

Agenda – Economy, Trade, and Rural Affairs Committee

Meeting Venue:

Committee room 2 – Senedd
and video conference via Zoom

Meeting date: 1 October 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 – 11.00

1 Introductions, apologies, substitutions, and declarations of interest

09.30

2 General Ministerial Scrutiny – Rural Affairs

09.30 – 11.00

(Pages 1 – 28)

Huw Irranca-Davies MS, Deputy First Minister and Cabinet Secretary for
Climate Change and Rural Affairs, Welsh Government

Gian Marco Currado, Director – Rural Affairs, Welsh Government

Dr Richard Irvine, Chief Veterinary Officer, Welsh Government

Attached Documents:

Research brief

Evidence paper – Welsh Government



3 Papers to note

11.00

3.1 Follow-up from the committee meeting held on 17 July 2025 – General Ministerial Scrutiny

(Pages 29 – 35)

Attached Documents:

Response letter from the Deputy First Minister and Cabinet Secretary for Climate Change and Rural Affairs, Cabinet Secretary for Economy, Energy and Planning, and Minister for Culture, Skills and Social Partnership – 18 September 2025

3.2 The Development of Tourism and Regulation of Visitor Accommodation (Wales) Bill

(Page 36)

Attached Documents:

Letter from the Chair to the Llywydd, and Chair of the Business Committee – 24 September 2025

3.3 Follow-up from the Committee visit to the Global Centre of Rail Excellence – 18 September 2025

(Pages 37 – 38)

Attached Documents:

Letter from the Chair to the Chief Executive, and Chair, of the Global Centre of Rail Excellence – 25 September 2025

3.4 Apprenticeship pathways inquiry

(Pages 39 – 54)

Attached Documents:

Welsh Government response to Committee report – 25 September 2025

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

11.00

Private session

11.00 – 11.35

5 General Ministerial Scrutiny: Consideration of evidence

11.00 – 11.15

6 EU–MERCOSUR Free Trade Agreement

11.15 – 11.25

(Pages 55 – 61)

Attached Documents:

EU–MERCOSUR Free Trade Agreement briefing

7 Future of Welsh Steel: Citizen Engagement Approach Discussion

11.25 – 11.35

(Pages 62 – 64)

Attached Documents:

Citizen Engagement Approach Paper

Agenda Item 2

Document is Restricted



Evidence Paper

Deputy First Minister and Cabinet Secretary for Climate Change and Rural Affairs' General Scrutiny at the Economy, Trade and Rural Affairs Committee

17/09/2025

This information is provided to aid the Committee in advance of the Deputy First Minister's attendance for General Scrutiny on Rural Affairs on 1 October 2025.

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1. Sustainable Farming Scheme

Our ambition is for the Sustainable Farming Scheme to support a sustainable, productive agricultural industry in Wales. Our future farm support will deliver multiple outcomes for all of Wales, and we will ensure that farmers are kept at its heart.

The SFS will serve as the primary source of government support for farmers. The Scheme will reward farmers for actions that align with the Sustainable Land Management (SLM) Objectives set out in The Agriculture (Wales) Act 2023 ('the Agriculture Act').

Those are:

- To produce food in a sustainable manner
- To mitigate and adapt to climate change
- To maintain and enhance the resilience of ecosystems and the benefits they provide
- To conserve and enhance the countryside and cultural resources and promote public access to and engagement with them, and to sustain the Welsh language and promote and facilitate its use.

We published a Scheme description on 15 July. This was not a consultation, this is the final version of the Universal Layer of the Scheme, along with the eligibility criteria, and Scheme Requirements.

It represents a new partnership between the people of Wales and farmers - supporting food production and addressing the climate and nature emergency.

The SFS is a product of unprecedented collaboration. We have listened to wide ranging views, and worked intensely with the farming unions, environmental NGOs and other organisations.

This publication included anticipated Universal Payment rates, and we also published a Ready Reckoner at the same time. For the first time individual farmers can see what their indicative payments will be for 2026 whether they choose SFS, or to remain with BPS.

The Royal Welsh Show was an opportunity to discuss the Scheme with farmers.

I have committed a maximum of £238m in 2026 for Universal Payments and the legacy Basic Payment Scheme. A minimum of £102.2m will also be available for the Optional / Collaborative Actions.

The changes we've made mean the SFS is accessible to all farmers. So, the budget I've made available for 2026 is intended to be sufficient to support all farmers joining SFS from 2026.

Detailed scheme guidance will be published later in 2025 including the definitive technical notes setting out all the scheme requirements, scheme actions, and evidence required for the scheme.

I have committed to retaining the SFS Ministerial Roundtable and Officials Groups going for the remainder of this government term. These discussions will shortly reconvene.

The next stages of SFS delivery are:

- To continue developing communications materials so farmers understand what the Scheme means for them and how they can prepare themselves.
- Finalising administration systems and processes ready for the Scheme to commence.

Liaising with stakeholders to further develop the Optional and Collaborative Layers of the Scheme.

2. Agricultural pollution regulations

The health of our waterbodies is critical for every person in Wales. From access to water for drinking, recreation and food production, to healthy, thriving ecosystems, the well-being of current and future generations is heavily dependent upon clean water.

Water quality in Wales is still being detrimentally impacted, and we must continue to make improvements. Whilst the causes of pollution are not limited to any one sector, agriculture remains one of the main contributors. Since the written statement of 31 March, which announced the intention to take forward all 23 recommendations in full and at pace, Natural Resources Wales' detailed assessments of marine protected areas (MPA) in Wales have been released highlighting the continued need to take action.

Following the publication of the review officials have been developing a detailed work programme to take forward the recommendations in what is a complex area of work. The main areas of immediate focus are outlined below.

Stakeholder Engagement

Due to the technical nature of the recommendations and the importance of a collaborative approach there is an opportunity to build upon the experience gained from both the review process itself and the Sustainable Farming Scheme (SFS) and the round table process to inform the way forward.

There will be opportunities for stakeholders to be engaged in the design and development of the potential areas for regulatory change, based on the recommendations of the review. As this is a regulatory process, any proposals for substantive changes to the regulations will require formal consultation and will need to be underpinned by the necessary Impact Assessments.

Cross compliance and enforcement

Officials have begun to review the cross-compliance process with the intention to ensure farms are not penalised where they have taken the appropriate steps to mitigate the risks of pollution in challenging circumstances and a breach of cross compliance is as a result of being under TB restrictions. There will be the opportunity for stakeholders to explore this issue early and to develop a sustainable and long-term solution.

As a reminder, where non-compliance with the Regulations has occurred, officials and NRW are also able to consider any unforeseen Exceptional Circumstances which may have resulted in a breach of Cross Compliance. Where farmers consider that any non-compliance is due to unforeseen matters beyond their control, circumstances can be considered on a case-by-case basis. This could include being under TB restrictions.

The Welsh Government has committed £1.58m for NRW's enforcement of the Regulations in the 2025-26 financial year, which targets high-risk agricultural activities. The enforcement approach is leading to change within the sector and compliance levels are improving.

Developing the evidence base

Officials have begun to draft technical specifications for work to be carried out by contractors with scientific and agronomic expertise. The specifications include exploratory work on key recommendations, including alternatives to the closed periods and the 170kg limit and soil protection measures.

The Welsh Government is engaging with CIRIA, the Construction Industry Research and Information Association, a neutral, independent and not-for-profit body, on its review of industry guidance on best practice in relation to slurry storage for designers, contractors and agricultural operators. The outcome could inform future regulatory change.

3. Bluetongue (BTV-3)

From 1 July 2025 the BTV Restricted Zone was expanded to cover the whole of England, which meant BTV movement restrictions for susceptible animals within England no longer applied.

In June, the Deputy First Minister announced his decision to maintain stricter controls in Wales to attempt to hold back the disease for as long as possible. This policy provided additional time for Welsh industry to vaccinate its livestock against the worst impacts of the disease.

A [Press Notice](#) was published on Friday 20 June providing further information on the measures put in place in response to the England-wide Bluetongue Restricted Zone (RZ), alongside the related guidance for farmers and vets. Over the summer, the Welsh Government has worked with stakeholders to allow greater flexibility for farmers and auctioneers while maintaining disease controls. A phased approach to facilitate Autumn sales was agreed that balances industry needs against the risk of disease incursion.

Following a Bluetongue Roundtable held on 8 July a [Press Notice](#) was published announcing the introduction of Bluetongue Approved Red Markets in Wales. This allowed for greater flexibility for farmers, abattoirs and auctioneers while maintaining disease controls.

A [Press Notice](#) published on Monday 4 August setting out further important changes to Bluetongue restrictions to facilitate Autumn sales and markets. Since Monday 18 August, Welsh livestock that have completed a course of a Bluetongue virus serotype 3 (BTV-3) vaccination, have been able to attend English markets (who must adhere to specific conditions) within 20km of the Welsh border.

As a result of risk assessments and ongoing constructive engagement with the livestock sector, we have recently agreed that from noon on 21 September some movement restrictions will be eased for all animals vaccinated against BTV-3 moving from the Restricted Zone (RZ) into Wales. This aligns with Bluetongue low transmission period associated with lower autumn temperatures.

Animals fully vaccinated with any BTV-3 vaccine and showing no signs of illness can move into Wales to live without a pre-movement test, under the conditions

of a general licence. This includes farm-to-farm, via markets, and from shows or collection centres.

Vaccination of animals moving under authority of this licence must have been reported on gov.uk . This new licence will supersede the measures for 'Specified Green Markets' in England (introduced on 18th August) and under the new licence arrangements, markets in both England and Wales will be able to sell vaccinated and unvaccinated livestock at the same sale.

Animals going to slaughter can continue to move under general licence, but slaughterhouses will no longer need to be designated after 21 September. The general licence will also be amended to include moves to slaughter markets and collection centres for onward movement to a slaughterhouse and will supersede the current 'Bluetongue Approved Red Market' process in Wales. There is no vaccination requirement for animals moving under this licence.

Only vaccinated animals or those that have received a negative pre-movement test will be able to move from a market in the RZ to Wales. Non-vaccinated animals will still need a negative pre-movement test and a specific licence from APHA to enable movements to live in Wales from the RZ.

There is broad agreement that vaccination is the best way of protecting flocks and herds against Bluetongue. We continue to work with our partners to encourage farmers to consider vaccination with their vets, and to remain vigilant for the disease and report any suspect cases.

This remains a dynamic situation and an evolving disease picture across Great Britain. The policy is being kept under regular review subject to evidence on the ground, and in partnership with the livestock and veterinary sectors.

4. Bovine TB

In May, The Deputy First Minister and Cabinet Secretary for Climate Change and Rural Affairs made an [Oral Statement](#) providing an update on the TB Eradication Programme in Wales.

The TB Eradication Programme Board and TB Technical Advisory Group (TAG) continue to meet regularly, providing advice to the Deputy First Minister on TB policies. A joint meeting of the TAG and Programme Board is scheduled for 18 September. The agenda includes discussions on the recently published Godfray bTB Evidence Review Update for England and TAG wildlife advice. The Programme Board will continue discussions on their Position Paper, whilst TAG will commence discussions on cattle movements and testing. The TAG will be meeting again in October where they will be considering the enhanced measures applied in persistent breakdowns as part of their ongoing discussions on cattle movements and testing.

In May the Deputy First Minister announced forthcoming changes to Inconclusive Reactor (IR) policy, whereby resolved standard IRs will be restricted for life to the farm on which they are found. A Programme Board Task and Finish Group are leading on the communications to support this change. The TAG is continuing to consider the role of wildlife in respect of bovine TB and initial advice, following their verbal update to the Programme Board at the joint meeting in September a written report will be shared with the Programme Board in the autumn.

The long-term bovine TB statistics from across Wales as a whole show positive progress in tackling TB, with the long-term data showing a clear downward trend in new herd incidents. We recognise the situation varies across the different regions of Wales and this is why we are taking a targeted approach.

While we have seen an increase in the number of cattle slaughtered because of TB in the 12-month period to June 2025, we have also seen an increase of 1.7% in new TB incidents, although the long-term trend still shows the rate of incidents falling. The TB Epidemiology Team are investigating these trends currently and findings will be considered to inform next steps.

The policy of Officially TB Free Withdrawn (OTFW) by default in Wales, coupled with the increased use of more sensitive diagnostic tests in herd breakdowns,

provides greater confidence that breakdown herds are free of TB before TB free status is regained and trading resumes. Overall, this reduces the risk of breakdown herds becoming recurrent and selling infected cattle to other herds.

5. Animal Welfare Private Members Bills

The [Animal Welfare \(Import of Dogs, Cats and Ferrets\) Bill](#) makes provision to restrict commercial importation and non-commercial movement of dogs, cats and ferrets into the UK from third countries, and prohibit import of mutilated, heavily pregnant and underage animals. The Bill passed committee stage on 14 May 2025 and a [Legislative Consent Memorandum](#) (LCM) was laid in the Senedd on 21 May 2025. A Senedd debate took place on 16 September.

The [Dogs \(Protection of Livestock\) \(Amendment\) Bill](#) includes provisions to deliver a number of amendments to the Dogs (Protection of Livestock) Act 1953 to improve enforcement in response to incidents of livestock worrying by dogs. The Bill passed committee stage on 21 May 2025 and an [LCM](#) was laid in the Senedd on 30 May 2025. Senedd Committees are due to report on the LCM by 19 September.

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

Rebecca Evans AS/MS

Cabinet Secretary for Economy, Energy and Planning
Ysgrifennydd y Cabinet dros yr Economi, Ynni a Chynllunio

Jack Sargeant AS/MS

Minister for Culture, Skills and Social Partnership
Y Gweinidog Diwylliant, Sgiliau a Phartneriaeth Gymdeithasol

Agenda Item 3.1



Llywodraeth Cymru
Welsh Government

Ein cyf/Our ref HID-PO-457-25

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



18 September 2025

Dear Andrew,

Thank you for your letter seeking further information following our appearance before the Economy, Trade, and Rural Affairs Committee on 17 July 2025 for general Ministerial scrutiny.

Our responses to your queries are provided in Annex 1 below.

Yours sincerely,

 *Rebecca Evans*  *JACK SARGEANT*

Huw Irranca-Davies AS/MS

Y Dirprwy Brif Weinidog ac
Ysgrifennydd y Cabinet dros
Newid Hinsawdd
a Materion Gwledig
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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.

Annex 1

Rural Affairs

Bluetongue

- *How many fewer livestock units have moved into Wales, since Bluetongue restrictions came into place?*

Our current figures for movements from England into Wales for July 2025 are only available for cattle and may not reflect all movements as farmers are still providing returns for this period. Movement data for sheep is expected in September.

6,890 cattle arrived in Wales from England in July 2025. Between 2022-2024 the average number of cattle that arrived during July was 11,401. These figures include both live movements and direct movements to slaughterhouses located in Wales.

Notably, although July movements have declined, there was an increase in livestock movements earlier in 2025. When comparing cumulative cattle movements to Wales from January to July across recent years, the figures show no significant deviation in 2025:

- **2022:** 82,017 cattle
- **2023:** 84,766 cattle
- **2024:** 96,640 cattle
- **2025:** 94,400 cattle

This suggests that short-term fluctuations, such as those observed in July, should be interpreted cautiously. To understand the true impact of BTV-3 restrictions, it is essential to monitor longer-term trends rather than relying on data from a single month.

Fisheries

- *How will your development and implementation of Fisheries Management Plans be impacted by the newly agreed extension to UK-EU fishing arrangements to 2038?*
- *How are you engaging with the fishing industry in anticipation of the extension?*

I will answer your first two questions together. As I said in the evidence paper, industry are concerned about the 12-year extension to access, which is understandable of course. In terms of the impact on Wales, the agreement continues access to EU waters, with guaranteed mutual access for 12 years. The status quo remains. The UK retains control over its waters to pursue its own sustainable fishing policies, and we remain outside the EU's fisheries rules.

Industry have noted concerns the implementation of Fisheries Management Plans (FMPs) may be frustrated due to the 12-year extension. The UK has preserved regulatory autonomy, and I want to be clear here that Fisheries Management Plans continue to be one of our top priorities, in line with the Strategic Approach.

The extension to UK-EU fishing arrangements to 2038 was ratified by the Specialised Committee on Fisheries on 19 June following the UK Government announcement. The Ministerial Advisory Group for Welsh Fisheries (MAGWF) meets quarterly, and the recent announcement was discussed with them in the 24 June meeting. The group is meeting next on 14 October and we will continue to engage the industry, through their representatives in this way.

As part of the extension announcement, UK Government announced the Fishing and Coastal Growth Fund. Discussions are ongoing at official level as the plans are developed. I am pleased to note fishing industry representatives from Wales were engaged in a meeting with Minister Zeichner on this and I wrote to him to set our priorities to support those discussions. We and all the other administrations are making strong representations for the fund to be devolved. Officials advise me this has been heard loud and clear and we continue to press for this. Alongside this, we are working constructively to shape the Fund to achieve the best outcomes for our industry. A further meeting was held on 7 August with UK Government, officials from all Administrations and industry representatives (Welsh Fisherman's Association for Wales) to support the co-design of the Fund. Discussions were positive and constructive, and we expect ongoing dialogue.

You may find it helpful to see the letter I received from Minister Zeichner, which is relevant to all the questions you have asked (Annex 2).

- *How are you engaging with the fishing shellfish industry in anticipation of the likely introduction of a UK-EU sanitary and phytosanitary agreement?*

We continue to seek clarity and push for the best outcomes for Wales from the UK Government around the potential SPS agreement and opportunities for Live Bivalve Mollusc producers to gain access to the EU market again. SPS dynamic alignment with the EU will reduce the red tape burden and reduce the cost of exporting our seafood products. As yet, there has been little to no communications from UK Government on the matter.

In addition to the Ministerial Advisory Group for Welsh Fisheries, where discussions are ongoing, officials have regular engagement with various industry advisory and working groups, put in place to support the management of permitted fisheries and development FMPs. When we have a steer from UK Government on plans, we will engage fully with these groups and representative bodies to disseminate the information as we get it. This will include more focused engaged with our exporters in Wales.

Agricultural pollution regulations

- *Why are some of the recommendations made by Dr Susannah Bolton's review of the agricultural pollution regulations identified as taking over three years to implement?*

Some of the recommendations are complex by nature and will require time to consider properly. In some cases, this will require commissioning of external scientific and agronomic advice prior to exploring the matters with stakeholders and reaching a conclusion on the way forward. If we can conclude those recommendations in a shorter timescale, then we will. Legislative reform requires necessary processes to be followed, including in relation to consultation, and this takes time. I want to make changes which will benefit farmers and the environment as quickly as possible. Where we can make changes without amending the regulations, we will do so at the earliest opportunity.

- *Will the Welsh Government be publishing a programme of works setting out how and when all the recommendations will be implemented? If so, when?*

It is important to note that the recommendations are not for specific regulatory changes. The majority of the recommendations are to *consider* further changes. My officials are developing a programme of work to take forward the recommendations. This programme includes a stakeholder engagement plan and more detail on how we propose to implement each of the recommendations. However, we must take forward the recommendations collaboratively with our stakeholders. As such, the programme of work will not be a static document and will change over time depending on stakeholder feedback and developments and as we progress each recommendation.

International Trade

- *As discussed in the session, you committed to write to us regarding confirmation that the Welsh Government is not making any public investment in any company that is investing in armaments to Israel.*

The Cabinet Secretary for Economy, Energy and Planning addressed this issue in a separate letter dated 4 August 2025.

Economy and Skills

Skills

- *When available, a timeline on when we can expect an announcement on construction apprenticeships and the reintroduction of a level 2 qualification.*

Following the Minister's formal request dated 16 July 2025, Qualifications Wales and Medr have commenced work to explore the reinstatement of a Level 2 construction apprenticeship framework. This work is being undertaken in response to issues raised with him about the continuing suitability of the current provision at level 3, and specifically whether the current framework was discouraging people from taking up the opportunity and hindering recruitment and progression.

Discussions are ongoing between Qualifications Wales and the awarding body City & Guilds to assess whether existing provision and qualifications can be adapted to support a Level 2 pathway. Technical feasibility work and impact assessments are being carried out throughout August and September 2025, with consideration being given to trade-specific requirements, delivery implications, and alignment with industry standards.

We expect to receive advice from Qualifications Wales and Medr by the end of September 2025 on the options open to us and consideration of steps to implementation. Qualifications Wales and Medr are working at pace to support early delivery, subject to feasibility and consultation outcomes.

We will provide a further update to the Committee once we have received the advice and when timelines are clearer.

- *Correspondence from the Minister for Further and Higher Education with a fuller response on rolling out junior apprenticeships.*

The Cabinet Secretary for Education is responsible for junior apprenticeships and will therefore write to you separately on this matter.

- *Specific figures on the uptake of rail degree apprenticeships.*

There were 13 apprenticeship starts on the Railway Engineering Degree Apprenticeship programme during the 2023/24 academic year. For 2024/25, two learners have commenced the programme to date; however, enrolment figures for the current academic year have not yet been finalised and may increase.

Economy

- *The specific detail on property development at Brocastle.*

The infrastructure works contract for the roads, services and creation of plateaux at Brocastle was substantially completed in late 2022 and further investment by Welsh Government in an Active Travel Route to compliment these onsite works was subsequently completed during 2023. Both these work packages were undertaken by Welsh based contractors – Walters and Alun Griffiths respectively.

Brocastle has received a number of enquiries from interested parties which included an 18-month exclusivity arrangement agreed with an internal technology company for approximately two thirds of the site. Due to reasons outside of the control of Welsh Government, those enquiries did not progress. Following the lapse of that arrangement, site marketing was relaunched last year, and officials are currently negotiating legal documents for the disposal and development of an advanced build unit on one of the development plots (plot 5) with a private sector developer.

Heads of terms for the disposal and development of another plot to an owner occupier are being finalised which will be the subject of ministerial approval prior to progressing to negotiation of legal documents.

The remaining plots continue to be marketed by commercial property agents and attract steady market interest.

- *Any information available on the dashboard data shared with the Transition Board with regards to outcomes and next steps for those affected by Tata redundancies in Port Talbot.*

More than £70 million has been announced to date by the Secretary of State for Wales and the Transition Board. Funding announced is being used to drive forward delivery of the following interventions:

- Supply Chain Transition Fund
- Employment and Skills Fund
- Business Growth, Resilience and Start-Up Fund

The Tata Steel UK (TSUK) Training Scheme (Compulsory Redundancy)

The TSUK re-training scheme continues to be available to any Port Talbot site employees leaving through compulsory redundancy. Four employees completed one month's training and have left the scheme. There has been no further interest to-date.

Redundancies to date (headline figures)

2,162 individuals left the business in the period September 2024 to end July 2025 of which:

- 709 left through natural attrition including retirement, other employment, started a new business
- 1,332 leavers via Voluntary Redundancy (number left TSUK by end July 2025)
- 120 leavers via Compulsory Redundancy (number left TSUK by end July 2025)

Supply Chain Fund – Launched 30 September 2024. Data shared on the supply chain activity to date (31/07/2025)

Launched on 30 September 2024, the Supply Chain Transition Fund is focussed exclusively on supporting businesses that are reliant on TSUK and impacted by the blast furnace closures. Funded by the UK Government, the Fund is delivered by Neath Port Talbot County Borough Council (NPT CBC), delivering the grant funding support in partnership with the Welsh Government's Business Wales service, who manage business support and advice for impacted businesses.

- 89 businesses have completed the Eligibility Checker Tool
- 77 businesses were eligible of which 71 have received a diagnostic review
- 44 businesses referred to NPT for grant application. Six businesses were provided further support around their projects and referred for a second funding application
- The remaining 27 active businesses are progressing with the diagnostic

Specialist Webinars support businesses with barriers, upskilling and transitioning, in addition to 1-2-1 specialist support.

Business Growth, Resilience and Start-Up Fund

On 19 December 2024, funding for the Business Growth, Resilience and Start-Up Fund was announced by the UK Government. Business Wales is working closely with the UK Government and NPT CBC on delivery of the business support and funding, leading on enquiry management and business advice and guidance prior to application of funding.

The objective of the '**Business Growth Fund**' is to introduce specialised grant packages to those businesses seeking to increase their role in the local economy.

The '**Resilience Fund**' focusses on supporting local businesses who have been impacted by the Tata transition but were not eligible to apply for support via the Supply Chain Fund.

The **Business startup fund** enables Tata steelworkers, their immediate families and others in the supply chain to receive business advice and financial support.

Growth and Resilience Funds activity to date (31/07/2025)

Resilience Fund

Since 19 December 2024, a total of 158 enquiries have been received. Following the Expression of Interest (EOI), each business is contacted for registration:

- 124 Registrations completed
- 2 waiting for 1st contact
- 23 Failed to contact
- 9 Referred to Supply Chain/Start up support

Growth Fund

Since 19 December 2024, 148 Enquiries received in total:

- 133 Registrations completed
- 1 Query Eligibility
- 8 Failed to contact
- 6 Referred to Supply Chain/Start up support

Start-up - Data shared on the start-up activity to date (10/06/2025)

| Referrals | |
|---|-----|
| Total No. general enquiries | 365 |
| Total Submissions via Online Form (Dec24) | 82 |

Business Wales has now registered 219 clients interested in starting a business, with 193 actively engaged in receiving business support. All clients registered are invited to participate in business start-up workshops and allocated a business adviser to develop their business plan and evidence need for funding through a cash flow forecast.

80 clients have been referred to NPT CBC for a discussion on the grant and the council issue a link to the grant application for clients to complete.

Business Wales has a regular presence at the Community Hub to meet clients and at local employment fairs. Regular events are now available at the Community Hub, Aberavon, with an online event also available on 18 September.

Employment and Skills Fund (ESF)

The ESF is part of a £13.5m UK Government funded programme coordinated by the TSUK Transition Board to support people and businesses affected by TSUK's transformation programme.

At the last meeting of the Job-matching, Outplacement, and Skills Working Group held on 14 April, a representative of NPT CBC reported that the ESF had 302 'live' participants and 329 training grants have already been awarded. It was reported that 172 ESF participants have found employment.

Community Support Hub, Aberafan Shopping Centre

Community the Union reported that, as at 11 April, 2,587 people have attended the Hub and some events have taken place including sessions on working on oil rigs and wind turbines.

Jobs fairs have taken place and further events are planned.

—
**Economy, Trade, and
Rural Affairs Committee**

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Rt. Hon. Elin Jones MS

Y Llywydd and Chair of the Business Committee

24 September 2025

Annwyl Llywydd,

The Development of Tourism and Regulation of Visitor Accommodation (Wales) Bill

Thank you for your letter of 19 September regarding the revised proposed timetable for the Development of Tourism and Regulation of Visitor Accommodation (Wales) Bill. Thank you also for raising the concerns noted in my letter of 10 September with the Welsh Government during your discussion on the Bill's shortened timetable for scrutiny.

In response to the revised timetable, I would refer you again to the points noted in that letter, most notably that the proposed timelines are too short to allow the quality of scrutiny that I would expect as part of the law-making process.

However, while the timescales are not ideal, the Committee will plan its work accordingly and endeavour to carry out the most thorough and considered Stage 1 scrutiny it can within the time available.

Yours sincerely,



Andrew RT Davies MS

Chair: Economy, Trade and Rural Affairs Committee



Simon Jones
Chief Executive Officer
Global Centre of Rail Excellence

Dr Debra Williams
Chair
Global Centre of Rail Excellence

25 September 2025

Dear Simon and Debra,

**Follow-up from the Committee visit to the Global Centre of Rail Excellence –
18 September 2025**

Thank you for hosting our visit to the Global Centre of Rail Excellence last week. Members really appreciated the tour of the site and you taking time to answer our questions.

Following the visit Members have a few follow-up questions I hope you would be so kind as to answer:

- What was the sale price of the site?
- Which corporate body sold and brought the site, and who owns it now?
- What is the total value of the Welsh and UK Government funding committed to the project so far?
- How much of that funding has been spent, how much committed funding is still to be drawn down, and what are future spend projections?
- Are there any draw down conditions on remaining funding?

- What is the relationship between the Walters Group and the project?
- What discussions have you had with the National Wealth Fund about the potential for the fund to support the development of the GCRE?

We discussed our visit in our meeting this week and have decided to also write to the Welsh and UK Governments with some follow up questions. We will publish those letters as part of our meeting papers.

Yours sincerely,

A handwritten signature in black ink that reads "Andrew RT Davies". The signature is written in a cursive style with some capital letters.

Andrew RT Davies MS

Chair: Economy, Trade and Rural Affairs Committee

We welcome correspondence in Welsh or English



Apprenticeship pathways

Response to ETRA Committee Report

03/09/2025

The Welsh Government welcomes the Economy, Trade and Rural Affairs Committee's report on apprenticeship pathways. We recognise the important work undertaken by Senedd Committees and extend our thanks to all those who contributed to the report.

The report sets out eight recommendations and eleven conclusions, and this document constitutes the Welsh Government's formal response to those proposals.

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1. Introduction

The Welsh Government welcomes the Apprenticeship Pathways report published by the Economy, Trade and Rural Affairs Committee in July 2025. The report provides valuable insights into the current challenges and opportunities within the apprenticeship system in Wales, and we thank the Committee for its thorough engagement with learners, providers, and stakeholders.

Since August 2024, operational responsibility for the delivery of apprenticeship programmes has transferred to Medr, Wales's tertiary education and research body. Medr now oversees apprenticeship funding, programme design, and framework review, ensuring provision aligns with Welsh Government priorities and responds to the evolving needs of learners, employers and the economy. Welsh Government retains responsibility for overarching policy relating to apprenticeships and makes available an annual budget allocation to Medr.

This response sets out the Welsh Government's position on the Committee's findings and recommendations and outlines the collaborative work under way with Medr and other partners to strengthen apprenticeship pathways and promote parity of esteem between vocational and academic routes.

2. Response to Recommendations

Recommendation 1.

The need for clearer messaging and raising awareness of apprenticeships within schools is clear. Welsh Government must work to ensure schools, colleges and employers engage with each other to present vocational courses as a good quality option. The Welsh Government may wish to explore the evidence base for introducing providers access legislation as part of the solution. This could include exploring lessons learned from the introduction of the Baker Clause, and subsequent amendments which came into force at the beginning of this year, in England. Welsh Government should write to this Committee to explain their findings and views on providers access legislation.

Response: Accept

The Welsh Government's Programme for Government sets out a clear commitment to achieving parity of esteem between vocational and academic routes in education. On 26 June, the Minister for Further and Higher Education, Vikki Howells MS, issued a Written Statement outlining five interdependent delivery strands to strengthen vocational education and training in Wales. One of these strands, 'Innovation', focuses on fostering partnerships between education providers and employers to ensure learners gain relevant, real-world skills.

In support of this, the Welsh Government, in partnership with key stakeholders, is developing statutory guidance for Medr on the design of local curricula for 16–19-year-olds. This guidance will:

- **Promote collaboration across schools and colleges**
- **Ensure learners are aware of vocational options**
- **Reinforce the commitment to parity of esteem between academic and vocational pathways**

Medr's strategic objectives align with these aims by seeking to create a flexible, integrated tertiary education system. This system will enable individuals to acquire the skills and knowledge needed to thrive in a changing economy and society. Medr also supports increased collaboration, the promotion of vocational pathways, and the expansion of work-based learning opportunities.

Under the Curriculum for Wales, schools are required to include learning that supports learners' understanding of career pathway decisions. Careers and work-related experiences are embedded as cross-cutting themes across both primary

and secondary education, allowing exploration of career options through various subject areas. The Curriculum for Wales statutory guidance further emphasises the importance of working with further education institutions and independent training providers to showcase apprenticeship opportunities, raise aspirations, and broaden learners' horizons.

The Welsh Government will review lessons learned from the implementation of the Baker Clause in England, which mandates that schools allow colleges and training providers to speak to students in Years 8 to 13 about non-academic pathways. The Welsh Government will write to the Committee on this matter in due course.

Careers Wales plays a central role in delivering impartial careers guidance and employability support across secondary schools, special schools, pupil referral units, and colleges. Their services are tailored to individual needs and include raising awareness of apprenticeship opportunities. Since September 2024, Careers Wales has offered guidance to all Year 11 learners before the end of the school year, reaching approximately 87% of the overall school-leaver cohort.

While Medr does not have a remit for pre-16 education, it supports the Welsh Government and Careers Wales in enabling apprenticeship providers to engage with schools and contribute to the provision of relevant information in careers advice and guidance materials. Careers Wales also leads on information, advice, and guidance for choices at age 18. We understand that Medr will write to the Committee separately regarding its work to increase ongoing participation in learning and training from the age of 16 upwards.

Financial Implications – None.

Recommendation 2.

Welsh Government should set out a detailed explanation for the reduction in the number of apprenticeship starts by skills sector and apprenticeship level, and how this affects the options available post year 11.

Response: Accept

The Welsh Government acknowledges the reduction in apprenticeship starts across certain sectors and levels. The decline is primarily due to the loss of European Social Funds, which created a £42.55 million shortfall in the apprenticeship budget between 2023–24 and 2024–25. Despite increased Welsh Government investment, rising delivery costs and longer programme durations -

particularly in revised frameworks like Health and Social Care - have reduced the number of apprenticeship opportunities that can be funded.

The increased cost of living has further intensified financial pressures on providers. While the budget has grown, it has not fully offset inflationary impacts or increasing staff costs. These pressures have coincided with a shift in provision toward higher-level, higher-cost apprenticeships aligned with national priorities such as net zero and advanced manufacturing. While this supports long-term economic goals, it has led to fewer entry-level opportunities, which traditionally serve as key vocational routes for learners leaving Year 11.

This shift affects the options available to school leavers, particularly those seeking alternatives to academic study. Reduced capacity in sectors like construction and hospitality, combined with increased competition for places, has narrowed the vocational landscape. Careers Wales continues to provide impartial guidance and labour market intelligence to help learners navigate these changes and explore alternative pathways. Looking ahead, the Welsh Government is working with Medr and other partners to monitor provision, explore funding flexibility, and ensure apprenticeship opportunities remain responsive to learner and employer needs. The commitment to parity of esteem between academic and vocational routes remains central to our approach. As an example, in response to identified demand from learners and the sector, the Welsh Government is working with Medr and Qualifications Wales to support the reintroduction of a Level 2 Construction apprenticeship framework. This aims to ensure that learners can access pathways that better reflect their starting points and progression needs within the sector.

To support additional starts in 25/26, Medr is redirecting £4m of its funding into contract delivery and implementing tighter contract management to maximise the number of learners who progress fully through their apprenticeship. This will be allocated to support additional provision in areas which contribute to economic need.

Medr is now responsible for monitoring apprenticeship delivery and outcomes. As part of its contract management responsibilities, Medr collects detailed statistics on apprenticeship starts by sector, level, and learner profile. This data is published on Stats Wales and helps to inform policy decisions, assess programme impact, and support strategic planning. As Medr are now responsible for managing the collection and reporting of data for Apprenticeships, they will respond to the Committee with a more detailed analysis by skill sector and apprenticeship level in due course.

Financial Implications – The increase of £4 million for contract delivery has been possible through Medr’s careful management of pressures and opportunities

across all of its programme budgets. However, given the nature of the apprenticeship contract an increase in starts this year creates a forward pressure on the overall apprenticeship budget for 2026–27 of £6 million, particularly if delivery volumes continue to rise or cost pressures persist. These implications will need to be considered as part of future budget planning discussions to ensure the programme remains responsive to strategic priorities and that the financial profile best supports providers to deliver their contractual obligations

Recommendation 3.

There are clear and significant challenges facing apprenticeship providers in recruiting and retaining skilled trainers and assessors. Welsh Government should explore the barriers and work with colleges to consider incentives and ways to address these.

Response: Accept in principle

The Welsh Government acknowledges the significant challenges apprenticeship providers face in recruiting and retaining skilled trainers and assessors - roles that are essential to maintaining high-quality delivery across the sector. While the Welsh Government remains committed to supporting the sector, this responsibility now falls within the operational remit of Medr. As the national body responsible for apprenticeship programme delivery, Medr will provide a direct and detailed response to the Committee on this issue.

Financial Implications – Medr’s response will include consideration of any associated financial implications.

Recommendation 4.

Whilst the minimum wage for apprenticeships is not in Welsh Government’s control they should look at ways to increase real pay for apprenticeships as part of their fair work agenda.

Response: Accept

The Welsh Government acknowledges the concern raised regarding the level of pay for apprentices. While the statutory minimum wage for apprentices is set by the UK Government and is therefore outside the Welsh Government’s direct

control, we recognise the importance of improving real pay as part of our broader commitment to the Fair Work agenda.

We agree that fair remuneration is essential to attracting and retaining apprentices, and to ensuring that vocational pathways are valued on par with academic routes. As part of our Fair Work programme, we will continue to explore mechanisms to encourage employers to offer enhanced pay and conditions for apprentices, particularly in sectors where recruitment and retention are most challenging.

Medr, as the national body responsible for apprenticeship programme delivery, will support the Welsh Government in communicating these messages to employers through the apprenticeship provider network.

Financial Implications – None.

Recommendation 5.

The Welsh Government should explore funding solutions to expand the degree apprenticeship offer but must also ensure value for money as part of this work.

Response: Accept

The Welsh Government acknowledges the importance of expanding the degree apprenticeship offer in a way that ensures value for money and aligns with our broader ambitions for a coherent and inclusive tertiary education system. However, operational responsibility for the development of degree apprenticeships in future lies with Medr. The Welsh Government will work closely with the Commission in pursuit of this objective.

As part of their remit, Medr is currently developing the next apprenticeships programme for implementation from August 2027. This includes consideration of the future role of degree apprenticeships within a joined-up tertiary system that offers clear and accessible pathways for learners. Medr will provide further detail on this work in their own response.

Financial Implications – Any budgetary requirements associated with the development or expansion of degree apprenticeships will be a matter for the incoming government to consider as part of future spending and programme decisions.

Recommendation 6.

The Welsh Government and Medr should review existing information and ensure that published information and guidance for employers clearly sets out FAQs regarding hiring an apprentice. Any new material should be based on what employers say they need. Welsh Government and Medr must also take into account the 'time poor' nature of SMEs when engaging with business and make it as easy for them as possible to be part of apprenticeship programmes.

Response: Accept

The Welsh Government recognises the importance of clear, accessible information for employers engaging with apprenticeship programmes, particularly in supporting small and medium-sized enterprises (SMEs). As the responsibility for reviewing and updating employer-facing guidance lies with Medr, they will provide their own response outlining how this will be addressed.

We agree that any new materials should be informed by employer feedback and tailored to meet the needs of businesses. As part of our ongoing commitment to promoting apprenticeships, the Welsh Government will be producing targeted communications and resources for employers as part of Apprenticeship Week. These materials will aim to raise awareness, simplify key messages, and encourage wider participation in apprenticeship programmes across Wales.

In addition, the Business Wales Advisory Service continues to act as a central point of contact for employers seeking support. It provides guidance on hiring apprentices and enables businesses to submit expressions of interest (EOIs), helping to streamline engagement and reduce administrative burden. This service complements the wider efforts to ensure that information is accessible, relevant, and responsive to employer needs.

Financial Implications – None.

Recommendation 7.

The Welsh Government must make faster progress in developing a vocational education and training strategy, as recommended by the Vocational Qualifications for Wales Steering Group and the Transitions to Apprenticeship Pathways Employment report. The Committee should be updated on progress so far and at regular intervals.

Response: Accept

As set out in a Written Statement issued by Vikki Howells MS - Minister for Further and Higher Education on 26 June, Welsh Government officials have worked with stakeholders to identify five broad interdependent delivery strands to strengthen the provision of vocational education and training in Wales. Our objective is to support the wider participation agenda by creating clearer and more accessible pathways for all learners. We will also ensure that vocational education and training is closely aligned with the broader skills agenda, responding to employer needs and contributing to the delivery of green jobs.

These delivery strands sit within the overarching agenda to develop a VET Strategy and ensure we respond to the recommendations outlined in the Review of Vocational Qualifications by Sharron Lusher MBE DL and the Report on Transitions to Employment by Dr Hefin David MS. Delivering this ambition will require a collaborative approach across the tertiary sector as a whole, and as such we have established a VET Stakeholder Reference Group, including representatives from Medr, Qualifications Wales, Colegau Cymru, Careers Wales and Estyn, to collectively consider each of these delivery strands.

Our intention is to publish a 'Strategic Direction for Vocational Education and Training for Wales' in the spring.

Financial Implications – None.

Recommendation 8.

Welsh Government must work with Regional Skills Partnerships, Careers Wales and other stakeholders to collate and understand Wales-wide labour market intelligence.

Response: Accept

The Welsh Government will be taking forward a national skills audit for Wales, which will combine data analysis with stakeholder engagement to assess skills demand and supply. While the audit will primarily focus on national priorities, it will also consider regional variations, drawing on the expertise of the Regional Skills Partnerships (RSPs). Medr is working closely with the Welsh Government to ensure the audit effectively informs their work and that of providers. The audit is expected to commence shortly.

To support these commitments, Medr is developing mechanisms to collate, test, and analyse information from key sources. These systems are designed to inform the development of tertiary education provision across Wales and are scheduled for implementation by the end of 2025–2026.

Medr's Strategic Plan for 2025–2027 outlines their founding commitments to:

- Collaborate with the Welsh Government to respond to its identified skills priorities
- Ensure apprenticeship provision aligns with government priorities and meets the needs of learners, employers, and the wider economy
- Build strong relationships with stakeholders to understand demand and ensure tertiary provision supports Wales's economic objectives

Careers Wales continues to play a vital role in supporting this agenda. They work closely with the Welsh Government and RSPs, sharing relevant labour market intelligence (LMI) as needed. Up-to-date LMI is available via the Careers Wales website, and they have developed resources to help teaching staff embed LMI into classroom learning.

Following a feasibility study and the development of a prototype for a potential data intelligence hub, Careers Wales is currently exploring options for its future implementation.

Financial Implications – £75k has been set aside within the 2025-26 budget to fund the Skills audit this year.

3. Response to Conclusions

Conclusion 1.

Whilst there have been some improvements in recent years, the issue of parity of esteem between academic and vocational education remains persistent in Wales. Fully addressing this issue will require significant work not just from Welsh Government and people working in the education and skills sector but also from wider civil society. The perception of apprenticeships being second choice needs to be addressed. As part of this it is vital all learners should be presented with clear and impartial options.

Conclusion 2.

The importance of targeted, meaningful work experience is clear. The Committee would like to see the Careers Wales programme for placements targeted at certain individuals, such as those at risk of becoming not in education, employment or training (NEET), be expanded.

Conclusion 3.

The reduction in the number of apprenticeships starts is a concern which needs further explanation.

Conclusion 4.

Welsh Government should examine ways they can improve access to transport, including looking at cost of transport, for people studying apprenticeships, particularly those from rural areas. We welcome the Welsh Government's £1 bus fare pilot and would like to see any analysis of its effect on young people's access to apprenticeships.

Conclusion 5.

It is often a significant challenge for learners to be able to map out a career path through the apprenticeship levels, especially when compared to the academic route of qualifications. There are roles for Medr, RSPs and Welsh Government to play in ensuring that the provision on offer and the route through it is clear for

perspective apprentices, those who have already embarked on courses, providers and employers to understand.

Conclusion 6.

We note that the Children, Young People and Education Committee has taken evidence on Junior Apprenticeships as part of its Routes to Post-16 inquiry.

Conclusion 7.

We were interested to hear stakeholders' perspectives regarding junior apprenticeships. It is anticipated this topic will be addressed within the work being conducted by the Children, Young People and Education Committee on Routes into Post-16 Education, and we look forward to reading their findings.

Conclusion 8.

The Committee welcomes Medr's review of apprenticeships. As part of this review Medr should examine how the overall apprenticeship system can be more flexible and responsive to employer and economic needs, in particular the transition to net zero and the rapidly changing technological landscape.

Conclusion 9.

Employers are critical to a successful apprenticeship programme. However, they face a range of barriers to engaging with the system and taking on an apprentice, such as lacking awareness of the benefits of hiring an apprentice, struggling to provide progression routes for apprentices, and difficulties navigating the system. These challenges are amplified for SMEs and more prevalent in some sectors than others

Conclusion 10.

The Committee is concerned about the impact of the reduction in the number of apprenticeship starts. This could lead to longer term skills challenges in some sectors. Welsh Government need to ensure they fully understand the impact of this on business confidence, learners and the Welsh economy.

Conclusion 11.

The Committee is concerned about the lack of urgency in addressing issues within and around the apprenticeship programme. In particular that if apprenticeships aren't delivering for the needs of employers and the economy that there will be missed opportunities in emerging and fast-paced sectors.

Response:

The Welsh Government acknowledges the Committee's conclusions and welcomes the opportunity to reflect on the current landscape of apprenticeship provision in Wales. The issue of parity of esteem between academic and vocational education continues to be a focus of policy development. Work is ongoing with Medr, Careers Wales, Qualifications Wales and other partners to ensure that learners are presented with impartial and accessible information about all available pathways.

Medr's ongoing review of existing apprenticeship frameworks and development of the future apprenticeship programme to be delivered from August 2027 provides a valuable opportunity to consider how provision can evolve to meet changing economic and employer needs, including developments in technology and the transition to net zero. The Welsh Government continues to engage with Medr and other stakeholders to support a system that is flexible, inclusive, and aligned with strategic priorities.

The Committee's observations on work experience, transport access, and progression clarity are noted. Careers Wales and Medr are exploring ways to enhance opportunities for work-based learning and improve visibility of vocational routes. The impact of initiatives such as the £1 bus fare pilot will be considered as part of broader discussions around accessibility.

Junior Apprenticeships (JAs), introduced at Cardiff and Vale College in 2016, have gained recognition for supporting young people aged 14–16 in progressing to further education or formal apprenticeships. The Estyn report on the Junior Apprenticeship Programme in Wales, published in May 2024, described how JA's have had a transformational impact on attitudes to learning for those at risk of disengaging from education. The Welsh Government looks forward to receiving the Children, Young People and Education Committee's forthcoming report and will consider its recommendations in due course.

The Welsh Government continues to work collaboratively with Medr, providers, employers, and regional partners to support the development of a vocational education system that reflects the needs of learners and the wider economy. This

includes ongoing analysis of apprenticeship trends and engagement with stakeholders to inform future planning.

To support employers, particularly SMEs, the Welsh Government is working with Medr to identify and reduce barriers to engagement with apprenticeship programmes. The Business Wales Advisory Service acts as a central access point for employers, offering guidance and enabling expressions of interest. This complements wider efforts to simplify processes and ensure that information is accessible, relevant, and responsive to employer needs.

In relation to apprenticeship opportunities, the Welsh Government's Knowledge and Analytical Services are working with Medr to analyse current trends and better understand the implications for learners, employers, and sectors across the economy. This work will inform future planning and help identify appropriate responses to emerging challenges.

Agenda Item 6

Document is Restricted

Agenda Item 7

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