

Agenda – Economy, Trade, and Rural Affairs Committee

Meeting Venue:

Committee room 5 – Tŷ Hywel
and video conference via Zoom

Meeting date: 27 March 2025

Meeting time: 09.30

For further information contact:

Robert Donovan

Committee Clerk

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Hybrid

Private pre-meeting

09.15 – 09.30

Public session

09.30 – 11.40

1 Introductions, apologies, substitutions, and declarations of interest

09.30

2 Hybu Cig Cymru – Panel 2

09.30 – 10.30

(Pages 1 – 27)

Prys Morgan, Procurement Director, St Merryn Merthyr, Kepak

Paul Edwards, Site Director, Dunbia Llanybydder

Attached Documents:

Research brief

Annex 1: Welsh Government Response: Review of Hybu Cig Cymru – Meat
Promotion Wales – October 2016

Evidence paper – Prys Morgan, Kepak

Evidence paper – Paul Edwards, Dunbia Llanybydder



Break

10.30 – 10.40

3 Hybu Cig Cymru – Panel 3

10.40 – 11.40

(Pages 28 – 43)

José Peralta, CEO, Hybu Cig Cymru

Catherine Smith, Chair, Hybu Cig Cymru

Attached Documents:

Evidence paper – Hybu Cig Cymru

4 Papers to note

11.40

4.1 Petition P-06-1488 Establish a ‘Care Society’ to Tackle the Long COVID Crisis in Wales

(Pages 44 – 45)

Attached Documents:

Letter from the Chair of the Petitions Committee – 7 March 2025

4.2 Meeting of the Inter-Ministerial Group for Environment, Food and Rural Affairs

(Page 46)

Attached Documents:

Letter from the Deputy First Minister and Cabinet Secretary for Climate Change and Rural Affairs to the Chair of the Legislation, Justice and Constitution Committee – 10 March 2025

4.3 Delays in Intensive Poultry Unit (IPU) Application Decisions – Request for Clear Timeline and Interim Measures

(Pages 47 – 48)

Attached Documents:

Letter from Jane Dodds MS to the Cabinet Secretary for Economy, Energy and Planning – 10 March 2025

4.4 Holyhead Port Storm Damage and Closure

(Pages 49 – 54)

Attached Documents:

Letter from the Minister for Transport, Irish Government – 10 March 2025

Letter from the Chair to the CEO, Irish Ferries – 18 March 2025

4.5 Business Committee review of the Public Bill and Member Bill processes

(Page 55)

Attached Documents:

Letter from the Chair to the Chair of the Business Committee – 13 March 2025

4.6 Follow-up to the Committee meeting held on 12 February 2025 – Apprenticeship pathways

(Pages 56 – 59)

Attached Documents:

Letter from the Minister for Culture, Skills and Social Partnership – 13 March 2025

4.7 Apprenticeship pathways – work experience

(Pages 60 – 70)

Attached Documents:

Written response from Estyn – 14 March 2025

Written response from the Welsh Independent Schools Council – 16 March 2025

5 Motion under Standing Order 17.42(ix) to resolve to exclude the public from the remainder of the meeting

11.40

Private session

11.40 – 13.05

6 Consideration of evidence following the meeting

11.40 – 11.50

7 Apprenticeship pathways: Key Issues discussion

11.50 – 12.20

(Pages 71 – 85)

Attached Documents:

Key Issues paper

8 Holyhead Port Storm Damage and Closure – Consideration of draft report

12.20 – 12.35

(To Follow)

Attached Documents:

Draft report

9 The Foundational Economy: Consideration of draft report

12.35 – 13.05

(Pages 86 – 124)

Attached Documents:

Draft report

Agenda Item 2

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Written evidence from Prys Morgan, Kepak

Thank you for the opportunity to provide evidence to the Economy, Trade and Rural affairs committee regarding Hybu Cig Cymru.

To provide context for the response I would like to provide some background of my involvement with HCC. I worked for MLC Cymru before moving to HCC in 2003, as Industry development manager. At the time we secured several EU projects and support from Welsh Government. In the financial years 2003/2004 to 2005/2006 this contribution ranged between 37 % and 46% of HCC income.

In 2008 I joined Welsh Country Foods as Procurement Director however I maintained a close working relationship with HCC and was appointed to the Board of HCC in 2012. I resigned from the Board when I accepted the role of Head of Operations at HCC in 2015 where I also contributed to establishing a database for sheep movements, EID Cymru. I returned to the private sector in 2017 and was appointed to the Board of HCC in 2020 until I resigned in 2024 due to governance concerns.

For clarity I am employed by a red meat processor Kepak who pays Welsh red meat levy and I pay Welsh red meat levy as a livestock producer in Wales. The family farms 1000 sheep and 40 suckler cows.

The 1967 Agricultural Act established the need for a levy to support the red meat industry due to market failure. This recognised that the industry comprised many small farmers and individual meat processors. The levy was therefore established with contributions from across the sector and to be used for the benefit of the whole supply chain. HCC was established in 2003 to promote red meat and to increase productivity of the sector.

Whilst there have been changes in the number of abattoirs and farms since the levy was established, there has been no significant change within the supply chain and the market failures that existed in 1967 still exist today. A key role of the levy body has been to communicate the good work being done by farmers, generating respect for the sector and helping Government to understand the key role that livestock farmers in Wales play. This communication work has been successful in lamb, but less so for beef where global issues relating to sustainability have highlighted the lack of understanding in this area.

Since farmers and industry pay levy to HCC, it is extremely important that farmers and industry are fully represented in the HCC Board and can control/direct how that public money is spent for the benefit of all. Hence Board representation should be selected by the Industry and not by Government and chosen from active stakeholders. In 2003, HCC was owned by Industry (Farming Unions, WDA, WLBP and MLC) not by Government and that arrangement worked well.

There are several areas that require strong leadership bringing together the industry and Government. There is strong feeling that HCC have not been fighting the corner for red meat producers in the way that had been done in the past and the protest by over 6000 farmers demonstrates failure to communicate and deliver practical solutions to the challenges the industry face.

At this moment in time, the prices being paid for beef and lamb are good, however this hasn't been the case and in a volatile market is not guaranteed to continue. Against this backdrop, farm incomes in 2023/24 remain extremely low with many farmers working a less than the minimum wage. Hence there is still a need for red meat levy support to help increase productivity / efficiency, to harness developments and technologies through R&D and to support the marketing of PGI Welsh Lamb, PGI Welsh beef and pork from Wales.

Production and processing costs have increased significantly in recent years and the same will apply to organisations promoting the industry and its brands. Hence careful consideration must be given to reducing costs and improving the efficiency of the organisation that spends the Welsh red meat levy, reducing operating costs and working collaboratively with the other levy bodies in non-competitive areas. Examples of this could/should include HR, finance, market intelligence, R&D, nutritional qualities of red meat and the defence of the reputation of the sector. Consideration should also be given to short-term measures to assist the existing organisation to delivery against its remit.

The reputation of any premium brand is built on the reputation of the organisation promoting that brand, not only with customers/consumers but with other stakeholders including Welsh Government, FSA Wales and wider Industry. The is an area that HCC has previously excelled at. Hence it is essential to ensure that that reputation is not undermined by collateral damage and to reassure Industry and levy payers that the monies they have contributed are being spent responsibly.

To that end, it is essential that the future organisation maintains good governance by having a Board of non-executive directors who are actively involved in the industry to provide the employed executive with strategic direction for responsible levy spend.

It should be noted that HCC is first and foremost a Limited company and is governed by company law. Whilst the company is owned by Welsh ministers the directors must comply with company law which takes primacy over other framework agreements from Welsh Government.

HCC at present is almost entirely funded by industry in terms of Welsh Red meat levy and based on this the industry should own the organisation whatever structure is

agreed upon, reverting to a similar structure to that of HCC when it was set up as described above but with more joint working with other levy bodies.

As a Board member and former member of staff who has been involved with HCC since 2003, the adverse publicity which has surrounded HCC in recent years has, personally, been soul-destroying and, professionally, I have found the publicity very disconcerting.

As a representative of Kepak, a company processing Welsh beef and lamb, this negative publicity undermines customer confidence and trust in the organisation marketing the product and making premium quality claims. Unfortunately the narrative over last 12 months has not been conducive to promoting livestock farming in Wales, which is a fundamental role of the organisation. There has also been, over last 12 months, an exodus of skilled people from HCC and this has consequently had an impact on the Industry in Wales at a crucial time. As levy payers we need to understand the root cause of this as it brings into question the ability of the organisation to deliver against it's remit.

As levy payers we also have to understand why both Government and HCC are pursuing an agenda that is contributing to a declining agriculture economy in Wales when Welsh red meat production is recognised as one of the most sustainable products. This has been exacerbated by the fact HCC is not delivering on its original goals and both levy income and production is declining. Livestock numbers in Wales and UK are declining this reduces the levy available. The figure of around 8.7 million sheep in Wales seen in the last 2 years is the lowest level since 2011. Since 2004 in Wales the dairy herd has increased slightly (3%) and the size of the beef herd has fallen considerably (33%). Recent changes to the VAT status of HCC also means that there is 20% less funds available to deliver activities as VAT cannot be claimed back from HMRC.

Mr Paul Edwards

██████████@dunbia.com

18th March 2025

Dear Nicole,

Ref: Request for written evidence

Evidence to Environment, Trade, and Rural Affairs Committee Inquiry into Hybu Cig Cymru/Meat Promotion Wales (HCC).

We understand the Committee is reviewing the effectiveness of HCC in delivering on its priorities and providing value for money to levy payers. Our written evidence is in line with the Committee members agreed focus of the enquiry, namely:

▪ **HCC's performance in delivering against its current priorities.**

It is our assessment that HCC's ability to achieve its current priorities has been significantly impacted by the absence of senior leadership over the past 12-18 months. The interim Chief Executive and Chair have had minimal engagement with Dunbia, and with a substantial number of executives, support staff and 2 key board members having departed from the organisation, the capacity of HCC to fulfil its priorities appears compromised given reports that most positions are yet to be filled.

▪ **The appropriateness of HCC's purpose, priorities and activities, and whether they should be revised.**

HCC's purpose is to promote red meat and sustain productivity in the agricultural sector. However, HCC has faced significant challenges in recent years, failing to meet these objectives due to a lack of leadership and experience, along with the departure of key personnel. This has affected the organisation's ability to execute its core functions and priorities effectively.

The primary goals of HCC include promoting Welsh Red Meat both domestically and internationally and highlighting the dedication of Welsh farmers. Unfortunately, recent efforts have resulted in considerable duplication of tasks previously performed by other levy boards or major processors. HCC marketing budgets have often been allocated to events that have made little or no impact on red meat sales, suggesting that these funds could be better utilised in more established markets where Welsh Lamb and Beef are already recognised.

Moreover, HCC's engagement with farmers, particularly young farmers, has been insufficient to retain them in agriculture or attract new entrants. The decline in the sheep flock and suckler herd presents an alarming trend for the processing industry, which will have substantial repercussions in the coming months and years. Reduced availability of finished livestock means less product for processing and marketing, thereby risking the loss of established markets for Welsh Beef and Lamb.

Given the evolving challenges faced by the farming and red meat sectors in Wales and globally, it is prudent to review HCC's strategies. This is particularly pertinent in light of the financial implications of leaving the EU. Promoting red meat amidst rising consumer prices and encouraging producers to restock their farms amid future uncertainties remains a significant challenge. Maintaining a critical mass of livestock is essential to safeguard the numerous jobs within the slaughter and processing sectors in Wales.

■ **The relationship between HCC and the farming and meat processing/exporting sector, including whether HCC is delivering value for money to levy payers.**

The relationship between HCC and Dunbia as a processor, levy payer, and exporter has deteriorated. There has been minimal contact with the Senior Team within HCC over the last 12 months. The departure of staff in key roles such as Marketing and Environment has impacted their ability to advance the red meat agenda. Additionally, several very capable and hardworking support staff have left, resulting in a significantly reduced organisation that appears rudderless.

HCC's primary objectives have always been to promote the Welsh Red Meat brand domestically and internationally and to include other industry stakeholders such as Welsh Government, Farmer Unions, the FSA, among others. Historically, HCC has been successful in achieving this, but in the last 12-18 months, there has been a decline in their capacity to lead the Welsh Red Meat Industry.

Rebuilding this reputation and delivering for the levy payers will be challenging. The appointment of a new Chief Executive is a starting point. Further key appointments need to be made, and the rebuilding of the support team needs to occur at pace to regain credibility in those key areas.

We feel it is essential the HCC Board comprises non-executive directors with a comprehensive understanding of the industry, including farming, processing, environment, legislation, and marketing. The Board needs to provide the Chief Executive with strategic guidance on how the red meat levy should be spent to achieve the set goals.

Since the departure of the previous CEO, HCC's relationship with levy payers has become more distant. The numerous media articles and television documentaries about ongoing issues may suggest that it is time for a new body and brand to be established for a fresh start.

■ **The relationship between HCC and the Welsh Government, including whether the Welsh Government should have more oversight.**

We believe that HCC should remain under industry control, as it is primarily funded by the Welsh red meat levy. We recommend increased collaboration between HCC and other levy bodies such as AHDB and QMS to reduce costs and promote a unified voice for the industry.

It may also be time to consider clearly defining or possibly separating the relationship between HCC and the Welsh Government, allowing levy payers to assume greater control over any future red meat levy body.

■ **Whether HCC is the most effective vehicle for developing, promoting and marketing red meat from Wales, and whether a red meat levy is the most effective means of funding this activity.**

We believe that Hybu Cig Cymru (HCC), with appropriate terms of reference and governance supported by the Welsh Government, is the suitable vehicle for developing, promoting, and marketing red meat for and within Wales.

Nevertheless, over the past 12 months, HCC has significantly underperformed, which has been quite disappointing for our business, especially given our positive experiences with HCC in the past. It is crucial to understand why both the Welsh Government and HCC have not adequately addressed the declining agricultural economy in Wales and the increasingly concerning reduction in flock and herd numbers.

While a red meat levy and promotional body are essential for the industry, the question remains whether HCC in its current format, is properly equipped or the appropriate entity to continue this vital work, considering the negative publicity, staffing, and funding issues it has faced.

I intend to be at your offices on 27th March 2025 to provide oral evidence. However, I may have a personal conflict that I will keep you informed about.

Could you please provide me with a list of topics and points that your department would like to discuss at this meeting?

Kind Regards



Paul Edwards
Dunbia Llanybydder



Hybu Cig Cymru: ETRA inquiry written evidence

1. Hybu Cig Cymru (HCC) welcomes the opportunity to provide **evidence to the Economy, Trade, and Rural Affairs Committee** on the nature and detail of its activities, delivery, relationships and funding. The inquiry is very timely against the backdrop of the organisation progressing the development of its new 2026-2030 vision for the Welsh red meat industry.
2. **HCC was created in 2003** by amalgamating the interests of the Meat and Livestock Commission in Wales as well as certain functions of other organisations at the time. This consolidation aimed to streamline efforts in promoting and developing the Welsh red meat sector
3. **A new CEO is in place since the end of January 2025.** The new leadership brings with him extensive experience (over 20 years) in the processing and commercialisation of Welsh red meat in the UK and abroad and is tasked to bring new life and perspective to HCC to continue its evolution as a relevant and meaningful organisation for the successful and sustainable future of a thriving red meat industry in Wales.
4. In addition to the office of CEO of HCC, he also holds the office of **Company Secretary and Director of EID Cymru**, a subsidiary of HCC dedicated to the tracing of animal movements from Wales. EID Cymru is directly and fully funded by Welsh Government.
5. As titled below, in the interest of simplicity and coherence we have chosen to address the **four key inquiry topics** issued.

HCC's performance in delivering against its current priorities. The appropriateness of HCC's purpose, priorities and activities, and whether they should be revised.

6. HCC's strategic purpose, **underpinned by the Red Meat Industry (Wales) Measure 2010**, comes from its vision document developed with the industry. The timeline of which aligns to each Senedd term. The current iteration runs up to the end of this Senedd term in 2026.
7. The vision for the Welsh red meat industry is for an innovative and prosperous future which **delivers for levy payers, consumers and wider society.**

8. Sustainability, premiumisation and trade success are all at the heart of the vision to develop and promote an ambitious and progressive outlook for Wales as world-leaders in red meat production, marketing and sales.
9. At the time of writing the organisation is at the initial period of engaging with industry to develop the 2026-2030 industry vision document set to be in place for the next Senedd term.
10. The purpose of HCC is the development, promotion and marketing of red meat from Wales.
11. HCC undertakes research and development, shares information and supports training to improve quality, sustainability, increase cost-effectiveness and add value to Welsh red meat products.
12. HCC **promotes Protected Geographical Indication (PGI) Welsh Lamb and Welsh Beef** and acts as the guardian of the PGI Welsh Lamb and PGI Welsh Beef brand and the post-PGI UK-wide GI brand.
13. In the UK and in many important markets worldwide, HCC works with retailers, processors and food service operators to strengthen business opportunities and undertakes regular promotional programmes for PGI Welsh Lamb and PGI Welsh Beef.
14. HCC carries out its role against a programme of priorities, as stated in the **Red Meat Vision for Wales:**
 - Positioning red meat from Wales as a premium product
 - Developing EU trade opportunities for Welsh red meat
 - Optimising domestic consumption of red meat from Wales
 - Seeking new consumers for Welsh red meat in established global markets
 - Securing market opportunities for Welsh red meat outside the EU
 - Enhancing the competitiveness of the Welsh red meat industry and underpinning the role of Wales' red meat industry in global food security
 - Supporting the economy, natural environment and society through sustainable red meat production and processing in Wales
 - Planning in terms of future trade, production and processing through horizon scanning and market intelligence
 - Demonstrating effective leadership and communicating to ensure unity of purpose and proactive advocacy.
15. The activities of HCC are multiple and varied, in the interest of brevity **find below a selection of the most relevant and impactful HCC activities between 2022-25** (i.e. within the period of the current vision and supporting business plan) grouped by the area of the supply chain that they influence and support.

Farmers

16. In 2023 HCC completed the £9.2 million European Union / Welsh Government funded **Red Meat Development Programme (RMDP)** involving three projects designed to increase efficiency and sustainability within the industry as well as enhance the public perception of Welsh Lamb and Welsh Beef. The projects were Stoc+; the Hill Ram Scheme and the Welsh Lamb Meat Quality project:

- **Stoc+ recruited 374 farms and engaged with 42 different vet practices.** As a result, 94% of participating farms had introduced or increased use of health management tools and participatory farms reported their animal health effectiveness increased from 64% before accessing the support to 93%. The results and learning from Stoc+ have been transferred to Welsh Government and have supported the development of the Animal Health Improvement Cycle (AHIC) which will be part of the new Sustainable Farming Scheme (SFS).
- **The Hill Ram Scheme** supported a total of 63 flocks. Analysis of the work suggested that the cumulative future value of genetic improvement achieved through the scheme in a 300-ewe flock if sustained are: £9,235 at year five and £60,403 at year ten. The success of the Hill Ram Scheme led to Farming Connect's Welsh Sheep Genetics Programme which has built on the strong foundations of the original work.
- **The Welsh Lamb Meat Quality Project** aimed to develop a blueprint for the supply chain to ensure that the production and processing of Welsh Lamb would achieve the highest possible levels of quality and consistency. The results highlighted that consumers value the qualities of Welsh Lamb. These messages have been disseminated through the processors across the supply chain with the support of HCC.
- The three projects were cumulatively designed to **strengthen and underpin the credentials and values of the PGI Welsh Lamb and PGI Welsh Beef brands.** This was achieved through working closely with the supply chain and Welsh Government to understand where challenges and improvements could be made.

17. HCC's **Livestock Selection events** help farmers understand how to maximise their production - and returns - by meeting market specifications. From March 2023 onward, HCC has staged over 20 separate days by abattoirs across Wales. During these events HCC also communicates key messages on shelf-life and its importance when seeking new markets.

18. HCC continues to **ensure audits underpin the integrity** of the PGI Welsh Lamb and PGI Welsh Beef brands. HCC utilises the latest forensic science (Oritain) available to support the traceability system, one of a few PGI schemes to have this level of assurance.

19. Over the past five years HCC has sought to develop a closer working relationship with deliverers of the Welsh Government funded **Farming Connect** programme. This has led to HCC presenting at a number of Farming Connect events and meetings. In the autumn of 2024, HCC attended and had information available at each red meat 'Our Farms' events organised by Farming Connect. HCC also has a strategic input and overview on the programme through its presence and representation on the Farming Connect Strategic Advisory Board.
20. A key part of HCC's producer and processor support is to influence and develop partnership working with other organisations. This seeks to enable greater cross-sector delivery and ensure effective and consistent messaging to the industry. In 2023/24 HCC represented the red meat sector in Wales at over **300 meetings pertaining to subjects such as animal health, climate change, genetic improvement and R&D.**

Processors and export sector

21. HCC works with processors and exporters to gain and grow market access, an example of this was a bespoke focused dinner event in February 2025 at the Dubai embassy showcasing Welsh Lamb. Events of this type have **helped facilitate the commencement of sales** of Welsh Lamb with a premium retailer in UAE and Saudi Arabia in 2024.
22. The organisation **regularly has presence in international export trade shows.** In order to showcase Welsh Lamb and Welsh Beef and facilitate the establishment of new customers in existing and new markets as well as strengthening existing ones. Examples over recent years include:
 - Gulfood-Dubai (2022; 2023; 2024; 2025)
 - Foodex-Tokyo (2024; 2025)
 - SIAL-Paris(2022; 2024)
 - Summer Fancy Foods-New York (2024)
 - Anuga-Cologne (2021; 2023)
 - Tutto Food-Milan (2024)
 - SIRHA-Lyon (2022; 2023)
 - AMC-USA (2023; 2024)
 - Tavola-Belgium (2022)
 - RC-Toronto (2021)
23. Driven by proximity and demand, the **European Union market continues to be the main export outlet for Welsh produce.** HCC seek to grow and maintain these markets through ongoing engagement at different levels of the supply chain. For example, the German retail market is notoriously difficult to access and needs local intel and face to face interactions to gain and maintain business. After years of perseverance by HCC's in-market representative, we managed to facilitate access to two premium German food retailers. Similarly, HCC also have in-market permanent representation in Italy, and Gulf Corporation Countries (GCC).

24. HCC seek to showcase the Welsh production systems, an inwards mission in 2024 with one of our largest branded Welsh Lamb accounts, **saw HCC bring across 20 Italian head butchers and area sales managers to experience the Welsh way**. This shows our continued commitment to maintaining key accounts in strategically important markets.
25. HCC continually seek to build on its relationship and support for independent retailers, food service and butchers. **HCC Butchers' Club has a stable membership (current 120 members)**, this at a time when pressures on the sector has increased over the last five years. Butchers' Club members have access to information, recipe cards and Point of Sale material throughout the year.
26. HCC has a staff member whose **primary focus is liaising with the SME businesses** (e.g. butchers, abattoirs, cutting plants) post-farmgate in the supply chain. This ensures that HCC is well informed of any issues or concerns being faced. HCC has also sought to identify external parties that have access to Welsh Government funds that can support SME businesses.

Consumers and retailers

27. Following investment over multiple years in targeted TV advertising campaigns, across England and Wales, brand awareness of Welsh Lamb has increased considerably from **39% to 72% (2022 – 2024)**. As independently verified by a leading market research company.
28. In 2024/25, HCC worked in partnership with a leading retailer to maximise consumer targeting, via loyalty card and Sky AdSmart. The campaign was able to target **specific households who had not purchased the Welsh Lamb brand** over the past six months. The growth secured from this activity was an increase in sales of **24% in Wales and 21% in England**. Significantly 50% of the conversion was secured from consumers that had previously been purchasing competitor brands.
29. In **partnership with a large premium UK wide retailer**, HCC implemented a targeted digital campaign in 2023/24 which promoted Welsh Lamb in a one-mile radius of all English stores, thereby securing 10% increase in visits to those stores.
30. In 2023/24, an integrated multi-media channelled Welsh Beef campaign was delivered. A leading market research company found that brand **awareness of Welsh Beef had risen from 70% to 85% and propensity to purchase increased from 44% to 65%**. The campaign reached over half the population of Wales.
31. From **consumer research undertaken** we have worked with top UK chefs and influencers - including the likes of Francesco Mazzei, Owen Morgan, and Chris Roberts - to showcase our product to consumers in an engaging and impactful way.
32. Working collaboratively with these ambassadors has enabled us to reach their audiences as well as our own. On 1 August in 2022 we **reached circa half a million consumers** with a video of Chris Roberts and Francesco Mazzei cooking on a hill farm in Snowdonia.

This is an example of HCC using influential chefs to underpin and communicate the premiumisation of Welsh red meat.

33. HCC **works collaboratively with the other levy bodies** and farming unions for events throughout the year including Great British Beef Week and Love Lamb Week ('Make it' Lamb). In 2024 across all social accounts the 'Make It Lamb' campaign saw a reach of almost 2 million consumers across the four levy bodies in one week. (1 - 7 September 2024).
34. HCC supports its **Pork producers in targeted bursts of activity**. In 2024 our Pork campaign saw over 3 million impressions on social media channels and google search with clicks of over 27,000 and a search advertising click through rate of 14% which is above industry average of 6%.

Policy and sustainability

35. HCC has taken a strong leadership position and its endorsement of the Welsh red meat production system via its '**The Welsh Way**' programme. Research work over the last four years has focused on the four environmental metrics - biodiversity, carbon, water, and soil health - that reflect the total environmental footprint of '*The Welsh Way*' of producing red meat. Key highlights include:
 - HCC published a **biodiversity baseline** in 2023
 - The commissioning of a **Life Cycle Analysis (LCA) in 2024** for Welsh Lamb and Welsh Beef to understand associated greenhouse gas emissions from farm to pre-packaging at the processor. Interrogating data from 373 Welsh farms concluded that Welsh Cattle and Sheep is produced to a significantly lower carbon intensity than UK and international alternatives
 - Results of HCC's commissioned **water usage baseline study are due in 2025**. As part of securing evidence to demonstrate the sustainability of the unique production systems in Wales, HCC is engaging with farmers across Wales to participate in a short survey to quantify the source and volume of water utilised for red meat production.
 - As part of HCC's commitment to the soil health environmental metric, **there is collaboration with sector partners**, AHDB and QMS's aim of environment baselining to establish on farm net carbon, taking account of carbon stored in soil, along with hedges and trees, as well as greenhouse gas (GHG) emissions and sequestration.
 - HCC continues collaboration with both AHDB and QMS on **pre-competitive sustainability workstreams**, and other UK sector partners to help reinforce the sustainability message, and include the industry-led Beef & Lamb Roadmap – to a net zero brief. In addition, work continues on industry leading genetic improvement projects focusing on efficiency and environmental gain such as the **Ram Compare** and **Breeding Better** programmes.

36. To support the industry, and ensure limited funds are utilised effectively, HCC are participants and contributors in **a number of external R&D projects**. Where possible HCC will work with other levy bodies on pan-UK projects such as **Ram Compare** and **GrasscheckGB**. Over the last year HCC has also been active members of research activity undertaken through the **Land Use Net Zero (LUNZ) Hub and the AFN+ Better Breeding programme**. This activity seeks to drive and inform innovative research to support the red meat sector in the future.
37. HCC has a remit to support the industry through R&D. Research collaborations with academic institutions, including Aberystwyth and Bangor universities, have focused on optimising grassland management and livestock breeding efficiency. These partnerships, circa 2022-23, were further reinforced through the recruitment of four **PhD studentships**, each investigating critical areas that will shape the future of the industry. This strengthened relationship between HCC, the agricultural sector, and universities in Wales underscores the ongoing commitment to advancing research that supports sustainable practices and industry growth.
38. HCC offers an **annual scholarship** to applicants who are employed within the Welsh red meat industry. Previous scholars have made ongoing contribution to the industry while also disseminating valuable insight into their scholarship topic. The current scholar is looking at improving suckler cow efficiency.
39. The **Welsh Lamb Meat Quality project** studied practices at all stages of the supply chain to establish a blueprint of taste quality and consistency. In total, 1,920 consumers across the UK tasted 13,440 samples of Welsh Lamb during the project, giving the industry a credible and robust blueprint of consumer preference. The project also studied the nutritional benefits of lamb, a valuable resource for the sector to highlight the importance of lamb, and wider red meat, in a healthy and balanced diet.
40. The **BeefQ project**, also funded by the European Union / Welsh Government Rural Development Programme, in collaboration with IBERS at Aberystwyth University progressed its aim of testing Welsh Beef production and processing systems using the Meat Standards Australia (MSA) grading system. HCC was an active member of the project facilitating training days and processor involvement in the important work.
41. The findings from the **Welsh Lamb Meat Quality Project** were showcased at the prestigious British Society of Animal Science - '*The Role of Livestock in our Ecosystems and Economy*'.

Health and education engagement

42. HCC supports a **range of health and education development activity**. As part of its annual engagement programme with health professionals, HCC exhibited to over 600 midwives, Royal College Nurses representatives, and lecturers with a total reach of over 20,000 clients/patients to showcase the health benefits of red meat for a balanced diet

(in 2024/25). Complementing this work HCC recently launched a quarterly e-bulletin sent to healthcare professionals about the benefits of red meat.

43. HCC **engages on an ongoing basis with teaching professionals** to inform and educate on evidence-based information around red meat, food and farming. Engagement includes presence at key events like the National Education Show in 2024-25. Complementing this type of activity is an ongoing quarterly e-bulletin at both a primary and secondary school level.
44. In 2024, HCC launched **Meat Minds**, the programme seeks to develop the next generation's knowledge and experience of industry structure and red meat-farm to fork production. As part of the programme members work collectively on an industry focused project, with the aim of producing new information and data to inform the industry as a whole.

Communications

45. HCC collects and **disseminates market research and intelligence** to the Welsh red meat supply chain about consumer trends, market patterns and future challenges. This is achieved through having its in-house market intelligence hub and also utilising external information and data. The information is disseminated on HCC's website, at meetings, webinars and in publications such as the annually released '*Little Book of Meat Facts*'. Examples include:
- A monthly **market e-bulletin with 3,000 subscribers**, containing news items on industry developments. Additionally, HCC also provide a weekly industry update to the subscribers with weekly prices and breaking news items for industry.
 - A consumer-focused **monthly e-bulletin to 30,000 subscribers** is also produced addressing why and where to purchase Welsh Lamb. A similar e-bulletin also exists for Welsh Beef and Pork.
 - HCC has a suite of **dedicated websites, with complimentary social media accounts**, in order to communicate with consumers, health and educational professionals, and trade. These include: **eatwelshlambandwelshbeef.com**; **redmeathub.wales**; **welshlambandbeef.com** ; **porcblasus.cymru**; **meatpromotion.wales**. As a highlight, our social media accounts have a combined 130,000 followers.
46. In addition, HCC regularly undertakes advocacy and defence communication activity to mitigate the impact of negative publicity around red meat. As an example:
- HCC, often in concert with other levy bodies, take up various issues where red meat and the various elements of its supply chain is misrepresented in the media. This has led to a change in coverage by some media outlets that were proven to be incorrect

in their reporting. **HCC seeks to ensure that the industry's voice is represented within media** through proactive, and sometimes reactive, engagement.

- **From September 2024 to date**, HCC has accrued a total of over 60 positive national press clippings on the topic of Welsh red meat reaching a total audience averaging 2.5 million per item.
- In late 2024, HCC **commissioned a research study into the red meat-eating habits of consumers** to highlight the knowledge gap of its benefits as part of a balanced diet. This resulted in 13 broadcast items with an estimated reach of circa 2 million consumers.

47. HCC's vision, plan and objectives were reviewed and validated in Autumn 2022. Inevitably, as time passes and the world changes there is a risk of its relevance diminishing. This is why, as part of its standard cycle, the organisation is currently undertaking a thorough consultation, research and synthesis of a suitable **new vision for the period 2026 – 2030**. This process is expected to be completed by the end of 2025 with a view of securing approval and funding for implementation ready for commencement by April 2026.

The relationship between HCC and the farming and meat processing / exporting sector including whether HCC is delivering value for money to levy payers.

48. The HCC team is in **regular contact with its levy payers, wider stakeholders and customers**, to constantly identify industry challenges and opportunities, support, guide and reflect on its own priorities and activities.
49. These regular interactions are of **paramount importance to support HCC's role as the conduit between the industry and the Welsh Government** representing the industry, informing and challenging government policy.
50. Key organisation with which **regular contact at all levels occurs include** Farmers' Union of Wales (FUW), National Farmers Union Cymru (NFU Cymru), National Sheep Association Cymru (NSA), Livestock Auctioneers' Association (LAA), Welsh Lamb and Beef Producers (WLBP), British Meat Processors Association (BMPA), Association of Independent Meat Suppliers (AIMS), Agriculture and Horticulture Development Board (AHDB), Quality Meat Scotland (QMS), Livestock & Meat Commission for Northern Ireland (LMC) , Pilgrim's, Dunbia, Kepak, Farmers Fresh and other lower throughput processors and sellers of Welsh red meat.
51. Below outlines the **type of engagement activity carried out on a regular basis** with both farmers and meat processing / exporting sector.
- **Regular one-to-one meetings:** HCC holds one-to-one meetings across the year with many stakeholders. HCC notes that the changes in leadership during the last

18 months will have had an impact on these meetings. One of the first priorities of the new Chief Executive after commencing at the end of January 2025 has been to re-engage on a one-to-one basis at senior level with all key levy payer groups.

- **Periodic one-to-many meetings:** HCC organise and attend regular one-to-many meetings. This includes presence at annual general meetings such as presenting to the 2025 NSA Cymru Annual General Meeting; and the recent processor presentations across Wales to listen to industry concerns and present HCC activity in the market.
- **Presence on key representative bodies:** HCC participates in levy payer organisation committees to provide input and listen to industry concerns. Significant examples include HCC attending the FUW Hill and Livestock Committee, the NFU Cymru Livestock Committee, and the NSA Cymru regional meetings.
- **Presence at key agricultural shows:** such as yearly presence at the Royal Welsh Show and RWS Winter Fair acting as a communications platform between HCC, stakeholders, customers, and the general public.
- **HCC's yearly conference:** providing two-way engagement with stakeholders and wider industry on industry development, issues and trends. In addition to expert keynote speakers the conference also includes a regular '*Ask the HCC Board*' agenda item aimed at providing an opportunity for levy payers to query all aspects of HCC's activities.
- **Industry updates:** HCC provides regular industry updates such as monthly market e-bulletins with numerous items on industry developments and statistics. As well as a weekly industry updates with shorter term weekly prices and breaking news. Additionally, HCC regularly (over 100+ releases in 2024/25) issues press releases with industry relevant information for key trade publications.
- **Wider strategic policy forums:** in order to influence policy at the national, UK, and global level, HCC is an active member of a number of representative policy forums including Sustainable Farming Scheme Ministerial Roundtable; Carbon Sequestration Review Panel and the Officials UA Group; Trade Policy Advisory Group; Global Roundtable of Sustainable Beef and the Global Meat Alliance.

Delivering value for money

52. HCC believes that it is **delivering good value for money for levy payers with a limited and dwindling budget** for what is a broad scope.

53. The value of aggregate agricultural output rose by approximately £120 million to around £2.2 billion in 2023. The value of output from cattle remained high at £572 million. The value of output from sheep showed a further increase of £57 million (or 21%) to just

under £325 million. **Gross output from cattle and sheep is estimated to be 40% of the value of agricultural output in Wales.**

54. **For the financial year 2024/25, HCC is exclusively funded by levy payers' funds to the tune of circa £4.3 million** (including £1.3m Levy Repatriation). To aggravate the pressures on HCC finances, in April 2024 a change to the organisations VAT status had a considerable impact on its buying power. HMRC ruled that HCC levies are outside of the scope of VAT, with effect from 1 April 2024. Prior to this date HCC had always charged VAT on levy invoices and recovered input VAT on all goods and services paid for by the levy. The net impact to HCC has been estimated to be approximately £400,000 which is no longer able to be recovered on the goods and services it purchases on behalf of levy payers. We are not the only levy body to be affected in this way with the change first being invoked with AHDB and thereafter with HCC and QMS from April 2024.
55. These funds are destined to develop *and* promote Welsh red meat and **equates to circa 0.6% of the value of the throughput (2024 – across the three species)**. Considering the broad scope of HCC activities as required by its remit, this is a substantially lower level of investment when compared to other consumer goods industries. Branded companies would typically invest 5% to 10% of revenues in marketing alone and that is only one of the areas of HCC's scope.
56. As a result of the above HCC has to be **selective and careful** with the activities and initiatives that are supported on the basis of importance and delivery potential.

The relationship between HCC and the Welsh Government, including whether the Welsh Government should have more oversight.

The relationship between HCC and Welsh Government

57. HCC, created in 2003, is a private company limited by guarantee wholly owned by the Welsh Government to develop, promote and market Welsh red meat. The *Red Meat Industry (Wales) Measure 2010 (the Measure)* gives the Welsh Ministers the power to deliver on the statutory objectives of:
- Increasing efficiency or productivity in the red meat industry
 - Improving marketing in that industry
 - Improving or developing services that the industry does or could provide to the community; and
 - Improving the ways in which the industry contributes to sustainable development.
58. The Measure sets out at Schedule 1 statutory functions of the Welsh Ministers for the purpose of furthering the objectives. The Measure gives the Welsh Ministers power to

delegate their functions under the Measure. **The Welsh Ministers have exercised their power and delegated functions under the Measure to HCC.**

59. Section 7 of the Measure gives the Welsh Ministers power to delegate their functions under the Measure. A **delegation agreement made between the Welsh Ministers and HCC on 28 March 2008 ('the Delegation Agreement')** delegated all of the functions set out in the Measure to HCC, which allows the collection of the levy at the point of slaughter in Wales or export and undertakes the statutory functions in relation to the Welsh red meat industry.
60. **Underpinning the relationship is a legal framework document that sets out the broad framework within which HCC operates**, details the terms and conditions under which the Welsh Ministers may provide resources to HCC, and defines the roles and responsibilities of the Welsh Ministers and HCC as well as the relationship between them. HCC's articles of association outline the managerial and administrative structure and responsibilities of HCC.
61. The Welsh Ministers set HCC's strategic objectives in its remit letter. **HCC must set out how it will achieve its strategic objectives in its business plan** which is approved by the ministers.
62. **Appointments to the HCC Board are made by the Welsh Ministers** in accordance with the Commissioner for Public Appointments' code of practice.
63. **The board is representative of farmer and processor levy payers and others who possess skills relevant to the future development of the organisation.** The current representation on the board includes, levy payers, marketing, corporate governance, the supply chain and sustainability.
64. The board comprises 11 non-executive directors (including the Chair). Two statutory committees and a working group also exist to advise the board on various functions and work streams.
65. **The HCC board is accountable to the Welsh Government** for achieving the defined objectives, ensuring high quality corporate governance and for oversight of the company's executive, including the role of the Chief Executive as the company's Accounting Officer. Governance and the internal control regime are primarily a matter for HCC's board.
66. HCC is responsible for **maintaining robust audit, internal control, and governance functions** to ensure its operations are efficient, transparent, and accountable. The audit function is crucial for reviewing financial performance, ensuring compliance with relevant regulations, and providing assurance that resources are used effectively. Internal controls are designed to safeguard assets, mitigate risks, and ensure the integrity of financial

reporting and operational activities. The governance framework at HCC includes clear roles and responsibilities, regular reporting mechanisms, and adherence to principles of good governance, ensuring that the organisation operates with transparency and in line with both public expectations and government policies. These functions collectively support HCC's strategic objectives and contribute to its continued financial health and sustainability.

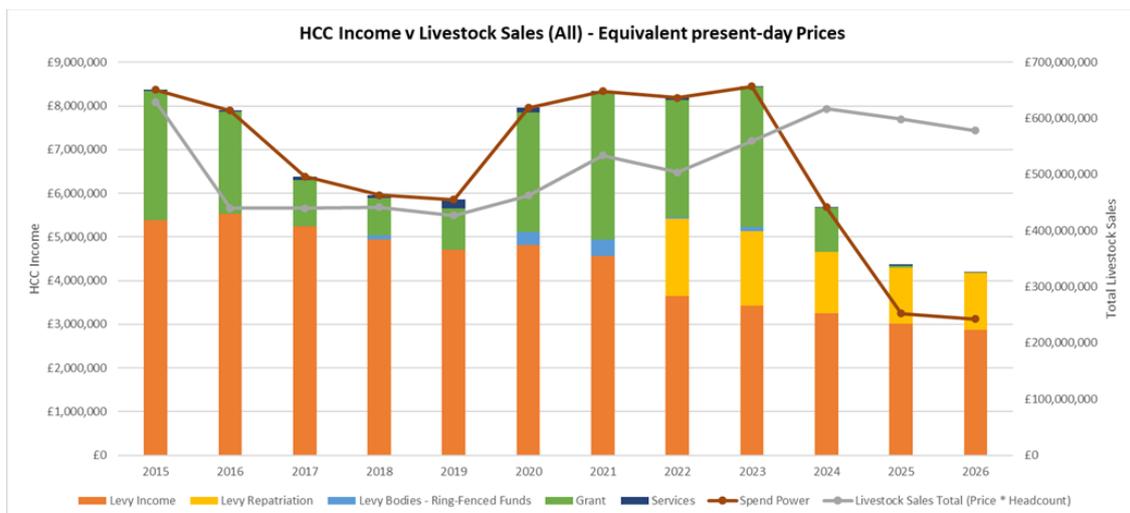
67. **The Auditor General for Wales is the company's auditor** in accordance with paragraph 18(1) of schedule 8 to the Government of Wales Act 2006.
68. The Welsh Government's role therefore focuses on accounting for delivery of objectives and the management of relationships between it and HCC. The Chief Executive attends board meetings to form the link between governance and management, with other members of the HCC leadership team also in attendance.
69. **In practical terms the breadth and depth of the Welsh Government involvement with HCC** can best be described as follows:
- Appointment of HCC Board members
 - A Welsh Government official has observer status on the HCC Board and is therefore kept abreast of all issues at HCC Board level
 - Quarterly formal governance meetings are held between HCC executive level and civil servants; and
 - Monthly meeting held between HCC executive level, HCC Chair and Welsh Government Director of Rural Affairs.
70. The current level of Welsh Government involvement in HCC, as described above, provides in our opinion **the right balance between freedom of execution and accountability oversight** in both strategic outlook and financial delivery of objectives.
71. **The disperse nature of the Welsh red meat supply base** makes it very difficult for the development and execution of strategy without the right vehicle to funnel that intention.
72. Any alternative oversight structures involving **no Welsh Government oversight** and more supply chain ownership risks failing due to the forementioned disperse nature and potential vested interests in the supply chain.
73. Any alternative oversight structures involving **more Welsh Government oversight** risks alienating a supply chain which is by nature suspicious of excessive government intervention.

Whether HCC the most effective vehicle for developing, promoting and marketing red meat from Wales, and whether a red meat levy is the most effective means of funding this activity.

74. HCC remains in principle the **most appropriate vehicle for supporting the red meat industry in Wales**, for the following reasons:

- Involves all relevant stakeholders in the supply chain
- Could ensure financial contributions from all relevant stakeholders
- Has a single-minded focus on the red meat industry in Wales
- Demonstrates Welsh Government real support for the red meat industry in Wales
- Provides independent expertise and knowledge for the industry
- Guardians of the PGI Welsh Lamb and PGI Welsh Beef brands
- Allows for a mechanism for the Welsh Government to be supporting partnership working with the industry over a perception of dictating policy only; and
- Satisfies the need to align a traditional and very disperse supply chain.

75. In order to appropriately support the industry and achieve its objectives. **HCC requires adequate funding in both level and structure.**



76. **Until 2024 the organisation was funded by a combination of levy payers' money and grant-aid** originally sourced from EU funds that have now ceased.

77. Levy income itself is driven by two key factors. The levy per head and the number of heads. As can be seen in the graph even after accounting for inflationary increases on the levy per head (since April 2023) the levy income has severely reduced over the past years and continues to do so. An additional effect of the continued reduction of livestock numbers is that **throughput critical mass for Welsh processors is quickly reaching a tipping point** with an increased risk of a significant processing capacity loss via plant closures.

78. In addition, changes in the VAT rating treatment of the company by HMRC means from 2025 the company can no longer claim VAT back on its purchases which translates into a **further loss of circa £400,000 per annum** in purchasing power.
79. The net effect of this is that the **purchasing power of the organisation is now less than half what it was ten years ago** when measured in today's pounds.
80. In addition, currently the Welsh Government is providing no annual financial support to HCC which results in a levy income as a percentage of the value of the finished animal of approximately **0.7% for sheep and 0.4% for cattle** which is becoming increasingly challenging for the effective delivery of the objectives of the organisation.
81. To partially mitigate the above challenges HCC has pursued several initiatives, as follows:
- **Levy Rate Increase:** HCC consulted with industry on levy rates during the autumn of 2022. It was proposed that future increases in the levy rates would link with inflation, measured by Consumer Prices Index including owner occupiers' housing costs (CPIH) from the previous calendar year. The Welsh Red Meat Levy rates were increased in April 2023 following a call for views with industry, a mechanism to link future levy increases to the CPIH was recommended by the HCC Board and subsequently agreed by the Minister.
 - **Levy Repatriation:** from April 2021, a scheme to reapportion producer levy between Wales, England and Scotland, to allow for movement of animals raised in one country but slaughtered in another, came into effect. The scheme was introduced to address the imbalance in the system where levy was collected in the country of slaughter without taking into account the country where the animal spent a significant part of its life.
 - **External Funding:** historically HCC has been able to augment levy income through external funds, an example of this was the Red Meat Development Programme (RMDP). The £9.2m five-year RMDP was delivered through the European Union / Welsh Government Rural Communities – Rural Development Programme 2014-2020. Other examples of funding received by HCC include the Welsh Government's Enhanced Export Development Programme. HCC has been successful with a few projects within this area, such as the ARFOR Challenge Fund and also a AberInnovation Solutions Catalyst programme. Many organisations are now adapting their structure and delivery style to meet the changing funding landscape.
 - **Efficiencies:** the organisation continues to identify opportunities to deliver efficiencies by reducing expenditure where appropriate, maximise income and deliver best value for money for the Welsh levy payer. Key measures include a revised staffing structure, ensuring that posts deemed surplus to requirements are not replaced (saving £240,000 p.a.), and estate rationalisation to optimise the use of HCC's office space and facilities (saving circa £300,000 over five-years). Although not directly impacting levy payers' funds, HCC also recently ceased its current lease

agreement for EID Cymru offices by agreeing to move them to existing Welsh Government facilities resulting in savings to tax payer of circa £400,000 over five-years, underlining HCC's commitment to provide good value for money and its ability to act swiftly. Additionally, HCC continues to review procurement processes to secure best value for money, implementing digital transformation initiatives to streamline workflows, and refine budget management practices to prioritise essential activities.

82. **To address the need for sustained financial capacity and reaffirm its commitment to supporting the industry, as well as its collaborative approach with the supply chain, the Welsh Government should consider a financial relationship moving forward, that reflects funding capacity pre-EU exit.** This would not only ensure the continued stability and growth of the sector but also enable HCC to fully discharge its responsibilities under the *Red Meat Industry (Wales) Measure 2010*. Sufficient Welsh Government grant funding and levy income are essential for the effective delivery of key initiatives, ensuring the industry's sustainability and its ability to meet future challenges.

Y Pwyllgor Deisebau Agenda Item 4.1

Petitions Committee

Chairs of Health and Social Care Committee;
Economy, Trade and Rural Affairs Committee;
Equality and Social Justice Committee; Children,
Education and Young People Committee; Wales
Covid-19 Inquiry Special Purpose Committee

07 March 2025

Dear Chair,

Petition P-06-1488 Establish a 'Care Society' to Tackle the Long COVID Crisis in Wales

The Committee considered the above petition during its meeting on 17 February, alongside correspondence from the Cabinet Secretary for Health and Social Care and the petitioner.

During the discussion, I noted key points raised in my prior meeting with the petitioners. Members acknowledged the wide scope of the issues raised, which extend beyond the remit of the Petitions Committee. It was clear that addressing these concerns would require a cross-governmental strategy from the Welsh Government.

As a result the Committee agreed to write to the First Minister, with relevant Cabinet Secretaries copied in for awareness, to inquire about the Government's cross-portfolio strategy for addressing long COVID, particularly in relation to individuals who are either unemployed or facing difficulties returning to work due to potentially undiagnosed long COVID.

Additionally, the Committee agreed to write to relevant Senedd subject committees to seek more information on your ongoing or planned inquiry work regarding the Welsh Government's strategic approach to Long COVID.

The full details of the Committee's consideration of the petition, including the correspondence and the actions agreed by the Committee can be found here: [P-06-1488 Establish a 'Care Society' to Tackle the Long COVID Crisis in Wales](#).

I would be grateful if you could send your response by e-mail to the clerking team at petitions@senedd.wales.

Yours sincerely

Senedd Cymru

Bae Caerdydd, Caerdydd, CF99 1SN

Deisebau@senedd.cymru

senedd.cymru/SeneddDeisebau

0300 200 6565

Welsh Parliament

Cardiff Bay, Cardiff, CF99 1SN

Petitions@senedd.wales

senedd.wales/SeneddPetitions

0300 200 6565

Carolyn

Carolyn Thomas MS
Chair

Croesewir gohebiaeth yn Gymraeg neu Saesneg.

We welcome correspondence in Welsh or English.

Agenda Item 4.2

Huw Irranca-Davies AS/MS

Y Dirprwy Brif Weinidog ac Ysgrifennydd y Cabinet dros Newid Hinsawdd a Materion Gwledig
Deputy First Minister and Cabinet Secretary for Climate Change and Rural Affairs



Llywodraeth Cymru
Welsh Government

Ein cyf/Our ref: PO/HIDCC/0106/25

Mike Hedges MS
Chair
Legislation, Justice and Constitution Committee
Welsh Parliament
Cardiff Bay
Cardiff
CF99 1SN

10 March 2025

Dear Mike,

I am writing in accordance with the inter-institutional relations agreement to let you know that the Inter-Ministerial Group for Environment, Food and Rural Affairs meeting scheduled for 10 March has been postponed. Officials are working to identify a new date. I will update the Committee if a new date is identified before the next scheduled meeting due to take place on 12 May.

I have also copied this letter to the Climate Change, Environment and Infrastructure Committee and the Economy, Trade and Rural Affairs committee.

Yours sincerely

Huw Irranca-Davies AS/MS

Y Dirprwy Brif Weinidog ac Ysgrifennydd y Cabinet dros Newid Hinsawdd a Materion Gwledig
Deputy First Minister and Cabinet Secretary for Climate Change and Rural Affairs

Canolfan Cyswllt Cyntaf / First Point of Contact Centre:
0300 0604400

Bae Caerdydd • Cardiff Bay
Caerdydd • Cardiff
CF99 1SN

Gohebiaeth.Huw.Irranca-Davies@llyw.cymru
Correspondence.Huw.Irranca-Davies@gov.wales

Rydym yn croesawu derbyn gohebiaeth yn Gymraeg. Byddwn yn ateb gohebiaeth a dderbynnir yn Gymraeg yn Gymraeg ac ni fydd gohebu yn Gymraeg yn arwain at oedi.

We welcome receiving correspondence in Welsh. Any correspondence received in Welsh will be answered in Welsh and corresponding in Welsh will not lead to a delay in responding.

Jane Dodds

Aelod o'r Senedd dros
Canolbarth a Gorllewin Cymru

Member of the Senedd for
Mid and West Wales

Rebecca Evans MS

Cabinet Secretary for Economy, Energy and Planning
Welsh Government

5th Floor

Tŷ Hywel

Cardiff Bay

CF99 1NA

Dyddiad | Date: 10/03/2025

**Pwnc | Subject: Urgent: Delays in IPU Application Decisions – Request for Clear
Timeline and Interim Measures**

Annwyl Rebecca,

I am writing to express my deep concern regarding the unacceptable delays in decision-making on application 20/0717/FUL and other Intensive Poultry Unit (IPU) applications currently under holding directions. While I fully appreciate the legal obligations to protect Special Areas of Conservation (SACs) and the complexities of phosphate discharge management, these prolonged delays are creating significant uncertainty and hardship for my constituents.

The ongoing review of the Water Resources (Control of Agricultural Pollution) (Wales) Regulations 2021 and further work on organic material spreading are important, but they must not be used as an excuse for indefinite delays. Businesses, farmers, and communities deserve clarity and certainty.

I am therefore asking for a firm timeline for decisions on these applications, including key milestones and any interim measures that can be put in place to provide transparency and accountability in this process.

Agenda Item 4.3

Senedd Cymru
Bae Caerdydd, Caerdydd, CF99 1SN
Jane.Dodds@senedd.cymru

Welsh Parliament

Cardiff Bay, Cardiff, CF99 1SN
Jane.Dodds@senedd.wales

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@janedoddsfld 

@DoddsJane 

/JaneDoddsWLD 

Jane Dodds

Aelod o'r Senedd dros
Canolbarth a Gorllewin Cymru

—
Member of the Senedd for
Mid and West Wales

Senedd Cymru

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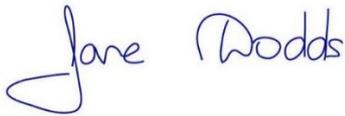
@DoddsJane 

/JaneDoddsWLD 

Given the impact of this issue on rural communities, I am copying in the Economy, Trade and Rural Affairs Committee to ensure that there is proper scrutiny of the delays and their consequences. I urge you to provide a clear response outlining when and how these matters will be resolved, as well as any temporary measures that can be taken to mitigate ongoing uncertainty.

I look forward to your prompt response with a clear action plan.

Yn gywir,



Jane Dodds MS/AS

Member of the Senedd for Mid and West Wales
Aelod o'r Senedd dros Canolbarth a Gorllewin Cymru

**cc: Andrew RT Davies MS, Chair of the Economy, Trade and Rural Affairs
Committee**





Darragh O'Brien T.D
Department of Transport,
Leeson Lane,
Dublin 2, D02 TR60

Mr RT Davies MS
Economy, Trade, and
Rural Affairs Committee,
Welsh Parliament,
Cardiff Bay,
Cardiff,
CF99 1SN

By email: SeneddEconomy@senedd.wales

10th of March 2025

Dear Mr. RT Davies MS,

I wish to acknowledge your letter of 4 February 2025 in relation to the proposed Welsh Senedd's Economy, Trade and Rural Affairs Committee short inquiry into the recent storm damage and related closure of Holyhead Port.

In light of the severe impacts that the disruption to services at Holyhead had on the Irish supply chain to Wales and the UK, I welcome your request for feedback from an Irish perspective.

I will begin with setting out the impact of the disruption, which in effect closed one of the most important sea routes out of Ireland to the UK. This route is especially important in terms of freight Roll-On\Roll-Off (RoRo) traffic both accompanied with driver and



unaccompanied loads and is a vital sea route for car and foot passenger traffic. The timing of the disruption coincided with one of the busiest times of the year.

In terms of volumes of trade, up to 10,000 units would cross the Irish Sea and in the region of up to 100,000 car passengers use the route per week on average in the weeks up to Christmas. Prior to the disruption this most strategic route had over a hundred sailings (average of 52 departures/52 arrivals) each week. The Dublin - Holyhead route comprises 34% of RoRo freight traffic moving between Ireland and Great Britain over the calendar year and approximately 23% all containerised/unitised freight coming through Irish ports.

The direct impacts were immediately evident to the ferry companies and to the road haulage sector. The ferry companies had to adjust to redeploying vessels onto existing alternative routes and also exploring possible new routes as temporary solutions. For example, Irish Ferries introduced temporary services between Dublin to Fishguard and Dublin to Pembroke with capacity for car passengers as well as freight.

The haulage sector in Ireland was faced with longer journey times, indeed on both sides of the Irish Sea, with significant numbers diverting away from Dublin to other ports such as Rosslare and also Belfast port. In response to the issues faced by the haulage sector the Department of Transport in consultation with the Road Safety Authority, applied a temporary derogation and limited relaxation of drivers' hours rules which applied from 14 December 2024 until 12 January 2025. The UK's temporary relaxation of drivers' hours was also relevant.

For the most part the steps taken within the freight system were appropriate, the extent of which were determined largely by the capacity of individual ports on both sides of the Irish Sea and linked with the capacity of the shipping companies to re-deploy vessels or provide extra sailings on alternate routes.



While the additional capacity put in place was sufficient for a short-term disruption, it was apparent that other routes were then utilised to their maximum capacity. This very high level of capacity utilisation is not sustainable and does not provide for a resilient system in case other disruptive events were to occur. It is also not sustainable from a cost perspective for the supply chain actors since the high demand led to price increases in ferry costs. It is therefore extremely important from the Irish perspective that measures are implemented to ensure that full Holyhead capacity is restored and that the infrastructure is resilient into the future.

In considering measures to enhance resilience into the future it should be noted that there is an increasing trend, in Ireland at least, for RoRo freight to travel unaccompanied on maritime routes. It is much more difficult for this type of freight to be diverted when disruption occurs given the additional labour requirement for providing drivers and for shunting services at the origin and destination ports. Consideration should be given as to the balance between accommodating accompanied and unaccompanied Ro-Ro freight at ports for better resilience in the longer term.

In terms of communication, the uncertainty in the first few days following the storm as to the extent of the damage and likely period of disruption, as communicated by the port operator, did initially hamper the discussion of, exploration and implementation of meaningful and suitable responses.

The efforts of the Irish, Welsh and UK Governments and officials through the various channels opened with each other and with stakeholders for the duration of the disruption were very effective in providing the platform for more open communications. This was certainly true of the Welsh Government's interactions with the port operator at Holyhead and with other Welsh ports in exploring options for increased services to those ports.



I would suggest that these relationships should continue and be strengthened. Consideration could be given to the designation of transport and supply chain coordinators on both sides of the Irish Sea, which could operate in a similar fashion to the network of “EU Green Lanes” coordinators which is activated in emergency circumstances to keep transport links and supply chains moving. I believe that consideration should also be given to how best to provide adequately for drivers’ welfare such as food, toilets and accommodation in such events. The provision and dissemination of information on traffic management from official sources would also be of benefit.

The Department of Transport does not hold any information on the contributing factors to the severity of the damage to the port and therefore cannot provide a viewpoint on the causes.

Finally, the Department of Transport in conjunction with the Irish Maritime Development Office is in the process of conducting a lessons learnt exercise from the Irish perspective. The early analysis has highlighted the issues addressed in this response and will provide further insights once completed. The Department looks forward to the opportunity to input to the proposed Task Force on the future of Holyhead as announced by Cabinet Secretary for Transport and North Wales, Ken Skates.

I wish the Committee every success with the enquiry.

A handwritten signature in blue ink, appearing to read 'D.O.', is positioned above a horizontal line.

Darragh O’Brien T.D
Minister for Transport

Andy Sheen

CEO

Irish Ferries

18 March 2025

Dear Andy,

Holyhead Port Storm Damage and Closure

I am Chair of the Senedd's Economy, Trade and Rural Affairs Committee. We were established to examine at policy and legislation, and to hold the Welsh Government to account in areas including business, economic development, skills, international trade, agriculture, fisheries and food.

I am writing as part of our inquiry into [Holyhead Port Storm Damage and Closure](#). On 6 March, we took evidence from a number of organisations and experts, including Stena Line Ports. Irish Ferries were invited to this session; however, disappointingly, did not respond. A [transcript](#) and [video](#) of this meeting can be found on our [website](#).

As part of Stena Line Ports' [evidence](#), they note that the damage happened to Terminal 3, which is "predominantly used by Irish Ferries". They also noted that "On 6 and 7 December 2024, there were two berthing incidents, which rendered Terminal 3 berth unusable. Storm Darragh was forecast; however, these incidents immediately preceded the peak of the storm when the red weather alert was in place."

The Committee would like to hear Irish Ferries' views on the evidence from our 6 March session. We are particularly interested in your response to the excerpts above and information about your operations between Holyhead and Dublin on 6 and 7 December, including clarification around any decisions made following the UK Met Office issuing the Red Weather Warning for Holyhead and most of the Welsh coast.

We also took evidence that two other incidents at Holyhead in 2023 and 2024 involved the berthing 'dolphins' and their fenders. Professor Andrew Potter told us there was limited information available from the Marine Accident Investigation Branch's website, but that it looked like "both involved manoeuvring in strong winds". Could you clarify if Irish Ferries were involved in either of these incidents? If so, please could you provide details?

The Committee would also welcome any other information you would like to provide that may be relevant to our inquiry into the storm damage and port closure. In particular, the Committee would be keen to hear any views you have on the:

- Causes: the factors contributing to the severity of the damage.
- Communication: the approach to communication during and after the storm, including communication with port users, communities and businesses affected by the closure as well as between Governments.
- Remediation: the speed of response in assessing and repairing the damage, including the support provided by Government.
- Impact: the impact of the closure, as well as the extent and effectiveness of the steps being taken to mitigate the impact.

Please could you reply to this letter by 11 April. I look forward to reading your evidence.

I have copied this letter to Llyr Gruffydd MS Chair of Climate Change, Environment, and Infrastructure Committee as I am aware they are also interested in this issue.

Yours sincerely,



Andrew RT Davies MS

Chair: Economy, Trade and Rural Affairs Committee

We welcome correspondence in Welsh or English

CC: Llyr Gruffydd MS, Chair, Climate Change, Environment, and Infrastructure Committee



The Rt Hon Elin Jones MS
Chair of the Business Committee

13 March 2025

Dear Llywydd,

Business Committee review of the Public Bill and Member Bill processes

Thank you for the opportunity to feed into the Business Committee review of the Public Bill and Member Bill processes. The Economy, Trade and Rural Affairs Committee discussed your letter regarding this review on 12 March.

We have limited experience of the Members and Public Bills processes, as such we do not have much to add to the review. We hope that you will get fuller responses from Members who have been successful in the ballot and then attempted to take legislation through the Senedd.

However, we would like to make the following observation: Members neither have the resources nor time afforded to the Government to develop legislation. Therefore, Members should ensure their proposed legislation is specific, short and focused. Advice to this effect should be offered to Members entering the ballot in the Seventh Senedd.

Kind regards,



Andrew RT Davies MS
Chair: Economy, Trade and Rural Affairs Committee



Llywodraeth Cymru
Welsh Government

Our ref JS PO 111 2025

Andrew RT Davies MS
Chair, Economy, Trade and Rural Affairs Committee

13 March 2025

Dear Andrew,

Apprenticeship Pathways Inquiry

Thank you for your letter of 25 February to the Cabinet Secretary for Economy, Energy and Planning. I am replying as the Minister responsible for skills and apprenticeships in Wales. I regret that I was unable to attend the Committee meeting on 12 February due to personal circumstances. However, I set out below the Welsh Government's response to the Committee's follow-up questions.

What progress has been made in developing a national strategy for vocational education and training?

This is a matter for the Minister for Further and Higher Education and I have asked that she write to the Committee.

Are you content with the advice and information that learners are provided with regarding apprenticeship opportunities, in particular the service provided by Careers Wales?

Yes. Careers Wales is only one part of a wider context in which young people receive careers information - we know other key influencers are parents, teachers and peers. However, Careers Wales offers professional, impartial careers information, advice and guidance tailored to each individual young person's needs.

Latest statistics show that over 95% of pupils who received careers guidance through Careers Wales entered education, employment or training on leaving school. The latest Careers Wales Quarter 3 report also shows over 96% of young people in education reported a raised awareness of the opportunities available to them following a careers guidance.

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Rydym yn croesawu derbyn gohebiaeth yn Gymraeg. Byddwn yn ateb gohebiaeth a dderbynnir yn Gymraeg yn Gymraeg ac ni fydd gohebu yn Gymraeg yn arwain at oedi.

We welcome receiving correspondence in Welsh. Any correspondence received in Welsh will be answered in Welsh and corresponding in Welsh will not lead to a delay in responding.

The new Careers Wales offer of a careers guidance interview to every young person went live at the beginning of September 2024 and has been well received by learners, schools and parents. By the end of December Careers Wales had provided this support to 61% of the current Year 11 cohort.

The Careers Wales website provides geographic intelligence for young people, so that they can see, for example, where particular types of apprenticeships are offered around Wales.

How aware are you that there has been a drop off in meaningful work experience in schools since Careers Wales stopped performing a central co-ordinating role in 2015? To what extent could this be a barrier to learners understanding their options as far as apprenticeships and work-based learning goes?

We are aware that the offer of work experience placements varies across Wales. The Young Person's Guarantee (YPG) National Conversation (2023-24) highlighted:

- a lack of availability of 'quality' work-related experience deemed essential to acquiring life skills and understanding career pathways;
- 1 in 5 (21%) of respondents had never undertaken any form of work-related experience;
- transport remains a key barrier, particularly for those in rural areas or facing financial constraints - over half of young respondents (54%) said better public transport availability would help them travel to the job, education or training they want.

Meaningful work experience is much broader than a work experience placement. The new curriculum for Wales recognises this and has introduced Careers and Work Related Experiences as an area of learning. Work related experiences now features throughout our children and young people's curriculum from the age of 3, rather than it being a standalone KS4 work experience placement.

Careers Wales support schools to link with employers and deliver Careers and Work Related Experiences in many ways, including:

- delivering a new Careers Wales Quality Award to support the implementation of CWRE across the curriculum;
- working with all secondary schools and thousands of businesses across Wales to facilitate a wide range of employer led curriculum activities and information events for learners;
- bringing together schools and employers with the aim of informing, inspiring and motivating young people about their career opportunities. Activities include, employer presentations, site visits, 'World of Work' days, mock interviews and careers fayres;
- Careers Wales also offer a facilitated database [Education Business Exchange \(EBE\)](#) that lists local and national employers and alumni from a variety of sectors who are interested in working with schools to develop exciting curriculum enhancing programmes for pupils. This is available to all secondary schools, Pupil Referral Units and special schools.

To what extent are you aware that learners are being put off from pursuing an apprenticeship or from continuing to the next level due to difficulties in mapping out clear pathways? Are the opportunities available for learners to progress through the levels if they wish to?

This is certainly something we hear about from apprentices, employers and training providers. It is, however, a complex issue because many factors can affect an individual's choices or an employer's ability to offer clear progression routes. Medr are working closely with providers and are looking at ways of improving progression pathways. That is their role and the government welcomes that work. I also look forward to receiving the Committee's recommendations in due course as to how we might address these challenges working with Medr.

How can there be more flexibility within the system to allow apprenticeship pathways to respond quicker to the changing needs of fast paced and emerging sectors?

This is something we are looking at in the light of wider thinking across the UK about the need to make our skills provision more flexible in order to respond to fast-changing needs. We are engaging widely with employers, apprenticeship providers and Medr to shape a more fit-for-purpose future skills strategy and system for Wales. We need to take account of but not be driven by the UK context, including the impact of the planned Growth and Skills Levy and the developing UK industrial strategy. We are engaging closely with the UK government on those issues.

As the Cabinet Secretary made clear in the evidence she presented, we very much welcome this inquiry by Committee which will help us identify some of the changes we may need to make in Wales to create the flexible and responsive skills system we all want.

There are a number of obstacles that smaller businesses face regarding the apprenticeship programme, such as limited administrative capacity and a lack of awareness about the benefits of apprentices. Who should be addressing these challenges and how?

What more can be done to encourage employers, in particular smaller businesses, to engage with the apprenticeship programme and provide apprenticeships?

The Welsh Government recognises the challenges facing small businesses. The Committee has already heard that Medr is working with employers to better understand the barriers they face, especially SMEs, in taking on apprentices and how to broaden the employer base going forward.

The Welsh Government will continue to work closely with Medr and others to improve take up of apprenticeships by employers of all kinds.

A number of reports have been published in recent years with recommendations to the Welsh Government, and other key stakeholders, regarding apprenticeships. How confident are you that these interlinked recommendations are being taken forward and who is monitoring them?

Responsibility for apprenticeships policy sits clearly with me as the Minister for Culture, Skills and Social Partnership. At official level, there is a relatively new Skills Division in Welsh Government (established last year) to provide a clear focus on skills and apprenticeships and to help drive forward improvement.

Wherever relevant officials and Ministers work together across portfolios to ensure a joined-up approach. In particular, the Minister for Further and Higher Education and I work very closely together on skills matters to ensure that our joint work with Medr is fully aligned and supports our shared policy goals.

Finally, **on progress of, and funding for, the implementation of recommendations made in Sharron Lusher's Review of Vocational Qualifications in Wales and Hefin David's Transitions to Employment report**, I shall arrange for the Committee to receive an update in due course.

Yours sincerely,

A handwritten signature in black ink that reads "JACK SARGEANT". The signature is written in a cursive style with a long horizontal line underneath the name.

Jack Sargeant AS/MS

Minister for Culture, Skills and Social Partnership

Y Gweinidog Diwylliant, Sgiliau a Phartneriaeth Gymdeithasol

Ymateb i Ymgynghoriad / Consultation Response

Enw / Name:	Owen Evans
Rôl / Role:	His Majesty's Chief Inspector of Education and Training in Wales
E-bost / Email:	ChiefInspector@estyn.gov.uk
Rhif Ffôn / Tel No:	029 2044 6446
Dyddiad / Date:	14.03.25
Pwnc / Subject:	Chair ETRA to Estyn – Work Experience

Background information about Estyn

Estyn is the Office of His Majesty's Inspectorate for Education and Training in Wales. As a Crown body, we are independent of the Welsh Government.

Our principal aim is to raise the standards and quality education and training in Wales. This is primarily set out in the Learning and Skills Act 2000¹ and the Education Act 2005. In exercising its functions, we must give regard to the:

- Quality of education and training in Wales;
- Extent to which education and training meets the needs of learners;
- Educational standards achieved by those receiving education and training in Wales;
- Quality of leadership and management of those education and training providers, including whether the financial resources made available to those providing education and training are managed efficiently and used in a way which provides value for money;
- Spiritual, moral, social and cultural development of learners; and,
- Contribution made to the well-being of learners.

Our remit includes (but is not exclusive to) nurseries and non-maintained settings, primary, secondary, special and all age schools, independent schools, pupil referrals units, further education, adult community learning, local government education services, work-based learning, and initial teacher training.

We may give advice to the Welsh Parliament on any matter connected to education and training in Wales. To achieve excellence for learners, we have set three strategic objectives:

¹ This act to be replaced by the Tertiary Education and Research (Wales) Act 2022 when the quality provisions are commenced.

- Provide accountability to service users on the quality and standards of education and training in Wales;
- Inform the development of national policy by the Welsh Government;
- Build capacity for improvement of the education and training system in Wales.

This response is not confidential.

Response

Introduction

Overall, we feel that pupils benefit from meaningful work experience opportunities when they are able to access. Over the past decade, there has been a significant reduction in the number of schools offering universal work experience to all pupils. However, since the pandemic, there has been a noticeable upward trend in schools re-establishing work experience programmes.

The main barriers to offering appropriate work experience opportunities include time constraints due to a full curriculum, the capacity of schools and Careers Wales to organise and vet placements, funding issues, and the availability of high-quality placements, especially in rural areas. Despite these challenges, schools recognise the benefits of work experience and provide work experience, often targeting vulnerable pupils or those at risk of exclusion.

The effectiveness of work experience varies. Pupils note that they find work experience helpful to support them with careers options and curriculum choices. It also helps motivate and engage some learners, helping them to stay in school. However, the quality of placements and the motivation of pupils play a crucial role in the success of these programmes. Where there is best practices, this often includes comprehensive plans to meet career framework requirements, collaboration between schools, Careers Wales, and local businesses, and a multi-agency approach to supporting vulnerable pupils.

To strengthen opportunities for work experience, we feel it would be helpful to:

- increase funding for schools and Careers Wales to support the organisation and vetting of work experience placements.
- promote close collaboration between schools, Careers Wales, and local businesses.
- implement targeted work experience programmes for vulnerable pupils and those at risk of exclusion.
- ensure high-quality work experience placements that provide valuable learning experiences and align with pupils' career interests.

- address barriers for pupils with disabilities, additional learning needs, or from disadvantaged areas to ensure equitable access to work experience opportunities.

Consultation questions

Do all schools offer sufficient meaningful work experience opportunities? If not, what are the barriers and what can be done to address them?

Learning experiences are a key aspect of Estyn's inspection framework for schools and PRUs. However, we do not routinely gather specific information about the number of schools offering and pupils accessing work experience. If Estyn were to undertake a thematic inspection about work experience in the future, we would be able to provide more specific information. In general, over the last decade there has been a reduction in the number of schools offering universal work experience to pupils. However, there is a noticeable upward trend in schools beginning to do so again since the pandemic.

The main barriers to doing so are:

- Time, schools note that many demands are put on their curriculum, including the need to offer extra curricular experiences and provide sufficient learning hours to meet exam specification requirements
- Capacity of schools to organise and vet placements and visit pupils who are on them, schools report that they are having to reduce the number of support staff to meet budget constraints
- Capacity of Careers Wales to support the process of organising and vetting work experience placements
- The availability of high quality work experience placements across Wales (especially in rural areas)

Background

- Many secondary schools used to offer a full week's work experience towards the end of the summer term (usually for Year 10 and Year 12 pupils)
- Careers Wales supported schools by identifying appropriate placements and carrying out safeguarding checks on work experience providers
- Schools also developed links with relevant businesses and other organisations in their area which might offer placements. Overall, these met the needs of a few pupils but, generally, the majority of pupils and parents had to identify suitable work experience placements themselves

- A reduction in funding for Careers Wales led to the withdrawal of support for vetting work experience placements; instead they created a database of providers who had previously been vetted and made this available to schools
- This change made it very difficult for schools to maintain work experience for all because of a lack of capacity to ensure pupils' safety; there was also an increased administrative burden on businesses (and potentially increased insurance costs if they took pupils for work experience) and this reduced the number of organisations prepared to offer placements
- Those schools who stopped providing universal work experience for all pupils cited these challenges as factors influencing their decision
- Some schools valued the impact of work experience highly enough to continue with it. In some instances, this was a decision taken by groups of schools e.g. groups of schools making a decision together in Anglesey
- Instead of universal work experience, schools, supported by Careers Wales, moved to a model of providing work experience opportunities for a few targeted pupils (typically vulnerable pupils or those at risk of permanent exclusion from mainstream provision) alongside more detailed information given to pupils about careers and the world of work in lessons
- Careers Wales also reduced the amount of time its advisers spent in school as a result of reduced funding and this meant that there was a move away from careers interviews for all pupils to a targeted approach for those most in need of support (e.g. at risk of becoming NEET)
- Careers Wales promoted the idea of 'masterclasses' in specific careers. The idea was that schools could book current practitioners to provide interested pupils with an overview of what a specific career involves
- When the careers and world of work framework was first introduced, a few schools introduced discrete careers lessons in which specialist teachers taught the different elements within the framework. This approach has largely disappeared in favour of a cross-curricular one, in which aspects of careers and the world of work are taught in PSE, WBQ and a few relevant subjects
- Many schools consider weekly work placements for particularly vulnerable pupils as part of bespoke alternative curriculum arrangements
- Since the pandemic, an increasing number of schools are re-establishing work experience programmes.

Impact

- The effectiveness of universal work experience is highly variable and is linked to the quality of the placement as well as the motivation and initiative of the individual pupil to make the most of the opportunity. In the best examples, it is

transformative for some pupils and leads either to a specific career choice or a much greater engagement in education to achieve a new-found goal. Conversely where it is less effective, pupils do not attend work experience at all or leave after a brief period, or they spend their time undertaking menial tasks which provide little insight into the world of work. The experience for most pupils falls between these extremes; they often enjoy the very different environment to school life and begin to gain some valuable understanding of what the world of work involves

- Alternative curriculum programmes for vulnerable pupils which incorporate an element of work experience often help to retain pupils in mainstream education who might otherwise disengage

Is there any specific best practice that should be replicated across Wales?

Best practice seen during school inspections includes:

- Comprehensive and coherent plans to meet the requirements of the careers and world of work framework (in primary and secondary schools)
- Close collaboration between schools, Careers Wales and local businesses to provide pupils with worthwhile opportunities to learn about the world of work
- Careers mapping tools that provide pupils with impartial advice about different career pathways
- Careers events for pupils and parents
- A multi-agency approach to supporting vulnerable pupils
- Collaboration between schools and colleges to ensure pupils are well informed before they decide on their next steps

At **Ysgol Gyfun y Strade** the 'Strade in the Community' programme was introduced with the aim of broadening the learning experiences of groups of learners with low levels of engagement, challenging behaviours or poor attendance.

The school works collaboratively with over 15 local services, organisations and businesses to target specific learners with appropriate interventions. For example, a group of Year 10 girls with low motivation and negative attitudes to learning attended a local care home for an afternoon a week for a period of eight weeks. They carried out basic caring tasks with support and thus developed their confidence and communication skills well. This in turn led to an improvement in behaviour back at school.

From the inspection report on Christ College Brecon:

The 'Futures Programme', encompassing guidance related to careers and future pathways, is well established and an integral part of this independent school's provision

throughout senior school. All teaching staff are involved in its delivery and development, and the programme is founded on the school's ethos of personalised care for pupils. As a result, pupils have a well-developed understanding of the world of work and the breadth of opportunities and pathways available to them beyond school. The highly effective work done by the school in support of university applications results in a high proportion of Year 13 leavers progressing to their preferred destination, for example university study, apprenticeships or employment.

Maintained special schools often provide valuable learning experiences about the world of work e.g. Heronsbridge, Maes Y Coed, Hen Felin, Maes Ebbw and Woodlands High School.

The following links are to relevant case studies from the last two years:

Ysgol Llanfair Dyffryn Clywyd

[Developing outdoor activities that focus on providing pupils with experiences of vocational careers. - Estyn](#)

Mary Immaculate R.C. High School

[Reducing the impact of poverty on educational attainment - Estyn](#)

Idris Davies School

[The leadership of effective school support for disadvantaged and vulnerable pupils - Estyn](#)

Stanwell School

[Supporting learners to make informed choices for the future - Estyn](#)

Bridgend College

[Supported internships and work experience, leading to paid employment for young people with additional learning needs and disabilities. - Estyn](#)

The following links are to recent relevant thematic reports:

[Impartial careers advice and guidance to young people aged 14-16 years provided by Careers Wales advisers](#)

[Youth Engagement and Progression Lead Worker Review](#)

To what extent are parents or carers having to secure work experience placements due to the lack of capacity, or ability, to do so within schools?

- In schools where universal work experience has continued or been re-introduced, parents play an important role in sourcing work placements. Schools then work with the pupils whose parents have been unable to find a suitable work experience placement

- On Ynys Môn, schools work together and employ an individual whose role it is to identify and vet appropriate work experience placements
- When schools use work placements as part of a bespoke alternative curriculum for small numbers of vulnerable pupils, staff normally source and vet these opportunities

Are there any barriers for specific learners that needs to be addressed, for example learners with disabilities or additional learning needs, or from disadvantaged areas?

- Securing work experience placements can be challenging for many pupils, but for specific learners such as those with disabilities, additional learning needs (ALN), or those from disadvantaged areas, these challenges can be even more pronounced. For pupils with disabilities and ALN, there may be a more limited pool of possible work experience placements. Employers may have concerns about the accommodations required or may feel unprepared to support these learners adequately. As a result, finding suitable placements can be more challenging.
- For pupils from disadvantaged areas, there may not be the same level of parental support e.g. for finding a work experience placement if required or being able to transport a pupil to a placement if necessary. This can impact their ability to find work experience placements, as parents might not have the resources or networks to help. Additionally, transportation to placements can be a significant hurdle if parents are unable to provide this support.
- Pupils with disabilities, ALN or from disadvantaged backgrounds benefit from a personalised approach, such as having a case worker to provide additional support. Work experience programmes should be tailored to meet the varied needs of pupils. Schools should consider offering a range of placements in different industries, ensuring that each pupil has access to opportunities that align with their interests and career goals. Personalised placements make work experience more relevant and engaging for pupils, especially those with ALN or from disadvantaged backgrounds.
- Building strong, mutually beneficial partnerships with local businesses and organisations is key to providing meaningful work experience opportunities. Schools and PRUs can actively approach potential partners, highlighting the benefits of collaboration for both pupils and businesses. Additionally, schools should consider working collaboratively with alumni networks to create placement opportunities.

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Economy, Trade, and Rural Affairs Committee
Welsh Parliament
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16th March 2025

Dear Mr Davies,

Re: Apprenticeship pathways – work experience

Further to your letter of the 25th February, please find attached a Report that the Welsh Independent Schools Council have prepared to assist with the The Senedd's Economy, Trade and Rural Affairs Committee inquiry into apprenticeship pathways. Please acknowledge safe receipt.

Should you have any questions, please do not hesitate to contact me.

Yours sincerely,



Emma Verrier
WISC CEO

Report for Andrew RT Davies

Under Part 1- Quality of Education of the Independent Schools Regulations it is stated that to be compliant schools should ensure the following provision:

2(2)(e)- For pupils receiving secondary education, access to up-to-date careers guidance that- i) is presented in an impartial manner

ii) enables them to make informed choices about a broad range of career options, and

iii) helps to encourage them to fulfil their potential

WISC sent a questionnaire to member schools asking the following:

Who oversees careers guidance in your school? (ie the Head? Head of sixth form? Other?)

How is careers guidance delivered within your school curriculum?

How are learners informed about all of the choices available to them upon leaving school?

What other factors influence the choices learners make?

When and how is meaningful work experience arranged for learners in your school?

Do you encounter any difficulties delivering careers guidance/arranging work experience?

How confident are you that you ensure all pupils are able to fulfil their potential?

27 out of 77 member schools responded to the questions, 11 mainstream and 16 special schools. Answers between the two sectors were very different due to the variation of set-up, types of pupils and numbers. The special schools have access to Careers Wales support and clearly value this and make appropriate use of this resource, whilst Mainstream schools are not able to access this support.

We have therefore, reported separately using the information from the two sectors.

Mainstream Schools

When it comes to who oversees careers guidance in these schools, the role often falls to an academic deputy or head of 6th form, with some schools having a designated head of careers.

Careers guidance is invariably delivered through the current school curriculum, mainly initially through PSHE lessons. From Year 11 onwards, guidance becomes more focused and, as is often the norm in independent schools, the support given is individualised in

tutor sessions and through advice from staff. About half the schools that provided information use Morrisby assessment and careers platform, whilst other individual schools mentioned Gatsby Benchmarks, Future Smart Careers and Unifrog. One school stated they use an independent careers advisor. These platforms clearly help inform pupils about the choices available to them on leaving school. Once again, all schools explained that they give plenty of support through personalised interviews and tutorials. About half of the schools mentioned that they use visits to fairs and universities to inform students further about their choices and alumni links and use of parent knowledge and experience were also cited.

A large number of factors were described as being influences on the choices that learners make. The main influences that the majority of schools remarked on were students' strengths and weaknesses, parental influence, already chosen career paths, financial factors and peer decisions. Other influences declared were distance from home, ALN support, available subjects to be taught, gap year programmes and travel experiences.

It varied considerably as to how and when meaningful work experience is organised for learners. Many schools clearly make use of contacts they have built up over time, including alumni, as well as useful contacts that family members may have. Some work experience is timetabled for Year 11 onwards with some of this being arranged in the post-examination period. One school stated that their work experience takes place out of term time. In a few schools, students are expected to arrange any work experience themselves.

Difficulties that schools face over delivering careers guidance and arranging work experience are also varied. It is sometimes hard to match the learners' interests suitably and schools in more rural areas, and on occasions in North Wales, face particular problems. Finding appropriate times within a busy curriculum and the suitable resources were stated by about half of the schools providing information as causing issues. Employer Health and Safety restrictions can cause difficulties when trying to arrange some work experience. Lack of access for mainstream independent schools to Careers Wales means schools are reliant on their own staff and the links they can make.

Most schools are confident or very confident that the support given to students regarding careers guidance and work experience is meaningful and valuable and that their learners therefore achieve their potential.

Special Schools

As in mainstream schools, the person overseeing careers guidance varies. In most cases this person has at least one other role within the educational setting.

Careers guidance is delivered through PSHE, enrichment and Health and Wellbeing sessions. In all respondents' schools it is embedded within the curriculum and may make use of either bespoke programmes or for example, the King's Trust Qualification, also guest speakers and one to one advisory sessions. Some pupils receive input from their LA, and one school stated that they are taking part in a Careers Pilot scheme recommended by Swindon LA.

All special schools stated that they make use of Careers Wales resources and support. Many of their students have opportunities to attend careers exhibitions and make college visits. Students are given individualised advice and support to guide them in their choices.

There are many factors influencing students' choice and several schools stated how hard this can be for their learners who have often had previous bad experiences or who have significant learning and behavioural difficulties. Influencing factors, therefore, are frequently related to the young person's capability of being able to engage with independent work or further learning. Other factors are related to being able to gain relevant qualifications, the need to be nearer family, what ALN provision is available, location and friendships.

The style and timing of work experience is varied within the special schools that responded. It may be linked with a behaviour programme, and for some pupils it may not be appropriate at all. Some schools make use of their own on-site facilities such as the garden or library to offer their learners work experience whilst others reach out to the local community. It is clear from responses that schools need to keep flexible over their arrangements with timing being varied and some work experience covering one day a week for a period rather than a block of time being used.

To have assistance with arranging work experience, some schools access Future Smart Careers and Careers Wales, also Foothold Cymru. A few schools stated that they do not encounter any difficulties, whilst some others explained that not all their learners can engage, not all employers are willing to accept placements and that matching pupils to their interests can be challenging. Health and Safety factors also impact.

The majority of schools are confident that they are able to offer guidance and experiences that will enable their learners to fulfil their potential with appropriate support along the way, although for quite a number of settings outcomes can be variable.

Agenda Item 7

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Agenda Item 9

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