

Revision Schedule

Stage One Report – Draft Technical Papers

Technical Paper No. 5: Agriculture

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1 Introduction

- 1.1 This Technical Paper has been prepared with a particular focus to identify the past, present and future contributions of the agricultural sector, encompassing farming, forestry and fishery production to the Cotswold Water Park (CWP). This review concerns farming patterns and performance, future trends, the policy framework and key issues that could influence and affect the future of farming in the CWP.
- 1.2 It has been recognised from the outset that the potential for the agricultural sector to make increased contributions to the CWP relates as much, if not more, to the perceptions and aspirations of the key stakeholders. The latter are landowners and farmers as both the managers and shareholders of this important rural resource.
- 1.3 From a historical perspective, it is recognised that agriculture has been the primary economic contributor of this predominantly rural area. However, this has changed considerably in the wake of mineral extraction.
- 1.4 The review has sought to draw attention to the range of contributions that should be considered in relation to agriculture in the production of a Master Plan for the CWP. In this respect, the report seeks to provide a synopsis of:
- the current position of farming in the CWP;
 - the key policies and who this may influence the future of agriculture in the CWP;
 - other key influences and the affect this could have on the composition of the agricultural sector; and
 - the principal issues and considerations for incorporating agriculture into the CWP Master Plan.

2 The CWP Agricultural Sector

Current Position

- 2.1 The CWP Landscape Character Assessment defines the predominant characteristics of the CWP landscape as being influenced by agricultural activities (see Technical Report 8: Landscape).
- 2.2 These characteristics are indicative of those found within the countryside of Gloucestershire and Wiltshire as a whole. This is principally that the farmed area within the CWP is both diverse and fragmented with respect to a host of variables: land tenure, holding size and structure, soil type, cropping and stocking systems, non-farmed (wildlife, archaeological, historical and amenity) features, management regimes and many other factors. Thus, the farming composition of the CWP reflects the fact that farming, as a whole, is historically the result of a multitude of independent actions.
- 2.3 General observations on the farming industry in the CWP indicate that the area has a typical mix of tenure systems: owner-occupation plus both privately and institutionally owned estates with land farmed both in-hand and tenanted. The area, which is predominantly Grade 3 (moderate to good) with some pockets of Grade 2 quality (very good – best and most versatile) farmland as classified by DEFRA, is home to the normal range of arable and mixed farming regimes plus a few intensive poultry units and fish farming enterprises. Overall, the full spectrum of large prosperous agri-businesses and a few small 'bread-line' farmers are represented within the CWP.
- 2.4 The significance of the dairy farming businesses in the CWP declined sharply when, in 2002/3, the Co-operative Wholesale Society (CWS), a significant land owner and agriculture producer in the CWP, decided to terminate its five dairy farming enterprises at Down Ampney. Previously, the CWS farming activities employed 80 staff across a single farming business that covered some 4,000 acres of the CWP. However, the CWS made a decision to concentrate on the production of cereals and arable break-crops, ceasing the production of dairy within the area. This has had a significant impact on the composition of the farming enterprise (with the operation now employing only one permanent member of staff) and dairy production in the CWP as a whole, as it was previously the single largest enterprise of this nature in the area. Some dairy farming still continues in the CWP (e.g. on one CWS tenanted farm of 250 acres), but this is on a massively reduced scale when compared to the dairy production undertaken by CWS prior to 2002.
- 2.5 It is expected that the CWS, as the largest single farming business within the CWP, will continue with cereals as its main enterprise in the immediate term. This stems from its members' interest in increasing the sales of own-grown and branded flour through the stores of both the Co-op and other large retailers.
- 2.6 The scope for expansion into unsupported crops, such as soft fruit and vegetables, is not great within the CWP on account of soil limitations.

Farming and Extraction

- 2.7 Agriculture currently remains a significant economic activity within the CWP. However, it is envisaged that the continued mineral extraction could future diminish the value of this activity over the forthcoming years.
- 2.8 Although it is beyond the scope of the study to confirm the land-use of sites prior to extraction, the rural nature of the CWP, and the continuing high level of farming that takes place within the area, suggests that a high proportion would have been agricultural-based.

Mineral Site Restoration

- 2.9 It is acknowledged that sites used for mineral works could, at least in principle, be converted back to agricultural land. However, the actual amount of land being restored back to its previous use has been very little when compared with the level of land that has been restored into lakes through mineral extraction.
- 2.10 A principal issue in restoring worked out sites back to agricultural land in the CWP, particularly high-grade agricultural land, due to a number of factors, including:
- the high water table means that the work-out sites, which continuously need to be de-watered whilst extraction activities commence, can be left to fill in naturally with minimal input or intervention;
 - the nature of the hydrological system means that only clean, uncontaminated, naturally occurring soils and soil forming materials to avoid the risk of contaminants being leached into the local aquifers and rivers; and very much related to this
 - this type of inert material is in very short supply both locally and nationally.
- 2.11 It is probably through a combination of these factors that have lead to for adoption of open-water creation in the CWP as part of the site restoration strategies, as evidenced by the 147 lakes already present. This compares to just two known extraction sites that have been in-filled with inert material, with both being small sites and thus less restrictive, either in relation to cost and policy, to backfill (infill) the extracted area.

Land Ownership

- 2.12 It is generally acknowledged that there are two main methods from which mineral extraction companies can secure land for mineral works; either through a leasehold agreement whereby the mineral extraction company will provide an income to the landowner per tonne of mineral (sand and gravel) extracted; or through the purchase of the freehold of the land from the landowner for an agreed price.
- 2.13 To date the general trend for the CWP has been for landowners to sell the freehold of land identified for extraction. From a historical perspective, this trend has no doubt been influence by the perception by landowners of the limited value in the land due to prevalence for restoration to lakes rather than returning back to agriculture. Furthermore, if the ownership of a leasehold is retained by landowners, it would become a necessity for them to take a very long-term view on the potential of their land (as much as 10-15 years depending on planning

approval, extraction and restoration). This in itself can be a motivation to sell depending on life position and the likelihood of transferring the business to the next generation of the family.

- 2.14 The CWS is certainly one example of this desire to retain and obtain an after-value of their land, with the advantage that they are in a position as a company to take a long-term perspective. Whilst continuing to be commercially motivated, it is encouraged by its members to demonstrate that social corporate responsibilities are an important priority and that due consideration is paid to the longer-term. Therefore, it is understood that the CWS is seeking to develop any anticipated mineral extraction sites on its land in a manner that fits with both its commercial and ethical edicts.

Farming & Diversification

Non-crop Diversification

- 2.15 Across the UK, farm diversification into other enterprises is becoming increasingly evident as landowners seek to maximise the value of their land and properties. This includes diversification into property development and ownership (conversion of redundant farm buildings to commercial, office and industry space); the delivery of tourism services (accommodation, attractions and leisure activities); and direct consumer produce sales (farm shops; home delivery).
- 2.16 Evidence of diversification in the CWP suggests that farmers, in general, have exhibited a taste for property development, as opposed to tourism and produce sales, based both on building conversions and sensitively sited/designed new build. In particular, this has been demonstrated by the CWS (Down Ampney and Latton).
- 2.17 There is one obvious exception to this rule. Butts Farm Rare Breeds and Shop based at South Cerney has been developed into a small-scale visitor attraction, and is open to visitors on a seasonal basis. However, this is the one tourism-based diversification that the study has revealed. Overall, in comparison to other rural areas in the South West, rural diversification into tourism enterprises is not considered to be a high priority within this part of Gloucestershire. It is likely that a key barrier to further diversification of land will relate partly to the knowledge that the land could become a mineral extraction site at some point in the future, but also because the CWP does not currently have resonance as a visitor destination for overnight leisure visitors (see Technical Paper 4: Tourism for more analysis on this sector).
- 2.18 Overall, therefore, the main type of diversification under the current climate for the CWP is likely to continue to be in property.

3 Policy Framework

- 3.1 The following section details the principal policy framework within which the agriculture sector in the UK operates. The purpose of this is to identify the support for potential diversification of the agriculture sector of the CWP into both crop and non-crop related, where it is determined appropriate, that could not only help provide a revenue, but also have more of a strategic impact in the wider scope of the CWP Master Plan.

European

- 3.2 The Common Agricultural Policy (CAP), established in 1962, provides the framework for agricultural sectors throughout the enlarged European Union at an annual cost to EU consumers and taxpayers of about 100 billion euros.
- 3.3 Under major reforms to simplify the CAP in 2003, financial support for farmers has seen the replacement of eleven schemes (essentially based on production subsidies for individual commodities) to a single payment. The latter is calculated according to a combination of historic farm production patterns and land area. By 2012, the payment will be based exclusively on land area, involving a flat rate per hectare. The farmers will be paid regardless of types and levels of production, provided that certain cross compliance standards are met. This de-coupling of financial support from the production process was devised in an attempt to reduce/eliminate surpluses on a pan-European scale. One of the measures designed as a production control has been Set-Aside. Qualification for the Single Farm Payment (SFP) involves cross compliance with a number of Statutory Management Requirements (SMRs).
- 3.4 Despite this reform, the CAP remains both the single most expensive EU policy and a source of international discontent, especially amongst developing countries. Even for European consumers, the CAP is expensive; its implementation is estimated to be equivalent to a value added tax on food of about 15%. As a result the policy does little to endear landowners, farmers and more particularly food chains to the public.
- 3.5 A Major reform of the CAP is scheduled for 2013 and is already the subject of intense speculation and debate. Whilst inevitably this fuels uncertainty amongst farmers, there are some clear markers for the future, namely:
- World Trade Organisation food negotiations are likely to continue to lead to increased global competition for European farmers, involving progressive reductions in tariffs for agricultural goods from the current levels of between 20% and 70% to the average for non-agricultural commodities of 4%;
 - the importance attached to the impacts of climate change are likely to grow, resulting in increased attention being paid both to the production of bio-fuels and to water shortages; and
 - the subject of both food standards and retailing is likely to come under greater scrutiny and regulation.

- 3.6 Changes are almost certain to be undertaken both gradually and carefully through multi-lateral trade negotiations. The main focus of this process will be the achievement of more broad-based sustainable economic development in rural areas, thereby meeting the growing challenge of globalisation. Farmers can expect that the changes will require them to cease being reliant on subsidy or protection. They will be rewarded by the market for outputs, not least safe and good quality food, based on high levels of animal health and welfare. The provision of societal benefits is also likely to grow in importance. Response to the needs of rural communities will feature prominently, as well as the practice of environmentally sensitive landscape and wildlife management and greater pollution prevention.
- 3.7 A consequence of this is likely to be increased farm diversification, particularly in crop diversification, into alternative products that can be seen to have a benefit in relation to these criteria, including timber, trout farms, and biofuels for example.

National

- 3.8 In response to the 2003 CAP reform, the national policy for England is implemented in the first instance through the Single Farm Payment (SFP) scheme. This is administered by the Rural Payments Agency. Introduced in 2005, it replaced the former complex system of production subsidies. Under this decoupled system of state support, farmers are effectively paid a flat annual sum, based on the land area which has been registered as qualifying for an SFP.
- 3.9 The second main Policy 'instrument' is the England Rural Development Programme (ERDP). Essentially this consists of **two types of scheme**:
- schemes to conserve and improve the rural environment, effectively **Land-based schemes** (including agri-environment schemes); and
 - schemes to help farming, forestry and other rural businesses and communities to adapt to changing circumstances and to develop, classified as **Project-based schemes**.

Land-based Schemes

- 3.10 The **land-based schemes** include the following components:
- Environmental Stewardship, which replaces the former Countryside Stewardship Scheme, the Environmentally Sensitive Areas and Organic Farming Schemes. It is designed to conserve the countryside, thereby securing extensive wildlife benefits;
 - Energy Crops Scheme (Establishment grants); and
 - The English Woodland Grant Scheme, replacing the Woodland Grant and Farm Woodland Premium Schemes.
- 3.11 These Land-based schemes provide financial incentives for land managers (particularly farmers and foresters) to adopt environmentally beneficial land management practices.
- 3.12 The principal component is the **Environmental Stewardship Scheme**, which has the following three elements:

- Entry Level Stewardship (ELS) open to all managers and land managers in England for land that is agricultural or part of it is farmed;
- Organic Entry Level Stewardship (OELS) available on land which is fully organic or in conversion to organic farming but which is not currently receiving payment under the Organic Farming Scheme; and
- Higher Level Stewardship (HLS) which would build on ELS and OELS to deliver higher levels of environmental management and enhancement and is designed to meet local environmental priorities.

3.13 The main features of each of the other schemes are summarized as follows:

- **Energy Crops Scheme (Establishment grants)** provides establishment grants for two energy crops, short-rotation coppice and miscanthus, and aid to help short rotation coppice growers set up producer groups. Energy crops are used to produce heat and/or electricity. They are carbon-neutral and therefore, as a substitute for fossil fuels, can help reduce greenhouse gas emissions and increase renewable energy generation. They represent a new opportunity for rural areas.
- **The English Woodland Grant Scheme (EWGS)** is the Forestry Commission's suite of grants designed to replace the Woodland Grant Scheme (WGS) and Farm Woodland Premium Scheme (FWPS) in England. There are six grant elements available - Woodland Planning, Assessment, Regeneration, Improvement, Management and Creation, although with regional budgets and priorities, availability may vary from region to region.

3.14 Cross compliance is another main component used in implementing both Government and EU policy. This requires that landowners and farmers have to be able to demonstrate that they are keeping their land in good Agricultural and Environmental Condition (GAEC) and complying with a number of Statutory Management Requirements (SMRs). Both the receipt and rate of payments under the SFP and Environmental Stewardship Schemes are dependent upon eligible landowners and farmers meeting the SMRs.

Project-Based Schemes

3.15 The second type of ERDP Scheme - **Project-Based Schemes** - previously included the Rural Enterprise Scheme, the Processing and Marketing Grant and the Vocational Training Scheme. They were all closed to new applications on 30 June 2006, but are expected to be renewed as part of a New Rural Development Programme later in 2007. These schemes are broadly defined as follows:

- **The Rural Enterprise Scheme** aims to provide target assistance to support the development of more sustainable diversified, enterprising rural economies and communities to assist their changing role of agriculture. As part of DEFRA's support for farm diversification activities, a land use planning feasibility study is being made available to those farmers who intend to pursue a viable diversification project under the Rural Enterprise Scheme. Projects range from the marketing of agricultural produce to converting piggeries into a nursery.
- **The Processing and Marketing Grant** is aimed at developing processing facilities for primary agricultural products in England, to benefit processors and the producers of the raw

material. It is open to individuals, groups of primary producers and companies. Grants are awarded towards the construction of new buildings, the refurbishment of old buildings and the purchase of new equipment.

- **The Vocational Training Scheme** offers grants of up to 75% of eligible costs for training that contributes to an improvement in the occupational skills of farmers and others involved in farming and forestry activities and their conversion. An external consultation on proposed improvements to increase uptake of the Vocational Training Scheme is planned for April following the Policy Commission's recommendation that it should be simplified. Details will be made available as soon as possible.
- 3.16 Another important component of the Government's suite of rural policies, which have a strong bearing on the agricultural sector relates to public access to farmland. This is a theme which has echoed through policy and practice announcements made by the government within the last twelve months.
- 3.17 As an example, the then Minister for the Horse Industry, Jim Knight MP, launched the Strategy for the Horse in December 2005, with one of its eight main aims being to increase access to off-road riding and carriage driving. In a subsequent interview he stated: *"The vision would be to improve the number of long distance trails and then improve the bridleway network off those trails so that we can achieve both economic gain in terms of equine tourism and increased participation"*. Government has acknowledged that one means of delivering this is via the local highway authorities, which are obliged to prepare Rights of Way Improvement Plans by 2007, in consultation with their Local Access Forums. The latter represents user, as well as landowner interests. Further, prior to major institutional change at the end of 2006, the Countryside Agency (which has since been integrated into Natural England) launched a Discovering Lost Ways project to tackle the problems of severed routes and the fragmented nature of the rights of way network. Its aim is to find lost rights and reinstate them, in order to increase the number of public rights of way in England.

Regional

- 3.18 At this scale the main policies driving the development of the agricultural sector are to be found in the 'Regional Economic Strategy for SW England 2006-2015' and its companion document 'Regional Delivery Framework'. Both were prepared by the South West of England Regional Development Agency (RDA). The latter was established in April 1999. Government sponsored, it is one of nine English RDAs tasked with both driving forward regional economies and providing strategic leadership in economic development and social regeneration.
- 3.19 The RDA is inevitably a main protagonist of the Government's Sustainable Strategy. This underpins all of its sectoral and crossing-cutting thematic foci. Thus one of the RDA's aims is to secure a sustainable future for rural areas.
- 3.20 The South West of England RDA is working to make the region a better place in which to live, work and conduct business. Its main strategic objective is stated to be the achievement of successful and competitive businesses. In relation to this there are five regional priorities, all of which have a bearing on the rural and agricultural sectors and thus the CWP, namely:
- the provision of support for business productivity;

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- the encouragement of new enterprises;
 - the delivery of skills for the economy;
 - the ability to compete in the global economy; and
 - the promotion of innovation.
- 3.21 Progress in delivering these priorities is being measured by outcomes and outputs, one of which is the achievement of sustainable farming and food operations.
- 3.22 In encouraging the implementation of its strategy, several key needs are recognized. These include the following, which are particularly pertinent to the CWP, namely:
- the need to attach great importance to protecting and enhancing the Region's unique environmental and cultural assets (many of which exist in farmland), so that they continue to attract investment and develop economic advantage;
 - the need to be mindful of the significant changes which the agricultural sector is undergoing and thus for flexibility in addressing the key issues affecting market towns and rural areas;
 - the need to progress plans and measures leading to the development of strong and inclusive (rural) communities;
 - the need to promote enterprise in rural areas;
 - the need to **'develop a land use strategy to integrate food and energy production, tourism, forestry, environmental management and access to the countryside'**; and
 - the need to **'protect natural resources and enhance our environment'**.
- 3.23 Specifically, the RDA's Delivery Framework calls for the region's environmental capital to be strengthened 'through initiatives to:
- promote sustainable land management;
 - enhance protected landscapes;
 - promote green infrastructure; and
 - improve biodiversity.
- 3.24 Within the overall Regional Strategy and Framework there are two sub-strategies which seem to resonate well with the aspirations of both the CWP's Joint Committee and Society, namely - the South West Climate Change Strategy and the Regional Renewable Energy Strategy. All of the above is very positive and gives the CWP stakeholders a great deal of 'lebensraum' in developing their own strategic and development plans.
- 3.25 The first of two features noted of the RDA's strategic guidelines in relation to this study is the absence of the CWP in the list of regional attractions that will deliver significant and sustainable economic benefits. The second is the seemingly relatively poor performance of the Food and Drink sector (i.e. linking into the local food and drinks market), which is one of the RDA's priority sectors for the future.

Local

- 3.26 There are five local planning documents that provide a further tier of guidelines in the overall hierarchy of resource conservation and development, with which any strategy and delivery plan for the CWP will need to be consistent. These are the Cotswold Local Development Framework (LDF), the Gloucestershire Structure Plan, the Wiltshire and Swindon Structure Plan 2016, the Cotswold District Local Plan and the North Wiltshire District Council Local Plan.
- 3.27 Not surprisingly, although different in terms of specific foci and the order of priorities, these plans share many common aims, objectives and thematic policies relating to the agricultural and related sectors. Sustainable development and sustainability are core principles to which all of the statutory authorities subscribe.
- 3.28 The Structure Plans prepared for Wiltshire and Swindon are particularly clear with respect both to rural development priorities in general and specifically to agriculture. The overall role of the Plan is seen as enabling development to take place in ways that ensure the economic vitality of the countryside whilst preserving the quality of the environment. Specific objectives, to which agriculture, forestry and new enterprises need to contribute include community development, the integration of land use and transport, energy efficient land uses, rural communities and conservation of the countryside. Particular facets of the sustainable use and development of rural resources include water, recreation and leisure, waste management, minerals, together with infrastructure and services. The protection of the best agricultural land and mineral resources is a specific priority, along with:
- maximising the potential for energy conservation and accommodating proposals for renewable energy; and
 - minimising the loss of countryside and protecting and enhancing the Plan area's environmental assets.
- 3.29 The latter conforms to the Wiltshire Biodiversity Action Plan (2002), which calls for the conservation of all important habitats including arable land, hedgerows, calcareous grassland and unimproved neutral grassland, woodland, streams, rivers, wood pasture, parkland and ancient trees. The management of all of these habitats falls to a greater or lesser extent within the general ambit of landowners' and farmers' responsibilities.
- 3.30 At an even more local scale, the Cotswold District Local Plan contains some very helpful observations and guidelines for the agricultural sector and associated changes:
- 'Changes in agriculture are seemingly inevitable, but are difficult to predict in terms of their extent or their effect on the local economy. The character of the Cotswolds has largely resulted from its agricultural past, and could be under threat from changes yet to take place. Owing to the inherently low quality of some land in the District, especially the upland wolds (outwith the CWP), agriculture in general and arable farming in particular, will be vulnerable. Diversification within or from agriculture may be expected, as a means of seeking to maintain farm incomes and employment levels, but this will need to be carefully controlled if the landscape character and nature conservation of the area is not to be adversely affected. The broad base of the local economy will help to achieve this. With falling numbers employed directly in agriculture or forestry, the rural economy has a much wider meaning than has been applied traditionally.'*

- 3.31 Diversification is well recognised to be one of the options available to landowners and farmers in addressing change. In this context the Cotswold District Plan is both realistic and helpful in providing policy guidelines, notably:
- Policy 6: Diversification of Farms and Agricultural Estates: 'development in connection with the diversification of an existing farm or agricultural estate will be permitted outside those areas where Policy 1 applies, provided that it is well integrated with the existing operation.'; and
 - Policy 21, relating to Agricultural Land: 'considerable weight will be given to the protection of the best and most versatile land. Development will not be permitted where it would result in the permanent loss of such land, or would prejudice its long-term agricultural use or value, unless there is an overriding need for the development which cannot be met elsewhere, in which case land of a higher quality shall not be used if suitable land of a lower quality is available. Development which causes unnecessary severance or disruption of farm units will not normally be permitted.'
- 3.32 In the context of needing to conserve agricultural assets, the extent to which County Council smallholdings and farms exist within the CWP will also need to be determined during Stage 2. This is important since the NFU has had cause to make public its concern over the sale of estate farms every time a tenancy expires. The potentially harmful resource and environmental management implications of sales being made to essentially non-farmers have been highlighted.
- 3.33 Relating to quite a different, but important policy planning dimension, it has been noted that Gloucestershire Food Vision (GFV) is the UK's first integrated countywide food policy framework. It brings together food issues across health, education, industry, access and food safety. It has been approved by the Gloucestershire Strategic Partnership (GSP) as a key Task Project that will help to deliver all the themes within its Community Strategy over the next 15-20 years.
- 3.34 In conclusion there are no surprises in the policy content of these local strategic and operational planning documents. They provide a clear framework within which a Strategic Plan for the CWP's multi-valued resources can be confidently be prepared.

Implications for CWP

- 3.35 All of the above point to the prospect of a rural economy that will face the following:
- The pressures to sustain financial viability are likely to increase. This suggests that farmers will continue to look to all possible means of improving revenues, including both the sale of land and buildings and conversions of the latter.
 - Farm inputs, including labour, will be reduced to a financially prudent minimum.
 - The long-term trend of declining numbers of farmers, of an increase in average farm size and of an aging population of farmers will continue.
 - Diversification into new crops (once there is reasonable certainty concerning both market outlets and farm-gate/contract prices) is likely to increase. This applies both to

diversification into new farming enterprises (e.g. green energy crops etc) and to non-farming activities (property development, storage, rural maintenance services, haulage etc). Such diversification will not be confined to on-farm activities. Indeed, the movement into off-farm business ventures, may grow more quickly than in the past.

- The predicted demise of Set Aside will provide opportunities to grow both new crops and larger areas of traditional crops for which new markets are developed.
 - Farming practices will become progressively more environmentally-friendly. This will mean that the fabric of the countryside (including archaeological features) will be both better conserved and maintained. The general condition and extent of wildlife habitats and endangered species are also likely to improve.
 - The provision and management of farm-based recreation and tourism facilities are likely to grow. However, this should not be regarded as a financial panacea, because not all landowners and farmers are motivated by a strong desire/acquired skill to manage 'people enterprises/crops'.
 - The demand for improved public access provision and management will continue to increase.
 - The development of niche markets, products and specialist systems (e.g. organic farming) is likely to be restricted to those opportunities which yield a realistic premium.
 - There is likely to be a growth in the interest shown by farmers in improving the price received for farm produce through more direct selling e.g. on-farm, in Farm Shops and Farmers' Markets.
 - The attention that needs to be paid by farmers to raising and meeting food standards is bound to increase to reflect the public's growing interest in healthy life-styles.
- 3.36 One cloud on the horizon for landowners and farmers who enjoy game shooting, is that they may face increasing pressures whereby attempts are made to outlaw the rearing, release and shooting of reared game birds. If successful, which is by no means certain, such measures would - it is argued - reduce farm revenues, the recreational enjoyment of those involved and the numbers of many species of wildlife (especially song-birds and insects) which currently benefit from both the provision and high quality management of game-bird habitats, especially on arable farms. The latter include arable field margins, beetle banks, conservation headlands, hedges, game strips, drainage ditches and wetlands. They account for an increasing area of rural land.
- 3.37 In all of these respects landowners, farmers and farm managers in the CWP are unlikely to differ from their counterparts in other areas of the country.
- 3.38 The above predictions are consistent with such discussions that have taken place with members of the land-based professions in the region.

4 Trends and Influences

Market Influences

- 4.1 It is generally recognised that farming in the UK is undergoing another 'revolution' thanks to a combination of complex factors, including the opening up of world trade and CAP reforms.
- 4.2 The future of the CAP and its impact on British farming continues to be uncertain, as do world markets, particularly the price of wheat. The latter, which tends to be highly dependent on harvest levels in both the USA and Australia, is likely to continue to be a major determinant of the levels of farming profitability within the CWP as in the rest of the UK.
- 4.3 Provided that both local markets and the prices for un-supported enterprise products, such as bio-mass/bio-fuel crops and wind energy, develop attractively for farmers, the general pace of diversification away from conventional farm enterprises is likely to grow. However, even then, the products of conventional cereal and mixed farming regimes are likely to remain as 'staples' for the foreseeable future.
- 4.4 Against the background of change and uncertainty, the survival and self-interest instincts of farmers can be expected to remain high. In short, farmers attitudes are likely to continue to be those associated with hard-nosed commercialism.

Economic Conditions

- 4.5 It is widely recognised that the economic climate within which farming operates is challenging. In conjunction with market conditions and the CAP reform, which are influencing returns, farmers are also experiencing increasing costs (e.g. labour, utilities bills) to their overheads. This is also coupled with complaints of a lack of available finance and a lack of technical support.
- 4.6 This factor is certainly evidenced in Gloucestershire where the agriculture sector's contribution to GDP fell almost by a half, and the workforce was cut by almost 10%, between 1997 and 2000. Furthermore, average farm incomes have fallen by a significant 25% in recent years.
- 4.7 However, whilst relative to the situation ten years ago it is accepted that farm profitability and returns on capital have declined, there is no evidence that the agricultural sector has reached a point where it is no longer financially viable. On the contrary, farmers in general continue to be resourceful through management adjustments, signing up to the agri-environmental scheme and undertaking enterprise and/or crop diversification.
- 4.8 As an example of this resourcefulness, organic farming is a success story of the modern-day farming market, particularly in relation to direct-to-consumer sales through traditional farmers markets and mail/internet sales.
- 4.9 As of January 2007, it is estimated that the total area of organic and in-conversion land in the UK as at January 2007 was 619,783 ha. This represents 3.5% of the total agricultural area (excluding common grazing) in the UK.

- 4.10 The influence from a farmers perspective in this type of agriculture has no doubt been fuelled by the evidence of larger income scales that can be achieved. For instance, Defra's Organic Farm Incomes 2004-2005 noted that the net farm income (NFI) for the organic cropping farms stood at £209/ha, representing an increase of 6% compared to the previous year. This compared to £42/ha for the conventional farming, representing a decrease of nearly 80%. This has now resulted in a substantial gap between the two groups in 2004/05 from a similar starting position in 2003/04.
- 4.11 A buoyant consumer market has also been linked to the general economic prosperity of consumers in the UK. The Soil Association recently reported that organic food and drink sales in the UK reached £2 billion mark for the first time in 2006, which represents a sustained market growth rate of 22% throughout the year. Key findings of the market included:
- retail sales of organic products through organic box and mail order schemes and other direct routes increased from £95 million in 2005 to £146 million in 2006 - a staggering 53 per cent growth, more than double that experienced by the major supermarkets;
 - sales of free-range and organic outstripping eggs from caged birds for the first time. Consumer concerns over animal welfare appear to be driving changes in the poultry sector; and
 - organic farmers are three times as likely to market their products locally or directly as non-organic farmers in the UK.
- 4.12 Although it is anticipated that conventional methods will remain the mainstream method of farming, this growth in organic produce denotes a significant shift in consumer interest and awareness in food production.

Other External Factors

- 4.13 Farming as an activity is reliant upon prevailing climate conditions, particularly in relation to cereals, vegetables and fruits, and having a healthy (disease free) crops and stocks.

Climate Change

- 4.14 As with many debates concerning climate change, the potential impacts of rising temperatures and changing climatic patterns on agricultural practises is a debate that is in its infancy.
- 4.15 The Country Land and Business Association produced a report in 2001 detailing the views on climate change and how this could impact the rural economy. The report suggests that the main climate projections for the UK between 2020 and 2050 are:
- a mean increase in temperature, with the 2020's realising temperatures of 1.3 °C to 1.8 °C above present day, and the 2050's experiencing temperatures of 2.0 °C to 3.0 °C above present day;
 - change in precipitation, with generally wetter winters and drier summers; the 2020's are predicted to be between 7% and 15% wetter in winter and 2% to 15% drier in summer, and the 2050s are expected to be between 11% and 20% wetter in winter and 15% and 20% drier in summer compared to present day;

- sea level is expected to rise, with the 2020's expected to experience between 14cm and 37cm above the present day, and in the 2050's between 28cm and 100cm above
- 4.16 Defra is continuing to investigate the likely effects of these changes will have on agriculture. In particular, it is assessing the increased risk of flooding in some coastal areas; seasonal increases in rainfall and the increased risk of flooding on river flood plains; changes in mean and seasonal temperatures and rainfall by geographical area; and the effects that these will have by soil type, slope and local farming systems.
- 4.17 The initial statements suggest that droughts, storms, heavy and prolonged rainfall are components of weather that are already within the experience of most farmers. However, it is the increased frequency of such events under future climate change that presents the greatest risks to farm businesses. For example, it has been estimated that the hot, dry summer of 1995 cost the UK farming industry about £457 million through reduced income and increased costs. Similarly, the flooding caused by heavy rainfall in July 2007 is being reported as being little short of disastrous for many British farmers. As such, farming is one sector which is feeling the repercussions of climate change now, whereas much of the debate at large concerns the future.
- 4.18 However, the farming sector is also seen as a contributor to climate change. As with many industries, farming is being scrutinised in relation to its practices to identify techniques of lowering its environmental impact, particularly its carbon footprint and use of water resources. Consequently, farming and landowners are under increasing pressure to adapt their enterprises to reflect change in climate and the predicted conditions it will present; whilst also adopting measures designed to mitigate climate change such as water management, soil management, greenhouse gas emissions and energy consumption.
- 4.19 According to Defra, these issues are not necessarily irresolvable threats to farming in the UK, and in actual fact they cite some conditions where opportunities for new crops may be forthcoming, i.e. new opportunities, particularly for farmers in the south of the UK include grain maize, sunflowers, grapes for wine, winter lupins and peaches. Moreover, changes in sowing date and the rate of spring growth and ripening and harvesting dates would reduce the threat of certain crops becoming unviable due to climate change, though a better understanding of disease and pest mitigation will need to be accompanied to any such changes.
- 4.20 The debate on climate change will no doubt continue, with the latest summer (2007) bucking the overall trend expected for summer periods in the UK, with the Met Office suggesting that England and Wales as a whole has experienced the wettest summer since 1839. Nevertheless, as with all weather patterns, any trends will be denoted over significant periods of time. For the moment, the experiences of 2007 are considered an anomaly to the prevailing patterns as denoted above (i.e. wetter winters, drier summers).

Crop & Stock Disease

- 4.21 A further factor in consideration of farming practices and how this may change in the future is in relation to crop and livestock diseases.
- 4.22 The recent history of BSE and Foot and Mouth outbreaks in the UK still present a wound for the farming industry, with the latter recently surfacing once more. Likewise, the potential of Avian Influenza to infect the UK still remains a key concern.

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- 4.23 It should be reinforced that Gloucestershire was one of the worst affected areas in the South West by the outbreak of Foot and Mouth, with tourism also significantly affected.
- 4.24 A multi-agency recovery programme has been successfully implemented, but the ability for the farming community to rebound to a position of relative strength will be more difficult should another crisis hit. No doubt that the recent Foot and Mouth scare in Surrey (2007) has been an unwelcome reminder amongst the farming community of the delicate nature within which they operate.

5 Key Issues & Considerations

The Future Role of Agriculture in the CWP

- 5.1 Mineral extraction will continue to be a significant vehicle for change in the CWP, with both County Council's seeking to utilise the sand and gravel resources located within the CWP to meet their apportionment targets. The existing land available within CWP that is conducive to this type of activity is predominantly agricultural land.
- 5.2 As a result, it is likely the changing agricultural landscape will have a significant influence on the Master Planning process for CWP in the future. Although this is dealt with in other reports accompanying the Master Planning process (Mineral Extraction; Landscape), it is still important to consider the agricultural sector and the role it will have to play in the future composition of the CWP.

Land Ownership

- 5.3 In the first instance this is likely to be through extraction, the potential change of land tenure, and the restoration strategies employed to restore worked-out land to a further land use.
- 5.4 As denoted previously, the prevailing trend within the CWP is for landowners to sell the freehold of the land identified for extraction to an aggregate company.
- 5.5 It is anticipated that this trend will continue for most farmers within the CWP due to the prevailing economic climate in agriculture becoming more challenging; the fact that the prevailing restoration strategy has been for lakes; and perhaps a desire for a lifestyle change. Nevertheless, the more recent occurrence and interest in the development of lakes for other uses may change this stance for certain landowners seeking to diversify their enterprise and to seek an after-value from their land.
- 5.6 In such instances, it will be necessary to ensure that the restoration strategies and potential after-use for the extraction sites are identified at the earliest opportunities

Restoration

- 5.7 The restoration strategies employed thus far within the CWP have been to create lakelands rather than return the land back to its previous use. As such, a significant proportion of agricultural land has been lost to extraction activities.
- 5.8 This may not be the position in the future, however. As denoted in Technical Report x: Minerals & Extraction, there is policy contained within both Gloucestershire and Wiltshire & Swindon Mineral Local Plans (MLP's) to return certain tracts of land identified as Preferred Areas or Areas of Search back to agricultural land - North West of Latton, parts of Eysey Manor, Dryleaze Farm, Kempsford/Whelford and Horcott/Lady Lamb Farm. These areas have been defined as the 'best and most versatile' agricultural land in the CWP, and thus have a significant value in relation to this sector in the future. For instance, the extraction permission for Eysey Manor Farm includes restoration back to high-grade agricultural land.

- 5.9 Furthermore, these sites and future sites are much closer to RAF Fairford, where potential conflicts between the creation of unmanaged open-water and the Bird Strike Zone will become more pertinent due to the requirement for Aerodrome Safeguarding.
- 5.10 Therefore, it is much more likely that proposed extraction sites will be required to present alternative restoration strategies in the future, potentially incorporating a return back to agricultural land.

Other Agricultural Land

- 5.11 It is accepted that not all land will be suitable for extraction or sought for minerals due to other prevailing factors (e.g. geological issues, hydrological issues, planning issues, bird strike zone, or land owners preference). Therefore, agriculture as an activity in its own right is still likely to have a significant role to play in the future of the CWP.

Key Considerations

- 5.12 As the analysis suggests, the agricultural sector as a whole is neither financially buoyant nor certain about the future, with respect to both traditional enterprises and diversification opportunities.
- 5.13 This uncertainty is founded on many complex, external factors. They include the impacts of global warming, harvests and trading upon arable products, the future of the CAP, the performance of the Rural Payments Agency and the embryonic state of bio-energy technologies. That said, farmers are generally hungry for profit and will respond to new initiatives, if they are convinced by the associated packages of economic incentives and allied instruments.
- 5.14 There is evidence to suggest that, within the farmed area of the CWP, there are opinion leaders and early adopters, who - if stimulated with appropriate packages of incentives - could make significant contributions to strengthening both the identity and sustainability of the CWP's development. The spectrum of potential contributions to the CWP from the agricultural sector are thought to include quality farm food products & markets, bio-fuel supply, farm-based recreation & tourism, conservation/enhancement of wildlife, visual and cultural assets, countryside services & education, employment and land sales. All of these have resonance with other wider considerations in relation to biodiversity, tourism, recreation and landscape form that are being considered as part of the Master Planning process.

Farm diversification

- 5.15 Preliminary investigations have revealed that, in addition to minerals extraction, there is scope for farm diversification into the following sectors:
- a) property development for residential and/or tourist purposes;
 - b) the production of green energy crops (bio-fuels); and
 - c) the provision of recreational and educational enterprises, which are compatible with commercial farming.

Property Development

- 5.16 Already there are examples of property development within the CWP relating to holiday lets. The extent to which further developments should be encouraged, in order to improve the long-term success of the CWP, will be covered elsewhere in the study. However, it is sufficient to indicate at this stage that the owners/managers of several of the bigger commercial farms have demonstrated a capability to undertake property development to a high standard (e.g. CWS at Down Ampney and Latton).

Crop Diversification

- 5.17 Although the types of agriculture production in the CWP are not anticipated to change significantly from its existing form, both the progressive development of the CWP, the changing agricultural policy, and issues such as climate change may present farmers and landowners with an opportunity to realise further income through diversification through crops.
- 5.18 Activities that would appear to have a synergy with the wider considerations for the CWP include:
- reed-bed cultivation for use as thatch and other reed-based products, potentially associated with reed habitats that may be introduced through nature reserves;
 - grazing and farming of livestock as a natural mechanism for managing and maintaining certain habitat, particularly on the floodplain; and
 - the production of green energy crops in order to deliver a more self-sufficient community in relation to energy, and thus reducing its carbon footprint.

Special Commentary on Green Energy

- 5.19 There has only been one venture of CWP enterprises into crop production for green energy generation. That involved the growing of coppiced willow on short-term rotation, which is reported to have failed to receive Local Authority approval. There is reported to be only one grower of Miscanthus in the Cotswolds-Midlands area.
- 5.20 From consultation with a specialist organisation involved in bio-energy, TV Energy based in Newbury, there are several constraints mitigating against this particular form of development. These include:
- the relatively small size of market demand for energy derived from biomass predicted between now and 2010. Currently the target is 85 MW of which the Forestry Commission expects to supply 59%. Regionally the total target for energy production from short rotation coppice is said to be approximately 7,000 hectares;
 - the relatively low density of wood chips;
 - wood chip contamination can cause serious problems through blockage of augers and damage to boilers and pipe-work;
 - the sensitivity of the economic performance of bio-fuel schemes to travel distances/costs between crop production and the point of energy conversion/transmission;
 - the significantly higher cost of boilers (approx 5 times) relative oil and gas heating systems;

- the need for investment in new machinery in the case of short-rotation coppice crops;
 - uncertainty that the returns from 10 year guaranteed bio-energy production crop contracts (linked to the Retail Price Index), offered by organisations operating combined heat and power schemes, will not be as high as the profits that might be earned from cereals. Currently the break-even point for wheat is £65 per tonne relative to short rotation coppice. The volatility of wheat prices internationally may, however, in the medium-term favour biomass. That said, the potential for achieving greater returns from the growth of cereals for ethanol may depress the scope for bio-mass crops; and
 - the fact that currently the economic viability of biomass heating systems is significantly dependent on grant funding, which has been proved both uncertain and unreliable.
- 5.21 Nevertheless, as in other regions of the country, there is considerable interest amongst the farming community in bio-fuel production. This is likely to become increasingly so with the demand for bio-diesel and bio-ethanol, the main types of bio-fuel, likely to increase as countries seek to achieve the European Union of at least 5 per cent of fuel to come from renewable sources by 2010. Bio-diesel is mainly produced from crops such as oilseed rape and soya, cooking oil and tallow. Bio-ethanol is an alcohol-based alternative to petrol which is made from wheat, maize, sugar cane or beet.
- 5.22 The advantage of these bio-fuels is that they are seen as carbon-neutral because the carbon released when it is burned is absorbed by the crops being grown to provide the next batch of fuel. Research is also being carried out into using wood, grass and some types of waste to make bio-fuel.
- 5.23 Consultations undertaken indicate that small numbers of landowners in the CWP are potentially interested in diversifying into this type of crop production, so as to satisfy domestic and/or relatively small-scale institutional demands (e.g. local school, village hall, hospitals and IKEA at Milton Keynes etc). More importantly, it is understood that there is the prospect of an investment in a medium sized boiler within relatively close (i.e. commercial) proximity of the CWP.
- 5.24 At this point it is not appropriate to make any recommendations concerning this particular diversification option. The future is likely to be driven by a combination of RDA initiatives and private sector risk-takers. Some of the latter are known to be large scale organisations, such as Land Securities. However, in the foreseeable future until the Government's future (nuclear) energy plans are known and reliable market opportunities are created for farming landowners, the scale of landscape and business change from this particular form of diversification within the CWP would seem to be limited.
- 5.25 The one significant advantage is that the price of wood chips in pence per KW Hour is £1.54 relative to £2.24 (natural gas), £4.25 (oil) and £6.51 (electricity).

Non-crop Diversification

- 5.26 In the case of non-crop farm diversification, the preliminary consultation associated with this study would suggest that there is good scope for farmers to contribute to expanding opportunities and facilities within the CWP, particularly in relation to recreational and educational enterprises.

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- 5.27 The full potential for this would need to be explored further, but it is envisaged this could include such activities as:
- contributing both to existing and possible future visitor centres and interpretive displays;
 - improving access through provision of permissive rights of way;
 - increasing the access opportunities for horse-riders and walkers to enjoy the countryside (see below the reference to the novel activities of the charity Toll Rides Off-road Trust [TROT]);
 - providing farm walks and demonstrations for adults, families and school children;
 - facilitating water-based sports;
 - providing camping and caravanning facilities; and
 - establishing one or more golf courses additional to the one created by Franklin Bros, north west of the CWP lakes area.
- 5.28 One way that landowners can benefit financially from the inexorable demand for more access is to create permissive paths, either as part of a grant scheme, such as Higher Level Stewardship or for the payment of a toll.
- 5.29 The charity Toll Rides Off-road Trust (TROT) has already established over 350 miles of toll rides nationally, by agreement with landowners and riders. TROT currently pays the landowner between £200 and £500 a mile per year, in return for the right to charge riders a subscription of between £63 and £125 per year depending upon travel distances to the access point. As part of the scheme, TROT manages the permitted paths and polices access on behalf of the landowner. The CWP falls within the ambit of the TROT Regional Development Officer, based in Oxfordshire. The opportunity to participate in this venture does not always depend upon multiple-farmer involvement in the establishment of a circular route. Opportunities exist equally for individual landowners/farmers who are able to provide a vital connection of say 0.5 mile between two existing bridleways.
- 5.30 The CWP enjoys one special landowning asset, namely the CWS, with respect to the provision of rural visitor attractions and related rural educational facilities. The CWS has a long history of direct experience in these fields, based upon its Visitor Centre at Stoughton Farm Park in Leicestershire. Preliminary discussions with the organisation's Rural Portfolio Manager revealed that the organisation would welcome opportunities to contribute to both the expansion of existing visitor facilities and to the creation of new ones. Further liaison with this particular role model should take place in Stage 2. Other interested parties would need to be involved to ensure that holistic results are achieved, both strategically and, at a later stage, operationally.

Local branding of Farm Produce

- 5.31 A significant amount of local branding of farm produce occurs already in relation to the wheat products of the CWS, which are retailed through its own (the Co-op) and other stores.
- 5.32 However, no branding using a specific CWP logo has so far been identified during the study. It is considered that represents a large opportunity for the agricultural sector of the CWP to

strengthen the areas identity. Currently North Cerney cheese, together with Lechlade trout and crayfish, is reported to be the local food produce that is discernible in the market place.

5.33 There are many role models for both branded food products and food marketing ventures, which merit investigation, namely:

- the 'Made-in-Gloucester' branded produce;
- Stroud and Cirencester markets;
- a Forest of Dean Local Food Group; and
- Mr John Ford, who has the potential and resources to establish a Food Market on his property within the CWP.

5.34 Some of these and other role models are elaborated in the Appendix.

Sustainable/Organic Farming

5.35 The relevant framework for consideration of both existing and new organic farming and food production initiatives are to be found in the Government's Organic Products (Amendment) Regulations 2006. They set out the inputs and practices which may be used in organic farming and growing, together with the inspection system that has to be in place to ensure this. The Regulation also applies to processing, processing aids and ingredients in organic foods.

5.36 The extent of participation by local farmers in the Organic Entry Level Stewardship (OELS) Scheme should be determined with the CWP. Such farmers qualify when their land is either fully organic or under conversion to organic farming, but is not presently receiving payment under the Organic Farming Scheme.

Agri-Environment schemes

5.37 Potentially these schemes have some bearing on the future identity of the CWP. However, for the reasons explained below, this may be limited.

5.38 As indicated in the Landscape Chapter, the present landscape within the CWP is significantly deficient in providing a coherent character. This is at least in large part responsible for the issues of 'identity' affecting the CWP. The agri-environmental schemes provide one of the means by which the present landscapes could be made more attractive; at least in theory. For that to happen, land holdings need to be registered with DEFRA - whether or not they are used for commercial agriculture - so that they are eligible to apply for grants under the Entry Level scheme. However, even if adjacent holdings do qualify for grant under the Scheme, there is no means of ensuring that the results achieved will yield landscapes which - in addition to meeting nature conservation and other important criteria - are visually coherent, attractive and sustainable. Ideally, there would need to be an overall Landscape Strategy associated with the Master Plan, to which at least a majority landowners would sign up, to ensure that this premise becomes a reality.

5.39 This failure to achieve coherence is well recognised, and is consistent with views expressed in relation to other key drivers of the CWP, especially tourism.

- 5.40 In areas of the CWP where mineral extraction either has not or will not take place, it may in the course of time be possible to achieve an attractive landscape identity for the CWP, through careful consultation and consensus-building involving Local Authority, Development Agency, NFU and CLBA support. However, in areas where minerals have already been extracted and landscape restoration has taken place, it would seem that - as currently framed - the Agri-Environment Schemes would not have a significant role to play in reforming them; the majority of the minerals extracted areas have not been restored to agriculture.
- 5.41 In relation to improving both nature and heritage conservation and visual coherence, the High Level Stewardship Scheme (HLSS) generally offers much greater scope than the Entry Level Scheme. However, in relation to the CWP it suffers from one universal shortcoming (bureaucratic complexity) and one specific disadvantage. The latter relates to the fact that although the HLS applications can be made in the case of land, which will not be worked for minerals in the ten years ahead, one landowner has decided against making such an application. The reason given was that it would be inappropriate to enter into the Scheme in areas where major land use change - such as mineral extraction - is in prospect. Having checked the application criteria with Natural England, which is now responsible for administering the Scheme, it can confidently be reported that no such statutory restrictions exist. Indeed, in areas which are destined for longer-term minerals extraction, it is considered that, provided attention is focused on the appropriate option/s - especially in the case of boundary habitats and corridor features - there would be merit in the holding qualifying for the HLS. Thus in situations where initially such landowners desist from participating in HLS, it would seem strongly desirable that efforts should be made to change attitudes, especially in areas of historic landscape value, such as Down Ampney.
- 5.42 The inter-face between commercial agriculture, minerals extraction and landscape identity is clearly one that should be addressed. Many Regional role models are well known to both the consultants and FWAG. They exhibit the virtues of organic and sustainable farming systems, which are managed with the aid of Whole Farm Plans thereby qualifying for annual payments under HLS. They could be enlisted as demonstration farms as part of the Strategic and Operational planning process, if required, at an appropriate stage.

Considerations for CWP

- 5.43 It is recommended that careful consideration be given to exploring the opportunities identified, particularly those involving:
- both crop and non-crop diversification, particularly those which have a distinct synergy with the wider considerations for the CWP;
 - branded farm products and farm markets;
 - farm-based and related tourism; and
 - creating identity through agri-environment landscape initiatives.
- 5.44 In relation to raising the profile and thus identity of the CWP both as a visitor attraction and as a place where local pride runs high, it is considered that there would also be merit in exploring the scope for embarking on a major sustainable development project on a community-wide scale. Clearly the farming community would have an important role to play as one but one of

the main stakeholder groups needing to be involved. It is envisaged that the development initiative could involve:

- either upgrading the environmental management practices in one or more existing villages; or, more ambitiously; or
- creating one or more new communities, in which all of the sustainable community development and sound environmental management practices, leading to healthy life-styles, would be incorporated (e.g. good spatial planning and design, renewable energy generation, energy conservation, waste re-cycling, traffic and carbon emission reduction, landscape and nature conservation/enhancement etc). There are many helpful role models with respect to both technology systems and community management dimensions. These include respectively the Eco-house (Leicester) and the Alternative Energy Centre (Machynlleth) and a Cotswold Village (Chew Magna).

5.45 The strong need for landowner/farmer perceptions and motivations to influence the formulation and implementation of a Master Plan for the CWP is recognised.