

An Interim Discussion Document from the Scottish Government's Agriculture Champions

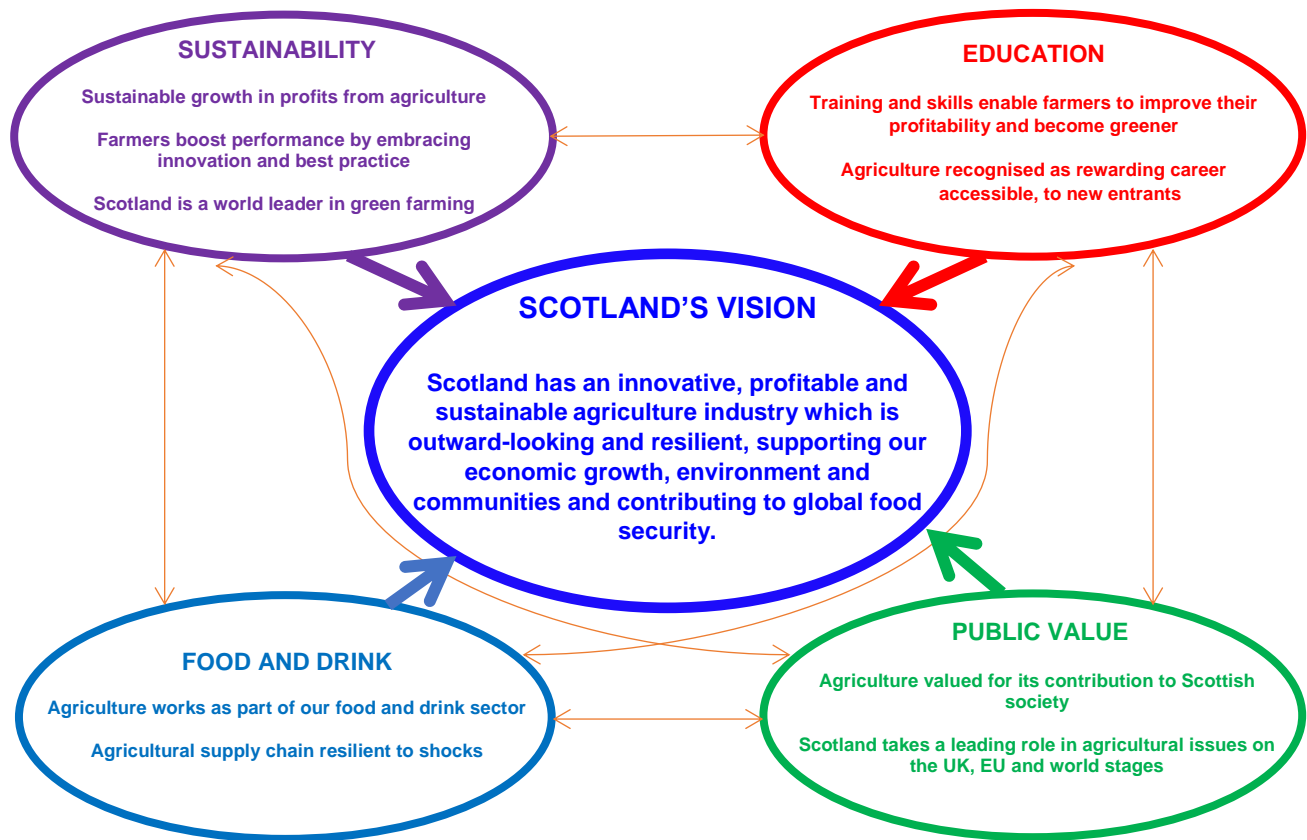
November 2017

AN INTERIM DISCUSSION DOCUMENT FROM THE SCOTTISH GOVERNMENT'S AGRICULTURE CHAMPIONS

Background

In 2015 the Scottish Government published a Vision for Agriculture and nine desired policy outcomes. The vision was expressed as: *Scotland has an innovative, profitable and sustainable agriculture industry which is outward-looking and resilient, supporting our economic growth, environment and communities and contributing to global food security.*

A lengthy national discussion/consultation was carried out and a summary of consultation findings was published in 2016. Whilst no doubt the Vision and outcomes will need to be reviewed over time, and acknowledging that it would be possible to haggle over their precise wording, we are content that they still set the right broad objectives for the future of Scotland's farm sector.



In early 2017 we were appointed as four Agriculture Champions to advise the Scottish Government on a strategy for delivering the Vision, taking account of other relevant Scottish Government initiatives and documents – such as the Land Use Strategy, the Land Reform (Scotland) Act 2016, the Forestry Strategy, and others.

As champions we have attended various events and meetings to enable us to have a two-way dialogue with interested stakeholders – for instance, the Scottish Government’s Agriculture and Rural Development stakeholder group and the Hill Farming Summit. We each brought together one or more groups of individuals selected for their expertise to help us develop our analysis.

For the purposes of managing the work, the 9 outcomes were split into 4 themes - Sustainability, Food and Drink, Public Value and Education. However, it became clear to us that these are not separate issues but elements of an overall strategic approach. For that reason we have set out our emerging thinking in this interim discussion document not under those four headings, but as the main elements of a single overall strategy developed by us collectively.

We would welcome views from stakeholders – both organisations and individuals – on the ideas in this discussion document, before we prepare our final report. Details of how to submit your comments are on page 14.

Timescale

Farming is a long term business, which we believe needs a strategy with a timescale of 10 to 15 years – longer than a single parliamentary term or the life of one government. For this reason we think the strategy for Scottish farming should be led by government but in partnership with the industry itself. Cross-party support for the main themes in the strategy would give the industry confidence that it will have longevity.

This is no small ask, as we envisage some significant challenges in the years ahead. Change is inevitable. The current system does not deliver and the “one size fits all” clearly is not working across Scotland’s diverse landscape . But we firmly believe that it is in the industry’s interest to work with government as a partner for delivering what the industry itself needs. We appreciate that this kind of leadership relies on there being visionary and well-supported individuals within the industry, who can engage in the interests of the whole of agriculture. Leadership skills is one area on which we expect to make recommendations.

The strategy should also be based firmly on the evidenced needs of the farming sector, and Scotland’s environment and rural communities, so that it can lead to a sector that is

fit for the future. There will be scope for creative solutions, and they will be needed. As we set out below, we firmly believe Scotland must gain the future funding it is entitled to, but even if that is achieved there will be a need to use different techniques to get maximum benefit from the money available – such as greater use of loans or other financial instruments, or help to cope with volatility through insurance or other risk management measures.

As with any strategy, implementation will be crucial. Scotland is often lauded for the fact that we can ‘get all the key players in one room’, and this is indeed an asset. Nonetheless it is clear to us that successful implementation of this strategy will require engagement by government beyond the portfolios of the Cabinet Secretaries who appointed us. Positive involvement in the areas of Education, Health, Planning, Housing and others will be vital.

Public Value

The concept of Public Value underpins all of the strategic themes we set out below. Farming is not just a private commercial business. It performs many functions which are of benefit to wider society, and also has the potential to create negative impacts such as pollution.

The position of food production in the public value debate is a complex one. We still have huge areas of food poverty in Scotland, so any expectation that the future profitability of farming can be assured simply through increases in food prices is questionable. However, nor would it be in the public interest to pursue a ‘cheap food’ policy that, due to the constrained production conditions faced in Scotland, led to our food supplies being virtually all imported. We believe the public interest in this area lies in having security of food supply, produced from the most appropriate land, and safeguarding best land for food production wherever possible.

It is right that farming is both supported and regulated by government but the support should be targeted and progressive. Improving the delivery of public benefit in return for the public money invested in agriculture has been a feature of all recent policy reforms, and that trend will continue.

But governments act on behalf of the whole population, who both benefit from the landscapes and biodiversity that farming protects, and pay the taxes that fund the support payments. It is in the interests of farming that people should be well-informed about the industry, not just as consumers but as taxpayers and as citizens.

At present we have limited information on the attitude of the public to the farming industry. We see the need for a baseline study to establish current attitudes. We would then envisage an outward focussed information and branding campaign, owned and led

by government but in partnership with the industry, to communicate to wider society about Scottish farming, its role and its challenges. Our sector has a fantastic commercial brand, thanks to the investment of private companies and public bodies like QMS but we also need to invest similarly in developing a societal brand which, like any branding exercise, will be a long term undertaking.

Themes

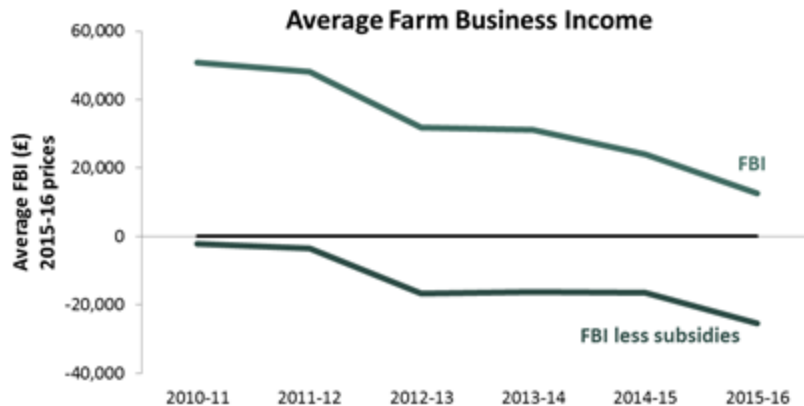
As this document is about a strategy not a detailed policy prescription, the policy details will of course need to be filled in over time. However, a clear overall strategy is required for all those working on the details, thereby providing the industry and stakeholder communities as well as government with clarity on what is trying to be achieved.

We have identified six strategic themes.

1. Continuity over the next five years, including securing the payments to which Scotland is entitled

It is widely accepted that Brexit is the biggest challenge faced by the agricultural sector for a generation. It is not our job to enter into the politics of Brexit. There are some who see it as an opportunity to produce policies better suited to our needs, and to strike trade deals separate from the EU-27. Others point out that there is much to do even just to avoid losing the trade deals that currently apply to us as part of the EU, and highlight the risks to our ability to export, to future support funding, and to the workforce (not only farm workers but inspectorate staff, scientists, official veterinarians and many others).

Farm policy has always been subject to change, but previous reforms in the last few decades have taken place at a pace, and with certainty sufficiently far in advance, such that the industry had time to adjust. What is beyond doubt in the case of Brexit is that the pace and uncertainty pose major threats to an industry in which many operators are already struggling with chronically low incomes.



Therefore we feel that seeing the industry through the next five years is not a mere tactical detail, but should be the first plank of a 10-15 year strategy. It should include keeping a close eye on CAP reform developments within the EU to ensure regulatory alignment and competitiveness.

Whilst continuity should be the watchword for the next five years, that does not mean no change. That period will also be the time when we set off in the future direction of travel. There are aspects of current policy which could be improved upon – as the EU itself is recognising as it plans the next CAP reform.

The Scottish Government has already, in the last reform, introduced capping of Pillar 1 payments, and we feel this concept should be examined more closely. Area-based payments are better suited to some types of farming than others, and where they are a bad fit with Scotland's large, extensive hill units, alternatives should be explored. For the slightly longer term, we envisage moving towards a more targeted, less 'one-size-fits-all' approach to farm policy, and we are attracted by the possibility of payment according to outcomes if that can be achieved with reasonable administration and audit.

The rest of our themes are about planning for the new world we will be moving towards.

2. Assisting the Scottish agriculture industry through a period of major transformational change

A transformational change is required to encourage individuals and businesses to be progressive, resilient and compliant. This will only come about if farmers are helped to tackle their greatest challenge – change in mindset.

Scottish farming is very diverse, in terms of sectors and land quality but also business models. We have world-class operators who have continuously evolved their businesses to match the best food producers anywhere. We have producers whose

options are severely limited by their location and physical assets, but who in many cases produce food while also generating other benefits that society values – supporting the local community and economy, preventing land abandonment and depopulation, and farming in ways which protect our globally important wildlife and landscapes.

We would classify each of these, different though they are, as examples of active and professional farming. Like any good business, they align themselves to what their customer wants - whether that customer is the food supply chain, or the government as the customer for public benefits on behalf of society. Those businesses are also the best placed in terms of the resilience needed to mitigate and withstand the shocks of the market, changing weather patterns and reducing support payments.

But this level of professionalism is not universal. For a long time EU agriculture policy encouraged farmers to produce whatever they could or whatever they chose, and tried to guarantee them a living come what may. There are some within the industry whose mindset is still in that place. Their business model is often based on what they have always done. When they have hit problems of low profitability, in the absence of new injections of public money their financial situation has often deteriorated.

Our industry is lucky to enjoy huge public goodwill, but it is not unlimited and it must continue to be earned. Consumers are ever more discerning and the industry has to read these trends and adapt. Public-funded farm support is not an automatic right, it is an asset offered to promote self-betterment and it should be used as such.

We therefore see the need, not for the whole industry but for some parts of it, for a change in mindset which should in turn lead to a new confidence. This is no small ask, particularly for those who have already been in the industry for many years, and it should be supported by government. It is already a key element of initiatives such as Scottish Enterprise's Rural Leadership programme, but the farmers who take part tend to be self-selecting and those whose mindset is already forward-looking. We believe the government should look at developing a programme to support mindset change and business skills across a wider audience.

3. Enhancing Scotland's Natural Capital

'Natural Capital' can be an off-putting phrase for farmers when they hear it from the mouths of lobbyists or NGOs. But farming has always been about preserving and enhancing natural capital – soil, water, wildlife and other assets which are vital for the long-term future of the business as well as the environment.

Farmers must receive the credit that they deserve for the work they do to protect natural capital, whether that is in the form of support payments or just recognition of the role they play – including their part in educating and informing. Those who are active and proactive in this role as stewards of the land should be financially rewarded. But equally the industry must face up to the evidence that there are environmental issues. We do not believe that the vast majority of farmers would deliberately go out to damage the environment. But things can be done inadvertently, through lack of knowledge or awareness; or short term financial pressures can lead farmers to do things which in their hearts they realize are not in the best long term interest.

The evidence shows that biodiversity has declined, and water quality is still a serious issue in some areas. On climate change, the government has not singled out farming for especially strong measures – indeed it has acknowledged that food production without emissions is not possible – but it expects every part of society to play its part including our sector.

So there must be, in our future strategy, a strong theme of making optimal use of our natural capital, for economic as well as environmental reasons. Human nature means that we all prefer carrots to sticks where possible, and we certainly envisage a major role for support and encouragement, but an underlying layer of regulation is also bound to be needed. The good news is that we believe the scope for win-wins between production and environmental considerations has not yet been fully exploited – as demonstrated by the Farming for a Better Climate programme.

We feel that a new focus on soil health is needed. Improved management of nutrients and other inputs can lead to less waste of expensive fertiliser, better water quality, reduced greenhouse gas emissions and an improved bottom line. Encouraging appropriate grazing levels and tillage systems could help avoid soil erosion and underpin long term sustainable production.

We believe there are also win-wins to be had in improved plant health and animal health and welfare, supported by investment in areas such as handling systems and training, forage analysis, performance recording and market data. Scotland's high health status is a huge asset, which we have traded on successfully. But to keep ahead of the competition, we need to keep investing in it – as has been done, for example, on BVD.

There will also be an increasing need for collaborative and multi-disciplinary approaches, within Scotland and across the UK as well as internationally. One example already exists in support of the livestock sector, where concerns about various animal borne diseases have resulted in a centre of expertise for livestock being established (EPIC). There are other examples, but there are also important gaps and the

collaboration that is taking place has risen up without a planned approach. We see a strong need to make greater use of such collaboration in the future.

A key area to start would be in plant health. There are over 900 pests and pathogens recorded as being a threat to arable crops, trees and horticulture. With crop protection coming under increased scrutiny, it will be all the more important in future that Scotland is prepared against plant health shocks.

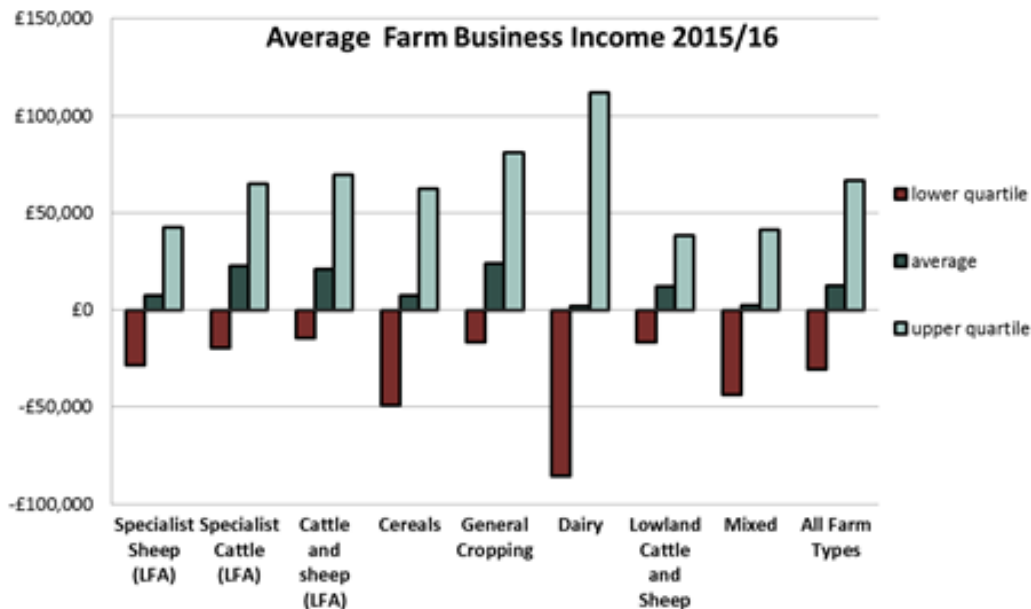
We also see a need for better integration of policy across different land uses. The present system suffers from being fragmented because of different policy imperatives, for example on forestry expansion and timber supply, on renewable energy installations, on biodiversity protection, on protecting wildland, on flood management and on agricultural support. The Land Use Strategy has made important first steps in drawing these policy threads together, but this must be continued.

Farmers themselves must also embrace this multi-objective approach. Many already do, seeing themselves as land managers with a range of opportunities at their disposal. But there are still those who see, for example, any woodland creation however carefully planned as a threat to the farming industry. That cannot be a healthy attitude, when planting trees has such an important role to play in carbon management and sequestration – not to mention in flood prevention and in livestock shelter and management.

4. Helping to improve the productive efficiency of Scottish agriculture

Farm productivity in Scotland and elsewhere in the EU has not moved significantly since the 1990s. Some have suggested to us that this is because farm support payments cushion farmers against the forces that prompt them to innovate, others that farmers' hands have been tied by increasing amounts of regulation. Either way, low productive efficiency leads to low profitability which is a widespread problem.

It is well known that the difference in performance between the top third and bottom third of the industry is huge – but it has been pointed out to us that unless they really study their figures, everybody thinks they are in the top third. Without recording and measuring activities it is not possible to effectively manage them.



Our recommendation about mindset change is closely related to this. The first step towards improving is to acknowledge the need to improve. We should not shy away from comparing ourselves with international competitors, nor from learning lessons between different sectors within Scotland, including those which have traditionally had little or no support from the CAP. Our research sector is world class, and good work is being done on knowledge transfer under programmes such as Monitor Farms and Farming for Profit, but we have to improve the transmission of proven research findings into farm practice across the whole industry. The development of innovation centres of excellence could contribute to progress in this area.

We believe there are lessons to be learned from programmes in Ireland. We will not be able to match their extraordinarily generous level of EU funding, but some of their most effective initiatives do not rely on big injections of public money but on embracing change.

The result is likely to be a diverse patchwork of farm businesses, but agriculture should be doing its research as to where the demand for product lies. For some, expansion and economies of scale may be the right way forward, while others will prosper by focusing on new emerging markets. Diversified income streams will be important for many. This diversity is a strength - one-size-fits-all does not apply to business models any more than it does to policy. Government support should not aim to tell businesses what to do, but to help each to work out the best way forward for them.

Profitability can also be improved by farmers capturing more value-added. In this regard we believe short, local supply chains – for example existence small-scale

horticulture for local niche markets – have a role to play for those with the appropriate skills and land.

5. Illustrating the huge opportunities for careers in the rural sector

The age demographic of Scottish farming has long been a cause for concern, as has a lack of succession planning in many businesses (whether within-family or moving towards share farming or contract farming). We recognise the efforts of the Scottish Government and others to help new entrants join the industry, through initiatives such as Farming Opportunities for New Entrants (FONE) and the SRDP Farm Advisory Service's new entrant programme. New entrants with their drive and enthusiasm are required in the industry, though there needs to be a relaxation in the planning laws to allow more housing for this to happen.

But the future need goes much wider than farmers and crofters themselves. We will also need a new generation of agronomists, engineers, food processing staff, and all the other supporting professions with which farming is mutually dependent. We need to shine a light for both rural and urban communities on how we increase appreciation and invest in innovation for the future. The focus on CAP-related issues for many years, both by government and industry, has perhaps led to this area being overlooked. That means there is huge scope for positive action. Rural Scotland has potential careers to offer for all, but we need to publicise, encourage and deliver that aim, and this may require an investment or funds being rediverted to give this the priority position it merits.

This area is largely unrelated to Brexit and as a result is fertile ground for early action. From a national perspective we have identified a number of key challenges which merit further attention such as: improving vocational and qualification pathways and infrastructure; increasing the degree of 'career inspiration' work in the pre secondary and early secondary school; using new creative ways to engage employers with a focus on microbusinesses; and adopting an evidence-based approach to ensure public-funded skills interventions reflect labour market need.

Annex A shows some specific ideas which we hope may be able to be pursued on a quicker timescale than some of our other recommendations.

We have looked at different segments of the careers market:

- The 16 year old school leaver
- The teenager who wants to stay on at school but is undecided what to do
- Mature student/Career Changer/ Self Employed

Most teenagers choose their subjects at Secondary School at the end of third term in their second year. At present there are 'Skills for Work' Rural Skills National Progression Awards at levels 4 and 5, but numbers are tiny and too often this is seen as a subject for the 'low achiever'. There are some excellent examples of school-business liaison, for instance in Moray and in Dumfries & Galloway, and involving a variety of industry figures ranging from STEM Ambassadors to RHET volunteers, Forestry Ambassadors and Lantra Champions . The good examples need to be rolled out much more widely.

We have looked closely at apprenticeship provision. At present there is no pre-apprenticeship option for rural skills, but we believe this principle would be beneficial and should be worked up drawing on the lessons of the well-established internship programme run by Ringlink. Modern apprenticeships in land-based subjects have leveled off and are heavily concentrated in the Central Belt and South. For many farm businesses, taking on an apprentice and fulfilling the requirements expected of the employer is hard, so we are very interested in the pilot projects in the North East and in Fife on apprenticeships shared across a group of businesses. This model may have great potential.



We believe it is essential these career opportunities are made available across Scotland, in urban as well as rural areas. As well as ensuring rural businesses can draw on the widest possible pool of talent, this will help improve the understanding of farming and food production in the population as a whole.

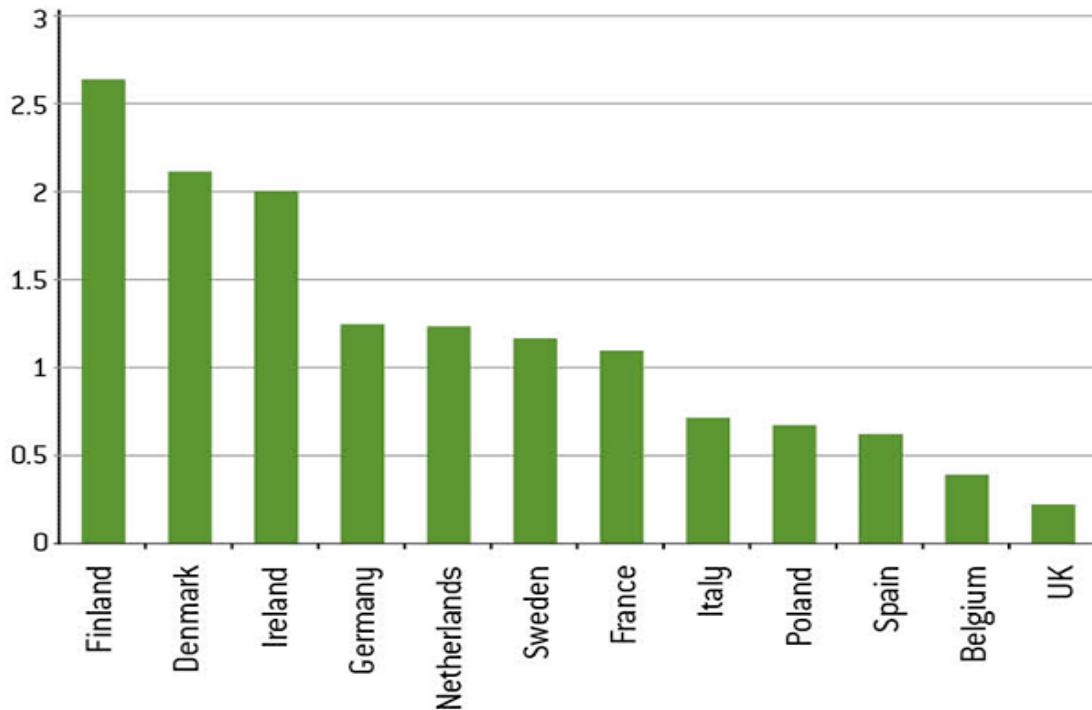
6. Improved integration of the whole supply chain for the benefit of all

Most farmers have not reaped huge benefits from the spectacular growth of Scotland's food and drink sector in recent years. The failings of our supply chains are well-documented. But the solution must be for the various players to work together – it cannot possibly be that the long-term answer lies in primary producers distancing themselves from, or being in conflict with, the businesses that buy their products.

Better information to the public about Scottish farming and its products has the potential to help, and future campaigns should be government led and owned. But in our market economy, it would be naïve to think that this alone will result in farmers receiving more sustainable returns from the supply chains they feed. The fundamental economic reality, that most farmers and crofters are small businesses selling their products to much bigger businesses, will remain.

In other countries, producers have addressed this reality by making much greater use of collaboration than in Scotland and the UK. We have discussed collaboration at length with our contributors and are struck by how many benefits it can bring: economies of scale in purchasing and selling; sharing of specialist machinery and staff; market information; risk management; logistics; branding and marketing. Perhaps most importantly of all, collaboration is a fantastic tool for enabling small producers to better produce the volume, quality and specification of product that their customers want – a basic requirement for a successful business in any sphere. We therefore see great potential in encouraging greater use of collaboration and building on the excellent, if sometimes unrecognised, work of SAOS.

Ratio of agri co-op revenue to national farm output (2013)



For some producers the right commercial strategy will be to feed into a national or international supply chain, competing on price as well as quality. For others, the future may lie in short supply chain relationships with the local retail and hospitality sectors. Our strategy should not dictate to any business what is the right approach to take, but it should encourage the provision of support and training so that each business can take well-informed decisions based on what the market wants. If we overproduce what we cannot sell, then that quality product goes into the commodity market where Scotland is not well positioned to compete.

Regulation of supply chain activity is also crucial. The grocery sector code of practice has had a positive impact, but more progress is needed to prevent bad practice in supply chains by those who hold disproportionate power, and there are also issues in competition law which need clarifying. It was probably right for the code of practice to begin with the major retailers, since their power is the greatest. But most producers do not deal directly with them, and the benefits of better supply chain relationships need to be felt along the whole chain. We would like to explore with stakeholders and the Scottish Government how best this can be achieved, which could include the retailers becoming more involved, for mutual benefit, in a partnership role with initiatives further upstream.

Next steps

A lot of thought and time has gone in to this discussion paper, but for it to have effect, there will have to be delivery programmes around the themes identified. These delivery programmes will identify the outcomes and then appropriate policies will be developed and implemented to deliver the outcomes.

As mentioned under the Career Opportunities theme, there is scope to take forward work in this area more quickly than in some others. In order not to lose time, we recommend that a delivery programme be put in place as soon as possible to deliver a Rural Skills Action Plan. Work is already under way on identifying the industry's needs for 2018/19 and planning student numbers and funding arrangements. We encourage the government to move quickly on this so as not to miss a year.

For the other issues where we envisage longer timescales, we would like to invite anyone with an interest - whether representing an organisation or as an individual - to comment on this interim discussion document and the themes we have identified.

Please send your comments to:

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Or by email to:

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by Friday, 29 December 2017.

We anticipate submitting our final advice to the Scottish Government in the early part of 2018. Thank you in advance for your comments, which will help inform that advice.

ARCHIE GIBSON HENRY GRAHAM JOHN KINNAIRD MARION MACCORMICK

Annex A

Detailed ideas on theme 5: Illustrating the huge opportunities for careers in the rural sector

1. In school

If we are going to get more teenagers and families interested in rural careers for all, and a subject in parity with other Highers, then there is a need for:

- A coordinated approach to support Skills for Work so that there is genuinely a “Career for All”. Illustrate the very large number of qualifications which can emanate from a Rural Skills Course.
- A coordinated approach to identify best practice at schools teaching Rural Skills at Level 4 so that it can be rolled out nationally.
- A method of supporting regions such as Aberdeenshire, Dumfries & Galloway who are piloting Rural Skills at schools. Continue to develop a National Progression Award at Level 5 at schools so that it can be rolled out nationally.

At present, it has been difficult to justify a Foundation Apprenticeship in Rural Skills at schools . The focus should be on building on Rural Skills Level 4 and development of Rural and Environmental Studies Level 5 but to build a Needs Analysis for a Foundation Apprenticeship when appropriate.

Similarly it has been difficult to justify Graduate Apprenticeships for agriculture, Forestry, and other land-based industries. The focus should be on increased vocational training and building a Needs Analysis for a Graduate Apprenticeship when appropriate.

Also Research organisations need to work with colleges to develop a national science education resource with the funding they have obtained.

2. Career Pathways

A lot of work has gone in to creating a structure through which businesses can liaise with schools to illustrate career opportunities through the 21 Regional leads and further council leads. Some excellent work has already been done at primary and secondary schools on where food comes from and the possible careers in Food and Drink.

There are some excellent examples in Moray and Dumfries & Galloway on what is possible. Further initiatives will enhance this, but it is still very regional and, because mainly microbusinesses are involved, there is a lack of real rural involvement in many of these Regional and Council leads . There is now a variety of Ambassadors, ranging from STEM Ambassadors to RHET volunteers to Forestry Ambassadors to Lantra Champions.

There is a need:

- to work with the various initiatives to leverage off them.
- to encourage more industry involvement at the 21 Regional Leads and to coordinate activities.
- for Ambassadors / Teachers need to be trained in what the career possibilities are.
- to develop a Toolkit for Ambassadors to illustrate course content, qualifications, career opportunities.
- for videos showing career opportunities, which have already been made by My World of Work, Scottish Association of Young Farmers Clubs, Lantra, Chartered Institute of Forestry, to be coordinated to ensure consistency and availability.
- for more detailed labour market intelligence for all of the sectors involved.

3. 16 year old school leaver.

Access to rural skills: 'Pre-Apprenticeship'

Currently there is no 'pre-apprenticeship' precedent in any sector in Scotland. There is however a well-established internship programme run by Ringlink which has been in existence since 2013. It is well supported by the industry, has a good attainment record and was oversubscribed three times in 2017/18. There is no automatic employment after the course, but the track record of participants in finding positions is good.

Funding has come from various sources such as Trusts, Councils and AHDB – in other words it does not have sustainable long term funding. Actions to consider:

- to continue with the development of the principle of Pre Apprenticeship.
- to explore how best to fund it sustainably including the potential for wider industry funding.
- to explore how to develop a new qualification.
- to develop partnership working to roll it out nationally.

Apprenticeships

There has been a leveling out in the numbers taking **Modern Apprenticeships** in land-based subjects in recent years. There has been a lack of investment in this area with little or no training done north of the Central belt. Actions to consider:

- to roll out nationally with existing frameworks and National Occupational Standards, as they are well established. Continue with the development of the new Technical Apprenticeship.

- to expand the Rural Skills Modern Apprenticeship with new pathways as well as estate maintenance and environmental management.
- to establish centres of expertise where skills training is done as well as research and imaginative training methods are used.
- to re-examine costs of training to ensure initiatives are fully costed.
- to ensure self employment skills are included.
- to recruit new trainers/instructors/assessors/verifiers.

Most rural businesses are microbusinesses with insufficient time for mentoring and supervision of an apprentice, not to mention issues of lack of profitability. For this reason Shared Apprenticeships need to be considered . There are two potential pilots with Opportunity North East (ONE) and Fife Rural Skills Initiative, which are fairly far advanced. Actions to consider:

- Support for the two pilots.
- Ensuring a compliant but practical model.
- Exploring further possibilities nationally and coordinating them.
- Building Rural Skills pathways to ensure employability all year.
- Requesting funding for coordination to assist compliance and success.

Annex B

The champions would like to thank the following for the time and energy they have given contributing to the work that underpins this document.

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