



Llywodraeth Cymru  
Welsh Government

IMPACT ASSESSMENT

# Retail action plan: integrated impact assessment

How the retail action plan impacts on a number of areas.

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# Section 1: What action is the Welsh Government considering and why?

The Welsh Government in collaboration with the **Retail Forum**, has prepared a Retail Action Plan (Plan) through a **social partnership** approach, with the aim of communicating its commitment and support for the retail sector in Wales. This will directly build on **A shared strategic vision for the retail sector** (Vision) which was published in June 2022.

The purpose of the Plan is primarily to advance the Retail Vision, but it also supports objectives outlined in the **Economic resilience and reconstruction mission** (Mission) published in February 2021, the Government's approach to the **Foundational Economy** which Retail sits within, and the wider, more strategic goals of this government.

The Mission places significant importance in our strategic objectives contributing to advancing a wellbeing approach to the Economy, which **The Wellbeing Economy Alliance** describes the wellbeing economy as a movement “beyond a focus on ‘means’, i.e. economic growth, to a focus on the achievement of ‘ends’, i.e. our collective wellbeing.” and “Developing a Wellbeing Economy is, therefore, not only about different measures or different policies, but also about changing our relationship to the economy and our approach to its management and governance.”

The Plan centres on providing support to the retail sector in Wales through focused actions relating to three pillars - People, Place and Resilience. Our early engagement with the Retail Forum, industry stakeholders and other Welsh Government departments has favoured a clear focus on this sector, to ensure that our actions will realise the intended outcomes. There is no additional funding associated with this Plan, rather its focus is on corralling activities across Government, and harnessing the will and appetite of the Retail Forum to make

positive changes through social partnership: **Social partnerships to bolster fair work in Wales**.

The focus of the Plan is to capitalise on the skills and resources held within the Retail Forum represented by, business representative organisations (FSB, Chambers Wales, CBI), stakeholder representative groups (Welsh Retail Consortium (WRC) and Association of Convenience Stores (ACS)), Wales TUC and Trade Unions, and Government.

The Plan will also follow the shift in policy direction as set out in the Mission and enshrined in the Economic Contract to underpin the national goals of fair and sustainable growth. Through the actions identified in the Plan the Retail Forum will support the sector to undertake actions which will contribute to the aims in the Mission of fair work, better jobs closer to home, decarbonisation, and place-based work to support a vibrant retail environment which is able to support biodiverse and sustainable high streets. The Plan also takes note of the Economy, Trade and Rural Affairs committee recommendations outlined in its report; **Raising the Bar: Securing the future of Hospitality, Tourism and Retail**, published in July 2022.

The retail sector is central to us all, and so the sector touches on a wide range of social and environmental issues ranging from labour and skills, through to decarbonisation and waste. It is not intended that all societal and environmental concerns relating to retail will be addressed by this Plan, which will retain its focus on providing support to the retail sector in Wales with the focus on people, place and resilience. However, in acknowledging that the retail sector in Wales forms an important part of the wider economy, the Plan will better integrate with the wider goals of our National Strategy.

## Long term

Town centres and high streets have struggled both during and prior to the

pandemic. Retail, and local shops play a key role in their regeneration, where the Association of Convenience Stores highlighted in its most recent report the social value retailers contribute by providing much needed wider services such as banking/ community information sharing/ pensions and bill payments as well as being facilitators for other services. These services can provide a lifeline for older people and those suffering poverty who cannot easily access online provisions. The retail sector is hugely important to the Welsh economy and its local communities. It provided jobs to 139,000 (BRES, ONS) people in 2021, more than in manufacturing (137,000 (BRES, ONS)), and contributed 5.7 per cent of Welsh economic output (Gross Value Added) (Regional Accounts, Office for National Statistics) in 2021. In terms of GVA, this is a larger share of the economy than in Scotland and all regions in England except for the North West (6.2 per cent).

The Plan marks the beginning of a long-term commitment to realise the vision of a vibrant retail sector that offers attractive and fair work and supports the priorities of Welsh Government and our communities.

It is proposed that the lifespan of the Plan will be for two years from publication, with the aim of evaluating actions and progress made towards the Vision. At the two-year anniversary the Plan will be revisited, where actions will be refreshed to ensure they remain current and reflect, the acknowledged, volatility and turbulence the sector is currently operating within.

The Welsh Government is acutely aware there are no quick fixes, easy solutions, or infinite budgets available to support this agenda. The Plan aims to capitalise on the willingness to work in social partnership with Welsh Government, employers, business representative bodies and trade unions working together to understand where we are now, where we want to get to and how we can get there. The Welsh Government is responding to stakeholders concerns (**'Unnerving' start to year for Welsh retail as fall in high street shoppers prompts call for support**) and have taken on board views in the development of this Plan.

Our initial evidence gathering emphasised the need for further focus on actions to raise the profile of retail issues and where there are levers of government available, to focus efforts on supporting people in the retail sector, the physical retail space and measures to build resilience in the sector as it continues to recover from significant shocks being felt as a legacy of leaving the European Union, the pandemic and global pressures such as a result of the conflict in the Ukraine and knock on effects of energy crisis and inflationary pressures.

The Welsh Government will provide direct public investment for the sector through actions identified in the Plan. Other interventions will target the drivers for long term change as identified through our industry and stakeholder engagement. The Actions bring together a number of programmes from across Government and the activities of the social partnership which includes work supporting the town centre regeneration (Town Centre Position) recognising the challenges with some high streets experiencing decline. Other measures will focus on non-domestic rates support (**Business Rates in Wales**) which the Welsh Government has committed to post pandemic. Key to the Plan will be developing research to understand how to better target support to employees in the sector, understand how to promote skills development and in advancing social objectives like more employees being paid the Real Living Wage (RLW) across the sector by engaging with **Cynnal Cymru** for example to understand the barriers to adoption by employers.

The pandemic was a hugely stressful and challenging time for retailers, businesses and workers. The retail sector is diverse and dynamic, and undergoing a significant transformation, with changes in consumer behaviour, technological advances, and accelerated growth in online shopping. These trends are having in some cases a negative effect (reduced footfall in our high streets, closure of retailers) and transitional effect on the sector. It is therefore very challenging to plan for the long term. However, retailers have a proven record of entrepreneurial and innovative approaches to meet customers' needs and provide the best possible shopping experience. The Welsh Government remains committed to retail and its position on the high street.

The importance of the sector is not limited to economic growth and job opportunities. The community benefits offered by national and local retailers go far beyond this and make a significant contribution to individual and societal well-being.

For many, especially those living in isolated or rural communities, the sector provides a vital opportunity for social interaction along with other important services such as access to post office services and cash machines. In addition, every year, retailers make significant investments in and donations to their local communities, helping to contribute to the development of inclusive, successful, and resilient places. The WRC in their report “Charitable Giving by the Retail Industry in Wales” (2019) identified that the retail sector in Wales was reported to have contributed £9.8 million to good causes in 2019 which was up 28% on the previous year ([Welsh charities continue to benefit from retailer giving](#)).

The Association of Convenience Stores reported in their 2023 [Welsh Local shops report](#) that there are 3025 convenience stores situated across Wales with 63% being in rural areas, providing over 23,000 jobs with a majority being female workers. Of these 63% are rural, 22% are suburban, and 16% are urban. The remaining 37% are in an isolated area with no other shops or businesses close.

## Prevention

Post-Covid, the sector has faced a significant struggle to attract consumers back to the high street and has been subject to some negative press identifying poor terms and conditions associated with work in this sector ([Why service workers are so burned out](#)).

The EU retail market monitoring report: [European Foundation for the improvement of living and working conditions Working conditions in the retail sector](#) highlights the fact that the continuing decline of small businesses

due to competitive pressure from large retailers has raised increased territorial and social cohesion issues. For example, local shops offering essential goods and services such as grocery, which are usually run as small businesses, are of growing importance for two groups with deteriorating accessibility; older and disabled people and people who are socially isolated, that is, those who live in sparsely populated areas and those without a car.

## People

The Plan includes measures for the prevention of entrenched issues facing the retail sector some of which are raised in the Bevan Foundation report: **Fair work in the foundational economy: experiences in retail**, including low pay in the sector, a need to invest in training for staff and relatively low trade union membership. Research undertaken specifically in the Food sector showed that around a third (32%) of Welsh food and drink establishments reported skills gaps, particularly in food science, engineering and commercial skills. This example represents a small part of the wider retail sector and indicates the scale of the issue.

The Plan aims to improve the pay, terms and conditions of those working in the retail sector, improving the livelihoods and prospects of workers, and in turn tackling poverty and underemployment. Specifically, the Plan will promote the RLW, deliver actions to increase trade union membership and actively work with retailers to improve terms and conditions of employment.

## Place

The high street has been in decline for several years. This decline has in part been accelerated by issues related to change in consumer behaviours and as a direct effect of the Pandemic. The Plan aims to raise awareness and promote support to retailers in Wales delivered through Town Centre Regeneration



strategy which feeds into Future Wales ([Update to Future Wales: The National Plan 2040](#)), The National Plan 2040. Measures also support local initiatives to deal with vacant high street premises, planning and public sector commitments to locating in high street locations. Support to the sector through tax relief is also evidenced in the Plan.

## Resilience

The Plan will strengthen the long-term resilience of the sector by including actions that support delivery of the Welsh Government [Net Zero strategic plan](#). The benefits of actions relating to energy efficiency are three-fold: they help tackle climate change, reduce energy costs and increase productivity in the sector. More specifically, in the case of adopting refrigeration with doors, they can reduce food waste as food can be chilled at a lower temperature for longer and improve shelf life.

## Integration

The Plan recognises the need for integration, by including actions that require cross-Welsh Government and social partnership working to deliver an agenda that goes beyond a tight focus on economic growth alone. The Plan is structured around three themes or pillars. Key actions which will be addressed in the Plan are described in this way so it is clear how they will integrate with wider Government strategies including the Well Being Goals and contribute to National Indicators. See Figure 1 below.

Additional to the integrated pathway set out in Figure 1, this also contributes and connects to wider work across Welsh Government including: fair work, town centre regeneration, infrastructure and planning, as well as in social cohesion and supporting culture, heritage and Welsh language.

In many places the small local retailers can often be a champion for the Welsh language and Welsh and local produce which demonstrates the importance on supporting the sector. Larger retailers are also leading initiatives to promote and engage consumers with the Welsh Language. Lidl become the first supermarket to achieve the prestigious Cynnig Cymraeg certification from the Welsh Language Commissioner in January 2023 ([Lidl speaks our language: retailer announces Welsh language certification](#)). Other retailers have developed a Welsh language policy ([Morrisons Welsh Language Policy](#)) and work with the retailers will explore more opportunities to expand the use of Welsh across its platforms and when engaging with customers.

There is always room for improvement and measures have been developed to support and encourage the uptake and use of Welsh in the retail sector, however much more work is needed ([The Welsh Language and the Economy: Institute of Welsh Affairs](#)).

Research undertaken by the Food Division of the Welsh Government has demonstrated the [Value of Welshness](#) and how this can provide commercial advantages in retail to producers. The Welsh economy wider has the capacity to advance and make the Welsh language familiar in every aspect of the consumers life ([The Welsh language and the economy](#)) and has a role in preventing the language from being marginalised. The Plan will draw attention to this and has identified measures to develop the language with the sector.

**Figure 1: Retail action plan strategic integration**

Well-being of Future Generations (Wales) Act 2015		Programme or Government Well-being Objectives (2021-2026)	Foundation Economy	Economic Mission	Retail Vision	Retail Action Plan Themes
Wellbeing Goals	National Wellbeing Indicators					
A Prosperous Wales	09 Productivity 11 Innovative businesses 24 Satisfaction with access to facilities and services 44 Biological diversity	Make our cities, towns and villages even better places in which to live and work.	Foundation Economy Approach	Economic Resilience and Reconstruction Mission	A shared strategic vision for the retail sector	Place
Resilient Wales	11 Innovative businesses 14 Global <u>footprint</u> 15 Waste not <u>recycled</u> 41 Greenhouse gas emissions 42 Greenhouse gas emissions for global good and services	Build a stronger, greener economy as we make maximum progress towards decarbonisation.				Resilience
A More Equal Wales A Wales of Cohesive Communities A Wales of Vibrant Culture and Thriving Welsh Language A Globally Responsible Wales	10 Disposable House Income 16 Fair Pay 17 Gender pay <u>difference</u> 20 People satisfied with their <u>jobs</u> 21 People in work 22 People not in education, employment, and <u>training</u> 29 Mental well-being 36 People speaking Welsh every <u>day</u> 46 Social Value Partnerships	Build an economy based on the principles of fair work, sustainability and the industries and services of the future.				People

## Collaboration

The Retail Action Plan has been delivered through a social partnership formed of Welsh Government, trade unions and employer representative bodies. The Retail Forum met in June 2022 and hosted a stakeholder event, engaging with interested parties. Following this further stakeholders were contacted including those who represent green issues (Green Peace/Friends of the Earth), accessibility issues (Guide Dogs for the Blind), pay and conditions (Unions) and with other stakeholders including those representing young people and race concerns.

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During the consultation events and workshops, views and issues were fed into the development of the Plan. This has ensured the measures are reflective of the current sectoral issues and the different stakeholder groups have had a voice in shaping the plan.

Members of the Senedd (Carolyn Thomas, Member of the Senedd for North Wales; questions about doors on fridges in retail) have also provided scrutiny of the Minister for Economy and his actions in this arena, these have also fed into the formation of the actions in the Plan.

The **Economic Ministerial Advisory Board** although not directly involved in the development of the Plan has advised the Minister on a number of issues and its 6 monthly report shared with the Minister for Economy in December 2022, identified key themes on retaining and attracting labour in Wales. Measures in the Plan consider advance RLW and other measures to support retail sector workers to access skills and training which are considered as an indirect action from this work.

## Involvement

The Welsh Government has carried out an engagement exercise in order to gather the evidence required to inform the scope of the Plan. This has included the involvement of key trade associations, interest groups, industry providers and other Welsh Government departments, to ensure that the decisions and actions contained in it are well informed and correctly address industry needs.

The core work of the engagement exercise has been based around one-to-one meetings, to facilitate a discussion of industry strengths, weaknesses, opportunities and threats, according to the stakeholder's point of interest. We have also used these meetings to review and gather opinion on the current work of the Welsh Government and the Retail Forum members.

This has been supported by the publication of a dedicated webpage on the Business Wales website, and the use of social media to invite and encourage the contribution of views and ideas via the Wales Retail Consortium and utilising retail forum networks.

The engagement did involve the third sector representatives, including discussions with interest parties ([Guide Dogs Campaigns: Campaigning For Guide Dogs](#)) ([Why supermarkets should put doors on their fridges](#)) and reviewing evidence from the Senedd, as well as the relevant Welsh Government departments to ensure that the Plan was informed by a wide scope of opinion.

More engagement is required specifically with groups who represent those with protected characteristics, and this will be ongoing work as the Plan is rolled out. The initial aim will be to identify new stakeholders to engage with about the retail sector and gather information which will help shape the future direction and possible actions, feeding into the evaluation process planned for two years post publication of the Plan.

## Impact

The Plan does not have any new funding available to develop bespoke or new initiatives but builds on work underway across government and activities that the social partnership can deliver specifically the retail sector.

There is also an acknowledgement that the retail sector in Wales cannot be decoupled in economic terms from the English or UK wider supply chain, with most significant businesses head-quartered in England or in Europe. This limits the reach of initiatives or the tools available to Government to influence and adopt significant new policies.

Legislative and strategic economic levers are largely reserved in policy terms and remain the responsibility of the UK Government. This will limit what the

Welsh Government can do to legislate or fund specific measures. As a result of these constraints the Plan focuses on actions which the Welsh Government, in social partnership can deliver and effect from a devolved perspective.

There is a need to further investigate blockers, barriers, and opportunities in the retail sector in Wales, where actions have been considered to develop research to understand where meaningful action can be developed specifically in advancing more favourable employment terms for workers in the sector in Wales. This will be considered by work done during the Plan period to look at advancing the RLW across the sector.

The Plan has a relatively short-term focus to the delivery, (two years from publication) this is in recognition of the apparent volatility in the sector being experienced due to many factors including post pandemic changes in consumer behaviours, impacts from leaving EU in the supply and availability of goods and the inflationary pressures and impacts of the energy crisis. The Plan will be reviewed, and actions evaluated by its two-year anniversary to ensure actions remain current and any opportunities that come available to support the sector can be adopted, as well as the latest industry insight and data collected to ensure the Plan remains current and relevant.

There is a growing recognition that town centres are undergoing significant changes which is a further reason for the Plan to remain focused. In the future our high streets and town centres will look different to those we are currently familiar with. Many of the impacts are as yet unknown – such as the increase in remote working ([Our Work-from-Anywhere Future](#)), growth of online purchasing ([The current and future growth of UK online shopping](#)) and we will need to take innovative approaches to ensure that the sector remains vibrant ([Working from home: how it changed us forever | Working from home | The Guardian](#)).

## Costs and savings

There is no new funding to support this Plan. The Plan aims to corral activities from across the Government and provide a specific and targeted focus on these into the retail sector.

Key funded measures include those which come from the non-domestic rates relief scheme the Welsh Government has commitment to in 2023-2024 ([Non-Domestic Rates: Retail, Leisure and Hospitality Rates Relief in Wales, 2023 to 2024](#)).

Some research funding will also be allocated to support Cynnal Cymru to undertake research across the retail sector to understand the real or perceived barriers to adopting the RLW and research looking at the national brand index work will be considered to support a stronger message about the impact of using the Welsh language, being in Wales and to strengthen messages about working in Wales.

The Plan has been brought forward through a social partnership approach, although not quantifiable, this approach supports the members engaged to all contribute to the delivery of key actions in the Plan and to take ownership in its advancement. Key actions in the Plan reside with retail forum members and capitalised on their resources and capability to advance the aims in the Vision through taking action at a business level.

## Section 8: Conclusion

### How have people most likely to be affected by the proposal been involved in developing it?

The Plan has been developed in social partnership with representatives engaged including retail business, sector representatives, trade unions and Welsh Governments who represent people and businesses in the sector. All have actively contributed and been consulted in the development and endorsement of the Plan. The social partnership approach and regular meetings with the Retail Forum has fed into the Plans' development resulting in proposition and list of intended actions, which will be delivered through shared responsibility. A close collaboration has ensured that our work has been fully informed to minimise unintended impacts and ensure that the Plan is targeted and relevant.

Notwithstanding the work in developing this Plan, there is a recognition that the Plan will not be able to address all the areas of Government strategy fully, but goes some way to instigating sectorial change aligned to Welsh Government wider objectives, with an honest intention to review and evaluate the Plans impact in 2 years, to revisit the actions, so they remain current and focus on delivering against Government priorities.

In 2022 following the launch of the Vision a number of stakeholder events were held to gather evidence from consultees. Feedback was then considered by the social partnership and Retail Forum members. This has resulted in several actions to mitigate identified issues in the sector; for example, those around accessibility, where there are still occasions when disabled people find the environment challenging and retailers have wrongly refused access to a customer who have a service animal in support or use a mobility scooter and the layout of the retail space or size of the entrance limit their access or ability to



enter a premise.

We have also sought to capture a wide range of views and opinion through an engagement exercise during 2022, to gather the evidence required to form the scope and focus of the Plan. This has included key trade associations, interest groups, industry providers and other Welsh Government departments, to ensure that the Plan correctly address industry needs.

## **What are the most significant impacts, positive and negative?**

In light of the impacts identified, how will the proposal:

1. Maximise contribution to our well-being objectives and the seven well-being goals; and/or,
2. Avoid, reduce or mitigate any negative impacts?

The Plan focuses on a suite of actions which are applicable now, can be delivered in social partnership and addresses sectorial issues and challenges presented in the current economic climate. Without additional funding, these actions corral together in this Plan activities across the Welsh Government with actions the social partnership can progress into one place with the aim of progressing towards achieving the Vision for the sector.

Following the themes of the Plan, the impacts will focus on three areas:

1. People: to address low pay and poor employment terms some retail workers experience, and to improve the opportunities and prospects of those employed by promoting skills developments. Action will also address concerns about retail crime and abuse which seems to continue to affect retailers.
2. Place: to address related to the physical landscape of retail and its

infrastructure through measure to support Non-Domestic rates relief and ongoing discussion about costs of doing business and location on Wales high streets, which seems to be transitioning through a period of significant change.

3. Resilience: to continue to build in resilience by supporting retailers to adapt and mitigate challenges such as in rising costs of energy by adopting renewable energy measures. Also support retailers to adopt regulatory changes such as in the roll out of a deposit return scheme for Wales.

By supporting the retail sector in Wales directly, the Plan will support employment opportunities for people across Wales and in many of our rural hinterland and key Welsh language communities. Retail also provides a mixture of employment opportunities for working parents, disabled people and ethnic minority communities across Wales. Actions in the Plan will support a range of communities across Wales.

The Plan's actions will directly contribute to Wellbeing Goals to:

- a prosperous Wales
- resilient Wales
- a more equal Wales
- a Wales of Cohesive Communities
- a Wales of Vibrant Culture and Thriving Welsh Language
- a Globally Responsible Wales

## **How will the impact of the proposal be monitored and evaluated as it progresses and when it concludes?**

There is a commitment outlined in the Plan to evaluate its impact in two years. The Evaluation will then aim to provide evidence on how the actions have advanced the sector towards its Vision and feed into developing a revised Plan so actions remain current and can include all levers of Government and those

available to the social partnership over time.

## **Children's rights impact assessment**

### **Analysing the evidence and assessing the impact**

The Plan has been developed with due regard to The Rights of Children and Young Persons (Wales) Measure 2011 and The United Nations Convention on the Rights of the Child (UNCRC).

During our evidence gathering exercise undertaken in 2022, feedback from stakeholders identified potential for indirect positive impacts for the well-being of children and young people arising from measures to support the retail sector in Wales. Retail businesses are embedded in local economies across Wales and offer the opportunity to underpin the agenda in the Mission to tackle regional inequality and improve levels of wealth fairly over the long term.

The retail sector employs a significant number of people between the ages of 25 to 60, as well as younger people under 25. The Plan aims to work with the retail sector to improve the employment terms, such as advancing RLW, encouraging trade union members, promoting skills development. These are measures which will improve the lives and prospects of those employed in the sector and consequently supporting young people directly employed or indirectly through supporting working parents.

Results from stakeholder engagement also highlighted concerns (admittedly not directly from children and young people) on where the next generation of retail sector employees will come from. The Plan aims to address this by working across the sector to improve working conditions, opportunities and to promote the sector as a potential career. The next stage of engagement and in the process of gathering evidence to inform the evaluation will directly engage

young people. As the Plan progresses bespoke work will be done to engage with your people directly including through the Young Peoples Guarantee Advisory Board which will be established in summer 2023.

The ONS reports that generally, due to many factors, women are still more likely to work part time than full time when they have a young dependent (**Families and the labour market, UK: Office for National Statistics**). The retail sector does provide part time and other flexible working shifts which can support parents who need to work fewer hours to meet caring responsibilities. The Plan aims to further strengthen the terms and conditions of retail sector employees which will have an indirect positive impact on children of those who are employed in the sector. Recommendations from the paper by Glasgow University (**Glasgow university, Women in Multiple Low-paid Employment: Juggling Time and Money**) cited the need to tackle low pay and provide certainty in jobs so that women would have to juggle fewer jobs to meet their family's needs.

Fostering and promoting economic growth and resilience across the sector will contribute to the aims in the Mission by creating a growing, sustainable and inclusive economy. In this way, our actions to support the sector will to some measure support Article 27 of the UNCRC for children to have a right to a standard of living that is good enough to meet their physical and mental needs. Interventions to support successful retail businesses will positively impact the opportunities within urban and rural areas alike. This will underpin the aims in the Mission of fair work and opportunities for all, and so indirectly contribute to improving the circumstances of children through helping to strengthen the communities they live in.

The Plan will include actions towards improving sector work and pay conditions and opportunities through skills development. The Plan will seek to raise the awareness of career and training opportunities and will foster engagement between businesses and education providers. In this way, the Plan will touch on Article 29 of the UNCRC for education to develop each child's personality and

talents to the full.

Utilising the social partnership engaged in the development of this Plan, there will be opportunities to engage with children and young people through the course of the Plan on measures to ensure they are targeted and understood, in accordance with Article 12 of the UNCRC "children have a right to say what they think should happen, when adults are making decisions that affect them, and have their opinions taken into account".

A commitment has been made to evaluate the impact of the Plan on its two-year anniversary. This will provide a means to assess the impact the Plan's actions have had on children and young people and provide feedback to inform a further Plan with revised and updated actions. So, any limitations of actions which have not achieved their objectives can be reconsidered and new evidence collated.

## Welsh language impact assessment

Cymraeg 2050 is our national strategy for increasing the number of Welsh speakers to a million by 2050.

The Welsh Government is fully committed to the new strategy, with the target of a million speakers included in its Programme for Government. A thriving Welsh language is also included in one of the 7 well-being goals in the Well-being of Future Generations (Wales) Act 2015.

Welsh Language Impact Assessment reference number: 04/04/2023

1. Does the proposal demonstrate a clear link with the Welsh Government's strategy for the Welsh language? – [Cymraeg 2050 A million Welsh speakers](#) and the related [Work Programme for 2017-2021](#)?

The Plan aims to support the retail sector to make progress towards the Shared

Strategic Vision which outlines the importance of the retail sector because of its impact into everyday lives of people the length and breadth of Wales. The Plan's actions will indirectly support the advancement of the Welsh Government objectives to increase the number of Welsh speakers by delivering actions which will help retailers adapt and address the economic pressures they are subject to, working towards a more resilient sector, supporting retailers to remain in high street locations and service communities across Wales.

The Plan also aims to address issues of employment in the sector to advance fair work principles. The nature of retail jobs means in many cases the sector provides valuable employment opportunities in urban, rural or other isolated communities, the Plan will indirectly contribute to providing better jobs closer to home and improve opportunities in Welsh speaking communities.

The Plan aims to coral actions across Government which will support the retail sector to achieve its Vision. The Plan will connect with other strategies such as those to build and develop to create an iconic brand for Welsh food and drink under the Sustainable Brand Values project, which will be used to underpin the new Brand Cymru (**The Value of “Welshness” | Business Wales: Food and drink**). Using our national identify in the promotion of Welsh food and drink in retail will indirectly include the promotion of our language at home, in the UK and across global markets. The Retail Sector is already doing good work in this space (**The big retail brands that say Welsh language is boosting business - some may surprise you - North Wales Live**) and the Plan aims to support retailers to build on this good work.

Retailers do actively promote the use of the Welsh Language (**Lidl speaks our language: retailer announces Welsh language certification**), although it is noted that the approach across the sector is not consistent with some retailers excelling and other not engaging at all. The Plan does not directly aim to address this with specific actions. However, the Retail Forum in social partnership with the Welsh Government does operate fully within the standards and through its campaigns and promotional work identified in the Plan will be

fully compliant with the Welsh Standards. Where opportunities are identified the Plan will also work with retailers to share best practice especially where retailers are actively developing initiatives to further provide opportunities to use and engage with Welsh language and culture. Retailers already understand that Welsh consumer are actively seeking opportunities to engage with the language and are responding to this (**The value of the Welsh language to the food and drink sector in Wales Research report**).

2. Describe and explain the impact of the proposal on the Welsh language, and explain how you will address these impacts in order to improve outcomes for the Welsh language. How will the proposal affect Welsh speakers of all ages (both positive and/or adverse effects)? You should note your responses to the following in your answer to this question, along with any other relevant information:

The retail sector has been identified as a Foundation Sector based on the importance of the industry in being embedded in Welsh communities. The potential impact of the sector in producing goods central to the well-being and security of Welsh communities is reinforced by the geographical dispersion of retail businesses across Wales.

The sector carries a presence in local and rural areas of Wales (see the Association of Convenience Stores 2023 report highlighted above in the impact assessment), which include the traditional strongholds of the Welsh language where there are some 40% or more Welsh speakers.

Cymru 2050 is for all the people of Wales including strongholds in urban areas and those Welsh people who do not communicate in Welsh but having exposure to Welsh through signs, audio etc. will subconsciously promote the Welsh language in such communities. Retail can play a significant role in achieving these aims.

Supporting the retail sector to achieve its Vision will help to improve local

opportunity for Welsh speakers to find work within their own communities. In doing so, we will encourage equitable outcomes by helping to improve economic prospects fairly between Welsh speaking communities and regions across Wales.

Our support for micro and SME businesses, which form an intrinsic part of local and rural economies, is already explained in the Rural Impact Assessment.

The Welsh Government continues to provide services and promote the uptake of the Welsh Language across business (**Welsh in Business is good for business**). This Plan will provide a further platform to promote the use of **Welsh Language in businesses** to support the language such as through training opportunities and assistance with bilingual signage for example.

In the further development of the Plan, we will continue to engage closely with ongoing work to identify ways in which we can support the commitment in the Welsh Language strategy to increase the use of Welsh in the workplace.

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