The focus of our government should be on providing stability to Welsh farm businesses.

Welsh Government has no proposals for stability measures, as currently provided by the BPS, to underpin high quality food production. The phasing out of stability support could undermine the competitiveness of Welsh farming and have major consequences for farming families, the rural economy and the wider food and drink sector. Stability measures are vital to ensure Welsh farming is competitive and to secure the continued supply of safe, high quality, affordable food for our nation in the context of future challenges to our global food production system.

Sustainable Farming and our Land proposes an adviser-led approach to scheme access with all aspects of the farm business and current farming practice considered at the point of entry. This approach would be resource intensive, bureaucratic and cause time delays. It is vital that future schemes are simple and practical for farmers to be able to apply for and deliver. The aim should be to minimise management, administration and advisory costs.

Welsh Government has not proposed specific eligibility criteria for the future scheme. It is vital that future support is targeted at active farmers who take the business risks associated with food production and not disadvantage farmers who do not own the land that they farm.

Welsh Government proposes further consultation on a new streamlined regulatory framework with clear minimum standards, smarter monitoring and proportionate enforcement. The burden of regulation weighs heavily on farmers minds, causing stress and anxiety and undermining business confidence. Future regulation must be proportionate and evidence-based and not place farmers in Wales at a competitive disadvantage.

Welsh Government proposes building on its existing offer of financial and practical support for farm business development currently offered through Farming Connect, Farm Business Grant and Sustainable Production Grant. Business Support measures should be developed following full evaluation of existing measures to demonstrate they can deliver the same or better outcomes than BPS.

Welsh Government states that it is strongly committed to maintaining support for farming and will ensure that funding returned to Wales after Brexit is directed at farming and not spent elsewhere. Welsh Government policy must be adequately funded to ensure the sustainable growth of the food and farming sector, supporting farmers to produce high quality food to world leading standards whilst maintaining and enhancing our environment and meeting our climate change obligations. Future policy must ensure that Welsh farming remains competitive with farming in the UK, EU and globally.

**Use the box below to tell Welsh Government about:**

- What Welsh farming means to you
- Your farming system
  - The number of people you employ- full time, part time, contractors
- The number of rural businesses you deal with
- Any on-farm diversification projects
- The role you and your family play in the local community. E.g. YFC, local school, community council, local shows, eisteddfod, sports teams etc.

## Royal Society for the Protection of Birds (n = 1,889)

We are in the midst of a climate and ecological crisis and we need an approach that helps 'nature friendly-farming' become the norm. Encouraging farmers to work together to help address these pressing issues is crucial.

That's why I welcome the Welsh Government's proposals for future farming and land management for Wales. I support plans to promote sustainable food production and to make the best use of taxpayers' money by using it to reward farmers and other land managers for restoring nature and providing public goods for society.

It's important that this approach includes managing wildlife habitats appropriately to save our most vulnerable species like curlew, golden plover and black grouse. These and other species have an intrinsic right to exist and restored populations are also essential in securing resilient ecosystems on which we all depend.

I agree it's vital that ongoing advisory support is available to farmers to help them restore and protect nature for us and future generations. It's also important that future schemes are monitoring progress effectively to ensure they work, including for farmland wildlife, and deliver value for money for the public.

## Ramblers Cymru (n= 70)

Dear Cabinet Secretary,

Sustainable Farming and Our Land: Revised proposals for supporting Welsh farmers after Brexit

I fully support Welsh land managers being rewarded to deliver valuable public goods through their land, including access to green spaces and outdoor recreation opportunities.

However, the proposals as outlined in the consultation document do not make it clear that any public money given to land managers would be dependent on them meeting the minimum standards laid out in Rights of Way and Access law.

Complying with all legal duties in relation to paths and access, must be the foundation of a land manager's eligibility for financial support. Additional support where actions go "beyond the maintenance required by regulation" is to be welcomed, but this must be for permanent enhancements and delivered in addition to statutory duties.

The new support scheme for land managers should recognise:

- The condition of paths and access land as part of the expression of interest & the farm sustainability review stages.
- Compliance with highway and access laws as a mandatory eligibility condition for Sustainable Farming Payments, particularly within the stages of creation, delivery and review of contracts.
- A monitoring system that includes a mechanism for public reporting of non-compliance with rights of way and access laws.

This is a unique opportunity to provide outstanding access to the outdoors and to nature in Wales. Wales can lead the way in implementing a new approach and reinvigorating public understanding of the benefits gained from paths and access land.

I urge Welsh Government to strengthen the Sustainable Farming Payments Scheme as outlined above.

Yours sincerely,

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