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Process evaluation of the Welsh Marine and Fisheries Scheme

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Process evaluation of the Welsh Marine and Fisheries Scheme

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Views expressed in this report are those of the researcher and not necessarily those of the Welsh Government

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Table of contents

List of tables.....	2
List of figures.....	3
Glossary.....	4
1. Introduction	5
2. Methodology.....	9
3. Overview of the WMFS	15
4. Reflections from scheme applicants.....	31
5. Reflections from the marine and fisheries sector	41
6. Learning from other programmes.....	50
7. Conclusions.....	61
8. Recommendations	68
Annex A: Stakeholder interviewees	72
Annex B: Applicant interviews topic guides.....	73
Applicant interviews: unsuccessful applicants	76
Annex C: Stakeholder interviews topic guide.....	79
Annex D: Comparator schemes topic guide.....	81
Annex E: E-survey questionnaires	83
Annex F: Follow-up interviews with wider sector topic guide	108

List of tables

Table 2.1: Number of applicants and interviews: Successful applicants	11
Table 2.2: Number of applicants and interviews: Unsuccessful / withdrawn applicants	11
Table 3.1: Number of fishers in Wales and the United Kingdom (2021-2022): regular	19
Table 3.2: Number of fishers in Wales and the United Kingdom (2021-2022): part-time	19
Table 3.3: Overview of the first three WMFS funding rounds.....	25
Table 3.4: Number of applications and approved claims by round.....	29

List of figures

Figure 3.1. Index of the number of vessels and gross tonnage for Wales and the UK
between 2017 – 2022 (value in 2017=100) 18

Figure 3.2. Fishing income per FTE in Wales and the UK (2008-2023).....20

Glossary

Acronym	Definition
CaSP Cymru	Wales Coasts and Seas Partnership
EMFF	European Maritime and Fisheries Fund
EU	European Union
Eol	Expression of Interest
GT	Gross Tonnage
MAGWF	Ministerial Advisory Group for Welsh Fisheries
MMO	Marine Management Organisation
RPW	Rural Payment Wales
WMFS	Welsh Marine and Fisheries Scheme

1. Introduction

Overview of the Welsh Marine and Fisheries Scheme

1.1 In December 2022, Welsh Government launched its Welsh Marine and Fisheries Scheme (WMFS). WMFS is designed to “support environmentally and economically sustainable growth in the Welsh seafood industry and encourage the Welsh coastal communities to thrive”.¹

1.2 The WMFS utilises new powers for Welsh Ministers contained in the UK Fisheries Act 2020, and a set of regulations approved by Welsh Ministers in 2022. The scheme itself comprises periodic funding rounds that target specific policy objectives. Each round can cover one or more of 18 separate eligible activities.² The first three funding rounds of the WMFS were:

- Round 1: Marketing Measures (December 2022 to March 2024) aimed to support marketing initiatives for fishery and aquaculture products. It involved a two-stage application process.
- Round 2: Energy Efficiency and Mitigation of Climate Change (January 2023 to March 2024) funded research projects that aimed to understand, establish baselines, and reduce carbon emissions. It involved a two-stage application process.
- Round 3: Health and Safety (September 2023 to March 2024) aimed to improve hygiene, health, safety, wellbeing, and working conditions for fishers and aquaculture workers through health and safety equipment. It involved a one-stage application process.

1.3 The background and context for the WMFS and its delivery is discussed further in Section 3 of the report.

The evaluation

1.4 In December 2023, Welsh Government commissioned SQW to undertake a process evaluation of the first three rounds of the WMFS: Marketing Measures, Energy

¹ Welsh Government (2022) [Welsh Marine and Fisheries Scheme: guidance relevant to all rounds](#)

² Ibid.

Efficiency and Mitigation of Climate Change, and Health and Safety. The evaluation was delivered between December 2023 and September 2024.

- 1.5 The most recent general funding round (opened for applications in February 2024) is out of scope for this evaluation.

Evaluation aims

- 1.6 The WMFS has the capacity to support future funding rounds, therefore it was considered timely by the Welsh Government to evaluate and understand the process of delivery to date. Learning from this evaluation will inform the design and delivery of future funding rounds. It will also help to ensure that the WMFS is able to provide appropriate and well-targeted support to, and engage fully in the scheme, the Welsh marine, fisheries and aquaculture sectors as they adapt to challenging market conditions.

- 1.7 Specifically, the main aims of this evaluation are:

- To explore how the first funding rounds have been delivered including their successes, areas for improvement and lessons learned.
- To understand whether any lessons can be learned from other UK Administrations delivering similar schemes.
- To understand whether the WMFS is meeting the needs of the marine and fisheries sector in relation to marketing, energy efficiency and climate change mitigation, and health and safety.

Evaluation research questions

- 1.8 The research questions for the evaluation are listed below.

- Research question 1: What activities have been delivered through the WMFS via the: marketing measures funding round, energy efficiency and mitigation of climate change funding round, health and safety funding round.
- Research question 2: What has worked well about the application process for and delivery of the WMFS to date, taking into consideration the: marketing measures funding round, energy efficiency and mitigation of climate change funding round, health and safety funding round.

- Research question 3: What has not worked well about the WMFS application process and delivery to date, taking into consideration the: marketing measures funding round, energy efficiency and mitigation of climate change funding round, health and safety funding round.
- Research question 4: What improvements could be made to the application and delivery process of WMFS funding rounds in the future?
- Research question 5: How has the application, delivery and claiming process and/or communications been, in the experience of those who applied in Welsh?
- Research question 6: To what extent have the needs of the sector been met in relation to marketing measures for fishery and aquaculture products, energy efficiency and mitigation of climate change and health and safety – in the view of applicants and stakeholders?
- Research question 7: What are the reasons individuals, organisations and businesses in the marine and fisheries sector may have chosen not to apply for funding via the WMFS?
- Research question 8: Have there been any unintended consequences of delivery of funding through the WMFS?
- Research question 9: What lessons can be learned from other UK Administrations delivering similar funding schemes?
- Research question 10: Are any short-term impacts identifiable from the WMFS?

1.9 As indicated by the questions, whilst the principal focus was on process issues, the evaluation also sought to identify any evidence of short-term impacts to date (RQ 10). Given there were no successful applicants in Round 1, and one in Round 2, the focus was on exploring the short-term impacts of Round 3 (e.g. improved safety, accident prevention). The evaluation was not able to consider RQ 5 ‘How has the application, delivery and claiming process and/or communications been, in the experience of those who applied in Welsh?’ because no applicants applied in Welsh. It is not known why no applicants applied in Welsh.

Report structure

1.10 This report is structured as follows:

- Section 2: Methodology
- Section 3: Overview of the WMFS
- Section 4: Reflections from scheme applicants
- Section 5: Reflections from the marine and fisheries sector
- Section 6: Learning from other programmes
- Section 7: Conclusions
- Section 8: Recommendations

2. Methodology

2.1 This section sets out the evaluation research and analysis approach, and the challenges with data collection that should be considered when interpreting the evidence.

Research approach

2.2 The evaluation has adopted a primarily qualitative approach, which has involved the triangulation of evidence gathered from a range of perspectives in order to assess implementation to date and to identify recommendations for scheme delivery going forward. The rationale for adopting a primarily qualitative approach reflects the focus of the research questions (i.e. on process) and the small applicant numbers for the first three funding rounds, which limited the potential for quantitative analysis. The evaluation has involved the following tasks:

- Scoping interviews with three representatives from Welsh Government Marine and Fisheries Funding Policy Team and one senior process manager in Rural Payment Wales (RPW). The individuals were interviewed at the scoping stage because of their experiences in designing and implementing the WMFS.
- A review of background materials, including strategic and scheme level documentation such as the National Marine Plan, Joint Fisheries Statement, and scheme guidance documents available online to applicants.
- Analysis of secondary data to provide a high-level depiction of the current and recent scale, characteristics and spatial coverage of the marine and fisheries sector in Wales (see paragraph 2.7 for further information).
- Interviews with successful (six) and unsuccessful (two) applicants from two rounds of the WMFS (Energy Efficiency and Mitigation of Climate Change and Health and Safety) (see Annex B for the interview topic guides). The sampling approach is detailed in paragraphs 2.3 and 2.4 below.
- Two surveys: (i) a survey for successful applicants (Health and Safety only) which received five responses and (ii) a survey of those that did not receive funding, which was open to those who applied for WMFS funding but were unsuccessful and the wider sector who did not apply for funding (see Annex E). The survey was routed according to whether they had or had not submitted an

application to one of the first three funding rounds. The survey received no responses from unsuccessful applicants and six responses from the wider sector. At the end of the survey, respondents who did not apply to the WMFS rounds in scope of the evaluation were asked to share their contact details if they were willing to participate in a follow-up interview to explore their answers in more detail; one follow-up interview was conducted. Surveys were used to broaden the opportunities for individuals to participate in the evaluation, and to complement the qualitative research.

- Interviews with seven sector stakeholders including representatives from sector bodies, environment/natural resources organisations, and universities/research institutes (see paragraph 2.6 for further information, Annex A for a list of organisations interviewed, and Annex C for the topic guide).
- Interviews with three representatives involved in the design / delivery of other relevant Welsh Government schemes, the (former) European Maritime and Fisheries Fund (EMFF), Agile Cymru and Coastal Capacity Building Scheme which makes up a part of the Local Places for Nature programme (see Annex D for the interview topic guide).
- A comparator review of other similar schemes in the UK, involving a desk-based review and interviews with policy officials in England, Scotland and Northern Ireland (see Annex D for the interview topic guide).

Sampling approach

- 2.3 Table 2.1 and 2.2 sets out details on the number of applicants (both successful and unsuccessful), those who provided agreement to the Welsh Government to share their contact details with SQW for the evaluation (all of whom were contacted by SQW), and the number of completed interviews by SQW. Under Marketing Measures no applications were approved for funding. Overall, of the 36 applicants, 11 agreed to sharing their contact details, of which eight completed interviews.

Table 2.1: Number of applicants and interviews: Successful applicants

Round	Number of applicants	Number who agreed to be contacted	Number of interviews completed
MM	0	n/a	n/a
EE and MoCC	1	1	1
H&S	22	7	5

Source: Welsh Government and SQW

Table notes: Figures refer to the number of unique organisations that applied rather than the number of applications. Figures for each round include one organisation who applied to all three funding rounds.

Marketing Measures ('MM'); Energy Efficiency and Mitigation of Climate Change ('EE and MoCC'); Health and Safety ('H&S')

Table 2.2: Number of applicants and interviews: Unsuccessful / withdrawn applicants

Round	Number of applicants	Number who agreed to be contacted	Number of interviews completed
MM	3	0	n/a
EE and MoCC	6	2	1
H&S	6	1	1

Source: Welsh Government and SQW

Table notes: Figures refer to the number of unique organisations that applied rather than the number of applications. Figures for each round include one organisation who applied to all three funding rounds.

Marketing Measures ('MM'); Energy Efficiency and Mitigation of Climate Change ('EE and MoCC'); Health and Safety ('H&S')

2.4 For future funding rounds, Welsh Government should consider including a condition within the scheme privacy notice that contact details may be used for research and evaluation purposes, including where Welsh Government commission an independent contractor. This should help any future evaluations to engage with a higher proportion of successful and unsuccessful applicants (see Section 8 for further information).

2.5 Our approach to survey distribution was as follows:

- Successful applicants survey: Welsh Government directly emailed the survey link to successful applicants of the WMFS who did not agree to share their contact details with SQW for an interview. The survey was designed for beneficiaries of

the Health and Safety round only.³ It was distributed to 14 successful applicants and received five responses.

- Unsuccessful applicants and wider sector survey: The survey was distributed via two main routes: (i) sector associations, bodies and organisations in Wales⁴, and (ii) the Welsh Government Fisheries X account. Relating to the former, the stakeholder interviews provided an opportunity to ask representatives bodies to distribute the survey link. The survey did not receive any responses from unsuccessful applicants. Six responses were received from the wider sector, comprising three fishing enterprises, a research institution and a sector association/body. It is not appropriate to estimate the proportion of the marine and fisheries population surveyed given the response rate (note, estimates for the size of the fishing sector specifically are provided in Section 3 which may be relevant to reflect on here).

2.6 For the interviews with sector stakeholders, individuals were identified from the Marine and Fisheries Funding Stakeholder Advisory Group (a dedicated advisory group established by the Welsh Government). All eight members of this Advisory Group were invited for an interview, of which five agreed. A further two interviews were undertaken with members of the Ministerial Advisory Group for Welsh Fisheries (MAGWF) and Wales Coasts and Seas Partnership (CaSP Cymru).

Analysis approach

2.7 The analysis and synthesis of evidence involved:

- Thematic analysis of qualitative evidence from the successful and unsuccessful applicant interviews, open survey questions (from both surveys), and stakeholder interviews. For analysis of interviews, each was written up by the interviewer from the SQW evaluation team using a consistent template. All notes were then analysed thematically against the relevant research questions to draw out key themes and identify consistency of key messages (or variation). Two

³ This was because the sole beneficiary of the Energy Efficiency and Mitigation of Climate Change completed an interview.

⁴ The stakeholder interviews provided an opportunity to ask representatives bodies to distribute the survey link and discuss logistics. Six stakeholders agreed to support with distributing the survey. Approaches to sharing the survey included social media, newsletters, and direct emails to networks.

researchers were responsible for the analysis – focused on the applicant and stakeholder interviews respectively. The emerging findings and key messages were discussed and validated with the study team in an internal workshop (see below).

- Quantitative analysis of secondary data from the Seafish Fleet Enquiry Tool⁵ and UK Sea Fisheries Annual and Monthly Statistics on the marine and fisheries sector in Wales.
- Quantitative analysis of closed questions from the successful and wider sector surveys using Excel. This involved question by question analysis only; no cross-tabulation analysis was possible owing to the small sample sizes.
- An internal workshop attended by the evaluation team to discuss key findings from the research, drawing on the primary and secondary evidence.

Study limitations

2.8 The evaluation faced several challenges and limitations which should be considered when interpreting the evidence:

- First, the number of applicants (both successful and unsuccessful) from the first three funding rounds was small, and as set out above, not all of these agreed to sharing their contact details despite Welsh Government sending multiple request emails. In total, the evaluation was able to gather primary evidence (via an interview or survey) from 11 of the 23 (48 per cent) successful applicants. We have not reported in-depth on individual findings by round in order to maintain anonymity of feedback.
- Second, there were no successful applicants from the first funding round (Marketing Measures), and no unsuccessful applicants from this round agreed to an interview or completed the survey. Therefore, feedback relating to Marketing Measures is from stakeholders only, rather than directly from applicants.
- Third, a broad approach was taken to distributing the wider sector survey, which included stakeholders sharing the survey link via social media channels, newsletter, and directly with their networks. The survey was extended by two

⁵ This Seafish tool provides a summary of data in Tableau on the size, structure and economic performance of the UK catching sector.

weeks to maximise the response rate and stakeholders were asked to send a reminder. Despite this approach, the survey only received six responses. Three individuals agreed to be contacted for a follow-up interview, and an interview was conducted with one individual.⁶ Due to the small sample size, findings should be interpreted with caution. The difficulties engaging with the sector may in part reflect that some businesses are facing considerable viability concerns owing to a range of external factors such as inflationary pressures and the implications of EU Exit. Therefore, understandably participating in the evaluation may not have been a priority for some businesses. The form of engagement may also have had an influence, with in-person surveys potentially preferred by some cohorts (e.g. those less familiar with online platforms). Options to seek to secure further engagement from the sector (for example via in-person interviews) were considered. However, it was agreed by the evaluation team and Welsh Government that in-person engagement would not be deliverable within the evaluation timescales, and the level of engagement from this approach was uncertain. For example, seeking to engage with fishers at ports would not guarantee engagement, as this is their place of work and they may not have the time to engage, there is also a risk that this would have impeded fishers in their business activities.

- Fourth, there was no monitoring data available for the first three funding rounds of the scheme. Outcome indicators were to be agreed at application stage for Marketing Measures and Energy Efficiency and Mitigation of Climate Change, however, there were no successful applicants under the former and one successful applicant under the latter. Outcome indicators were not relevant under the Health and Safety funding round as grant was only available for pre-determined items. Therefore, it was challenging for the evaluation to robustly assess the achieved and expected short-term impacts of the scheme. The assessment of short-term impacts of the WMFS is therefore based on self-reported feedback from successful applicant interviews/survey responses and the perspectives of stakeholders.

⁶ All three individuals were contacted by the evaluation team, but two individuals did not respond.

3. Overview of the WMFS

3.1 This section provides an overview of the WMFS, including the policy context and legislative basis, its aims, and the types of activity supported. A summary of the first three funding rounds in scope for this evaluation is also provided.

Background and context

3.2 The WMFS needs to be understood against the wider policy context in Wales which seeks to promote the sustainable use of natural resources to both protect ecosystems and generate economic and social benefits. Four documents are of particular importance:

- **The Well-being of Future Generations (WFG) Act 2015**⁷ which created seven statutory wellbeing goals and committed public bodies to work in accordance with the sustainable development principle. In the WMFS context, two of the wellbeing goals are particularly noteworthy: ‘Resilient Wales’, which maintains and enhances ecosystems that support social, economic and ecological resilience; and ‘Prosperous Wales’, an innovative and low carbon society which recognises environmental limits whilst developing an economy which generates wealth and employment opportunities.
- **The Environment (Wales) Act 2016**⁸ emphasises the ‘sustainable management of natural resources’ to ensure that their social, economic, environmental and cultural benefits are available for future generations. The Act includes provisions for Natural Resources Wales to produce ‘area statements’ to provide more localised evidence on risks and opportunities.
- The Environment Act includes a **Marine Area Statement**⁹ covering the inshore waters of Wales.
- **The Welsh National Marine Plan (2019)**¹⁰ adopts a 20-year view to provide a framework to support the sustainable management of Welsh seas. It details

⁷ National Assembly for Wales (2015) [Well-being of Future Generations \(Wales\) Act 2015](#)

⁸ National Assembly for Wales (2016) [Environment \(Wales\) Act 2016](#)

⁹ Natural Resources Wales (2023) [Area Statements](#)

¹⁰ Welsh Government (2019) [Welsh National Marine Plan](#)

cross-cutting and sector-specific policies and objectives. One of the latter is to “support and safeguard a sustainable, diversified and profitable fishing sector.”

- 3.3 Against this background, the WMFS was Welsh Government’s first domestic scheme post EU Exit.¹¹ It was created as a successor to – but not direct replacement for – the previous European Union funded scheme (EMFF) which was no longer available to the Welsh (or wider UK) fishing industry following EU Exit. In this sense, WMFS is comparable to the Marine Fund Scotland, the Fisheries and Seafood Scheme in England, and the Marine Environment and Fisheries Fund in Northern Ireland. In addition, a new £100m UK wide scheme – UK Seafood Fund – delivered by Defra has been established to support the long-term future and sustainability of the UK fisheries and seafood sector.
- 3.4 The legislative basis for the WMFS is provided by the Fisheries Act 2020 passed by the UK Government, and a set of regulations approved by Welsh Ministers in 2022 using powers conferred on them by the Act (‘Marine, Fisheries and Aquaculture (Financial Assistance) Scheme (Wales) Regulations 2022’). The Act provides a framework for sustainable management of UK fisheries, including mechanisms for financial assistance, and the activities which are eligible for financial support under the Scheme. Under the Act, responsibility for financial assistance is devolved to each of the UK’s devolved administrations.¹²
- 3.5 The WMFS was also informed by the Joint Fisheries Statement 2022 which was agreed by Welsh Ministers and other UK administrations to outline how each of the fisheries policy authorities will meet the eight objectives of the Fisheries Act 2020. The Statement aims to deliver “world class, sustainable management of our sea fisheries and aquaculture” through three areas including “supporting a modern, resilient and environmentally responsible fishing industry”.¹³
- 3.6 The context for the delivery of the first three rounds of WMFS has been challenging. Specifically, fisheries are still navigating the implications of the UK’s exit from the

¹¹ Prior to the UK’s exit from the European Union, fisheries management in the UK was governed by the Common Fisheries Policy

¹² Welsh Government (2022) [The Marine, Fisheries and Aquaculture \(Financial Assistance\) Scheme \(Wales\) Regulations 2022](#)

¹³ Department for Environment, Food & Rural Affairs (2022) [Joint Fisheries Statement](#)

EU and associated trade and regulatory decisions. This particularly impacted the aquaculture sector because live bivalve exports such as mussels and oysters from non-Class A waters that had not been purified were banned from entering the EU¹⁴ – many producers in Wales operate in Class B waters. Fisheries also need to navigate the impacts of wider conditions including energy prices and inflationary pressures. Taken together, these external influences have considerably impacted the long-term viability, and investment capacity, of many businesses across the Welsh fisheries and marine sectors.¹⁵

Sector trends

- 3.7 Data from the Seafish Fleet Enquiry Tool provide an insight as to how the Welsh Fisheries sector has changed over time, and how these trends compare to the rest of the UK.¹⁶ The latest data available are from 2023, and based on data provided to Seafish by the Marine Management Organisation (MMO) but covers data collected across the UK by the devolved fisheries administrations. Fisheries administrations are the organisations responsible for fisheries management in each of the home nations. The MMO is the devolved fisheries administration responsible for managing marine activities in England, and the Welsh Government is the responsible fisheries administration in Wales.¹⁷ This has been supplemented by data from the MMO's UK sea fisheries annual statistics report 2022 (published in September 2023), which provides data regarding fleet characteristics in Wales and the UK.
- 3.8 The Welsh fisheries industry is relatively small in a UK industry context. In 2023, there were an estimated 3,824 active fishing vessels in the UK - 223 of which were in Wales, making up 5.8 per cent of the UK total. Both the UK and Wales have experienced a consistent decline in the number of vessels since 2017; at that point there were 321 in Wales and 4,637 in the UK.
- 3.9 While both Wales and the UK have experienced a similar level of decline in the number of active vessels, they have diverged in Gross Tonnage (GT) terms.¹⁸

¹⁴ For example, see: House of Commons (2023) [Library Debate Pack: Shellfish aquaculture](#)

¹⁵ For example, see: [Welsh fishing industry is facing 'sea of challenges' | Fishing News](#)

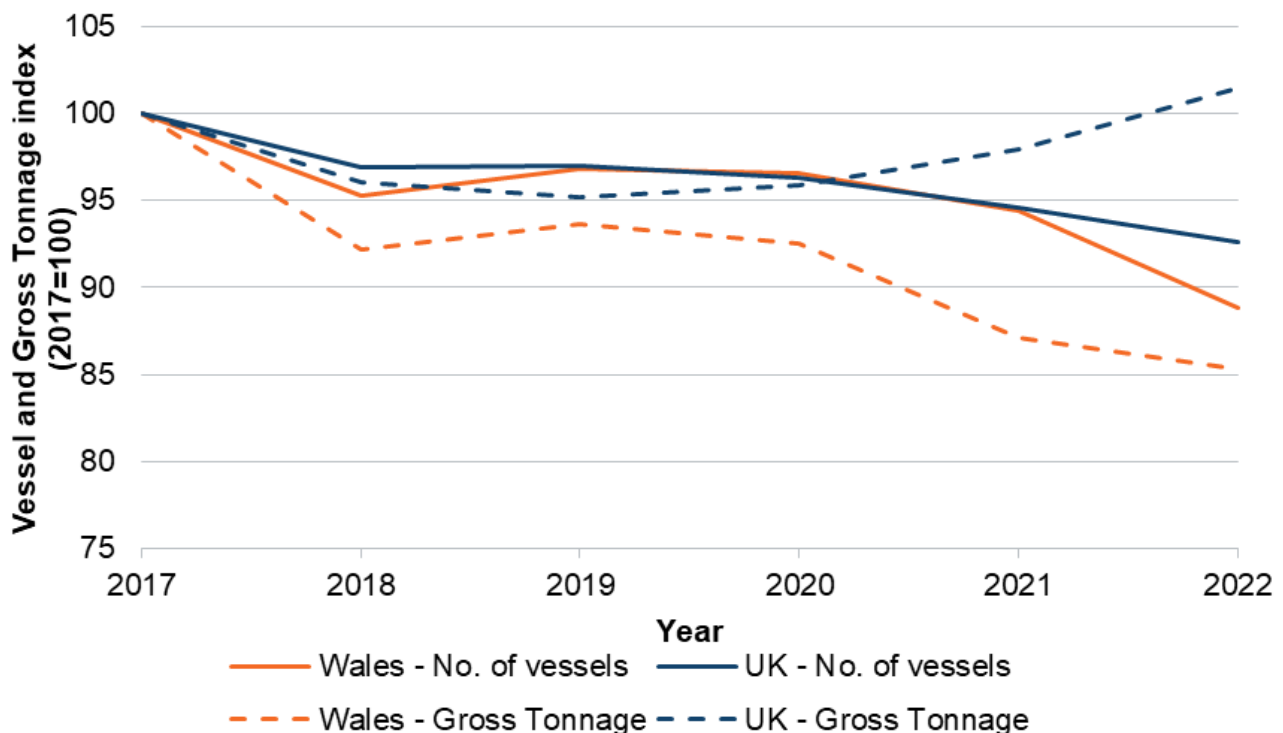
¹⁶ Seafish (2024) [Fleet Enquiry Tool](#)

¹⁷ Marine Management Organisation (2023) [UK sea fisheries annual statistics report 2022](#)

¹⁸ Gross tonnage (GT) is a volumetric measure of vessel capacity.

Figure 3.1 shows how the UK has been able to retain a similar level of GT despite a decline in vessels, while Wales has experienced a substantial decline in its GT since 2017. Moreover, GT in Wales has declined by a higher rate than the number of vessels, meaning the average GT per vessel has fallen in Wales while the average GT per vessel has risen UK-wide. Therefore, not only does Wales now have a smaller number of vessels in total, these vessels are also smaller (in GT terms) on average compared to 2017. In comparison, the UK as a whole has seen its average vessel capacity increase while the number of vessels has fallen.

Figure 3.1. Index of the number of vessels and gross tonnage for Wales and the UK between 2017 – 2022 (value in 2017=100)¹⁹



Source: SQW analysis of UK sea fisheries annual statistics report 2022 data

3.10 There were approximately 650 fishers in Wales in 2022, making up roughly 6 per cent of all fishers in the UK. The number of regular fishers declined in Wales between 2021 and 2022, while the UK figure rose slightly (see Table 3.1 and 3.2). It was not within the scope of the evaluation to explore the reasons for this decline in regular fishers, however, factors that are likely to have contributed to this trend are

¹⁹ Data for Vessels and Gross Tonnage have been indexed to 100 in 2017. Indexing has been used allow easier comparison of change in values over time relative to this starting point, and each other.

discussed at paragraph 3.12. Part-time fishers represent a larger proportion of the Welsh industry: in 2022, 39 per cent of Welsh fishers were part-time, compared to 14 per cent of UK fishers as a whole.

Table 3.1: Number of fishers in Wales and the United Kingdom (2021-2022): regular

Region	2021 (% of employees)	2022 (% of employees)	Percentage change
Wales	532 (68%)	399 (61%)	-25.0%
United Kingdom	8,806 (82%)	8,909 (86%)	+1.2%

Table 3.2: Number of fishers in Wales and the United Kingdom (2021-2022): part-time

Region	2021 (% of employees)	2022 (% of employees)	Percentage change
Wales	253 (32%)	255 (39%)	+0.8%
United Kingdom	1,918 (18%)	1,447 (14%)	-24.6%

Source: SQW analysis of UK sea fisheries annual statistics report 2022 data.

3.11 Despite challenges in recent years, fishing income per full-time equivalent (FTE)²⁰ increased in both Wales and the UK (although is relatively volatile year-on-year) between 2008 to 2019, largely driven by increases in the average prices that fish can be sold for.²¹ In particular, a sharp rise in the price of Shellfish between 2016-2017²² contributed towards higher incomes, particularly in Wales which had a relatively high proportion of its sales made up by Shellfish (in 2017, 87% of Welsh sales were in Shellfish compared to 38% in the UK).²³ Figure 3.2 shows a sharp decline in income per FTE in both Wales and the UK between 2019 and 2020, which is the product of socio-economic challenges presented by the Covid-19 pandemic. However, since 2020, income per FTE in Wales continued to decline between 2020-2023, while it has recovered in the UK as a whole.

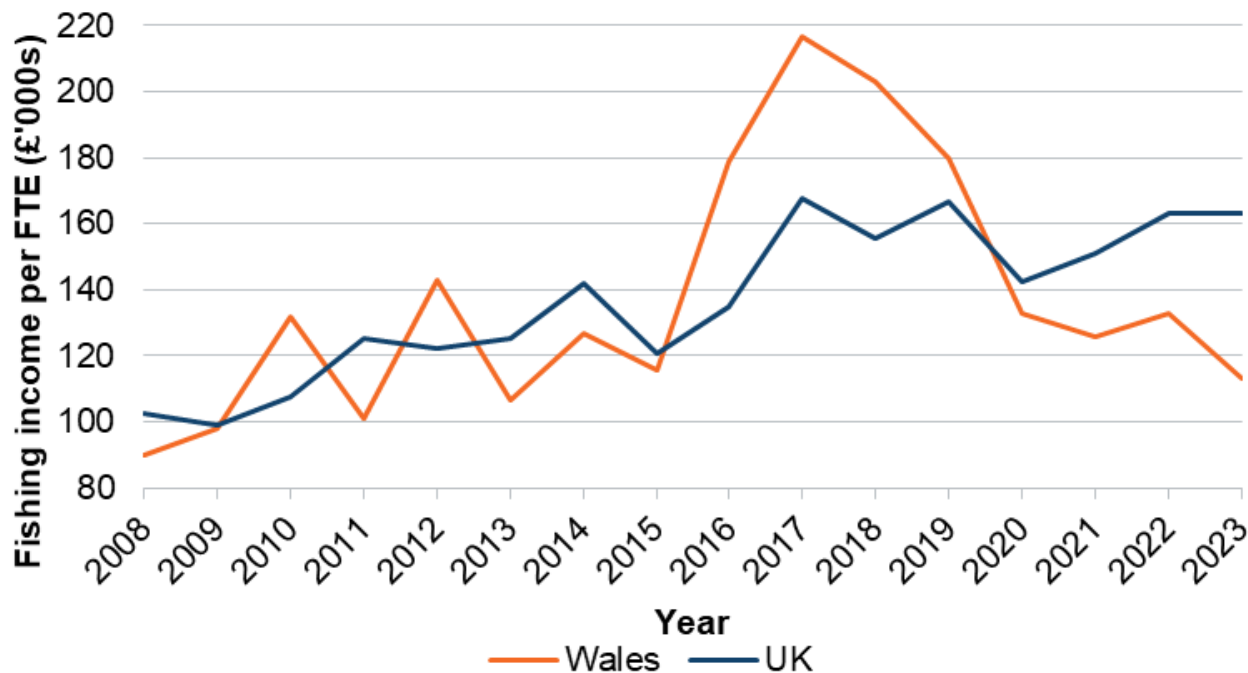
²⁰ A full-time person is counted as one FTE, while a part-time worker gets a score in proportion to the hours they work.

²¹ For further information see: MMO (2023) [UK sea fisheries annual statistics report 2022 – Landings](#)

²² Seafish (2018) [Economics of the UK Fishing Fleet 2017](#)

²³ Marine Management Organisation (2018) [UK Sea Fisheries Statistics 2017](#)

Figure 3.2. Fishing income per FTE in Wales and the UK (2008-2023)



Source: SQW analysis of Seafish Enquiry Tool data

3.12 Overall, the data suggest that the fisheries industry in Wales is small relative to the scale of the UK industry, and it has become smaller in absolute terms in recent years. While fishing income should be interpreted carefully due to its volatility year-on-year, the data suggest that income per FTE in Wales has experienced persistent decline since 2017, while UK fishing income has recovered following the Covid-19 pandemic. A number of industry challenges, including the Covid-19 pandemic, the UK’s exit from the EU and regulatory challenges, are likely to have contributed towards this decline.²⁴

Scheme overview

3.13 An initial three-year funding allocation of £6.2m between 2022/23 and 2024/25 was provided by the UK Government to support marine, fisheries and aquaculture in Wales. This funding pot supports a range of support mechanisms, including WMFS. A total budget of £1.5m for 2023/24 was allocated to the first three rounds of WMFS.

²⁴ For example, see: [Welsh fishing industry is facing ‘sea of challenges’ | Fishing News](#)

- 3.14 The WMFS aims to “support environmentally and economically sustainable growth in the Welsh seafood industry and encourage the Welsh coastal communities to thrive.”²⁵
- 3.15 Specifically, the four key aims of the WMFS are to:
- provide Welsh Ministers with the scope and flexibility to provide financial assistance over a wide range of subject areas within the Welsh marine, fisheries and aquaculture sectors
 - invest strategically for the long-term benefit of the sectors
 - adapt to short-term challenges and opportunities
 - support our seafood producers, coastal communities and marine environment to thrive together.
- 3.16 To achieve this, WMFS can support a relatively broad range of 18 separate activities, including but not limited to those which promote innovation, infrastructure establishment, marketing, and the conservation of aquatic ecosystems and biodiversity (full list of activities below). The WMFS operates through a series of funding rounds. Each round can address one or more policy priorities and cover one or more of the 18 eligible activities. The funding rounds are delivered via RPW.
- 3.17 A dedicated Advisory Group – the Marine and Fisheries Funding Stakeholder Advisory Group – was established for the scheme to provide a mechanism for engaging with the sector to inform scheme design and delivery.

Activities that can be funded under the WMFS

- Activities which promote innovation.
- Activities relating to professional advisory services.
- Activities which promote human capital, networking.
- Activities which improve hygiene, health, safety and wellbeing.
- Activities which support diversification of businesses.
- Activities which mitigate the effects of adverse extenuating circumstances.

²⁵ Welsh Government (2022) [Welsh Marine and Fisheries Scheme: guidance relevant to all rounds](#)

- Activities which establish or improve infrastructure for marine and freshwater users.
- Activities which promote job creation and encourages new entrants to the marine, fishing and aquaculture industries.
- Activities which support fishers or aquaculture farmers to establish new fishing or aquaculture businesses.
- Activities which contribute to the sustainable development of aquaculture sites.
- Activities which support the marketing of marine, fisheries and aquaculture products or recreational fishing.
- Activities which lead to new or improved products, processes or management and organisation systems.
- Activities which reduce the impact of seafood production on the marine environment.
- Activities which contribute towards conservation, restoration or enhancement of aquatic ecosystems and biodiversity.
- Activities which contribute to the design and implementation of conservation measures.
- Activities which support marine spatial planning for the sustainable use of marine and coastal resources.
- Activities which contribute towards the mitigation of climate change or its effects.
- Activities which maintain or improve animal health and welfare.

3.18 This evaluation covers the first three WMFS funding rounds: Marketing Measures; Energy Efficiency and Mitigation of Climate Change; and Health and Safety.

3.19 It is noted that a fourth 'General' round of the WMFS is currently underway (2024/25 financial year); this round is not within scope of the evaluation.²⁶ The fourth round offers both capital and revenue funding, is broad in focus, and is open to both marine and fisheries enterprises. The round was launched in February 2024, the application window closed in May 2024, and the claims deadline is the end of March 2025.

²⁶ Welsh Government (2024) [General funding round \(Welsh Marine and Fisheries Scheme\): guidance](#)

First three funding rounds

- 3.20 The table overleaf provides an overview of each of the three in-scope funding rounds, including aims, grant characteristics, application process, and timescales. As demonstrated, the rounds were varied in their processes (i.e. single and two-stage application process), funding type (i.e. revenue and capital), scale (i.e. grants ranging from £200 to £100,000), and areas of focus.
- 3.21 In terms of eligibility:
- Rounds 1 and 2 were designed for marine, seafood, and aquaculture enterprises, with Round 2 also open to academia, scientific / technical bodies and the third sector
 - Round 3 was specifically targeted at commercial fishing or aquaculture enterprises.
- 3.22 The three funding rounds were delivered sequentially. Marketing Measures, opened for applications in December 2022. The application window for the Energy Efficiency and Mitigation of Climate Change opened in January 2023, followed in September 2023 by Health and Safety. All three rounds were promoted through the following mechanisms:
- A Press Notice was released and hosted on the Welsh Government website and on the Welsh Government Fisheries X account (which was cascaded by sector bodies).
 - All members of the Marine and Fisheries Funding Policy Stakeholder Advisory group, MAGWF, and CaSP were emailed details of the funding rounds, and were asked to share the information with their members and wider in the marine and fisheries sector.
 - Where possible, fisheries licence and intertidal permit holders were emailed, and if no emails were held, letters were posted.
- 3.23 The application process for the first two revenue funding rounds was a two stage process – an Expression of Interest (EoI) and full application – whereas Health and Safety adopted a one stage process. The Health and Safety round used a standard cost approach whereby a list of eligible items and their associated costs were pre-

determined by Welsh Government. For all three rounds, claims were required to be submitted and approved by the end of March 2024.

Table 3.3: Overview of the first three WMFS funding rounds

Funding round information	Round 1: Marketing Measures ²⁷	Round 2: Energy Efficiency and Mitigation of Climate Change ²⁸	Round 3: Health and Safety ²⁹
<p>Overall aim</p>	<p>To support marketing initiatives for fishery and aquaculture products with several strategic objectives:</p> <ul style="list-style-type: none"> • Finding new markets for various types of fishery and aquaculture products (e.g. species with marketing potential, unwanted catches etc.) • Promoting quality and value-added aspects of these products by facilitating compliance with certification requirements, promoting sustainable practices, and supporting direct marketing efforts. • Enhancing transparency and traceability in production and markets through market research, surveys, and studies. 	<ul style="list-style-type: none"> • Research to understand, establish baselines, and reduce carbon emissions, including improving energy efficiency and adapting to climate change effects. • Activities such as energy efficiency and carbon audits, data analysis, and feasibility studies for innovative products/processes. 	<ul style="list-style-type: none"> • To improve hygiene, health, safety, wellbeing and working conditions for fishers and aquaculture workers by providing grants for investments in health and safety equipment.

²⁷ Welsh Government (2022) [Marketing Measures \(Welsh Marine and Fisheries Scheme\): guidance](#)

²⁸ Welsh Government (2023) [Energy Efficiency and mitigation of Climate Change \(Welsh Marine and Fisheries Scheme\): guidance](#)

²⁹ Welsh Government (2023) [Health and Safety \(Welsh Marine and Fisheries Scheme\): guidance](#)

Funding round information	Round 1: Marketing Measures	Round 2: Energy Efficiency and Mitigation of Climate Change	Round 3: Health and Safety
Indicators / outcomes	<ul style="list-style-type: none"> • Number of jobs created • Number of jobs secured • Number of New Markets identified / secured • Increase in revenue and/or sales • Number of Market surveys/studies/research carried out compared to previous years 	<ul style="list-style-type: none"> • Anticipated level of energy efficiency saving in the target sector measured as, for example, Kilowatt/Hour (kWh) per annum or Litres of fuel/Tonne of landed catch. • Anticipated % reduction in carbon (and other greenhouse gas) emissions in CO2 tonnes per annum for the target sector. • Number of energy efficiency/carbon audits/feasibility studies complete 	N/A
Type of grant	Revenue only	Revenue only	Capital only
Scale of grant	£500 - £50,000 per project Maximum intervention rate dependent on type and size of applicant (30 per cent to 100 per cent).	£500 - £100,000 per project Maximum intervention rate dependent on type and size of applicant (30 per cent to 100 per cent).	£200 - £10,000 per applicant Maximum intervention rate between 50 per cent (non-micro-entity) and 80 per cent (SME-micro-entity) of the approved standard cost.
Application process	Two-stage application process: EoI and full application.	Two-stage application process: EoI and full application.	One stage application process. Standard cost scheme.

Funding round information	<ul style="list-style-type: none"> • Round 1: Marketing Measures 	<ul style="list-style-type: none"> • Round 2: Energy Efficiency and Mitigation of Climate Change 	<ul style="list-style-type: none"> • Round 3: Health and Safety
Key dates	<ul style="list-style-type: none"> • Eol window opened 05/12/22 and closed on 13/01/23. • Eol outcome notification: within six weeks. • Full application submission window: 13/02/23 to 09/05/23. • Full application appraisal completion: aim within 90 days. • Activity had to be completed, and expenditure defrayed and claimed by 31/03/24. 	<ul style="list-style-type: none"> • Eol window opened 10/01/23 and closed on 06/02/23. • Eol outcome notification: within six weeks. • Full application submission window: 09/03/23 to 01/06/23. • Full application appraisal completion: aim within 90 days. • Activity had to be completed, and expenditure defrayed and claimed by 31/03/24. 	<ul style="list-style-type: none"> • Application window opened 06/09/23 and closed on 11/10/23. • Claims deadline: 120 calendar days of the date the contract is issued.

Source: SQW based on WMFS scheme guidance documents

- 3.24 A breakdown of the number of successful, unsuccessful, and withdrawn applications is presented in the table below. Across the three rounds, 23 of 41 applications (56 per cent) were successful. The three funding rounds received applications from, and awarded grants to, a range of different organisation types. Applicants were most commonly seafood enterprises, accounting for four of the six Marketing Measures applications and all but one of the successful Health and Safety applications. The seven full applications to Energy Efficiency and Mitigation of Climate Change were from three universities, three other research institutions, and one aquaculture sector organisation.
- 3.25 There were no successful applications under Round 1 (Marketing Measures). Feedback from Welsh Government suggested that this can, at least in part, be explained by the profile of applicants. Round 1 was intended to support marketing initiatives for fishery and aquaculture products. However, contrary to Welsh Government expectations, no fishers applied. Therefore, the types of projects set out in the applications received did not align with the strategic aims and objectives of the funding round, and were not funded.
- 3.26 There was one successful application under Round 2 (Energy Efficiency and Mitigation of Climate Change) which claimed £26.3k. As part of the claim, proof of completion of an energy audit was provided. Energy efficiency savings could not be measured at the time of final claim as these savings would come from implementing the recommendations from the energy audit, which was not funded as part of the project. Again, it was highlighted by Welsh Government representatives that the profile of applicants was not as intended: the expectation was that fishers would apply for energy efficiency and carbon audits for their boats to use as an evidence base for upgrades. However, this was not the case in practice. Five applications were unsuccessful on the basis that they did not align with the aims of the round, activities were not eligible, and they were unable to meet the result indicators/outcomes. Also, one application was withdrawn due to insufficient time to complete the projects within the funding period.
- 3.27 Under Round 3 (Health and Safety), 28 applications were received and 22 applications were approved. However, the number of grants claimed was lower: 15 grant claims were submitted, of which 13 were approved and processed for

payment totalling c. £46.7k. The remaining two claims (accounting for £17.6k of requested grant drawdown) were unsuccessful and not paid. It is noted that seven approved grant applications were not subsequently claimed. Where known, the main reason why applicants did not claim was that they were unable to source the equipment to the specifications required.

Table 3.4: Number of applications and approved claims by round

Round	No. of Eols	No. of applications	No. of successful applications	No. of un-successful applications	No. of applications withdrawn	No. of claims approved
Round 1: MM	6	6	0	6	0	0
Round 2: EE and MoCC	10	7	1	5	1	1
Round 3: H&S	n/a	28	22	4	2	13
Total	16	41	23	15	3	14

Source: Welsh Government

Considerations

3.28 The scoping interviews highlighted that the number of applications for the first three rounds was lower than anticipated by the Welsh Government. Feedback suggested four key factors may have contributed to the level of demand:

- Rounds 1 and 2 provided revenue funding based on the agreement with UK Government. However, all scoping interviewees suggested (based on their experience and knowledge working in policy development and programme implementation in marine and fisheries) that capital funding is preferred by fishers. The funding type was seen to have led to the lack of applications by fishers for Rounds 1 and 2.

- The scheme has an annualised budget meaning projects must be delivered and grants claimed within one financial year. Therefore, unlike the earlier EMFF, it was not possible to provide the opportunity for supported organisations to deliver longer-term, larger-scale projects with the potential for greater outcomes. This was seen to have potentially reduced demand from marine, seafood, or aquaculture enterprises.
- Linked to the above, completing the application, project delivery, and claims process within a 12 month period is challenging. Overall, the two-stage application process for Rounds 1 and 2 took around eight months, leaving six/seven months for projects to be delivered and grants claimed. This was despite the application windows for both rounds opening prior to the financial year of the grant (i.e. 2023/24) in December 2022 and January 2023 for Rounds 1 and 2 respectively with the intention of maximising the delivery period. This tight delivery period may have led to uncertainty over the deliverability of activity, leading to reduced demand.
- The challenges currently facing the sector mean that some businesses are not able to provide the required match funding for the grants.

3.29 Feedback from applicants and wider sector stakeholders relating to these issues is discussed in the sections that follow.

4. Reflections from scheme applicants

- 4.1 This section presents the evidence from successful applicants collected through the six interviews and five survey responses. It reflects on the effectiveness of the customer journey, short-term impacts of the scheme, aspects of the scheme that could be improved going forward, and future funding needs. The evidence has been analysed collectively to ensure anonymity for all interviewees and survey respondents.
- 4.2 Evidence from unsuccessful applicants is also presented. Given the small number of unsuccessful applicants interviewed (two), their feedback has been summarised and presented separately at the end of the section.

Background and context

Rationale for WMFS application

- 4.3 All successful applicants interviewed applied to the WMFS to fund the purchase of new equipment or to facilitate the upgrading of existing equipment. Survey respondents cited similar motivations for applying to the WMFS.
- 4.4 In the absence of WMFS funding, two interviewees would not have purchased the equipment/kit due to costs, while others explained how the scheme offered financial support with purchasing equipment which they may have otherwise purchased in future. The role of the scheme was therefore to accelerate and expedite this purchase.
- 4.5 Applicants were asked about their previous experiences of applying for public funding. Six of the eleven applicants interviewed/surveyed, had previous experience applying for capital or revenue funding from other Welsh/UK Government or EU funded schemes. This included EMFF, the Welsh Government's Coastal Communities Fund and Innovate UK. None of the survey respondents nor interviewees identified alternative sources of funding which could have been used to deliver the same activity eligible for funding under the WMFS. However, in one case, WMFS funding was used to continue to fund activities which had previously received funding from other sources.

Effectiveness of the Customer Journey

Promotion and marketing

- 4.6 The communication channels through which applicants were made aware of the funding varied across the successful applicants interviewed / surveyed. Successful applicants reported first becoming aware of the relevant funding round of the WMFS through email (and mail for those without an email address), sector bodies/associations (e.g. Welsh Fisherman's Association, Welsh Aquaculture Producers' Association), social media and word-of-mouth.
- 4.7 There was mixed feedback on the marketing and promotion of the scheme. Two survey respondents rated the marketing and promotion as good/excellent (scoring four or five, where one is poor and five is excellent), whilst the remaining four respondents rated it neutral (i.e. three out of five). This was corroborated by three interviewees, who emphasised the importance of ensuring that the scheme is promoted through both digital and physical materials, in order to maximise the reach of programme. Two interviewees suggested specific ways to improve marketing and promotion:
- enhancing the visual appeal of marketing materials (e.g. use of posters, rather than plain text emails) was suggested by one interviewee
 - automated notifications from the Welsh Government for registered fishers alerting them of upcoming funding opportunities was suggested by another interviewee.

Application, assessment and contract

- 4.8 Overall, survey respondents thought the design of the funding round was clear, with most applicants (four) rating various aspects – eligibility criteria, size of the grant, and rate of intervention (i.e. the proportion of total project costs eligible for grant support) – clear or very clear (i.e. four or five out of five, where one is very unclear and five is very clear) in terms of clarity as explained in scheme documentation and guidance. The remaining applicant scored the clarity of these aspects as unclear or neutral (i.e. two or three out of five). No successful applicants interviewed suggested improvements to any of these aspects of design.

4.9 However, all but one of the successful applicants interviewed were generally dissatisfied with the application process itself. The one interviewee who was satisfied found the application process to be simpler than previous grant applications. Specific challenges highlighted by applicants that were dissatisfied included:

- ambiguity over the types of activities which could be funded through the scheme
- difficulty navigating and using the online RPW system (for example, some questions, such as calculating future fuel usage and daily catch, were difficult for the applicants to answer)
- a perceived inability to contact RPW or Welsh Government and receive support, resulting in a perceived 'impersonal' application process
- (for Round 3 specifically) strict requirements in equipment specification, particularly in comparison to the perceived flexibility provided under the precursor EMFF Standard Costs scheme. In some instances, it was felt that these requirements did not align with the needs of applicants. As a result, it was felt that restrictions may potentially compromise safety, where strict eligibility criteria mean that equipment purchased through the scheme is not suitable for the vessel in which they are installed (e.g. incorrect size / specification etc). It was noted that strict requirements may deter people from applying for future schemes.

4.10 Some examples of the feedback provided are set out below:

"[The RPW portal] makes it really inaccessible to people who don't come from a background of applying for grants." (Applicant interview)

"The rigid specs for the equipment are in fact detrimental to safety." (Applicant interview)

4.11 Two interviewees mentioned receiving support from third-party amateurs or advisors to help with their application. They received support regarding clarifications about the scheme, auditing requirements, and the type of equipment eligible under the scheme. However, this was not common to all applicants.

4.12 Further, two interviewees were aware of other potential applicants that they reported decided not to apply mainly due to the online application process. It was

suggested that a simplified application process (for example, a portal which is easier to navigate and upload documentation), with appropriate support, would improve the accessibility of the funding. It was also noted by three interviewees that application processes for other schemes (e.g. UK Seafood Fund, the precursor EMFF Standard Costs scheme) were seen to be more straightforward compared to WMFS.

- 4.13 Experiences of the assessment process were generally positive. Three of four survey respondents believed the assessment process to be transparent, with feedback provided through the process deemed to be useful.³⁰ One survey respondent was dissatisfied with transparency of the process (rating it two out of five). Five of the interviewees were satisfied with the assessment process. The one interviewee who was dissatisfied felt the assessment process was too long. They explained that (in their view) the extended assessment process was detrimental to their project, whereby approval delays shortened the delivery and claim submission timeframe, therefore the project was unable to deliver fully against expected benefits.
- 4.14 The two-step application process for Round 2, involving an EoI and full application, received positive feedback from the two interviewees who completed this process. The EoI requirements were considered proportionate to assess whether the proposed project would meet the aims and objectives of the WMFS.
- 4.15 Survey respondents were generally satisfied with the assessment and contract process with three (out of four³¹) rating the transparency of the process and the feedback provided as five (where one is very dissatisfied and five is very satisfied), and three (out of four) rating the time taken between application and receiving the contract offer as four or five (i.e. satisfied/very satisfied).

Delivery of activity

- 4.16 Given the number of successful applicants, the scale of activity delivered under the first three funding rounds was modest. However, where activity was funded through the WMFS, it was generally delivered as intended. All survey respondents (relevant

³⁰ One survey respondent did not provide a response to this question.

³¹ One respondent did not answer the question

to Round 3 only) reported that activity was delivered as anticipated, and that the equipment purchased met their needs in relation to enhancing the health and safety of their organisation. The Health and Safety round enabled the purchase of a variety of items, with the items most commonly reported by survey respondents including searchlights, lifejackets, handheld radios, ladders, net bins, and autopilot systems. It was reported that this equipment is now being used (or is available for use when designed for emergency use only).

- 4.17 Overall, interviewees were also able to deliver activity as planned. However, for some there was misalignment between the activity that was funded and their initial expectations. In particular, it was noted the scale of activity could have been greater with a shorter assessment process, or the funding had been more flexible in terms of the types/specification of equipment eligible for funding.

Monitoring and claims

- 4.18 While survey respondents found the monitoring and claims process to be simple, the majority of those interviewed experienced some difficulties. Issues experienced by individual applicants included an inability to claim funding due to differences between equipment purchased compared to what was eligible, a longer than expected period for reimbursement following submission of the claim (noting how this can result in cash flow challenges for sole traders and small organisations) and compressed timelines for the auditing of purchases (causing challenges for equipment with longer lead times). One interviewee was unable to claim their grant because the equipment purchased was deemed to be ineligible due to differences in specification. Other beneficiaries found that the claim requirements lacked clarity from the outset, so they were asked for additional evidence following their initial claim submission.
- 4.19 Two interviewees also pointed out the delay between filing a claim and receiving reimbursement as an issue, which was seen to be a challenge for sole traders and small businesses given cash flow constraints. This concern is greater when there is little flexibility in eligible equipment for the scheme, increasing the risk of not being reimbursed. This was also seen to have influenced the level of demand for the WMFS, as one interview noted:

“Applicants have to fund everything themselves initially until they receive it back and some people don’t have the capacity to do it ... Many fishing businesses don’t have the spare cash, not because it would not be useful, but they don’t have the money, so I think this is the number one reason for a low number of applicants”. (Applicant interview)

- 4.20 There was mixed feedback from survey respondents on the grant claims process. Two (out of five) were very satisfied with the timeliness of the process (rated it five, where one is very dissatisfied and five is very satisfied). The remaining three respondents were dissatisfied (two respondents) or neutral (one respondent) about the timeliness of the process. Furthermore, three (out of five) survey respondents were satisfied or very satisfied with the evidence required (e.g. invoices, receipts) and the overall ease/clarity of the process.³²
- 4.21 As a condition of the grant award, Welsh Government state that equipment purchased using the funds and any associated paperwork, can be reviewed in the next five years to ensure compliance. These monitoring requirements were felt to be appropriate, with no interviewees mentioning how these could be improved.

Short-term impacts

- 4.22 Evidence of short-term impacts of the first three funding rounds is limited at this stage. Some indications of short-term impacts from both survey respondents and interviewees include:
- safer working practices as a result of new or improved equipment
 - installation of more efficient and/or effective equipment, leading to potential increased productivity and lower running costs
 - increased capacity for catching and storage, helping to indirectly generate revenue.
- 4.23 Some interviewees highlighted that these impacts could have been more pronounced (delivered quicker, on a larger scale, higher quality) had the funding been more flexible (e.g. in terms of eligible equipment) to their business needs and delivered in a more timely manner.

³² The remaining two respondents rated the evidence requirements as two (i.e. dissatisfied) and overall ease / clarify of the process as one (i.e. very dissatisfied) and three (i.e. neutral)

4.24 The evidence also indicates that challenges experienced by WMFS applicants may have had a negative effect on interest in future funding opportunities. Two of the survey respondents indicated they would not be interested in applying for potential future rounds of WMFS. Similarly, some interviewees (three) expressed their reluctance to apply for any future funding rounds if the process remains the same, because in their view the application process was disproportionate to the potential financial award.

Overall reflections

4.25 In general, successful applicants highlighted the value of the funding in supporting activities beneficial to their organisation. However, they also identified a number of ways in which the WMFS could be improved going forward to maximise the benefits for industry:

- **Greater alignment with the needs of industry.** While successful applicants felt that the activity funded by WMFS was of value, it was felt it could have been of greater value if the scope of eligible activities had been broadened, both in terms of the types of activities (e.g. training, vessel modification etc) as well as increased flexibility in what the funding allowed (e.g. specification of equipment). More broadly, there was felt to be a need to address emerging sector challenges, such as adaptations to comply with evolving policy and regulation changes (e.g. Maritime and Coastguard Agency requirements, catch limits, net zero requirements etc.).
- **Improve sector engagement and support.** Linked to the above, in order to ensure future funding rounds are more aligned with the needs of the sector, it was suggested that Welsh Government engage more fully with industry when designing the scheme. Two interviewees suggested that Welsh Government could increase its presence at fishing ports by funding on-site 'relationship managers'. These managers would serve as intermediaries, fostering consistent dialogue between the industry and policymakers during the design and marketing phase.
- **Support during the application phase:** Feedback indicated that increased support from the Welsh Government policy team or RPW (or equivalent) during

the application process would be beneficial so that potential applicants can design a project which is eligible and aligns with the overall priorities of the sector.

- **Improved ease of access to funding.** It is important to design and deliver a scheme which is fully accessible to all segments of the sector in order to increase demand. Addressing issues relating to the complexity of the application submission, the assessment process, and claims submission were highlighted as particularly important. It was noted that if not addressed, some WMFS applicants may choose not to apply for future funding opportunities.

Future funding needs

- 4.26 Successful applicants identified several challenges and opportunities that could be addressed or taken advantage of with the support of future funding for the sector. Challenges identified in the survey include navigating difficult market conditions (e.g. low market prices, challenges associated with overfishing), with opportunities seeking to address these being in access to new markets (such as enabling fishers to sell straight to public).
- 4.27 In response to these challenges and opportunities, survey respondents suggested that future funding rounds may seek to support fishers or aquaculture farmers to establish new fishing or aquaculture businesses, as well as help with complying with new regulations (e.g. fishing restrictions). However, needs are diverse and so flexibility should be maintained. Interviewees agreed with this sentiment, highlighting the need for future funding rounds to provide funding for other aspects affected by regulation (e.g. training, vessel modification etc.). Interviewees also suggested alternative designs for future funding and business support, such as access to a pooled specialist resource to assist with project delivery (e.g. engineering support), as well as opportunities to submit collaborative proposals in order to deliver more transformational projects.
- 4.28 Successful applicants identified several specific areas which may necessitate funding support in future. This includes the provision of training, improvement to physical structure of vessels, as well as opportunities which encourage collaboration between organisations (particularly in aquaculture). Three of five

survey respondents thought any future funding rounds should prioritise capital expenditure (the other two respondents were unsure).

Summary of feedback from unsuccessful applicants

- 4.29 The two unsuccessful applicants interviewed applied to WMFS to aid their response to challenges in the market, particularly in relation to rising energy costs, climate change and changes in legislation. Both reported having been successful in applying for previous grant programmes, including EMFF.

Effectiveness of the Customer Journey

- 4.30 The unsuccessful applicants interviewed cited a number of challenges with the application, assessment and contract process, some of which aligned with those mentioned by successful applicants. Recognising that they were unsuccessful in their application which may have influenced their perspectives, in their view:
- The assessment process lacked transparency and clear feedback on why they had been unsuccessful. One interviewee noted that they did not receive any feedback on their application.
 - There was insufficient support throughout the application process. Email was the only means to communicate with RPW, which was considered both impersonal and inappropriate for the sector. Communication was felt to be hampered by the fact that the scheme was designed by the Marine and Fisheries department at Welsh Government, but delivered by RPW in Welsh Government, meaning applicants felt unable directly communicate with Welsh Government on issues relating to the scheme.
 - There was a perceived lack of understanding of the complexities/nuances of the fishing industry evident in the activities eligible for support and the relatively complex application process (compared to the scale of funding on offer).
- 4.31 Both unsuccessful applicants highlighted the need for future funding rounds to include greater engagement with industry, both in design and delivery. This included a suggestion relating to alternative opportunities to engage (such as through telephone and face-to-face) as well as ensuring both programme design and delivery considered the needs of the sector (such as consideration for cash flow limitations among sole fishermen and small enterprises).

- 4.32 While interviewees recognised the need for rigour in assessing applications, in their view minimising the level of detail/information required at the application stage was important, particularly where the award value was modest in scale. They suggested that a proportionate / flexible approach may be suitable, whereby grant programmes which are offering greater awards also require a greater level of detail, to ensure sufficient scrutiny.
- 4.33 One of the two unsuccessful applicants mentioned how annualised funding can encourage certain activities and discourage others, ultimately impacting the nature of support received by the sector. In their view, multi-year funding may help to address these challenges, and ensure that a larger proportion of the sector are able to access business support programmes.

5. Reflections from the marine and fisheries sector

- 5.1 This section presents the feedback from the stakeholder interviews (seven) and responses to the wider sector survey (six, plus one follow-up interview). Interviewees and survey respondents included representatives from sector bodies, environment/natural resources organisations, universities/research institutes, and fishing enterprises. The section considers the sector context, demand and implementation of the scheme, short-term impacts, and how the design and delivery of future funding rounds of the WMFS could be improved.

Sector context

- 5.2 Stakeholders were asked to reflect on the key challenges and opportunities for the marine and fisheries sector in Wales when the WMFS was launched in December 2022. Most stakeholders mentioned the ongoing implications of the UK's withdrawal from the EU. In particular, the impact of trade and regulatory decisions on the ability of Welsh aquaculture businesses to trade with the EU were highlighted. In 2022, the sector was also recovering from the demand and supply challenges (e.g. export delays, closure of hospitality businesses) associated with the Covid-19 pandemic. Inflationary pressures and rising energy costs were also cited as challenges by most stakeholders, with sole traders particularly affected. A small number of stakeholders referenced climate change mitigation and adaptation as both a challenge and opportunity for the sector. Specifically, exploiting the renewable energy potential of Wales was identified as an opportunity area for the sector but required considerable public funding support.
- 5.3 Since the launch of the scheme, interviewees stated that the challenges and opportunities for the sector have largely remained unchanged (at Spring 2024). The implications of EU Exit, inflationary pressures and rising energy costs have continued to impact the sector.
- 5.4 Survey respondents were also asked to reflect on the two main challenges and opportunities currently for their business/organisation. The challenges stated reflected some of the issues raised by stakeholders, including energy costs. However, a range of other challenges were raised including competition from larger businesses/businesses in other UK nations, low local fish prices, and uncertainties

over marine licensing. There was less feedback relating to opportunities, which may in part reflect the current challenging operating and trading conditions for the marine and fisheries sector. This said, where respondents provided feedback, this focused on opportunities from the transition to a more sustainable sector, for example, emerging markets to support marine restoration projects and the provision of ecosystem services. The opportunity to learn from feedback on the first three funding rounds of the WMFS, to ensure future rounds fully meet sector needs was also mentioned.

- 5.5 Taken together, the feedback from the interviews and survey highlighted the very challenging delivery landscape for the scheme and the importance of external factors in influencing its delivery and potential role.

Demand and implementation of the scheme

- 5.6 The majority of survey respondents (five out of six) were aware of the WMFS prior to the survey.³³ All five were aware of the Health and Safety funding round when the application window was open, and four were aware of the Marketing Measures and Energy Efficiency and Mitigation of Climate Change rounds.

- 5.7 Three of the five respondents who were aware of the scheme prior to the survey, stated that one of the reasons they did not apply for the first three funding rounds was a lack of capacity to complete the application process. This was explained further by two respondents who stated that the application process was not proportionate to the potential benefits.

“The complexity of the application process made the cost benefit for small projects unviable for micro-SMEs” (Wider sector survey respondent)

- 5.8 The other reasons most frequently identified (by three respondents) for not applying were that the activity which could be funded and the type of funding (i.e. revenue / capital) available did not align with the needs of their business/organisation.
- 5.9 The stakeholders interviewed were also asked to reflect on the factors that influenced demand for the first three funding rounds, and the factors that may have encouraged engagement from businesses/organisations that did not apply. The

³³ The remaining respondent was unsure whether they were aware of the WMFS prior to the survey

consistent feedback from stakeholders was that the lack of demand for the first three funding rounds reflected issues with the design and delivery of the scheme specifically, rather than a lack of demand from the sector for support more broadly. Indeed, stakeholders emphasised that there is strong demand from the marine and fisheries sector for public sector and grant-based support, as illustrated by the quotes below.

“It's not that there's a lack of demand for support within the sector. It's a lack of demand for this type of support delivered in this way”. (Sector stakeholder)

“The problems sit with the funding allocation mechanisms and timescales, rather than a lack of demand or the core concept behind the scheme”. (Sector stakeholder)

“Organisations are interested and receptive to new funding streams, and if the fund is right for them, they will pull out all the stops to get a bid in. If that hasn't happened on WMFS, then something isn't right, because people need the money”. (Sector stakeholder)

- 5.10 This said, it was acknowledged that the current state of the sector may have influenced demand. It was reported that many businesses in the sector have been in “survival mode” over the past three-five years, owing to a range of external factors (for example, see above). Therefore, they do not have the resources or the impetus to invest when the future of their business is uncertain.
- 5.11 The most frequently mentioned design and delivery elements that worked less well, and therefore discouraged engagement with the scheme, are summarised in the paragraphs that follow. It is noted stakeholders did not explicitly identify any factors that worked well in the design and delivery of the first three funding rounds.
- 5.12 All stakeholders stated that the funding timescale for the scheme was a major challenge. Grants must be applied for, approved, spent and claimed within a financial year, which prevents long-term, and potentially more strategic projects / activities – with potential to deliver more substantial benefits for the sector – from being delivered. This issue was also raised in the wider survey feedback and successful applicant interviews. Stakeholder interviewees also noted that, in some

cases, the assessment of applications was delayed which further reduced the delivery period, resulting in some applicants withdrawing.

- 5.13 Most stakeholders (five) cited issues relating to the application process. Overall, the application process was not considered proportionate for the size of grants available. The sector consists of many sole traders and micro businesses who have limited capacity to apply for funding, so according to stakeholders, processes perceived to be bureaucratic will deter individuals from applying. Three survey respondents also perceived the application process as being “overly complex and restrictive”. The RPW portal was highlighted as a particular challenge, with stakeholders describing it as “challenging to navigate” (based largely on feedback from sector members) for a sector which is largely unfamiliar with the system.³⁴ It was also noted that there was a lack of available support during the application process and a perceived lack of communication between the policy team at Welsh Government and the RPW delivery team, as illustrated in the quote below.

“If you encounter a problem you have to contact a technical team, who are separate from the Marine and Fisheries team, which can lead to confusion and a lot of back and forth” (Sector stakeholder)

- 5.14 Issues relating to the types of activities funded and the eligibility criteria were also raised by stakeholders. Around half of stakeholders (three) stated that the scheme documentation did not clearly articulate what activities would be fundable, which in practice led to applications being rejected because they were ineligible. With regard to the focus of each of the funding rounds, there were mixed views amongst the stakeholders who were familiar with the details of each of the funding rounds; the feedback is summarised below.

- Marketing Measures: this funding round was considered appropriate by one stakeholder when considering implications of the EU Exit and the need for some businesses (particularly aquaculture businesses) to find new markets for their products. However, another stakeholder thought the funding round did not respond to the priorities of the sector, and this was reflected in the low level of interest in the round.

³⁴ Note the Rural Payment Wales online system was originally designed for the agriculture sector.

- Energy Efficiency and Mitigation of Climate Change: stakeholders agreed with the need to invest in energy efficiency and the mitigation of climate change. However, it was explained that the focus on feasibility studies, research etc. was arguably too narrow, and would not deliver direct benefits for businesses in the short-term. Instead, stakeholders suggested that the sector would have benefited from more direct support, for example, to upgrade vessels to improve fuel efficiency; this was considered important in ensuring that Welsh vessels can modernise in order to adhere to Maritime and Coastguard Agency regulations. It is noted that providing capital expenditure was not possible at the time Round 2 was developed (in line with the funding agreement with UK Government).
- Health and Safety: it was suggested that this round could have been more effective had applicants been able to use it as a component of a wider project, for example, an overhaul of a vessel, which was not possible given the list of eligible items.

5.15 More broadly, a couple of stakeholders noted that in their view there has been a lack of clarity regarding the priorities of the scheme overall. In part, this was attributed to ‘marine’ and ‘fisheries’ being covered under one scheme, with different priorities across the two components of the sector.

5.16 The type of funding available also hindered demand for the first two funding rounds. Revenue funding was available under Marketing Measures and Energy Efficiency and Mitigation of Climate Change. As suggested above, stakeholders emphasised that there is stronger sector demand for capital funding (e.g. to invest in improving vessels). This said, it was recognised as positive and encouraging by two stakeholders that following feedback on the first two funding rounds, Welsh Government provided capital funding under the Health and Safety round (and the subsequent General funding round).

Scheme fit in the landscape of wider support for the sector

5.17 The stakeholders interviewed did not identify any alternative dedicated sources of public sector support for the sector in Wales, highlighting the importance of WMFS. However, it is noted that there is the UK wide scheme – UK Seafood Fund – which is available for Welsh businesses/organisations. Feedback in relation to the scheme’s fit in the wider landscape of support focused on comparing the WMFS

with other schemes in Wales or the UK. Specifically, three stakeholders expressed frustration that the scheme is not equivalent to the England scheme (Fisheries and Seafood Scheme, FaSS). The higher absolute grant size on offer and the types of activities funded (for example, capital for modification and re-engining of boats) under FaSS were mentioned. One stakeholder thought it was likely that a similar scheme in Wales would be well received by the sector. Two other schemes were also mentioned by three stakeholders: Coastal Capacity Building scheme (this is explored further in Section 6) and which is being delivered effectively and flexibly according to two stakeholders, and Nature Networks which is being administered by the National Heritage Lottery Fund. All three stakeholders consider the delivery of both schemes to be effective compared to the WMFS.

Short-term impacts

- 5.18 Stakeholders perceived the short-term impacts of the WMFS to be limited to date given the low levels of engagement with the first three funding rounds. However, around half of stakeholders (three) noted that it was difficult to comment on the impact of the scheme because of a lack of publicly available data. Notably, information on the number and value of grants awarded/claimed had not been made publicly available by the Welsh Government at the time of the research; this contrasts with similar schemes in other UK nations.
- 5.19 Furthermore, three stakeholders identified negative, unexpected consequences of the first three funding rounds. Stakeholders believed that the sector has negative perceptions of the WMFS owing to the issues with the first three funding rounds, and this may deter businesses/organisations from applying in future. Two of these stakeholders who engage closely with businesses in the marine and fisheries sector also reported that the experience of the scheme to date has led to a worsening of sentiment and trust towards the Welsh Government within the sector.

Looking forward

- 5.20 The stakeholder interviews and survey provided useful perspectives on how the WMFS could be revised in terms of design and delivery to ensure the needs of the sector are addressed going forward. Six main themes emerged:

- **A clear strategy for the sector which informs the activities funded under the scheme.** There was overarching feedback from the interviews that the scheme would benefit from a clearer set of strategic priorities for the sector overall, which would in turn inform investment decisions under the scheme. This would help provide clarity on the types of activities eligible for funding. It was suggested that undertaking a horizon scanning/gap analysis exercise could be useful to better understand how WMFS fits within the funding landscape, and how a specific funding round can be effectively targeted to address any notable gaps in support.
- **Linked to the above, greater stakeholder engagement in the design and delivery of future funding rounds.** Interviewees noted the need for meaningful stakeholder engagement (early in the process) to support with the design of future funding rounds. The sentiment that the perspectives and needs of fishers and other marine stakeholders should be more actively considered was also reflected in the sector survey feedback. In relation to the Marine and Fisheries Funding Stakeholder Advisory Group, stakeholders thought that there is scope to improve the quality of engagement between Welsh Government and the Group, for example, by demonstrating how discussion and advice from the Group has informed decision-making, and providing more regular updates on delivery progress.
- **Change the funding model to allow multiyear projects.** As set out above, the ability to undertake multiyear projects is seen to provide the potential to support the delivery of more strategic projects, with potential to deliver greater benefits for the sector.
- **A mix of capital and revenue funding support.** There were mixed views on the type of support that would be most beneficial for future funding rounds. However, overall, the feedback suggests that a mix of capital and revenue funding would be beneficial going forward. Of the six survey respondents, two identified a preference for capital, two identified revenue, and two identified both. There were similarly mixed views from interviewees. Some were keen for future rounds to offer capital funding only whilst others thought a mix of capital and revenue is more appropriate to meet the needs of everyone in the sector.
- **Improved marketing and promotion of the scheme.** The evidence from successful applicants indicates that marketing and promotion was considered

adequate overall, although some improvements were suggested. Similarly, feedback from a small number of stakeholders suggests there is scope for improvement in relation to two aspects: ensuring that marketing and promotion is clear and accessible (i.e. through a range of online/offline channels) for the sector, and where possible, providing advance notice (e.g. six months) of upcoming future rounds so that businesses/organisation can plan accordingly.

- **A simpler and more proportionate application process with access to support.** A more proportionate process was considered important for the sector in general, but especially for organisations applying for smaller funding amounts. Over half of stakeholders (four) also thought that Welsh Government should reconsider the use of the RPW online system or at least alter the system (for example, by ensuring all questions are directly relevant to the scheme/sector), to ensure alignment and relevance to the marine and fisheries sector. In the survey, the simplicity of the application process was rated the most important factor in influencing interest and engagement with future funding rounds (average ranking of 4.8 out of 5³⁵). Additional support with the application process would also be welcomed by stakeholders; this could involve allocating resource for animateurs / consultants to support applications and/or additional support directly from Welsh Government. In terms of the time of year for the application window, there was mixed feedback from the survey, but overall, winter was preferred by respondents.

5.21 Feedback from some stakeholders indicated that some of the lessons learned from the design and delivery of the first three funding rounds have already informed the implementation of the fourth round. Specifically, broader eligibility criteria and greater flexibility around capital funding were cited. This aligns with feedback from the Welsh Government regarding the implementation of changes in Round 4. These changes include the provision of both capital and revenue funding (whereas previous rounds were either revenue only/capital only), more funding categories to support a broad range of projects, and more relevant result indicators for applicants to choose from, based on the category they chose.

³⁵ Where one is not very influential and five is very influential

Priorities for future funding rounds

5.22 Within the remit of the WMFS, survey respondents were asked which activities (from the list of 18 eligible activities) they think should be prioritised for any upcoming funding rounds.³⁶ Across the responses, eleven different activities were selected, however, the most commonly identified priorities (by three respondents each) were:

- ‘Activities which support diversification of businesses’. Specific examples of activities included diversification into second sale³⁷, the use of fishing trawler(s) for day experiences for general members of the public, and the production of species for marine restoration projects and projects to support biodiversity net gain.
- ‘Activities which promote job creation and encourages new entrants to the marine, fishing and aquaculture industries’. Suggested activities focused on support for promoting fishing as a career and introducing training/courses for new entrants to the sector.
- ‘Activities which contribute to the sustainable development of aquaculture sites’. Suggested activities included further research into water quality, given its importance for aquaculture in particular, and taking a systems approach to research (from ‘sea to plate’) to consider all parts of the supply chain. Amongst other things, respondents noted that this research would help provide evidence to support licencing which is necessary for new and existing producers to operate.

5.23 Survey respondents were asked the extent to which they were interested in applying for potential future funding rounds under the WMFS on a scale of one to five (where one is not all interested and five is very interested). All six respondents were interested (rating it three or higher) in future funding rounds focused on activities that they identified as priorities (as set out above). Interest more generally for funding rounds focused on other activities, was lower, but only one respondent indicated they were not interested in this support.

³⁶ Survey respondents could select up to three activities

³⁷ i.e. it has already been purchased before

6. Learning from other programmes

6.1 This section considers lessons from two other broad types of programmes: (a) programmes similar to WMFS which have been delivered by other UK nations, following the UK's exit from the EU and (b) other relevant programmes delivered in Wales. The programmes are:

- in category (a) the Fisheries and Seafood Scheme (FaSS) in England; the Marine Fund Scotland (MFS) in Scotland; and the Maritime and Fisheries Fund in Northern Ireland (MFF(NI)).
- in category (b) European Maritime and Fisheries Fund (EMFF), Coastal Capacity Building Scheme, and Agile Cymru.

6.2 Evidence presented in this section has been gathered through a review of publicly available data and documents, and supported by interviews with representatives of each programme.

6.3 The section also provides some factual information on the UK Seafood Scheme based on a review of publicly available data and documents. This scheme was not included as a formal comparator because it is a UK wide scheme, rather than a scheme designed and delivered by one of the UK's devolved administrations. However, the UK Seafood Scheme is important contextually, as a major intervention in the marine and fisheries sector that is open to Welsh businesses.

Purpose and considerations for the comparator review

6.4 Four points are noted in relation to the comparator review. First, it is highlighted explicitly that the purpose of this comparator review was not to evaluate the other programmes or to comment on their progress or effectiveness.

6.5 Second, the learning from other programmes covered both what was seen to have worked well, and what was seen to have worked less well (or has been a challenge) in order to provide insights for WMFS.

6.6 Third, it is recognised that the scope, scale, implementation context, and policy/regulatory conditions varies across the programmes, and with WMFS. In this context, the purpose was not to seek to identify specific actions that can be simply

transferred or copied across to WMFS. Rather the purpose was to identify learning to inform future thinking/planning by the Welsh Government.

- 6.7 Fourth, and drawing on these points, the learning set out draws on the evidence from across the three programmes in each category; feedback from interviews related to specific programmes is not identified (as agreed with interviewees, to encourage participation and the provision of detailed feedback).

Learning from programmes in other UK administrations - Overview of the programmes

Fisheries and Seafood Scheme, England

- 6.8 The Fisheries and Seafood Scheme (FaSS), administered by the MMO on behalf of the Department for Environment, Food & Rural Affairs (Defra), delivers investments to safeguard the long-term sustainability, resilience and prosperity of the seafood sector across England.³⁸
- 6.9 High-level outcomes which the scheme is aiming to deliver against include:
- Creating a more sustainable and resilient sector.
 - Boosting the demand for English seafood and accessing new markets.
 - Improving participation through co-design and co-management.
 - Achieving good environmental status through the conservation and restoration of the marine environment.
 - Supporting net zero through reducing emissions within the industry.
- 6.10 The FaSS provides financial assistance for projects that support the development of the catching, processing and aquaculture sectors, and for projects that enhance the marine environment. Since opening in 2021, the scheme has committed c.£27 million to over 1,300 projects, with the most recent funding round closing in June 2024. The scheme is available to applicants whose organisation and/or vessels are registered in England.
- 6.11 The FaSS sought to provide continuity of support for the fisheries sector in England post-EU exit. This said, the programme did make some changes compared to the EMFF scheme, to bring it more closely in line with England-specific policy. This

³⁸ Marine Management Organisation (2024) [Fisheries and Seafood Scheme](#)

includes the Seafood2040 (SF2040) strategic framework – which establishes a target of doubling UK seafood consumption (from one portion to two portions per person, per week) – supported by the English Aquaculture strategy, which sets out the objectives and principles for the sector over the next 20 years.³⁹ ⁴⁰ Four of the five high-level outcomes which underpin the FaSS are directly linked to these policies. The final outcome – supporting net zero through reducing emissions within the industry – is more closely related to the UK Net Zero Strategy, in which fishing and maritime vessels are explicitly mentioned as an opportunity to decarbonise.⁴¹ Indicators aligned to each of these outcomes were designed to ensure that projects applying for funding were able to demonstrate their contribution towards the programme's aims.

Marine Fund Scotland, Scotland

- 6.12 In March 2022, Scottish Government published its 'Blue Economy Vision', setting out how activities related to Scotland's marine environment contribute towards environmental, social, and economic outcomes.⁴² The 'blue economy' encompasses a broad range of different activities, including fisheries and aquaculture, transport, energy production and ports.
- 6.13 The Marine Fund Scotland (MFS) is one mechanism through which Scottish Government supports Scotland's marine sectors, to help Scotland achieve the Blue Economy Vision.⁴³ The MFS funds a diverse set of projects – including seafood processing, harbour improvements, and marine research – with the primary requirement being that projects deliver against at least one of the following outcomes (which are underpinned by the Blue Economy Vision, as well as Scotland's Fisheries Management Strategy 2020-2030, Strategy for Seafood, and Fisheries Management Strategy 2020-2030):
- Established and emerging marine sectors are innovative, entrepreneurial, productive and internationally competitive.

³⁹ Seafish (2021) [Seafood 2040 - A Strategic Framework for England](#)

⁴⁰ Huntington, T. and Cappell, R. (2020) [English Aquaculture Strategy](#)

⁴¹ Department for Business, Energy & Industrial Strategy (2021) [Net Zero Strategy: Build Back Greener](#)

⁴² Scottish Government (2022) [Blue Economy Vision for Scotland](#)

⁴³ Scottish Government (2024) [Marine Fund Scotland 2024-2025](#)

- Scotland is a global leader in healthy, quality, sustainably-harvested and farmed Blue Foods, for our own population and beyond.
- Scotland’s Blue Economy is resilient to climate change, contributing to climate change mitigation and adaptation, with marine sectors decarbonised, resource efficient and supporting Scotland’s Net Zero commitments.
- Thriving, resilient, regenerated, healthy communities have more equal access to the benefits that ocean resources provide.

6.14 All projects also had to deliver against a fifth objective, whereby “Projects funded by the Marine Fund Scotland represent value for money, are delivered successfully, show clearly how they have met their outcomes, and share lessons so that projects can develop and improve in the future”.

6.15 The scheme launched in 2021, and has had three complete funding rounds to date, with assessment of fourth round applications for 2024-2025 ongoing at mid-2024. Across the first three rounds, MFS committed funding to 271 projects amounting to c.£40m in grant awards. This included £1.6m-£1.8m each year (totalling c.£5m) to Seafood Scotland (the national trade and marketing organisation for the Scottish Seafood Industry) to be used for the promotion of Scottish Seafood domestically and globally.⁴⁴ Other significant initiatives supported harbour maintenance, enhancement of processing infrastructure, and investments in sustainable technologies for more eco-friendly operations.

Maritime Fisheries Fund, Northern Ireland

6.16 The Maritime Fisheries Fund (NI) (MFF(NI)) was designed to support maritime and fisheries activity and help deliver the objectives of the Common Fisheries Policy (CFP) and encourage the development of Integrated Maritime Policy. MFF(NI) funding was designed to support five priority areas:

- Promoting environmentally sustainable, resource-efficient, innovative, competitive and knowledge-based fisheries.
- Fostering environmentally sustainable, resource-efficient, innovative, and competitive and knowledge-based aquaculture.
- Fostering the implementation of the Common Fisheries Policy.

⁴⁴ Scottish Government (2024) [Marine Fund Scotland: grants awarded](#)

- Fostering marketing and processing.
- Fostering the implementation of the EU's Integrated Maritime Policy.

6.17 The MFF(NI) provided support for projects that deliver on sustainable economic growth in the sea fisheries and aquaculture sectors. The purpose of the scheme was to continue to provide Northern Ireland with a financial support mechanism for the fisheries, inland waters, aquaculture and maritime sectors, following the UK's exit from the EU.

6.18 The MFF(NI) was delivered between March 2021 to March 2024. In April 2024, the MFF(NI) evolved to become the Marine Environment and Fisheries Fund (MEFF) following policy changes and learning gathered during the design and delivery of the initial scheme. Both programmes have been managed by the Department of Agriculture, Environment and Rural Affairs (DAERA).

6.19 As of March 2024, the MFF(NI) had committed funding to 77 projects totalling £3.7m (c.£48k per project). While FaSS and MFS have been designed to fund a range of projects considered to deliver against each scheme's high-level outcomes, the MFF(NI) was more tightly defined in which activities it was seeking to support. Eligible activities broadly covered:

- investment on board fishing vessels
- fishing vessel energy improvements and re-engining
- aquaculture, processing and marketing
- investments to shore-based facilities
- partnership, information sharing, advisory services, job creation and training
- marine environment and inland fishing.

UK Seafood Fund

6.20 In 2022, Defra launched its £100m UK Seafood Fund to support the long-term future and sustainability of the UK fisheries and seafood sector.⁴⁵ The UK Seafood Fund consists of a number of schemes, under four areas of funding:

- infrastructure (allocated £65m)

⁴⁵ Department for Environment, Food & Rural Affairs (2024) [UK Seafood Fund](#)

- science and innovation (allocated £24m)
- skills and training (allocated £10m)
- exports support (allocated £1m).

- 6.21 The Infrastructure Scheme, which accounts for almost two-thirds of the funding allocation of the UK Seafood Fund, aims to build capacity across the UK fishing sector supply chain by investing in ports and harbours (Rounds 1 and 2), coastal communities and fleet modernisation (Round 3), and recreational sea fishing (Round 4). All rounds are now closed for applications, with only round three still allocating funding. Rounds 1, 2, and 4 of the Infrastructure Scheme awarded £56.25m to 30 projects across UK.⁴⁶
- 6.22 The science and innovation funding area distributes funding across two schemes: the Fishing Industry Science Partnerships (FISP) scheme and the Seafood Innovation Fund. Now closed, the FISP scheme awarded £13m to 41 collaborative projects between research organisations and industry, in an effort to improve knowledge of the fisheries and aquaculture sector.⁴⁷ The Seafood Innovation Fund was launched in 2019, before becoming part of the UK Seafood Fund in 2021. The fund seeks to support innovative technology and ideas which have a considerable impact on the industry or market, with the aim of boosting sector productivity and sustainability.⁴⁸
- 6.23 The Skills and Training funding provided c.£4.5m to projects which improve quality and range of training available for the catching, processing, aquaculture and recreational sectors.⁴⁹ This included £3m to the Scottish White Fish Producers Association (SWFPA) to build a Scottish Seafood Centre of Excellence – an industry facility with purpose-built classrooms, areas for technical training, and technology demonstration spaces.
- 6.24 The £1m allocated to seafood exports support seeks to increase UK seafood exports to existing markets, as well as exploring opportunities in new markets.⁵⁰

⁴⁶ Department for Environment, Food & Rural Affairs (2024) [UK Seafood Fund: Infrastructure Scheme - projects](#)

⁴⁷ Department for Environment, Food & Rural Affairs (2023) [UK Seafood Fund: Fisheries Industry Science Partnerships scheme](#)

⁴⁸ UK Seafood Innovation Fund (2024) [Seafood Innovation Fund](#)

⁴⁹ Department for Environment, Food & Rural Affairs (2023) [UK Seafood Fund: Skills and Training Scheme](#)

⁵⁰ Department for Environment, Food & Rural Affairs (2024) [UK Seafood Fund](#)

6.25 Information is publicly available on successful applicants for some of these schemes, including location, which provides an indication of whether businesses in the fisheries and seafood sector in Wales are successfully engaging with the UK Seafood Fund. For instance, £3.8 million was awarded to two projects in Wales under the UKSF Infrastructure Scheme (Round 2) but no funding was awarded to projects in Wales for Rounds 1 and 4.⁵¹ No funding was awarded to projects in Wales under the first two rounds of the UK Seafood Fund Skills and Training Scheme.⁵²

Learning from programmes in other UK administrations - Learning points for the WMFS

6.26 Drawing on both the primary and secondary research, the comparator review of programmes in other UK administrations identified five key learning points for WMFS:

- **Implications of annual funding cycles.** Interviews suggested that a requirement for projects to be completed within a single year, and an associated annual funding cycle, can inhibit activities and limit support for interventions that are strategic, innovative and potentially transformative (including where activity may require research and testing activities in advance of a full implementation stage). A preference for the ability to support multi-year projects, with associated budget mechanisms to enable this, was identified in some cases. In this context, it was noted that FASS initially operated time-limited/competitive funding rounds (for the first round, until October 2021) which focused on investment in specific areas. However, this was not received positively by industry, and so the scheme adapted to involve rolling applications (from April 2022 to June 2024) which delivered on the programme's high-level outcomes.
- **Transparency.** The three programmes in the other UK administrations publish details of supported projects online. This provides accessible and transparent information to the sector on what has been supported. This can help to both

⁵¹ Department for Environment, Food and Rural Affairs (2024) - [UK Seafood Fund: Infrastructure Scheme - projects](#)

⁵² Department for Environment, Food and Rural Affairs (2024) - [UK Seafood Fund: Skills and Training Scheme – projects](#)

encourage engagement and take-up in future rounds, and demonstrate the nature and scope of support provided.

- **Consultation and industry and stakeholder engagement.** A commitment to engagement with the industry, including individual businesses and external stakeholders such as representative groups, to inform scheme design, and support subsequent implementation was highlighted as important in interviews. It was recognised that this takes time and dedicated resource, including to enable in-person activity to actively engage with potential beneficiaries.
- **Cross-government working.** Effective engagement and linkages with other government departments and agencies was identified as important, at both devolved/national and UK level. This was seen to be important to ensure that schemes can respond to and meet the needs of industry, and are coherent with the wider sector support offer at a policy level. It can also help to reduce duplication and ensure that activity complements other support available.
- **Capacity matters.** Cutting across the points above, an important theme from the comparator review of other UK programmes was the need to ensure there is sufficient delivery and management capacity, to enable effective engagement with other parts of government, industry and stakeholders, and active communications, alongside core programme management activities.

6.27 The comparator review also highlighted that there are similar challenges for other public sector programmes. These challenges include the ability to successfully engage with the fisheries and marine sector due to industry characteristics (for example, the fragmented nature of the sector and the level of technology adoption). It is also challenging for the sector to identify match funding, which may limit the engagement of some part of the industry, including micro- and small businesses. The comparator review did not identify any single or simple solution here. However, consistent with the learning set out above, effective stakeholder engagement, proportionate and accessible application processes, and consistent messaging and communications were identified as important by policy officials supporting other programmes in the UK in seeking to mitigate these challenges. Strong alignment of programme activities to identified need and policy agendas, and clear strategic priorities also emerged as important themes in this context.

Learning from other Welsh Government programmes - Overview of the programmes

European Maritime Fisheries Fund

- 6.28 The European Maritime Fisheries Fund (EMFF) was co-financed by the Welsh Government and the EU. Introduced in 2014, over the 2014-2020 programme period, the programme received a funding allocation of €19.7 million. The UK MMO had overall responsibility for managing the operational programme; however, in Wales it was delivered by Welsh Government and the application/payment process was run through the WEFO IT system and RPW.
- 6.29 The programme sought to provide support for fisheries, inland waters, aquaculture and the maritime sector. Grant support was provided for sustainable development within the fishing and aquaculture sectors, conservation of the marine environment, and growth and jobs in coastal communities.

Coastal Capacity Building Scheme

- 6.30 The Coastal Capacity Building Scheme is aimed at supporting local projects in coastal areas across Wales. The scheme has a yearly budget of £500,000 available for projects lasting five months or more, with a minimum value of £20,000. The Welsh Government have committed to funding the scheme from 2023 to 2025. The scheme is administered and managed by a team at the Wales Council for Voluntary Action (WCVA), and funding is coordinated through Local Nature Partnerships.
- 6.31 The Scheme seeks to address challenges posed by the climate emergency by fostering partnerships and community-led actions for nature recovery and sustainability, building capacity to deliver sustainable actions that promote growth and recovery in marine and coastal areas. It encourages collaboration between various stakeholders, including communities, businesses, local authorities, and other public bodies, to facilitate nature recovery and rejuvenation efforts.

Agile Cymru

- 6.32 Agile Cymru aims to deliver cross-border and international economic co-operation across shared interests. Delivered by the Welsh Government, the Agile Cymru team sit within the Welsh Government's Horizon Europe Unit.

6.33 Agile Cymru funding supports a wide range of activity; the primary focus being outcomes that deliver benefit for Wales. The scheme provides financial support (revenue) for ‘seeding’ or facilitating activity that builds cross-border and international partnerships. This includes financial assistance aimed at stimulating Welsh participation in the European Union’s Flagship research and innovation programme, Horizon Europe, as well as other research and innovation schemes such as international UKRI competitions, Eureka, and European Cooperation in Science and Technology (COST).

Learning from other Welsh Government programmes - Learning points for the WMFS

6.34 The comparator review of other Welsh Government programmes identified five key learning points for WMFS based on interviewee feedback:

- **Proportional systems and processes.** The development, implementation and continuous improvement of application, assessment and monitoring systems and processes was seen as a key success factor for other programmes. This helps to ensure that systems and processes are easy to understand and recognised as proportionate to the level of support on offer. This includes IT systems, which was seen as particularly important where interventions are seeking to engage sectors and businesses (such as fisheries) which may have lower exposure to and experience with online mechanisms, relative to other sectors. Finding a way to simplify and streamline IT systems and requirements (consistent with scheme requirements and criteria) was therefore identified as a key step to building healthy engagement.
- **Funding and project delivery windows.** Annual ‘in year’ funding rounds were seen to present a challenge. The comparator review highlighted the benefits that could be achieved – in term of engagement and demand and subsequent progress in delivery and outcomes generated – from being able to offer extended lead in times for bids, and delivery windows for projects, likely stretching across multiple financial years (as appropriate to the nature of activity).
- **Transparency.** Interviews highlighted the importance of regularly disseminating information on what has been funded, and (where this is available) evidence on

the achievements and benefits of funded projects. This commitment to transparency was seen to help maintain engagement from potential applicants/beneficiaries and wider stakeholders and partners.

- **Clarity of strategic purpose.** Clarity of alignment with policy priorities, a well-established strategic vision and purpose, and a clear target group and implementation model from the outset was seen to help to facilitate effective engagement with (potential) applicants. This clarity of strategic purpose was also seen to strengthen the quality, and alignment and relevance of bids received.
- **Leveraging existing networks and relationships.** Engaging with existing stakeholder networks (e.g. industry representative groups, place-based associations etc.) and utilising established working partnerships were factors that were seen to have supported effective delivery in other programmes. This was seen to have helped secure engagement, allow momentum to be generated more quickly (by building on existing structures and processes), and therefore potentially deliver stronger results over the longer-term.

6.35 The comparator review of other Welsh Government schemes also highlighted the importance of effective and targeted communications when engaging with traditional and fragmented sectors and industries, such as marine and fishing. However, the challenges of this were also recognised. The learning set out above related to the proportionality of systems and processes, and leveraging existing networks and relationships were seen as important in this context. Ensuring there is appropriate capacity and resourcing of programme teams, with experienced, knowledgeable and flexible staff was also highlighted.

7. Conclusions

- 7.1 This final section sets out the key findings against the evaluation research questions. Findings relating to what worked well and less well, and improvements for future rounds in the future are grouped together.

Activities delivered through the first three funding rounds of the WMFS (RQ 1)

- 7.2 Overall, the scale of activity delivered under the first three funding rounds was modest. In aggregate, £73k in grants were claimed and approved by 14 beneficiaries under the Energy Efficiency and Mitigation of Climate change and Health and Safety funding rounds. There were no successful applicants for – and therefore no activity delivered through – the Marketing Measures round.
- 7.3 Where activity was funded through the WMFS, it was generally delivered as intended according to successful applicants interviewed/responding to the online survey. The Health and Safety round enabled the purchase of a variety of items – including searchlights, lifejackets, handheld radios, ladders, net bins, and autopilot systems. It was reported by all applicants that this equipment is now being used (or is available for use when designed for emergency use only).

What has and has not worked well about the application process for and delivery of the WMFS to date, and suggested improvements for future funding rounds (RQs 2/3/4)

- 7.4 Feedback from successful applicants suggests the assessment, contracting and claims process worked well overall. However, there were some issues identified including timescales (with some delays in decision making and contracting), and the complexity of the claim requirements. Confusion over eligibility of activity also led to unsuccessful applications. Further, unsuccessful applicants reported the assessment process lacked transparency, with scope for improved feedback on why they had been unsuccessful.
- 7.5 The marketing and promotion of the schemes was also seen by successful applicants engaged in the evaluation and stakeholders to be broadly appropriate. This said, a small number of applicants and stakeholders suggested that marketing and promotion could have been improved to ensure messaging was clear and

accessible for the sector, and provide sufficient (automated) notice to support planning.

7.6 There was considerable feedback on aspects of the application process that worked less well. Many of the points raised were also suggested as opportunities to improve the application and delivery processes going forward. There was a high level of consensus from both successful and unsuccessful applicants, and from stakeholders, on aspects of the application process that worked less well. Key points were as follows:

- The time and level of information required to complete the application was not proportionate, particularly for businesses/organisations applying for a small grant. Some of the evidence required was difficult for sole traders/micro businesses to provide.
- Linked to the above, the annualised funding model meant that once the application process was complete, the period for deliver funding activities was short.
- There was a lack of clarity over the types of activities which could be funded through the scheme. This led to ineligible applications and some frustration from applicants.
- The RPW online system – initially designed for the agriculture sector – was reported to be difficult to use, as the marine and fisheries sector was largely unfamiliar with the system. Also, some of the questions were difficult for marine and fisheries businesses/organisations to complete (for example, calculating future fuel usage and daily catch), especially considering the current uncertain trading conditions.
- There could have been greater support during the application process. Applicants could contact RPW, but some difficulties were raised including a reported/perceived lack of practical understanding of the marine and fisheries sector by RPW.

7.7 Based on this evidence, there are some recommendations for the application and delivery process of WMFS funding rounds in the future; these are covered in Section 8.

To what extent have the needs of the sector been met in relation to the first three funding rounds of the WMFS? (RQ 6)

- 7.8 Overall, the evidence suggests that the scheme has not met the needs of the marine and fisheries sector to date. This is evident in the qualitative feedback from applicants, the wider sector survey, and stakeholders. It is also indicated by the low level of demand for the first two funding rounds (Marketing Measures and Energy Efficiency and Mitigation of Climate Change), and the subsequent modest scale of activity delivered; in practice, very few sector actors have been supported by the first three funding rounds of the WMFS, and fewer than anticipated by Welsh Government. Fieldwork with stakeholders and a small number of the wider sector suggested that some sector members may not have had capacity to apply due to external factors such as the after-effects of the EU Exit and Covid-19 pandemic, as well as inflationary pressures – discussed further in paragraph 7.17 below. This may have contributed to the levels of interest and applications for the first three funding windows. However, stakeholders and the wider sector also identified that the scheme design and delivery likely also played a part – as summarised below.
- 7.9 Feedback from stakeholders emphasised that the type of funding (i.e. revenue only) and issues around the types of activities fundable dampened demand for the first two funding rounds. For example, it was argued that the Energy Efficiency and Mitigation of Climate Change round was too narrowly focused on research / feasibility studies, with direct support (e.g. to upgrade vessels to improve fuel efficiency) preferred by the sector but not eligible for support. This was corroborated by the wider sector survey evidence, with three out of five respondents identifying a misalignment between the activity which could be funded/type of funding available and the needs of their business/organisation as reasons for not applying for the scheme.
- 7.10 The Health and Safety round saw greater engagement and generally met the needs of successful applicants. This said, with around a third of approved applicants not claiming the grant (7 of 22), the conversion rate from application approval to claim approval was low given the nature of the intervention – standard cost for pre-qualified eligible items. This may in part reflect some of the challenges outlined above, for example, types/specification of equipment eligible for funding, and the

timescales to purchase and claim equipment. Notably, the main reason why approved applicants did not claim was an inability to source the equipment to the specifications required.

- 7.11 The feedback from stakeholders emphasised that there is strong demand within the sector for financial and targeted support from Welsh Government for the marine and fisheries sector. Therefore, the low level of engagement is likely to indicate how the scheme design and delivery may need to be more closely aligned with sector needs (as detailed elsewhere, for example see paragraph 5.9).
- 7.12 In order to address the needs of the sector effectively, clarity on the needs and priorities of the sector was seen as critical. Feedback from stakeholders and successful/unsuccessful applicants highlighted the importance of ongoing engagement and collaboration between Welsh Government and the sector to determine the key priorities which in turn should inform scheme design and delivery for future rounds. It was suggested by two successful applicants that this could include greater presence of Welsh Government at ports to foster increased dialogue between industry and policymakers.
- 7.13 Further, stakeholders thought that there is scope to improve the quality of engagement between the Marine and Fisheries Funding Stakeholder Advisory Group and Welsh Government. This could include the provision of more regular updates on delivery progress to the Group, and Welsh Government encouraging and facilitating constructive discussion and challenge by the Group. This could also include explicit feedback by Welsh Government on how discussion and advice from the Group has informed activity and decision-making to demonstrate active listening and commitment.
- 7.14 It is also noted explicitly that the evaluation covered the first three rounds, which were delivered at pace and working in an evolving and challenging landscape. There is also evidence that the WMFS has recognised and adapted to address some of the challenges experience. This included providing capital funding in Round 3, and pivoting in Round 4 (out of scope for this evaluation) to include both capital and revenue funding, provide more funding categories to support a broad range of projects, and the development of more relevant result indicators.

What are the reasons individuals, organisations and businesses in the marine and fisheries sector may have chosen not to apply for funding via the WMFS? (RQ 7)

- 7.15 The evaluation sought to engage widely with the sector via an online survey which was disseminated multiple times by Welsh Government and sector associations, bodies and organisations in Wales. However, the response rate was low. Therefore, the evidence base on the reasons why businesses/organisations in the sector may have chosen not to apply for funding via the WMFS is limited and the findings should be interpreted with caution. However, the wider sector survey suggested a lack of capacity to complete the application process and misalignment between business/organisation priorities and the type of activity which could be funded and the type of funding available (i.e. capital / revenue) were key reasons for not applying.
- 7.16 Further, the feedback from applicants and stakeholders on aspects of scheme design and delivery that worked less well set out above provides further evidence on why businesses/organisations may have chosen not to apply to the scheme. A consistent theme from stakeholders was the actual or perceived complexity of the application process, which was seen to have deterred applicants. The tight timescales for delivery were also a deterrent.
- 7.17 More broadly, it is important to consider the context in which the scheme has been delivered. Secondary data indicate that the fisheries sector in Wales has become smaller in absolute terms in recent years. Wales has experienced a decline in the number of vessels and gross tonnage since 2017. The number of regular fishers also declined in Wales between 2021 and 2022. It is likely that these trends can in part be explained by external influences (e.g. EU Exit and rising energy costs). For example, since exiting the EU, the UK cannot export live bivalve exports (such as cockles, clams, oysters, mussels and scallops) from non-Class A waters. However, many producers in Wales operate in Class B waters, and are therefore unable to trade with the EU unless live bivalve mollusc are purified. The feedback from stakeholders also indicates that these external factors influenced demand for the first three funding rounds owing to their impact on the long-term viability, and investment capacity, of many businesses/organisations across the Welsh fisheries and marine sector.

Have there been any unintended consequences of delivery of funding through the WMFS? (RQ 8)

- 7.18 Feedback from both stakeholders and applicants suggests there have been some adverse unintended consequences from the first three funding rounds of the scheme. Some applicants expressed their reluctance to apply for any future funding rounds if the process remains the same, because the application process is considered disproportionate to the potential financial award.
- 7.19 Further, stakeholders raised concerns that the sector has negative perceptions of the WMFS owing to the issues with the first three funding rounds, and this may deter businesses/organisations from applying in future. The scheme was also reported by two stakeholders to have led to a worsening of sentiment and trust towards the Welsh Government within the sector.
- 7.20 That said, there was a recognition amongst some sector stakeholders that the Welsh Government has sought to respond in real time to the lessons learned as noted above (i.e. providing capital funding in Rounds 3 and 4, paragraph 7.14). This was seen to help to mitigate these adverse unintended consequences.

What lessons can be learned from other UK Administrations delivering similar funding schemes? (RQ 9)

- 7.21 The comparator review of similar programmes in other UK administrations identified several key learning points for WMFS:
- **Implications of annual funding cycles.** A preference for the ability to support multi-year projects, with associated budget mechanisms to enable this, was identified in some cases.
 - **Transparency.** The online publication of awarded grants/projects provides accessible and transparent information to the sector on what has been supported. This can help to both encourage engagement and take-up in future rounds, and demonstrate the nature and scope of support provided.
 - **Consultation and industry and stakeholder engagement.** The importance of allocating sufficient time and resource to engage with the industry, including individual businesses and external stakeholders to inform scheme design, and support subsequent implementation.

- **Cross-government working.** Effective engagement and linkages with other government departments and agencies should be encouraged, at both devolved/national and UK level. This helps to reduce duplication and maximise alignment across different funding schemes.
- **Capacity matters.** Cutting across the points above, sufficient delivery and management capacity is key, to enable effective engagement with other parts of government, industry and stakeholders, and active communications, alongside core programme management activities.

7.22 In the context of successfully engaging with the marine and fisheries sector, the importance of ensuring strong alignment of programme activities to identified sector needs and clear strategic priorities also emerged as key themes from the comparator review of other UK programmes.

7.23 The lessons which can be learned from the design and delivery of other Welsh Government programmes align with those above. The importance of proportional application and delivery systems and processes was also highlighted, alongside multiyear funding and project delivery windows, transparency, clarity of strategic purpose, and leveraging existing networks and relationships in the sector.

Are any short-term impacts identifiable from the WMFS? (RQ 10)

7.24 Evidence of short-term impacts from the WMFS is limited at this stage. This largely reflects the low levels of engagement with the first three funding rounds. This said, there is some evidence of positive short-term impacts relating to safer working practices, increased capacity for catching / storage, and more efficient equipment leading to potential productivity and cost benefits.

7.25 Feedback also suggests that greater transparency – notably, publicly reporting the number and value of support projects – would help stakeholders to understand and communicate the contribution of the scheme. As noted above at paragraph 6.257.21, publishing data on the scheme may also help enhance wider sector buy-in and engagement as the scheme delivers future funding rounds.

8. Recommendations

- 8.1 Based on the evidence from this process evaluation, ten recommendations to inform the design and delivery of future funding rounds of the WMFS have been identified. Recommendations relating to scheme ‘strategy and design’ are set out first, followed by recommendations relating to scheme ‘delivery and management’.

Scheme ‘strategy and design’ recommendations

Recommendation 1: Define more explicitly, consistently and clearly the overall aims and purpose of the scheme.

- 8.2 There was frequent feedback that the WMFS would benefit from a refreshed and explicit statement of long-term aims and priorities, which in-turn informs investment decisions (i.e. the focus of future funding rounds). This would provide greater alignment with industry needs and clarity on the types of activities eligible for funding. This should align with – but move beyond – the aims as currently established⁵³ to identify the priorities of the scheme, and what it is looking to achieve for the sector.
- 8.3 To inform this, a gap analysis exercise may be useful to define the ‘fit’ of WMFS within the wider funding landscape, and how best to target future funding rounds to meet the needs of the sector. This should include a substantive and wide-ranging industry engagement exercise (e.g. via workshops, surveys, discussion forums), to demonstrate publicly and clearly the commitment of the programme (and the Welsh Government) to responding to industry needs.

Recommendation 2: Enhance communication and engagement with the sector where practical and proportionate to inform the design of future funding rounds.

- 8.4 It is suggested that Welsh Government should explore with the Marine and Fisheries Funding Stakeholder Advisory Group the most appropriate mechanism(s) for an enhanced level of sector engagement. This should include both immediate and longer-term on-going engagement mechanisms to retain buy-in and commitment of the sector.

⁵³Welsh Government (2022) [Welsh Marine and Fisheries Scheme: guidance relevant to all rounds](#)

Recommendation 3: Explore the possibility of adjusting the current annual funding model with UK Government.

- 8.5 Engaging with UK Government to seek to enable the programme to provide the opportunity to support multi-year projects, and relaxing the requirement for applications and activities to be delivered within a one-year funding cycle, should be seen as a priority by the Welsh Government.

Recommendation 4: Continue to offer a mix of capital and revenue funding support where appropriate.

- 8.6 Capital and revenue funding could be provided under the same or separate funding rounds, as necessary and consistent with round objectives. In this context, evaluating the effectiveness of offering both types of funding in Round 4 compared to either revenue or capital in previous rounds would be beneficial.

Scheme ‘delivery and management’ recommendations

Recommendation 5: For any future standard cost rounds, explore the possibility of incorporating greater flexibility around specifications (e.g. bespoke kit) and/or the ability for applicants to make the case for the purchase of other equipment to encourage demand and alignment to industry needs.

- 8.7 The imperative to balance greater flexibility with ensuring public value for money will be important in progressing this recommendation. Discussions with other UK programmes may be helpful in this context (see R10 below).

Recommendation 6: For future funding rounds, work with industry partners and stakeholders to ensure that the stated round aims are transparent, unambiguous and understood fully by the sector.

- 8.8 The rounds in-scope of this evaluation had clearly stated aims and eligibility criteria, in principle. However, in practice, there was some confusion in industry perceptions and understanding. This contributed to no or very few eligible applications in the first two rounds. Welsh Government should consider how to develop, test and potentially pilot the use of round aims depictions with industry, including by drawing on the inputs of the Marine and Fisheries Funding Stakeholder Advisory Group.

Recommendation 7: Implement a series of actions to realise a simpler and more proportionate application process, which includes access to support.

8.9 To deliver against this recommendation, in the immediate-term, the Welsh Government should:

- review the current application system, and identify opportunities to streamline the application process in general, or at least for smaller grants applications/smaller businesses and organisations; any improvements should also be communicated to the sector to encourage engagement with future rounds
- identify opportunities to improve internal communication mechanisms between the Marine and Fisheries Funding Policy Team and RPW; the aim should be to ensure that understanding/knowledge of the sector informs both the design and delivery of the scheme in practice.

8.10 In the medium-term, the Welsh Government should consider undertaking options reviews on:

- the continued use of the RPW online system, or the use of an alternative system
- the provision of additional support with the application process to help to improve the number and quality of applications; this could involve allocating resource for animateurs/consultants/industry stakeholders to support applications and/or additional support directly from Welsh Government.

Recommendation 8: Include a condition that applicant contact information may be shared with the Welsh Government and any contracted evaluators for the purpose of evaluation within the scheme privacy notice.

8.11 This should help to secure stronger engagement from applicants with any future process and/or impact evaluations of the scheme. This would need to be progressed in line with relevant UK GDPR and information security guidelines; advice from specialists within the Welsh Government should be sought.

Recommendation 9: Enhance the transparency of the scheme by publishing annual data on projects supported by the scheme (within UK GDPR guidelines) from Round 3 onwards.

- 8.12 Providing more regular updates on delivery progress to members of the Marine and Fisheries Funding Stakeholder Advisory Group (and possibly, MAGWF and CaSP Cymru) will help to improve transparency and understanding by the sector on the support provided.

Recommendation 10: Seek to establish a regular and dedicated forum for the four UK nations to share knowledge and best practice on marine and fisheries scheme design and delivery.

- 8.13 The forum would comprise representation from Welsh Government's Marine and Fisheries Funding Policy team and their counterparts in England, Scotland, and Northern Ireland. Meeting on a regular (e.g. bi-annual or annual basis) the forum would explore what is working well and less well 'in real time' and share best practice and relevant resources to support effective delivery in each jurisdiction.

Annex A: Stakeholder interviewees

Governance, management and delivery staff interviewees

- Three representatives from the Marine and Fisheries Funding Policy Team, Welsh Government
- A senior process manager from Rural Payment Wales

Stakeholder interviewees

- Agile Cymru
- Aquaculture Industry Wales
- Bangor University
- CaSP Cymru
- Department of Agriculture, Environment and Rural Affairs (Northern Ireland Executive)
- Department for Environment, Food & Rural Affairs (UK Government)
- Marine Directorate (Scottish Government)
- Menai Strait Fishery Order Management
- National Resources Wales
- Pembrokeshire Coastal Forum
- Rural Payments Wales
- Wales Council for Voluntary Action
- Welsh Fishermen's Association

Annex B: Applicant interviews topic guides

Topic guide: successful applicants

Background and context

Q1. Please can you provide a brief overview of your business/organisation, and your role?

Q2. Prior to WMFS, had your business/organisation previously applied for and / or received capital or revenue funding from any other Welsh Government or EU funded schemes?

Q3. Why did you apply for the [insert name of round] round of the WMFS? Probe in relation to:

Effectiveness of the Customer Journey

Q4. How did you first become aware of the [insert name of round] round of the WMFS?

Q5. Could the marketing and promotion of the WMFS have been improved in any way? If so, how?

Q6. To what extent was the offer and coverage of the [insert name of round] round clear (i.e. as explained in the Welsh Government's promotion and associated documentation/guidance) in respect to:

- a. The eligibility criteria
- b. The type of grant available
- c. The types of activities which could be funded
- d. The scale of grant on offer
- e. The intervention rate on offer

Q7. [Energy Efficiency and Mitigation of Climate Change only] Do you have any feedback on the Expression of Interest (EOI) stage in terms of the following:

- a. Was the process and guidance documentation clear and easy to follow?
- b. Were the requests for information in the EOI form clear and reasonable? Were any aspects of the form particularly difficult to complete, and if so, why was this?
- c. Was the time window available to complete the EOI sufficient?
- d. Was the time between EOI and full application appropriate?

Q8. [All] Do you have any feedback on the (full) application stage in terms of the following:

- a. Was the process and guidance documentation clear and easy to follow?
- b. Was the process proportional (i.e. in terms of time / cost) to the scale of the grant on offer?
- c. Were the requests for information in the application form clear and reasonable? Were any aspects of the application particularly difficult to complete, and if so why was this?
- d. [Health and Safety only] Did the list of eligible equipment influence the equipment you applied for?

Q9. [Energy Efficiency and Mitigation of Climate Change only] Were there any advantages or disadvantages of the two-stage application process?

Q10. Did you receive any support from animateur and/or advisors during your application process?

Q11. Did you receive any support from any other organisations (for example, sector organisations, Rural Payment Wales)?

Q12. Do you have any reflections on the assessment process in relation to the following:

- a. transparency of the process
- b. time between submission of the application and being issued with a contract
- c. usefulness of the feedback provided

Q13. [Where previously applied for support] How did the WMFS application, assessment and contract process compare to other application processes for sector related capital/revenue assistance?

Delivery of activity

Q14. [Energy Efficiency and Mitigation of Climate Change only] What activity has been delivered to date? Probe on:

- a. Has activity been delivered as planned, and if not, why not?
- b. Have any factors helped or hindered activity?

Q15. [Health and Safety only] What equipment have you purchased with the grant?

Q16. Overall, has the grant met your needs as you expected when you applied for the funding?

Q17. [Energy Efficiency and Mitigation of Climate Change only] Do you have any feedback on monitoring requirements?

Q18. Do you have any reflections on the process of claiming the grant?

Overall reflections

Q19. Reflecting on the application and delivery process overall:

a. What parts of the process worked really well?

b. What parts of the process would you change for future rounds of the WMFS?

Short-term impacts

Q20. Have there been any benefits to your business/organisation to date as a result of the WMFS grant?

Q21. Have there been any unexpected or unintended consequences of the WMFS grant?

Looking forward

Q22. What support could the WMFS focus on in the future that would be most beneficial for you?

Applicant interviews: unsuccessful applicants

Background and context

ASK ALL

- Q1. Please can you provide a brief overview of your business/organisation, and your role?**
- Q2. Prior to WMFS, had your business/organisation previously applied for and / or received capital or revenue funding from any other Welsh Government or EU funded schemes?**
- Q3. Why did you apply for the [insert name of round] round of the WMFS?**

Effectiveness of the Customer Journey

ASK ALL

- Q4. How did you first become aware of the [insert name of round] round of the WMFS?**
- Q5. Could the marketing and promotion of the WMFS have been improved in any way? If so, how?**
- Q6. To what extent was the offer and coverage of the [insert name of round] round clear (i.e. as explained in the Welsh Government's promotion and associated documentation/guidance) in respect to:**
- a. The eligibility criteria
 - b. The type of grant available
 - c. The types of activities which could be funded
 - d. The scale of grant on offer
 - e. The intervention rate on offer

Application and assessment

- Q7. [Energy Efficiency and Mitigation of Climate Change only] Do you have any feedback on the Expression of Interest (EOI) stage in terms of the following:**
- a. Was the process and guidance documentation clear and easy to follow?
 - b. Were the requests for information in the EOI form clear and reasonable? Were any aspects of the form particularly difficult to complete and if so, why was this?
 - c. Was the time window available to complete the EOI sufficient?

d. Was the time between EOI and full application appropriate?

ASK IF COMPLETED FULL APPLICATION ONLY

Q8. Do you have any feedback on the (full) application stage in terms of the following:

- a. Was the process and guidance documentation clear and easy to follow?
- b. Was the process proportional (i.e. in terms of time / cost) to the scale of the grant on offer?
- c. Were the requests for information in the application form clear and reasonable? Were any aspects of the application particularly difficult to complete?
- d. **[Health and Safety only]** Did the list of eligible equipment influence the equipment you applied for?

Q9. [Energy Efficiency and Mitigation of Climate Change only] Were there any advantages or disadvantages of the two-stage application process?

ASK ALL

Q10. Did you receive any support from animateur and/or advisors during your application process?

Q11. Did you receive any support from any other organisations (for example, sector organisations, Rural Payment Wales)?

Q12. Do you have any reflections on the assessment process in relation to the following:

- a. transparency of the process
- b. usefulness of the feedback provided
- c. [Where contract offer withdrawn only] time between submission of the application and being issued with a contract

Q13. [Where contract offer withdrawn only] Why did you decide to withdraw your application and what were the key factors influencing this?

Q14. [Where previously applied for support] How did the WMFS application and assessment process compare to other application processes for sector related capital/revenue assistance?

Overall reflections

ASK ALL

Q15. Reflecting on the application process overall:

- a. What parts of the process worked really well?
- b. What parts of the process would you change for future rounds of the WMFS?

Looking forward

ASK ALL

Q16. What support could the WMFS focus on in the future that would be most beneficial for you?

Annex C: Stakeholder interviews topic guide

Context

Q1. Please can you provide a brief overview of

- a. your business/organisation, and your role
- b. your involvement with, and/or knowledge of, the WMFS?

Q2. The first round of the WMFS was launched December 2022. At the time what were the key challenges and opportunities facing the marine and fisheries sector in Wales?

Q3. Have there been any important changes / developments in the marine and fisheries sector since December 2022?

Q4. Considering the key challenges and opportunities in the sector, how effectively do you think the design of the first three funding rounds responded (in principle) to the needs of the sector?

Demand and implementation

Q5. The number of applications was lower than anticipated across all funding rounds. What factors do you think influenced demand for the first three funding rounds, in terms of:

- a. Factors internal to scheme (i.e. design and delivery), and if factors varied by round
- b. Factors external to the scheme (i.e. sector and wider economic context), and if factors varied by round

Q6. What factors may have encouraged engagement from those that did apply for the first three funding rounds?

Q7. For each of the first three funding rounds of the scheme, do you have any feedback on:

- a. What worked well in delivery
- b. What worked less well in delivery

Q8. How effectively did the first three funding rounds fit in the landscape of wider support for the sector?

Short-term impacts

Q9. In your opinion, have the first three funding rounds under WMFS led to any impacts on the sector?

Q10. Have there been any unintended consequences of delivery of funding through the first three funding rounds under WMFS?

Looking forward

Q11. Looking forward, do you think potential future funding rounds under WMFS could be improved in terms of design and/or delivery processes to ensure that the needs of the sector are addressed?

Q12. Do you have any final comments you wish to add regarding the design and implementation of the first three rounds of the WMFS?

Q13. Would you be willing to share the survey link through your organisation's communication channels?

Annex D: Comparator schemes topic guide

Topics for discussion

Context for the scheme / programme

- How would you describe the underpinning context for the scheme / programme, including relevant legislation, policies, sector challenges/opportunities etc.
- What problems and/or opportunities was/is the intervention seeking to address?
 - [If relevant] Did this change / has this changed over time?
 - If yes, how did you seek to respond effectively to this change?

Reflections on the design of the scheme / programme

- How did you go about defining the aims and objectives of the scheme / programme?
 - What key factors influenced this?
 - Did you encounter any challenges/issues in this process. If yes, how did you respond?
- How did you go about defining the coverage and parameters of the scheme / programme design? e.g. types of activities funded, area(s) of focus, scale of funding, timescales etc.
 - What key factors influenced this?
 - Did you encounter any challenges/issues in this process. If yes, how did you respond?
- On reflection, what has worked well and less well in relation to design?

Reflections on the delivery of the scheme / programme

- How did you go about delivering the scheme / programme? e.g. what structures / processes did you put in place for implementation and governance, who else was involved.
 - What key factors influenced this?
 - Did you encounter any challenges/issues in this process. If yes, how did you respond?
- How did you ensure alignment with other forms of support for the sector?
 - What key factors influenced this?
 - Did you encounter any challenges/issues in this process. If yes, how did you respond?
- On reflection, what has worked well and less well in relation to delivery?

Key transferable lessons for the WMFS

- What do you think are the key lessons from your scheme / programme that the WMFS can learn from as it looks to future rounds of support?

- What are the implications / required actions of these lessons for the Welsh Government?

[For representatives of schemes in other UK nations only] Perspectives on the WMFS

- Do you have knowledge of the design and/or delivery of the WMFS?
- [If able to comment] Do you have any reflections on what has worked well in relation to design and delivery to date?
- [If able to comment] To date, do you have any reflections on what has worked less well in relation to design and delivery to date?

Annex E: E-survey questionnaires

E-survey for successful applicants

Background and context

Q1. Which of the following best describes your business or organisation: (Select one only)

- a. Fishing enterprise
- b. Aquaculture enterprise
- c. Marine enterprise
- d. University / research institution
- e. Sector association, body or organisation in Wales
- f. Other, please specify

Q2. Please can you confirm that your business / organisation successfully applied for the Health and Safety round of the Welsh Marine and Fisheries Scheme (WMFS)? (Select one only)

- a. Yes (GO TO Q3)
- b. No (GO TO WIDER REFLECTIONS QUESTIONS Q19)
- c. Don't know (GO TO WIDER REFLECTIONS QUESTIONS Q19)

IF Q2=a

Q3. Prior to applying to WMFS, had your organisation previously received capital or revenue funding from any other Welsh Government or EU funded schemes? (Select one only)

- a. Yes
- b. No
- c. Don't know / not applicable

IF Q3=a GO TO Q4. IF Q3=b/c GO TO Q5

Q4. Please can you provide the name of the scheme or schemes that your organisation previously received funding from?

Open text response

**Q5. How did you first become aware of the WMFS funding round for Health and Safety?
(Select one only)**

- a. Welsh Government website
- b. Welsh Government social media channels
- c. Sector association, body, or organisation in Wales
- d. Word of mouth (i.e. colleague, friend, family member)
- e. Other, please specify

Q6. Please can you briefly explain what motivated you to apply for the WMFS funding round for Health and Safety?

Open text response

Effectiveness of the Customer Journey

IF Q2=a

Q7. How would you rate the marketing and promotion of the Health and Safety funding round on a scale of 1-5, where 1 is poor and 5 is excellent:

	Scale 1-5	Not applicable	Don't know
Marketing and promotion			

Q8. Can you rate the clarity of following aspects of the Health and Safety funding round (i.e. as explained in the Welsh Government's promotion and associated documentation / guidance, on scale of 1-5, where 1 is very unclear and 5 is very clear:

	Scale 1-5	Not applicable	Don't know
a) The eligibility criteria			
b) The absolute size value of grant available [i.e. £200 - £10,000]			
c) The percentage of the standard cost of an item that was eligible for a grant [i.e. 50%-80%			

	Scale 1-5	Not applicable	Don't know
depending on type/size of applicant]			

Application, assessment and contract

IF Q2=a

Q9. How satisfied were you with the following aspects of the application, assessment and contract process for the Health and Safety funding round on a scale of 1-5, where 1 is very dissatisfied and 5 is very satisfied:

	Scale 1-5	Don't know
a) Guidance documentation		
b) The list of eligible equipment		
c) The application form on RPW Online		
d) The length of time the application window was open		
e) The time of year of the application window		
f) The transparency of the assessment process		
g) The usefulness of feedback provided through the assessment process		
h) The time taken between application and receiving the contract offer		

Q10. Do you have any other comments about the application, assessment and contract process for the Health and Safety funding round? *This textbox can also be used to explain your scores in the previous questions.*

Open text response

**Q11. Did you receive any support from the following during the application process?
(Select all that apply)**

- a. Animateur / advisor
- b. Sector association, body or organisation in Wales
- c. Rural Payment Wales / Welsh Government
- d. Informal support from peers
- e. Other, please specify
- f. No support received
- g. Don't know

IF Q11=a-e GO TO Q12. IF Q11=f/g TO GO Q13

Q12. Please can you briefly explain the type of support you received and why this was needed?

Open text response

Delivery of activity and benefits

Q13. What equipment, if any, did you purchase with the grant? (Select all that apply)

- a. Twin Chamber minimum 275n SOLAS automatic inflation lifejacket with integrated automatically activated PLB
- b. 4 man life raft (canister type) including Hydrostatic Release and Cradle
- c. MOB Recovery system
- d. MOB self recovery ladder
- e. MOB training dummy
- f. DSC/VHF Handheld radio
- g. Immersion Suit
- h. Automatic Identification System (AIS)
- i. Small Net Bin

- j. Medium Net Bin
- k. Large Net Bin
- l. Net Flaker/Stacker
- m. Multi-function display screen
- n. Autopilot
- o. LED Deck Lighting
- p. Searchlight (Battery operated)
- q. Toilet Facilities
- r. 3 Litres Anti-slip paint
- s. Rubber Matting
- t. I have not purchased any equipment
- u. Don't know

IF Q13=t/u SKIP TO WIDER REFLECTIONS QUESTIONS Q19. IF Q13=a-s GO TO Q14

Q14. Did you experience any challenges purchasing the equipment? (Select one only)

- a. Yes
- b. No
- c. Don't know

IF Q14=a GO TO Q15. IF Q14=b/c GO TO Q16.

Q15. Please can you briefly explain the challenges you experienced?

Open text response

Q16. At this stage, has the equipment purchased met your needs in relation to enhancing the health and safety of your organisation or business? (Select one only)

- a. Yes, fully met the needs of the business / organisation

- b. Yes, partially met the needs of the business / organisation
- c. No, not met the needs of the business / organisation
- d. Don't know

IF Q13=a-s (i.e. purchased equipment)

Q17. Have there been any benefits to your business / organisation to date as a result of the WMFS grant?

Open text response

Claims process

Q18. How would you rate the following aspects of the grant claims process for the Health and Safety funding round on a scale of 1-5, where 1 is very dissatisfied and 5 is very satisfied:

	Scale 1-5	Don't know
Timeliness of the process		
Evidence requirements (e.g. invoices, receipts)		
Overall ease / clarity of the process		

Wider reflections

Q19. What are the two most significant challenges and opportunities currently facing your business / organisation?

If your organisation is a research institution or sector association / body, please answer this question in relation to the Welsh marine and fisheries sector as a whole.

Challenges:

- 1) Open text response
- 2) Open text response

Opportunities:

- 1) Open text response
- 2) Open text response

Considering these challenges and opportunities the next set of questions focuses on how potential future rounds under the WMFS could be designed and delivered to meet sector needs.

Q20. Within the remit of the WMFS, what activities do you think should be prioritised for any upcoming funding rounds? Please select three activities.

- a. Activities which promote innovation.
- b. Activities relating to professional advisory services.
- c. Activities which promote human capital, networking.
- d. Activities which improve hygiene, health, safety and wellbeing.
- e. Activities which support diversification of businesses.
- f. Activities which mitigate the effects of adverse extenuating circumstances.
- g. Activities which establish or improve infrastructure for marine and freshwater users.
- h. Activities which promote job creation and encourages new entrants to the marine, fishing and aquaculture industries.
- i. Activities which support fishers or aquaculture farmers to establish new fishing or aquaculture businesses.
- j. Activities which contribute to the sustainable development of aquaculture sites.
- k. Activities which support the marketing of marine, fisheries and aquaculture products or recreational fishing.
- l. Activities which lead to new or improved products, processes or management and organisation systems.
- m. Activities which reduce the impact of seafood production on the marine environment.
- n. Activities which contribute towards conservation, restoration or enhancement of aquatic ecosystems and biodiversity.
- o. Activities which contribute to the design and implementation of conservation measures.

- p. Activities which support marine spatial planning for the sustainable use of marine and coastal resources.
- q. Activities which contribute towards the mitigation of climate change or its effects.
- r. Activities which maintain or improve animal health and welfare.

FOLLOWING Q20 RESPONDENT ROUTED TO SEPARATE FOLLOW-UP QUESTIONS FOR EACH OF THE THREE ACTIVITIES SELECTED ABOVE.

Q20a. Under [ACTIVITY NAME] are there any specific areas that you would like to see prioritised for any upcoming funding rounds?

Open text response

REPEAT FOR EACH ACTIVITY

Q21. What type of support would be most beneficial for your business / organisation in potential future funding rounds of the scheme? (Select one only)

- a. Revenue
- b. Capital
- c. Both / either
- d. Don't know

Q22. How important will the following factors be in influencing your interest and engagement with potential future funding rounds under the WMFS, on a scale of 1-5, where 1 is not very influential and 5 which is very influential:

	Scale 1-5	Don't know
Size of the grant available		
Intervention rate (i.e. the percentage of the costs eligible for a grant)		
Simplicity of the application process		
Simplicity of monitoring and reporting requirements post contract		

	Scale 1-5	Don't know
Length of the application window		
Time of year of the application window		

IF Q22 'Time of year of the application window'=3-5

Q22a. What time of year (i.e. season(s) or month(s)) would be preferred for the application window?

Open text response

ASK ALL

Q23. Do you have any further comments you wish to make in relation to the design and delivery of future potential funding rounds under the WMFS? This textbox can also be used to explain your scores in the two previous questions.

Open text response

Q24. To what extent are you interested in applying for potential future rounds under the WMFS, on a scale of 1-5, where 1 is not all interested, and 5 is very interested?

	Scale 1-5	Don't know
For funding rounds focused on the three activities you previously identified as priorities		
More generally, for funding rounds focused on other activities		

E-survey unsuccessful applicants and the wider sector

QXX. Did your business / organisation receive funding from any of the first three funding rounds under Welsh Marine and Fisheries Scheme (WMFS)?

- a. Yes (END SURVEY MESSAGE: "Please contact Aimee Marks at Welsh Government (Aimee.Marks@gov.wales) who can share the survey link for businesses / organisations who received funding from the first three funding rounds under WMFS")

b. No (CONTINUE)

IF QXX=b (No)

Q25. Which of the following best describes your business or organisation: (Select one only)

- a. Fishing enterprise
- b. Aquaculture enterprise
- c. Marine enterprise
- d. University / research institution
- e. Sector association, body or organisation in Wales
- f. Other, please specify
- g. My business / organisation does not operate in the marine and fisheries sector
(END SURVEY)

Q26. Did you apply for any of the first three rounds of the WMFS?

- a. Yes (GO TO Q27)
- b. No (GO TO WIDER SECTOR QUESTIONS Q58)
- c. Don't know (GO TO WIDER SECTOR QUESTIONS Q58)

Q27. Which WMFS funding round did your business / organisation apply for?

- a. Marketing Measures (GO TO Q28)
- b. Energy Efficiency and Mitigation of Climate Change (GO TO Q28)
- c. Health and Safety (GO TO Q42)
- d. Don't know (GO TO WIDER SECTOR QUESTIONS Q58)
- e. None of the above (GO TO WIDER SECTOR QUESTIONS Q58)

Unsuccessful Marketing Measures or Energy Efficiency and Mitigation of Climate Change applicants (i.e. IF Q27=a/b)

Q28. Prior to applying to WMFS, had your organisation previously received capital or revenue funding from any other Welsh Government or EU funded schemes? (Select one only)

- a. Yes
- b. No
- c. Don't know / not applicable

Q29. Please can you provide the name of the scheme or schemes that your organisation previously received funding from?

Open text response

Q30. How did you first become aware of the WMFS funding round for [Marketing Measures / Energy Efficiency and Mitigation of Climate Change]? (Select one only)

- a. Welsh Government website
- b. Welsh Government social media channels
- c. Sector association, body, or organisation in Wales
- d. Word of mouth (i.e. colleague, friend, family member)
- e. Other, please specify

Q31. Please can you briefly explain what motivated you apply for the WMFS funding round for [Marketing Measures / Energy Efficiency and Mitigation of Climate Change]?

Open text response

Effectiveness of the Customer Journey

ASK IF Q27=a/b

Q32. How would you rate the marketing and promotion of the [Marketing Measures / Energy Efficiency and Mitigation of Climate Change] funding round on a scale of 1-5, where 1 is poor and 5 is excellent:

	Scale 1-5	Not applicable	Don't know
Marketing and promotion			

Q33. Can you rate the clarity of following aspects of the [Marketing Measures / Energy Efficiency and Mitigation of Climate Change] funding round (i.e. as explained in the Welsh Government’s promotion and associated documentation / guidance, on scale of 1-5, where 1 is very unclear and 5 is very clear:

	Scale 1-5	Not applicable	Don't know
a) The eligibility criteria			
b) The absolute size value of grant available [i.e. £500 - £50,000 for Marketing Measures OR £500 - £100,000 for Energy Efficiency and Mitigation of Climate Change]			
c) The maximum grant threshold [i.e. 30%-100% depending on type/size of applicant]			

Application and assessment

ASK IF Q27=a/b

Q34. How satisfied were you with the following aspects of the Expression of Interest (Eoi) stage for the [Marketing Measures / Energy Efficiency and Mitigation of Climate Change] funding round, on a scale of 1-5, where 1 is very dissatisfied and 5 is very satisfied:

	Scale 1-5	Don't know
a) Guidance documentation		
b) The Eoi form		
c) The time of year of the Eoi window		
d) The length of time available to complete the EOI		
e) Period of time between the Eoi and the full application		

Q35. What happened following your Eoi?

- a. The Eol was successful, and I completed a full application (GO TO Q37)
- b. The Eol was successful, but I did not complete a full application (GO TO Q36)
- c. The Eol was not successful (GO TO Q40)
- d. Don't know (GO TO Q40)

ASK IF Q35=b

Q36. Please can you briefly explain why you decided not to complete the full application form?

Open text response

ASK IF Q35=a

Q37. How satisfied were you with the following aspects of the full application process for the Marketing Measures / Energy Efficiency and Mitigation of Climate Change funding round on a scale of 1-5, where 1 is very dissatisfied and 5 is very satisfied:

	Scale 1-5	Don't know
a) Guidance documentation		
b) The full application form on RPW Online		
c) The length of time the application window was open		
d) The time of year of the application window		
e) The transparency of the assessment process		
f) The usefulness of feedback provided through the assessment process		

ASK IF Q35=a/b

Q38. Do you have any other comments about the application and assessment process for the [Marketing Measures / Energy Efficiency and Mitigation of Climate Change] funding round? *This textbox can also be used to explain your scores in the previous questions.*

Open text response

Q39. Where there any advantages or disadvantages of the two-stage application process?

Open text response

ASK IF Q27=a/b

Q40. Did you receive any support from the following during the application process? (Select all that apply)

- a. Animateur / advisor
- b. Sector association, body or organisation in Wales
- c. Rural Payment Wales / Welsh Government
- d. Informal support from peers
- e. Other, please specify
- f. No support received (GO TO Q52)
- g. Don't know (GO TO Q52)

ASK IF Q40=a-e

Q41. Please can you briefly explain the type of support you received and why this was needed?

Open text response

GO TO Q52

Unsuccessful Health & Safety applicants (i.e. IF Q27=c)

Q42. Prior to applying to WMFS, had your organisation previously received capital or revenue funding from any other Welsh Government or EU funded schemes? (Select one only)

- a. Yes
- b. No
- c. Don't know / not applicable

IF Q42=a

Q43. Please can you provide the name of the scheme or schemes that your organisation previously received funding from?

Open text response

IF Q27=c

Q44. How did you first become aware of the WMFS funding round for Health and Safety? (Select one only)

- a. Welsh Government website
- b. Welsh Government social media channels
- c. Sector association, body, or organisation in Wales
- d. Word of mouth (i.e. colleague, friend, family member)
- e. Other, please specify

Q45. Please can you briefly explain what motivated you to apply for the WMFS funding round for Health and Safety?

Open text response

Effectiveness of the Customer Journey

ASK IF Q27=c

Q46. How would you rate the marketing and promotion of the Health and Safety funding round on a scale of 1-5, where 1 is poor and 5 is excellent:

	Scale 1-5	Not applicable	Don't know
Marketing and promotion			

Q47. Can you rate the clarity of following aspects of the Health and Safety funding round (i.e. as explained in the Welsh Government's promotion and associated documentation / guidance, on scale of 1-5, where 1 is very unclear and 5 is very clear:

	Scale 1-5	Not applicable	Don't know
a) The eligibility criteria			
b) The absolute size value of grant available [i.e. £200 - £10,000]			
c) The percentage of the standard cost of an item that was eligible for a grant [i.e. 50%-80% depending on type/size of applicant]			

ASK IF Q27=c

Q48. How satisfied were you with the following aspects of the application, assessment and contract process for the Health and Safety funding round on a scale of 1-5, where 1 is very dissatisfied and 5 is very satisfied:

	Scale 1-5	Don't know
a) Guidance documentation		
b) The list of eligible equipment		
c) The online application form on RPW Online		
d) The length of time the application window was open		

e) The time of year of the application window		
f) The transparency of the assessment process		
g) The usefulness of feedback provided through the assessment process		

Q49. Do you have any other comments about the application and assessment process for the Health and Safety funding round? *This textbox can also be used to explain your scores in the previous questions.*

Open text response

Q50. Did you receive any support from the following during the application process? (Select all that apply)

- a. Animateur / advisor
- b. Sector association, body or organisation in Wales
- c. Rural Payment Wales / Welsh Government
- d. Informal support from peers
- e. Other, please specify
- f. No support received (GO TO Q52)
- g. Don't know (GO TO Q52)

ASK IF Q50=a-e

Q51. Please can you briefly explain the type of support you received and why this was needed?

Open text response

GO TO Q52.

Wider reflections (ASK IF Q27=a/b/c (i.e. unsuccessful applicant))

Q52. What are the two most significant challenges and opportunities currently for your business / organisation?

If your organisation is a research institution or sector association / body, please answer this question in relation to the Welsh marine and fisheries sector as a whole.

Challenges:

- 1) Open text response
- 2) Open text response

Opportunities:

- 1) Open text response
- 2) Open text response

Considering these challenges and opportunities the next set of questions focuses on how potential future rounds under the WMFS could be designed and delivered to meet sector needs.

Q53. Within the remit of the WMFS, what activities do you think should be prioritised for any upcoming funding rounds? Please select three activities.

- a. Activities which promote innovation.
- b. Activities relating to professional advisory services.
- c. Activities which promote human capital, networking.
- d. Activities which improve hygiene, health, safety and wellbeing.
- e. Activities which support diversification of businesses.
- f. Activities which mitigate the effects of adverse extenuating circumstances.
- g. Activities which establish or improve infrastructure for marine and freshwater users.
- h. Activities which promote job creation and encourages new entrants to the marine, fishing and aquaculture industries.
- i. Activities which support fishers or aquaculture farmers to establish new fishing or aquaculture businesses.
- j. Activities which contribute to the sustainable development of aquaculture sites.

- k. Activities which support the marketing of marine, fisheries and aquaculture products or recreational fishing.
- l. Activities which lead to new or improved products, processes or management and organisation systems.
- m. Activities which reduce the impact of seafood production on the marine environment.
- n. Activities which contribute towards conservation, restoration or enhancement of aquatic ecosystems and biodiversity.
- o. Activities which contribute to the design and implementation of conservation measures.
- p. Activities which support marine spatial planning for the sustainable use of marine and coastal resources.
- q. Activities which contribute towards the mitigation of climate change or its effects.
- r. Activities which maintain or improve animal health and welfare.

FOLLOWING Q53 RESPONDENT ROUTED TO SEPARATE FOLLOW-UP QUESTIONS FOR EACH OF THE THREE ACTIVITIES SELECTED ABOVE.

Q53a. Under [ACTIVITY NAME] are there any specific areas that you would like to see prioritised for any upcoming funding rounds?

Open text response

REPEAT FOR EACH ACTIVITY

Q54. What type of support would be most beneficial for your business / organisation in potential future funding rounds of the scheme? (Select one only)

- a. Revenue
- b. Capital
- c. Both / either
- d. Don't know

Q55. How important will the following factors be in influencing your interest and engagement with potential future funding rounds under the WMFS, on a scale of 1-5, where 1 is not very influential and 5 which is very influential:

	Scale 1-5	Don't know
Size of the grant available		
Intervention rate (i.e. the percentage of the costs eligible for a grant)		
Simplicity of the application process		
Simplicity of monitoring and reporting requirements post contract		
Length of the application window		
Time of year of the application window		

IF Q55 'Time of year of the application window'=3-5

Q55a. What time of year (i.e. season(s) or month(s)) would be preferred for the application window?

Open text response

ASK ALL

Q56. Do you have any further comments you wish to make in relation to the design and delivery of future potential funding rounds under the WMFS? *This textbox can also be used to explain your scores in the two previous questions.*

Open text response

Q57. To what extent are you interested in applying for potential future rounds under the WMFS, on a scale of 1-5, where 1 is not all interested, and 5 is very interested?

	Scale 1-5	Don't know
For funding rounds focused on the three activities you previously identified as priorities		

More generally, for funding rounds focused on other activities		
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Wider sector questions (ASK IF Q26=b/c OR Q27=d/e)

Q58. Prior to this survey, were you aware of the Welsh Marine and Fisheries Scheme (WMFS)?

- a. Yes
- b. No (GO TO Q61)
- c. Don't know / not sure (GO TO Q61)

IF Q58=a

Q59. At the time the application windows were open, which, if any, of the first three funding rounds under WMFS were you aware of:

	Aware	Not aware
Marketing Measures		
Energy Efficiency and Mitigation of Climate Change		
Health and Safety		

ASK IF Q58=a

Q60. Why did you decide not to apply for the funding round(s)? (Select all that apply)

- a. My business / organisation did not need or want to apply for grant funding at the time the application window was open
- b. Activity which could be funded did not align with the needs of my business / organisation
- c. Type of funding (i.e. revenue / capital) did not align with the needs of my business / organisation
- d. Uncertainty over eligibility for the grant
- e. Timing of the application window

- f. Timescales to deliver the project / activity
- g. Capacity to complete the application process
- h. Could not provide the required match funding
- i. Advised not to apply e.g. by an advisor, sector representative
- j. Experience from previous applications for similar funding
- k. Other, please specify

ASK ALL

Q61. What are the two most significant challenges and opportunities currently for your business / organisation?

If your organisation is a research institution or sector association / body, please answer this question in relation to the Welsh marine and fisheries sector as a whole.

Challenges:

- 3) Open text response
- 4) Open text response

Opportunities:

- 1) Open text response
- 2) Open text response

Considering these challenges and opportunities the next set of questions focuses on how potential future rounds under the WMFS could be designed and delivered to meet sector needs.

Q62. Within the remit of the WMFS, what activities do you think should be prioritised for any upcoming funding rounds? Please select three activities.

- a. Activities which promote innovation.
- b. Activities relating to professional advisory services.
- c. Activities which promote human capital, networking.
- d. Activities which improve hygiene, health, safety and wellbeing.

- e. Activities which support diversification of businesses.
- f. Activities which mitigate the effects of adverse extenuating circumstances.
- g. Activities which establish or improve infrastructure for marine and freshwater users.
- h. Activities which promote job creation and encourages new entrants to the marine, fishing and aquaculture industries.
- i. Activities which support fishers or aquaculture farmers to establish new fishing or aquaculture businesses.
- j. Activities which contribute to the sustainable development of aquaculture sites.
- k. Activities which support the marketing of marine, fisheries and aquaculture products or recreational fishing.
- l. Activities which lead to new or improved products, processes or management and organisation systems.
- m. Activities which reduce the impact of seafood production on the marine environment.
- n. Activities which contribute towards conservation, restoration or enhancement of aquatic ecosystems and biodiversity.
- o. Activities which contribute to the design and implementation of conservation measures.
- p. Activities which support marine spatial planning for the sustainable use of marine and coastal resources.
- q. Activities which contribute towards the mitigation of climate change or its effects.
- r. Activities which maintain or improve animal health and welfare.

FOLLOWING Q62 RESPONDENT ROUTED TO SEPARATE FOLLOW-UP QUESTIONS FOR EACH OF THE THREE ACTIVITIES SELECTED ABOVE.

Q62a. Under [ACTIVITY NAME] are there any specific areas that you would like to see prioritised for any upcoming funding rounds?

Open text response

REPEAT FOR EACH ACTIVITY

Q63. What type of support would be most beneficial for your business / organisation in potential future funding rounds of the scheme? (Select one only)

- a. Revenue
- b. Capital
- c. Both / either
- d. Don't know

Q64. How important will the following factors be in influencing your interest and engagement with potential future funding rounds under the WMFS, on a scale of 1-5, where 1 is not very influential and 5 which is very influential:

	Scale 1-5	Don't know
Size of the grant available		
Intervention rate (i.e. the percentage of the costs eligible for a grant)		
Simplicity of the application process		
Simplicity of monitoring and reporting requirements post contract		
Length of the application window		
Time of year of the application window		

IF Q64 'Time of year of the application window'=3-5

Q64a. What time of year (i.e. season(s) or month(s)) would be preferred for the application window?

Open text response

ASK ALL

Q65. Do you have any further comments you wish to make in relation to the design and delivery of future potential funding rounds under the WMFS? *This textbox can also be used to explain your scores in the two previous questions.*

Open text response

Q66. To what extent are you interested in applying for potential future rounds under the WMFS, on a scale of 1-5, where 1 is not all interested, and 5 is very interested?

	Scale 1-5	Don't know
For funding rounds focused on the three activities you previously identified as priorities		
More generally, for funding rounds focused on other activities		

Q67. Would you be willing to participate in a short follow-up interview in June/July to explore your survey responses in more detail?

- a) Yes
- b) No

IF Q67=a

Q68. Please can you provide your name and email address so that we are able to contact you regarding an interview?

	Open text
Name	
Email address	

Annex F: Follow-up interviews with wider sector topic guide

- Q1. Please can you tell me a bit about your business, and your role?**
- Q2. Has your business/organisation ever applied for and / or received capital or revenue funding from any Welsh Government or EU funded schemes?**
- Q3. In the survey, you mentioned that you [insert survey response] of the WMFS...**
- a. If aware: How did you hear about the WMFS?
 - b. If unaware: Were you actively looking for funding opportunities during the period Rounds 1 to 3 were open for applications [start date – end date]?
- Q4. [If aware] You mentioned that the reason you didn't apply was [insert survey response]. Please can you expand on why that is the case?**
- Q5. How do you usually find out about funding opportunities? (e.g., websites, newsletters, colleagues)**
- Q6. In the survey, you mentioned [insert survey response] as the biggest challenges currently facing your business/organisation/the sector. Please can you provide more information on how these challenges are impacting your business/organisation/the sector?**
- Q7. In the survey, you mentioned [insert survey response] as the biggest opportunities for your business/organisation/the sector currently. Please can you provide more information on how these opportunities are impacting your business/organisation/the sector?**
- Q8. In the survey, you identified [insert survey response] as important factors influencing your interest in potential future funding rounds. Can you explain your thinking here in a bit more detail?**
- Q9. You stated that you were [insert survey response] in applying for potential future rounds under the WMFS? Please can you expand on why that is the case?**
- Q10. [If previously applied for funding] Is there anything from your experience of applying for other funding programmes that the WMFS can learn from as it looks to future rounds of support?**
- Q11. Do you have any further comments you wish to make in relation to the design and delivery of future potential funding rounds under the WMFS?**