



Footpath



Bridleway



Restricted Byway



Byway open to all traffic



Permissive Path



National Trail



Open Access



**The Trails Trust: Mendip Hills Test Area Environmental Land Management T&T 159A 'Incentivising green infrastructure public access and biodiversity creation in land management'. Final report (12).**



Test and trial research in the Mendip Hills National Landscape test area.

## **Test & Trial 159A Final report 12, September 2024**

An investigation into how to deliver the creation and improvement of green infrastructure strategic networks for public access and biodiversity, in land management plans.

### Themes

Advice & Guidance

Land Management Plans

Payments

New and Innovative Mechanisms

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The Trails Trust – facilitators of T&T 159 and 159A

*This report is submitted to Defra as part of the ELM Test and Trial programme*

*'Green Infrastructure is a strategically planned and delivered network comprising the broadest range of high-quality green spaces and other environmental features. It should be designed and managed as a multifunctional resource capable of delivering those ecological services and quality of life benefits required by the communities it serves and needed to underpin sustainability. Its design and management should also respect and enhance the character and distinctiveness of an area with regard to habitats and landscape types.'* (Natural England, 2009)

*'This is a great start to this process, at last we have something and this something is so much better than nothing. Currently with regard to access / green infrastructure provision there is nothing – no coherent support, no help and no narrative. This is the whole reason why nothing gets done and good projects are not delivered!*

*Every national landscape should have an access officer in the team. Our organisation could lead on that. There's an NGO here leading on nature recovery – SWT do that so why not an NGO lead for access?*

*This T&T could be an effective start to more strategic planning, effective leadership to provide access for all, equality and inclusion is so important and we need to also think about farming pressures, there are so many threads. We need an access focus across the landscape starting with the National Landscapes, Parish Councils and involving organisations like ourselves, TTT and CPRE'. (T&T 159A land manager participant 2024).*

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# 1. Objectives

TTT's overarching objective for test and trials in the Mendip test area

'To enable the creation and improvement of a strategic, connected, accessible and safe access and biodiversity green infrastructure landscape scale network that works for land managers, users and nature'.

ELMs test and trial 159A (test 2) objectives

## **Objective 1 Advice and guidance**

Review T&T 159 (test 1) findings to develop and test:

- an advice and guidance toolkit framework to inform landowners / land managers who are considering undertaking public access and biodiversity creation / improvement under the schemes.
- two A&G information delivery mechanisms suggested in T&T 159 (test 1) regarding advice that the market is not good at providing, which is important to land managers when considering the delivery of access and biodiversity as a public good. Mechanisms chosen included:
  - a pictorial image mechanism aimed at demonstrating best practice public access engagement and education issues and mitigation of barriers to access.
  - a specialist packet of advice based on creating a highway exit assessment mechanism.

## **Objective 2 Valuing payments and incentivising private investment**

Based on the T&T 159 (test 1) participant' opinions that aspirational public access routes could be incentivised by payments based on land values (V), operational loss (L), recreational value (R), access infrastructure (C) and annual improvement activities (A):

- develop and test valuation charts, which include local land, operational loss and recreational (ORVaL) values, to see what payment value is sufficient incentive for participants to include access and biodiversity creation and improvement, in single holding land management plans,
- test the concluded payment chart values on potential private, public and third sector investors, to ascertain what mechanisms determine the environmental outcome value is attractive to them,
- investigate co-financing mechanisms to fund strategic public access and biodiversity in local, best practice and landscape scale land management plans, and research investment opportunities from private, public and third sector stakeholders,
- develop and test a simple blended finance mechanism explaining where and how landowners and others, such as the voluntary sector, could search for blended finance to support green infrastructure access and biodiversity creation in LMPs.

## **Objective 3 Constructing land management plans**

Research and test how land managers can plan for green infrastructure access and biodiversity creation, improvement and maintenance in land management plans by:

- reviewing T&T 159 (test 1) participants, selecting and agreeing participation with ten owners of different land holdings along the aspirational public access routes (identified, surveyed and tested in T&T 159) covering varying holding size, mission, primary and secondary purposes, and different ownership/tenancy structures,
- researching and constructing long-term agreements (30+ years) and conservation covenants mechanisms,
- surveying each holding to establish map baseline data with respect to public access, biodiversity, and land designation data and reporting on interventions to improve public access and biodiversity,
- working with participants to create single holding LMPs by discussing surveys and creation and improvements reports, exploring options and solutions and testing the blended finance options,
- creating a public access and biodiversity best practice template based on an exploration of what commonalities exist between holdings,
- producing an example of a landscape scale LMP using the best practice template as a guide.

#### **Objective 4 Final report**

Produce a final report drawing together the findings and conclusions from objectives 1-3 and providing answers to the policy questions specified.

## 2. Key learning from T&T 159A (test 2) (executive summary)

### 1. Strategic vision for access and biodiversity on a landscape scale

Holding participants and stakeholders were enthusiastic about creating and investing in a linear multi-user green infrastructure network, and improving existing access and biodiversity. Combining strategic public access and nature recovery plans, to create a landscape scale network, has many positive ecosystem benefits for communities, environment, biodiversity and nature.

### 2. Incentivising participation, collaboration and investment

Multiple factors incentivised both the holding participants and the stakeholder investors. Facilitation was most important, nothing happens without it. Face to face discussions incentivised. Important factors were legacy, creating a permanent network, the co-existence and engagement of people, biodiversity & nature, food and farming, economic opportunity and rewards, delivering for local communities and environment. Small realignments of existing paths would be really helpful, safeguarding stock and people. Upgrading existing access rights from walking to multi-user to support horse riding and cycling should be incentivised in the scheme.

### 3. Incentivising network creation & improvement through effective support

All the mechanisms designed were effective (pictorial images, highway exit advice, A&G toolkit framework, constructing agreements), or very effective (advice packets, payments, blended finance, LMP construction). The essential building blocks for green infrastructure network delivery in a scheme had been provided.

### 4. A&G gaps in the market

Mechanisms most notable for lack of A&G were pictorial images, highway exit advice (specialist packets), A&G toolkit / handbook and voluntary access creation agreements mechanisms. Valuation & payment, blended finance and LMP creation mechanisms will all require A&G support ensuring 'no gaps'. A well-publicised 'one stop shop' access & biodiversity handbook will ensure that A&G lands with its intended audience.

### 5. Valuing the green infrastructure network for access and biodiversity creation and improvement

Holding participants and stakeholder investors agreed that land value established the minimum price for a capital payment for a bridleway dedication example. A fairer value would include a 50% operational loss payment. Participants favoured market land valuations, stakeholders slightly favoured similar, but less variable, government green book values. ORVaL could be useful for calculating higher recreational values.

No consensus apparent on dedication of access land rights valuation mechanisms, value or minimum price. Access land was difficult to value as poor-quality, but with high social welfare value. Linear route development creating a connected network was preferred by both groups.

Smaller access and biodiversity activities should be fully repaid and large schemes individually valued.

Permissive access should be supported in a scheme with payment mechanisms reflecting the difference between permissive and permanent access. Converting permissive access routes and trials to permanent access and being rewarded with the capital payment through a scheme was very attractive.

### 6. Land management plans

CROW Act S16 and express dedication at common law were the most attractive voluntary access creation mechanisms obviously safeguarding investments in land use change and associated environmental outcomes. The range of mechanisms used in P4C *'proved that options can be included'*. Inclusion of mechanisms creating short-term informal permissive paths and trials was also attractive. Dedication under HA 80 and the formal permissive access mechanisms were unattractive.

Participants were willing to consider conservation covenants but more information and advice is needed.

Data collected through templates and surveys showed that access, biodiversity, facility and agreed options for access creation and improvement commonality existed between all holdings along public access routes. The data was applicable to informing single holding, best practice and landscape scale LMPs. Three of the holdings, all smaller farms, had engaged with a farm business survey, which had not led to any economic or other advantage, research suggested that less public facing holdings would benefit most.

Participants agreed accessing this baseline data would be difficult therefore facilitation and specialist help are required to develop green infrastructure for access and biodiversity, though a scheme in LMP.

## **7. Impacts and overcoming barriers to access / future access**

Holding participants agreed that the scheme support discussed would mitigate most barriers from access faced by land managers and many barriers to access faced by the public. Stakeholders identified multiple barriers erected by government, with particular emphasis on the Local Authority use of S106 and CIL monies and the policy exclusion of environmental net gain and ecosystem services. Government review of its own processes and policy, supplying A&G and knowledgeable facilitation, and the creation of a blended finance and non-finance pledges mechanism would lead to successful delivery of an access & biodiversity network in any area and through any scheme.

## **8. New and innovative mechanisms theme, financing the network, blended finance.**

Stakeholder investors and holding participants agreed that there was no joined up approach or funding mechanism to deliver the green infrastructure network for access and biodiversity, despite its potential, and opportunities for finance. A mechanism was designed with the help of Somerset Community Foundation to bridge the funding gap with agri-environment money, accept monies directly from S106 and CIL, and make provision for non-financial pledges. Holding participants agreed that the mechanism was good, useful and well planned. A funding route would normally be Defra but schemes *'didn't match this strategic network aspiration'*.

## **9. Leadership and roles**

Stakeholder investors and holding participants agreed that provision of local facilitators, trained in access and biodiversity, was the primary role. Mendip Hills National Landscape unit/ partnership was viewed, by most, as the obvious leader to develop the access and biodiversity green infrastructure landscape scale plan with support from the scheme, community, specialists, farm agents, user groups and stakeholders.

The landscape scale LMP was an ideal vehicle to encourage collaborative working and blended finance investment. Somerset Community Foundation, already managing the Mendip Hills Fund, could manage a non-agri-scheme environment fund. Rural Payments Agency had an obvious role.

The local highway authority role in creating, improving or maintaining green infrastructure for public access and biodiversity was very questionable. Participants associated the LHA with the most unattractive voluntary agreement mechanisms, slow processes and lack of motivation to improve a decaying

inaccessible, disconnected and unsafe public access network. Stakeholders associated the LHA with adversarial, non-transparent S106 and CIL funds processes.

## **10. An access and biodiversity scheme**

T&T 159 (test 1) participants said that access and biodiversity creation and improvement needed its own scheme, instead of being levered into an agri-scheme. The current network decay and disconnect is in stark contrast to landowner and land manager willingness to create, improve and maintain access. Participants with significant acreages of land with obvious environmental outcomes potential, but no farm business, are excluded from agri – schemes, except from Farming in the protected landscape scheme (FiPL).

The creation of the strategic green infrastructure public access and biodiversity network in land management delivers on all four of the FiPL themes (nature, climate, people, place).

The FiPL scheme could be the basis for a green infrastructure access and biodiversity scheme and should be retained. Defra should explore expansion of the FiPL model with public and third sector stakeholders such as National Landscapes, Community Foundations and with private sector investors, to effect inclusion of blended finance and non-financial resources to fund green infrastructure access and biodiversity eco services and environmental gain.



### 3. Definitions and acronyms

Agri-scheme	Agricultural scheme
AONB	Area of Outstanding Natural Beauty (now National Landscapes)
A&G	Advice and Guidance
ATV	All-terrain vehicle (mobility vehicle)
BNG	Biodiversity net gain
CIL	Community Infrastructure Levy <a href="https://www.gov.uk/guidance/community-infrastructure-levy">https://www.gov.uk/guidance/community-infrastructure-levy</a>
CPRE	Council for Protection of Rural England
CROW	Countryside and Rights of Way Act 2000
CS(S)	Countryside Stewardship (Scheme)
DEFRA (Defra)	Department for Environment, Food & Rural Affairs <a href="https://www.gov.uk/government/organisations/department-for-environment-food-rural-affairs">https://www.gov.uk/government/organisations/department-for-environment-food-rural-affairs</a>
EA	Environment Agency
EDCL	Express dedication at common law
ELM(s)	Environmental Land Management (scheme)
ENG	Environmental net gain
FIPL	Farming in Protected Landscapes <a href="https://www.gov.uk/guidance/funding-for-farmers-in-protected-landscapes">https://www.gov.uk/guidance/funding-for-farmers-in-protected-landscapes</a>
FWAG	Farming & Wildlife Advisory Group <a href="https://www.fwagsw.org.uk/">https://www.fwagsw.org.uk/</a>
HLS	Higher Level Stewardship
KM	Kilometre
LA	Local Authority
LHA	Local Highway Authority
LMP	Land Management Plan
MHAONB	Mendip Hills area of natural beauty
MHNL	Mendip Hills National Landscape
n	Number of participants / stakeholders in a test
NGO	Non-government organisation
NE	Natural England <a href="https://www.gov.uk/government/organisations/natural-england">https://www.gov.uk/government/organisations/natural-england</a>
NL	National Landscapes
NPPF	National Planning Policy Framework <a href="https://www.gov.uk/government/publications/national-planning-policy-framework--2">https://www.gov.uk/government/publications/national-planning-policy-framework--2</a>
ORVal	Outdoor Recreation Valuation Tool <a href="https://leep.exeter.ac.uk/orval">https://leep.exeter.ac.uk/orval</a>
OS	Ordnance Survey
P4C	Paths for Community scheme
PROW	Public rights of way
QR (code)	Quick response (code)
RPA	Rural Payment Agency
S106	Section 106 of the Town and Country Planning Act 1990
SCF	Somerset Community Foundation
SWT	Somerset Wildlife Trust
T & T	Test and trial
TTT	The Trails Trust
TIFF	Total income from farming

## 4. Introduction to research in the Mendip Test area and T&T 159 (test 1)

### Defra Test & Trials

The Government's vision for a future agricultural and environmental land management scheme is based on rewarding public goods with public money, creating a thriving, self-reliant and resilient farming sector, ensuring world class animal welfare standards and food production and a trusting and productive relationship between farmers and government.

Public goods are commodities or services that benefit all members of society.

### Delivering Environmental Land Management Public Goods

Six public goods have been defined by government as: 1. clean and plentiful water, 2. clean air, 3. protection from, and mitigation of environmental hazards, 4. mitigation of, and adaptation to, climate change, 5. thriving plants and wildlife, 6. beauty, heritage and engagement.

### Test and trials in the Mendip test area

Two test and trials have taken place in the Mendip test area which covers an approximate area of 300 square kilometres (30,000 hectares).

### Test 1 T&T 159 'How to incentivise green infrastructure access & biodiversity' 2020 – 2021.

T&T 159 (test 1) researched **the willingness** of 50 landowner and manager participants, from diverse holdings and businesses, across the test area, to deliver a strategic, connected, accessible and safe green infrastructure network.

The network combines existing and aspirational multi-user access space with biodiversity enhancement, working for all through offering multiple benefits for land owners / managers, users and nature.

The green infrastructure network, if created, would deliver four public goods:

2. and 4. cleaner air mitigation of, and adaptation to, climate change (through safe connections for communities strategic travel by walkers, cyclists, equestrians and mobility scooter users)

5 and 6. thriving plants and wildlife, beauty, heritage and engagement (through creating connections, improving access and enhancing biodiversity along corridors and margins, in woodland and open space).

### Defra's Test and trials priorities or themes and sub themes covered by the Mendip T&Ts

Themes included: role of advice and guidance, payments / blended finance, land management plan, collaboration, innovative delivery solutions.

Sub themes explored throughout the Mendip T&T's included:

- delivering environmental outcomes with public access - combining an access network with biodiversity / nature recovery strategy (can these co-exist?),
- variation between holdings and participants (does this make a difference to willingness to participate?),
- barriers to multi user access (what are the solutions for land managers and the public),
- creation of permanent access (legacy), is permissive access a public good compared to permanent access?

- what incentivises the creation / improvement of a green infrastructure network?

### Farming in protected landscape scheme (FiPL).

In 2021 Defra brought forward the farming in protected landscape scheme. This is the only agri-scheme that currently funds green infrastructure projects for access and biodiversity.

The scheme funds projects that: 1. support nature recovery, 2. mitigate the impacts of climate change, 3. provide opportunities for people to discover, enjoy and understand the landscape and its cultural heritage, 4. protect or improve the quality and character of the landscape or place.

The creation of the Mendip green infrastructure public access and biodiversity network in land management delivers on all four of the FiPL themes. In running concurrently with these test and trials in the Mendip Hills NL, FiPL has provided a very useful case study in how a future access could be funded work and work through the inclusion of all landowners / managers.

### Test 1 T&T 159 'How to incentivise green infrastructure access & biodiversity' reported in 2021.



The primary tool designed for T&T 159 (test 1) was an aspirational green infrastructure multi-user network designed to connect strategic linear green trails around the test area with connecting local circuits and community connections, mapped on Ordnance Survey Explorer.

The network was designed along quiet lanes (unclassified county roads: picture left), multi-use rights of way (byway, RB, bridleway). The planned network (currently fragmented) required 101 aspirational routes. These were planned along existing rights of way (footpath), permissive trails and

connections to and through open space. Aspirational routes were planned along corridors (where these existed e.g. green lanes and along boundaries / margins, this type of access infrastructure being generally preferred by land managers and offering non-operational space that can also be enhanced for biodiversity (picture right: Green Lane opened for multi-use and enhanced for biodiversity through re-building a dry-stone wall and works to hedges and trees, project part funded by FiPL) .

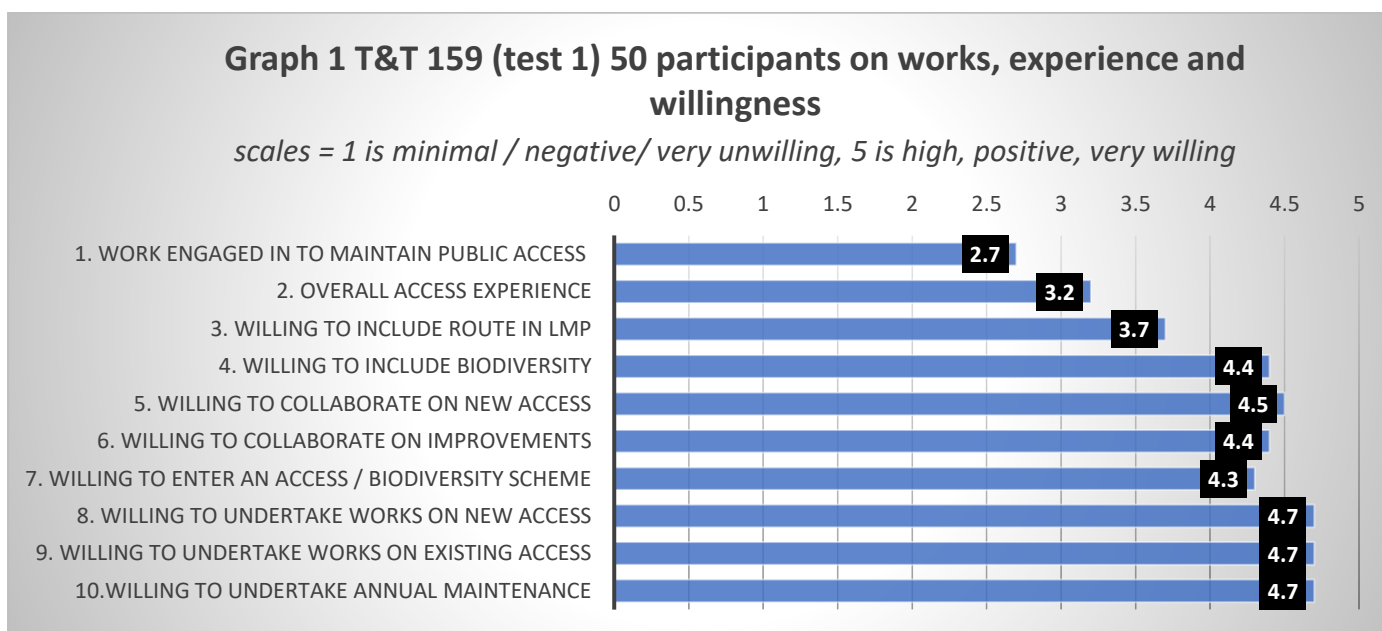


This approach offered a strategic vision by connecting to and improving existing green infrastructure assets, creating multi-user routes accessible to all abilities and offering multiple benefits including safety, health / leisure, engagement with farming, food, landscape / nature, history / heritage and support for rural economy & tourism.

T&T 159A Test 2 'Incentivising green infrastructure public access and biodiversity creation in land management' 2022 - 2024 builds on the T&T 159 (test 1) findings by researching how advice and guidance, payment and funding mechanisms, created for the test, could provide support, through land management plans to overcome barriers to access, faced by both land managers and the using public

## Key findings from T&T 159 (test 1)

Graph 1 shows key findings from interviews with 50 participants



Key findings on themes:

- No variation due to land holding size, business mission / purpose, participation in countryside stewardship in willingness to engage with access. 94% had diversified away from a primary agricultural purpose.
- Barriers to access exist both for the public and for landowners and land managers. Provision in the test area is overwhelmingly for able bodied people (proliferation of stiles, narrow gates and kissing gates, noted in the access survey and in the interviews). There were serious land manager concerns about a wide range of impacts (mixing of dogs, people, machinery and stock) but agreement that mitigations and solutions such as improved structures and public engagement / education provided through ELMs could work.
- The majority (62%), were immediately willing to include the aspirational multi user access route and 92% agreed to access to an alternative route, if the aspirational route was not suitable.
- Reward for permanent access creation should factor in local land value, loss of operational recreational value, dedication set legal costs, capital works and annual works payments.
- 94% were willing to undertake or oversee access and biodiversity creation and improvement works.
- 86% of participants said specialist advice within the scheme was needed
- 90% of participants were willing to work collaboratively in a wide range of scenarios to create and maintain green infrastructure across holdings. Collaboration was vital for nature recovery as well as for public access. 94% overwhelmingly agreed that leadership is needed to deliver projects.
- Successful delivery of permanent green infrastructure in an access and biodiversity scheme depends on the ELM scheme being adaptable, flexible and above all available to the key players,

landowners who have the power to dedicate rights and land managers who need to agree. Green access and biodiversity infrastructure creation is highly likely to be instigated by external interests such as multi-user groups.

- 84% of participants said that they were willing / very willing to include biodiversity enhancement with access. MH AONB said ‘the creation and/or enhancement of public access routes is a mechanism for joining up these ecological networks, enhancing and extending existing natural habitats. The biodiversity interventions identified in this ELM Test are examples of how Green Infrastructure can be a key component in addressing biodiversity loss’.
- More incentives for permanent rather than permissive access could also help ensure wildlife habitat is not destroyed when an agri-environment scheme comes to an end. With the right incentives the majority of participants recognised the significant public good value of a permanent well-located green infrastructure network and the opportunities that can bring for sustainable green travel, healthy recreation, and for nature and economic recovery
- Public education needs to be enabled, participants were keen to find solutions to access issues, to take control rather than access being ‘something that is done to them.’



Access the T&T 159 (test 1) report and accompanying appendix at <http://www.thetrailstrust.org.uk/downloads/Elms-report-appendix.zip>

## 5. Introduction to T&T 159A (Test 2)

### **'Incentivising green infrastructure public access and biodiversity creation in land management' 2022 - 2024**

T&T 159A (test 2) researched **how** an agri-scheme could support landowners and managers to create strategic public access, particularly for multi-use, together with undertaking existing access improvements and biodiversity enhancements in access spaces.

These activities would benefit everyone through removal of barriers and impacts, support diversification / the rural economy and support nature recovery.

The ten holdings together owned 11081 acres, including approximately 1920 acres of woodland.

#### **Advice and guidance theme.**

T&T 159 (test 1) showed the majority of 50 participants agreed that specialist advice provision would be needed in a scheme, on a wide range of public access with biodiversity creation / improvement topics. However, the high willingness of the 50 landowner / manager participants interviewed \* to engage with access creation, improvement and maintenance along with biodiversity enhancements, within access space, means there are considerable opportunities to collaborate to improve the green infrastructure network for public access and biodiversity. (\*At the conclusion of T&T 159 (test 1) 90% of participants were willing or very willing to enter a public access and biodiversity scheme and 10% were undecided).

Well-targeted and funded green infrastructure network route creations and improvements would help resolve impacts on land management operations, educate and engage the public, help restore nature, deliver multi-user (foot, bicycle and horse rider) and disabled access, and support farmers to exploit new economic opportunities that could stem from a strategic, connected, permanent green network of access and biodiversity infrastructure. In order to achieve these positive outcomes, advice and guidance is needed on a wide range of factors

'Willingness' depended on a number of factors. These included being able to select the infrastructure location, good quality structure provision, engaging with the public to reduce impacts and liability issues, reasonable landowner reward, process and permanency to deliver habitat, community need and local economic benefit. It was notable that 47 / 50 (94%) participants had a secondary diversification or employment and were not therefore totally dependent on income from their primary land-based operation.

T&T 159 (test 1) showed that public access was welcomed by the 50 participants but most had concerns about impacts on operations, stock, workers, wildlife and biodiversity. Improving public facing engagement and educational signage and improved waymarking along access routes would, they agreed overcome most barriers. To support land managers fearful of erecting their own signage due to liability issues, an A&G pictorial image mechanism was designed and tested to mitigate barriers from public use, filling a market gap.

Barriers to the public using countryside access exist. These include access route locations, lack of signage, , poorly maintained or inaccessible structures, eroded surfacing, obstructions, lack of connectivity and highway exit safety. 101 access route surveys during T&T 159 (test 1) showed that the current public access network predominantly only works for activities on foot by able-bodied people.

Highway exit safety is a major barrier to creating and improving the connectivity, safety and accessibility of the green infrastructure access network, this was confirmed by earlier TTT research and by access surveys in T&T 159 (test 1). Land managers are not responsible for highway exit safety, but could be rewarded through new Agri - schemes to ensure routes exit at the best locations and to maintain visibility splays. A highway exit mechanism was developed by highway specialists, Transient Designs Ltd filling a gap in the market not provided for by government, local highway authorities or protected landscapes. This mechanism was also used to test whether a sample packet of specialist advice was an effective method for delivering advice.

Discussions with the 50 participants in T&T 159 (test 1) showed that a comprehensive advice & guidance toolkit to engage land managers to collaborate to create, improve and maintain connected, accessible safe, green infrastructure network that works for people and nature, was also a significant market gap. In T&T 159A (test 2) a review of the data collected in T&T 159 (test 1) was planned to inform, research and test an A&G framework toolkit mechanism for an access and biodiversity handbook.

### **Payments and innovative mechanism themes.**

In T&T 159 (test 1) the 50 participants were tested on payments expected for a) the creation (dedication) of permanent multi user public access rights along a linear route and b) in open space / woodland, and c) annual works to maintain, improve and enhance green infrastructure for access and biodiversity.

With respect to:

- a) participants as a group agreed a valuation formula as the basis for a landowner reward payment in a scheme for a linear route as:  $V$  (land value) +  $L$  (operation loss) +  $R$  (recreational value) +  $D$  (legal dedication costs) +  $C$  (capital works) +  $A$  (annual improvements and maintenance activities).
- b) valuation for open access land was difficult but should be based on the area over which rights were to be dedicated, but no valuation formula was agreed.
- c) participants were willing to undertake works on new and existing access and on annual maintenance in a scheme, (including biodiversity enhancements). However, although participants agreed with the scheme setting payment rates for capital works and annual activities, the fact that schemes had not adequately covered the true cost of materials and labour, in the past, or provided any element of profit, was a disincentive to participation.

In T159A (test 2) a participants payments & chart test mechanism was devised to research and test participants and potential funding stakeholder opinions on the formula (a) to see what payment value would be sufficient incentive to include access and biodiversity creation and improvement in individual land management plans and scheme participation. Participants included individuals who had created permissive access (formal and informal including through countryside stewardship and an individual who had created a permanent right of way for reward in the past. Research was planned to include investigating valuing b) open space and c) annual works. Following initial interviews, analyse responses to see if a single payment value could be agreed on to incentivise permanent public access in a landscape scale LMP.

An investigation into public and private co-financing mechanisms to fund strategic public access and biodiversity in local, best practice and landscape scale land management plans with partners, specialists and non-farming participants was planned looking at future funding opportunities such as from local tourism & attraction businesses, active travel & outdoor pursuit providers, planning gain (£106 / Community Infrastructure Levy), grants and other third-party mechanisms. The blended finance stakeholder investigation would be used to devise a green infrastructure blended finance mechanism to support landowners and others, such as the voluntary sector, in securing blended

finance to support green infrastructure access and biodiversity creation and improvement in LMPs.

### **Land management plan themes**

T&T 159 (test 1) research data showed that participants recognised community priorities for access, the wider benefits and opportunities deriving from a strategic multi user network and that concerns about the proposed access could be mitigated. At test conclusion 45 / 50 (90%) of participants were willing / very willing to join a scheme.

In T159A (test 2) it was planned to:

- write and test a specialist topical document about how to construct the long-term agreements (30+ years) to create, improve, maintain green infrastructure for access and biodiversity and including conservation covenants mechanisms,
- review T&T 159 participants and select and agree participation with ten owners of different land holdings along the aspirational public access routes (identified, surveyed and tested in T&T 159) covering varying holding size, mission, primary and secondary purposes, and different ownership/tenancy structures,
- survey each holding to establish map baseline data with respect to public access and biodiversity.

Draft LMPs for each holding would be created. Working with participants to analyse survey assessments, gain public behavioural insight and explore how to record solutions to resolve issues, create and improve green infrastructure for access and biodiversity and explore options for landowner / manager economic benefits deriving from a connected, accessible, safe, strategic green infrastructure landscape scale network.

A 'best practice' LMP was planned for public access and biodiversity based on an exploration of holding commonalities existing between holdings, supported by the A&G, payment, blended finance and construction of agreement mechanisms

A landscape scale LMP for the Mendip test area was planned, using the best practice template as a guide, to work to test how to record solutions to resolve issues, record options to create and improve green infrastructure for access and biodiversity and economic benefits on a landscape scale.

### **Final workshop**

The workshop was planned to conclude T&T 159A was to finally test and agree the best practice template as a guide to produce a landscape scale template with participants.



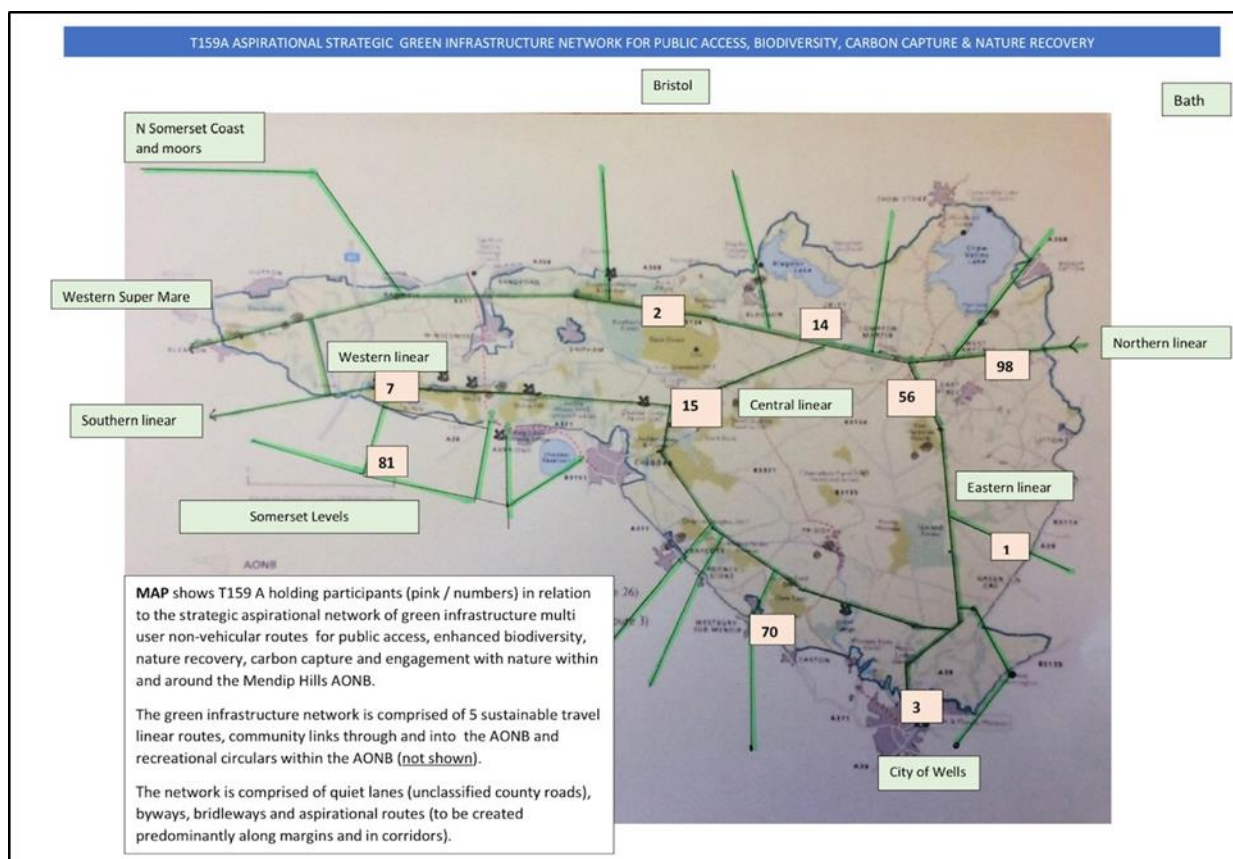
## 6. T&T 159A (test 2) Methodology, Mechanisms, Tools, Participants and Stakeholders

In order to test the public access and biodiversity green infrastructure network creation and improvement objectives and policy questions the facilitation team designed mechanisms and tools. Participants representing the ten holdings across the Mendip Test area, and the private, public and third sector stakeholders were interviewed separately using questionnaires and other tools. Reports were written to capture the data and these were sent periodically to Defra.

Mechanisms designed for T&T 159A	
Theme	T159A mechanisms
A&G / LMP	A. Pictorial image mechanism (overcoming barriers / impacts)
A&G / LMP	B. Usefulness of topical advice packet highway exit advice mechanism
A&G / LMP	C. Advice & guidance toolkit access & biodiversity mechanism
Payments	D. Payment mechanism and payment charts
LMP	E. Constructing long term agreements mechanism
LMP	F. Construction of land management plans mechanism
Payments / new & innovative mechanism	G. Blended finance

### Tools used throughout T&T 159A interviews

1. Mendip aspirational green infrastructure access & biodiversity network map (see 2)
2. Mendip Test area map showing T&T 159A (test 2) participant holding locations and relationship to the strategic network shown below.



3. Green infrastructure creation chart showing options.

Tools developed to test each mechanism (some shown for illustration purposes).

**A. Pictorial Image mechanism**



1. Participant pictorial image questionnaire
2. 3 suites of 10 pictorial image signs (30 signs illustrated left)

**B. Specialist topical advice packet, a highway exit interface assessment mechanism**

1. Participant specialist topic highway exit questionnaire
2. Specialist packet Highway exit simple assessment tool by Transient Designs with examples and 4 x highway Intersect Improvements at specific sites in the landscape (illustrated below).



**C. Advice & Guidance framework for access & biodiversity toolkit mechanism**

1. Participant A&G framework questionnaire
2. Chart 1 framework of key components for an A&G toolkit within a scheme
3. Table 2 key questions for planning green infrastructure access and biodiversity
4. Table 3 Key advice and guidance topics for planning green infrastructure access and biodiversity

**D. Payment valuation and chart test mechanism (holding participants and stakeholders)**

1. Participant valuation & payments mechanism questionnaire.
2. Stakeholder investors valuation & payments mechanism questionnaire.
3. Valuation charts 1 & 2 determination of capital payment for permanent public access space.
4. Valuation chart 3 ORVaL social welfare / recreational values for aspirational access.

**E. LMP constructing agreements**

	1. PERMANENT ACCESS (VOLUNTARY DEDICATION AGREEMENTS)	2. PERMISSIVE ACCESS (VOLUNTARY PERMISSIVE AGREEMENTS)	3. CONSERVATION COVENANT
ADVANTAGES	• INHERENTLY PERMANENT ACCESS SECTION 55	• FLEXIBLE	• FLEXIBLE
DISADVANTAGES	• PERMANENT ACCESS SECTION 55	• FLEXIBLE	• FLEXIBLE
KEY QUESTIONS	• PERMANENT ACCESS SECTION 55	• FLEXIBLE	• FLEXIBLE
KEY ADVISORY TOPICS	• PERMANENT ACCESS SECTION 55	• FLEXIBLE	• FLEXIBLE

1. Participant Long-term and agreements and covenants questionnaire
2. Long term agreements specialist topic paper
3. Voluntary agreements access creation access table (2 and 3 illustrated left).

**F. Construction of Land Management Plans**

1. LMP group of A,B,C,D templates to complete

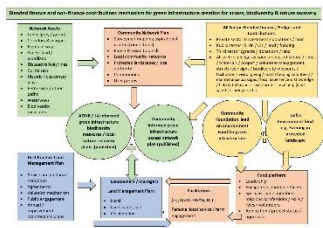


2. Holding access and biodiversity maps (map section illustrated left).
3. T159A (test 2) access survey scoring system and access survey score sheets.
4. T159A (test 2) existing access survey holding reports.
5. T159 (test 1) biodiversity surveys used again in T159A (test 2).
6. T159 A (test 2) new biodiversity / nature recovery methodology and surveys based on MHNL nature recovery plan model.

7. Best Practice Plan templates (final).

8. Landscape scale LMP for Mendip Test area.

**G. Blended Finance mechanism**



1. Blended finance stakeholders questionnaire
2. Participant LMP mechanism F template D
3. Blended finance and non-finance innovative mechanism (illustrated left).

<b>T&amp;T 159 participants selected to participate in T&amp;T 159A</b>				
<b>Holding number / type</b>	<b>Holding size (acres)</b>	<b>Mission</b>	<b>Primary purpose</b>	<b>Secondary / diversification</b>
1 Estate	1000+	Multi-faceted	Mixed farms	Sub-letting, Employment (barrister), Field sport.
2 Estate	1000+	Agriculture	Lowland grazing livestock	Field Sport / woodland conservation
3 Estate	1000+	Landscape	Lowland grazing livestock	Field Sport
4 Conservation / access charity	1000+	Landscape	Conservation	Sub-letting, land let, events
5 Organic / regeneration farm to supermarket	1000+	Agriculture	Dairy	Beef/sheep
6 Mineral extraction company	1000+	Mineral Extraction	Industrial / commercial	Agriculture let, woodland
7 Family farm regeneration	250-500	Other	People / livestock	Tourism, sales
8 Family farm	50-250	Agriculture	General Cropping	Equestrian (livery)
9 Family farm	50-250	Agriculture	Lowland grazing livestock	Plant hire / contracting
10 Family farm	250-500	Agriculture	Dairy	Equestrian (livery)

<b>T&amp;T 159A Stakeholders selected for interview in the investor co-finance and chart research</b>			
Test No	Sector	Description of operations	Interviewee(s)
S1	Private	Large infrastructure (Airport)	Public Relations & Community Manager
S2	Private	Dairy Farm and known brand cheese makers (farm to supermarket)	Farm Operations Director
S3	Private	Local campsite / outdoor pursuits	Owner
S4	Private	National property developer (homes)	Land Director
S5	Private	Local glamping site for adults	Owner/manager
S6	Private	Property Development Group consultant	Owner/ director
S7	Private	Large infrastructure (nuclear power plant)	Corporate and Social Responsibilities officer
S8	Private	Orchards and known brand cider maker (farm to supermarket)	Owner Director
S9	Third	Community foundation (county)	CEO
S10	Public	Mendip Hills AONB Unit	Unit Manager
S11	Private	Road and active travel route / path construction (national)	Owners/directors
S12	Third	Wildlife Trust (county)	Head of Nature Recovery / Sustainable Finance Specialist
S13	Third	Active travel development (national)	Company Surveyor and secretary
S14	Public	City Council	Councillor with responsibility for the local plan

<b>T&amp;T159A (test 2) reports and appendices sent to Defra</b>	
All available from trailstrust90@gmail.com	Report no
Pictorial Image mechanism A	1
Topical advice packet highway exit assessment mechanism B	2
A&G Framework for a toolkit mechanism C	3
Participants Payments report & chart test mechanism D	5
Investors report & chart test (blended finance) D continued	6
Blended Finance mechanism G	7
Creation of long-term agreements mechanism E	4
LMP creation (for a single holding) mechanism F	8
LMP Best Practice creation F continued	9
LMP Landscape scale creation F continued	10
LMP Workshop F continued	11
T&T 159A Final report	12

Note: T&T 159 test 1 report and appendix are available from <http://www.thetrailstrust.org.uk/downloads/Elms-report-appendix.zip>

## 7. Key learning from T&T 159A mechanisms

### Mechanism A: Pictorial Image mechanism test



#### Introduction to mechanism

T&T 159 (test 1) found that most of the 50 landowner / manager participants welcomed public access. However a majority said that public access has an impact, or partial impact on current operations, stock, workers, wildlife and biodiversity and they expect that to continue. Concerns were expressed about erecting signage to resolve these issues, fearful that their own choice of wording may infer liability.

Participants agreed that improving public facing engagement and educational signage and

improved waymarking along public access routes would remove most of the impacts experienced by them and overcome significant barriers to future public access provision.

T&T 159A (test 2) proposed to research a pictorial image mechanism as a tool to provide public education & engagement with users, who may often unwittingly be causing land managers issues, through signage along with additional solutions, such as countryside code promotion, educational signage and the use of QR codes, logos and improved way marking.

Public rights of way are highways through the countryside. A positive response to the mechanism should encourage the production of a government approved signage mechanism for land managers' use on the public rights of way network. A countryside signage mechanism similar to the instantly recognisable signage mechanism that exists for the public road transport highway network.

Three designers were asked to each design a suite of ten pictorial images, based on the ten most common impacts of public access experienced across individual land holdings.

#### Participants taking part in the test

**54 people** participated. This group included these sub groups:

- 17 participants representing the 10 holdings participating in T&T 159A (picture above shows the 2 participants from the Conservation Charity holding taking part in the pictorial image test).
- 37 members of the public, all access users of rights of way / green space (13 of these identified as landowners / managers).
- 30 participants in total were landowners / managers.
- 24 members of the public were not landowners / managers.
- 5 of the landowners / managers representing the 10 holdings in T&T 159A did not access the countryside as users of rights of way / green space.

## Key learning from T&T 159A (test 2) research into a Pictorial Image Mechanism

### 1. Countryside activities undertaken in the countryside by test participants.

49 participants (from all sub groups) said that they frequently undertook some of the 10 different types of activities listed, in the countryside.

- Top 5 activities undertaken were walking, dog walking, running, horse riding, mountain biking
- Access frequency - 49 participants accessed the countryside / green space **11,660 times per annum**

### 2. Most effective pictorial image suites.

The two main sub groups of 30 landowners / managers and 24 public access users **disagreed** on which of the three suites of 10 images, designed to overcome impacts and barriers, was most effective. This suggests that landowner and managers need support with public engagement language and approaches.

**Suite 1** images based on health and safety executive colours (red, blue or yellow) were preferred by most landowners /managers because they were more *'authoritative'*, *'official'* and *'more likely to be adhered'* to.

**Suite 3** images based on a cartoonist type of image (predominantly green and yellow) were preferred by the majority of public access users because they were more *'humorous'*, *'friendly'*, *'hopeful'*, NOT *'aggressive'*, *'patronising'*, *'warning'* or *'begging'*.

**Suite 2** images based on *'be kind /good /aware / nice'* messages (predominantly orange and green) was seen by participants as sympathetic, polite, lovely, positive, happy but too complicated, twee, confusing, difficult to read and too nice.

### 3. Individual pictorial images (ten in each suite)

- Landowners and managers considered the majority of suite 1 images to be most effective and suite 2 images to be least effective.
- Public access users considered all of suite 3 images to be most effective and suite 1 images to be least effective.



- As a whole group, over half of the participants agreed that these 5 images were the most effective (picture left). Four images from suite 3 and one from suite 1
- This image from suite 1 (picture below) was the least effective.



### 4. Inclusion of QR code

Three quarters of the group said that the code worked on their phone, navigated correctly and that it would be helpful. The majority of 'NO' responses were due to participants not having a phone or a smart enough phone and so were unable to complete the test.

## 5. Pictorial image mechanism effectiveness - conclusion of research

The pictorial image mechanism was judged to be effective in overcoming impacts and barriers to access. T&T holdings average score 4.1 out of 5 (effective). All (30) Landowners / managers group scored an average of 4 out of 5 (effective). 24 public users (not landowners / managers) average score 4.5 out of 5 (very effective). Government / Defra leadership required to ensure a national countryside access pictorial mechanism was designed, supported and available, limiting land manager liability.

### Participant quotes

#### T&T 159A participants representing the ten holdings said:

H4 Conservation charity *'the mechanism needs to accommodate a wide range of communities especially where English is not the first language or disability makes comprehension difficult. Need to be clear what is being asked of the access user. It would be good if national standards for trail signage were developed that are consistent across UK much as highway signage / symbols are. **Cohesion in the landscape of interchangeable signage that is used throughout the countryside, would be revolutionary to visitor experience.** Pictures need to be thematic, simple, relevant and kept up to date, not just left when not needed. Plastic pockets that signs could be slipped into and screwed shut then replaced or removed as necessary'*.

H5 Organic farm to supermarket *'these signs will be a useful tool for informing users of land management considerations. We would like to be able to use the artwork in our own sign layouts - for example incorporating all 'standard' instructions such as ' be aware of ground nesting birds' and ' keep dogs under close control' into our own welcome sign'*.

H6 Quarry company regional manager *'signs will only do so much but are still useful and worth having. Usefulness may depend on audience and siting. The suite design may need to be tailored to an area for instance the friendly style of suite 3 could be fine in an area where appreciation for the countryside is widespread but suite 1 might be more effective nearer to urban areas'*.

#### Members of the public said:

- *'I would definitely look at them whilst out walking'*.
- *'I see very few signs - any would be good, but I like suite 3 - sets a nice tone!'*
- *'Most people will appreciate the signs but a few will ignore'*.
- *'The QR codes are a good addition'*.
- *'It would be useful to have landowners details in case of hurt animals or the animals have escaped'*.
- *'The kind looking non-aggressive messages (suite 3) send a positive image to the public to engage them in respecting the land'*.
- ***'Very effective and really necessary if we are going to encourage more people into the countryside'***

Read the full pictorial image test analysis in T159A Pictorial Image report (1)

## Mechanism B: Specialist / topical advice packet: highway exit interface assessment mechanism test



Picture by Ted Liddle

### Introduction to mechanism

T&T 159 (test 1) found that 43 / 50 (86%) landowner / manager participants agreed that specialist advice provision would be needed in a scheme, on a wide range of public access with biodiversity creation / improvement topics.

In T&T 159A (test 2) highway specialists, Transient Designs Ltd, were asked to develop a sample packet of specialist advice in 3 parts (see tools). The highway exit access interface assessment mechanism produced by Transient Designs, and tested on participants, was a simple

risk assessment tool to support landowners / managers wanting to create, upgrade or improve public access routes on their land, enabling them to decide if further specialist advice was needed.

The highway exit mechanism test investigated the:

- usefulness of providing specialist topical advice packets to support landowners and land managers participating in Environmental Land Management schemes (ELMs).
- effectiveness of the specialist advice within the packet.
- potential of the chosen specialist advice topic to fill a gap in the market.

The public access highway exit interface specialist advice was chosen as the topic to test because:

- Public access and biodiversity green infrastructure strategic network aspirational route surveys carried out in T&T 159 (test 1) showed highway exit safety is a major barrier to creating and improving the connectivity, safety and accessibility of the green infrastructure network. Vulnerable people on foot, horse, bicycle and mobility scooters, are frequently expected to travel along busy roads to reach quiet lanes and off-road routes, and to cross at highway exit locations where the visibility is poor, and their safety is compromised.
- T&T 159 (test 1) showed that delivery of public access routes that avoid a busy road was ranked as being the second most important priority out of fifteen public access delivery priorities, that landowners and land managers can deliver.
- Earlier research by TTT indicated that highway exit safety, relating to countryside access, is a gap in the market due to lack of guidance from government, local highway authorities and protected landscapes. To further test this research, in T&T 159A (test 2) 29 AONBs were contacted to see what advice, guidance or processes they had regarding the assessment of rights of way interfaces with highway exits, where routes were to be improved or created. Only 6 responded and only 3 of these had anything useful to offer.
- Lack of highway exit specialist advice negatively impacts landowners / managers, users and rights of way departments keen to improve and create public access, and prevents route provision. Land



managers are not responsible for highway exit safety, but could be rewarded through new Agri - schemes to ensure routes exit at the best locations and to maintain visibility splays.

## **Participants taking part in the test**

14 landowner / land managers representing the ten holdings in T&T 159A (test 2) participated.

Due to time limitations, only part 1 of the mechanism was tested on participants. The second and third parts would probably have answered some of the more neutral responses (see quotes).

## **Key learning from T&T 159A (test 2) research into a specialist topic: highway exit interface mechanism**

### **1. Usefulness of specialist / topical advice packet (response: very useful)**

The participants were very positive and enthusiastic about receiving specialist advice in a packet, scoring this aspect 4.9 / 5 (very useful). An advice packet was seen as *'similar to the provision of the former Countryside Stewardship handbook'*, *'a sanity saver'* and *'trustworthy'* because sent by an authority such as government through a scheme, giving confidence in the advice being offered. Several participants said they would **not** spend time searching for specialist advice, navigation of government websites was *'horrendous'*. Most participants agreed that specialist advice delivered in person would still be needed.

### **2. Ease of locating this specialist advice (response: difficult)**

The participants considered that if they decided to create the aspirational route or improve access on the holding, currently it would be difficult to locate advice on highway exit assessment, if not available through a scheme, scoring this as 2 (difficult) / 5. The general view was that there was no obvious or straightforward information source that participants could be confident about. Some might search the internet, others approach the local council but opinions were divided on how helpful or quick this would be. Some thought the government should be the source of this advice as a *'credible source'* and the advice would be *'authentic and 'reliable'* not *'just from an internet search'* but others argued that *'you couldn't assume a government website would be easy'* and *'the Defra library is a soulless library of black and white'*.

### **3. Clear identification of the stage at which further advice from a delivery partner such as local highway authority or national highways should be sought (response: undecided).**

The participants were undecided about this key element of the advice with some scoring 'yes' (43%), others 'to some extent' (28.5%) and others 'no' (28.5%). They disagreed on whether the advice packet made it clear *'when to bring in other agencies'* with some unable to identify the stage at which this should happen. Some participants said they wouldn't contact highways or a highway authority anyway, one said *'it should be the facilitators job'*. The introduction of an *'immediate consultation panel'* might help make it more obvious and clarity was needed to highlight when any third - party permission would be needed.

### **4. Mechanism easy to read and understand, helpful, practical and feasible (4 questions - responses ranged from yes – to some extent).**

These questions tested whether the advice was easy to read, understand, helpful and feasible to use. The majority of participants responded positively on each of these points, the advice was practical and feasible to use, when creating the aspirational route or improving public access on the holding in a scheme.

Most participants considered that the advice packet covered all the basics needed, offering a good overview and starting point and prompting the asking of the right questions. One participant said that *'when you start a project you realise there are things that you may not have thought about'*. They agreed

that it was a useful mechanism with *'good design options', 'set out well', 'easy to follow' with 'helpful / understandable diagrams, graphs and pictures'*.

The majority of participants related the advice to the highway exit of the proposed aspirational route on their holding. A minority felt that there was *'too much information to take in'*, others that the advice left unanswered questions (see quotes). There were concerns expressed around the roles and responsibilities of individual organisations and about legalities and options, particularly around public access exits onto main roads. A number of suggestions to improve the advice were offered.

## 5. Conclusion of research

5a) Effectiveness of mechanism: as a group the participants considered that the highway exit assessment mechanism was effective scoring 4.1 / 5 (effective). They suggested small clarifications and some redesigning would be helpful along with the inclusion of more tools and improved identification of next steps to give confidence in using it to guide the design and planning process. There would always be a role for someone to be in charge of the project (a facilitator) and specialist advisors to be available to support decision making and design.

5b) The **usefulness** of providing specialist topical advice packets to support landowners and land managers participating in Environmental Land Management schemes (ELMs) was scored by participants as **4.9 / 5 (very useful)**.

## Participant quotes

H6 Quarry company PLC (regional estates manager): *'this advice is very interesting, we have a lot of road crossings and rights of way on our land and it is so important to consider health and safety in this area, this advice and the discussion has been very good'. 'Advice (on this) would be difficult to find, I would go to the Highways Authority and probably the Rights of Way department at the moment to find advice. It is difficult to get any advice from the authority, it is often a very slow process and you might not get a definitive answer. This highway exit tool is really useful'*.

H9 Family farm (owner) *'we would struggle to know where to look for advice and guidance on this subject and would have been put off, we like to be involved and prefer to meet/talk with people but it is great to have access to some simple guidance'*.

H8 Family farm (owner) *'very useful (to receive specialist advice in a topical packet). Government websites drive me absolutely mad. You think you have found the thing that you are looking for, then there's 4 or 5 more options that they think might be useful but you get dragged into a minefield of information miles from what you want – it is infuriating having to plough through all that and is the real reason why stuff never gets done! But with this, once you know that highway exits are a thing that you need to think about, to have this drop through the post or be able to go straight to it that's really helpful / useful – a real sanity saver'*.

H4 Conservation charity (neutral responses) ranger *'more tools and support are needed in the guidance to help with the application. Sometimes next steps are needed or need to be clearly identified. The guidance is helpful as a starting point, for instance in helping understand potential for a grant to support a project'*.  
Countryside manager *'the concept is good, this is a great starting point but it would need to be more comprehensive to give me confidence that I could use it to guide my design and planning process. If the highway exit crossing is simple then the confidence level would be higher. Complex crossings would generate more questions and confidence level would therefore be lower'*.

Read the full highway exit test analysis in T159A Advice packet Highway Exit assessment report (2) and the Transient Design assessment mechanism.

## Mechanism C: Advice & Guidance Framework for a Toolkit mechanism test



### Introduction to mechanism

103 aspirational access route surveys carried out during T&T 159 (test 1) showed that the current public access network of rights of way and open space predominantly only works for activities on foot by able-bodied people.

However, the high willingness of the 50 landowner / manager participants interviewed \* to engage with access creation, improvement and maintenance along with biodiversity enhancements, within access space, means there are considerable opportunities to collaborate to

improve the green infrastructure network for public access and biodiversity. (\*At the conclusion of T&T 159 (test 1) 90% of participants were willing or very willing to enter a public access and biodiversity scheme and 10% were undecided).

Well-targeted and funded green infrastructure network route creations and improvements would help resolve impacts on land management operations, educate and engage the public, help restore nature, deliver multi-user (on foot, bicycle, with a horse (ridden / driven), mobility ATV), and support farmers to exploit new economic opportunities that could stem from a strategic, connected, permanent green network of access and biodiversity infrastructure. Picture above shows a newly created strategic 5.5 km route, enhanced in places for biodiversity and delivered through the Farming in Protected Landscape scheme by a test participant.

In order to achieve these positive outcomes, advice and guidance is needed on a wide range of factors such as access route location, signage, structures, surfacing, highway exit safety, biodiversity measures, maintenance, creation mechanisms, occupier liabilities, economic opportunity and so on.

Throughout discussions with the 50 landowner / manager participants in T&T 159 (test 1) it was abundantly clear that they needed specialist help to overcome barriers to access and impacts from access and to engage and collaborate with restoring and improving the network. On the specific question about the need for advice and guidance, 43 / 50 (86%) participants agreed that specialist advice would need to be provided through a scheme on a wide range of public access / biodiversity topics. 41 / 50 (82%) said they preferred delivery from an advisor or agent, backed up by a reference handbook.

In T&T 159A (test 2) a comprehensive review of all the data gathered in T&T 159 (test 1) was undertaken (see background paper at appendix 6 in the A&G framework report 3). Discussions at participant interviews revealed a complete lack of A&G delivery and support to land owners and managers regarding the management and improvement of public access on their holding. Lack of A&G support denies landowners / managers, the public and nature all the multiple opportunities and benefits that safe, accessible, high value, permanent green infrastructure networks can bring.

Following the review, advice and guidance mechanisms for testing in T&T 159A were designed. Working with specialists, including some who represent some of Defra's Delivery Partners, sample topical advice packages to test on participants through different delivery mechanisms were designed. These advice packages would deliver A&G gaps that research in T&T 159 (test 1) identified as critical to support land managers in delivering public access and biodiversity interventions, that the market would appear to be not so good at addressing.

In addition to the pictorial image mechanism A, a specialist advice packet for a highway exit assessment mechanism B (already discussed) the advice packages included mechanism C, a framework for an Advice and Guidance toolkit. The framework mechanism consisted of charts and tables featuring key components, questions, and suggested advice and guidance topics for planning green infrastructure. The mechanism was tested on the participants representing the ten holdings in T&T 159A (test 2). They were asked if they thought that the framework was sufficiently comprehensive to inform future development of a A&G toolkit for green infrastructure creation / improvement and whose role it was to deliver the A&G and a toolkit.

## **Participants taking part in the test**

14 landowner / land managers representing the ten holdings in T&T 159A (test 2) participated.

## **Key learning from T&T 159A (test 2) research about an Advice and Guidance Framework for a Toolkit**

### **1. Participant approval for the A&G framework for a toolkit designed for the test.**

The majority of participants approved of the suggested advice and guidance framework finding the chart and tables easy to read and understand. They agreed that answers to questions and the topics suggested would provide the advice and guidance required to create and improve green infrastructure access and biodiversity routes and space across their land holding.

Some participants thought that there were some key advice components, questions or topics missing. Most participants were able to make helpful suggestions for information, topics or subjects that they considered should be included, to support them in creating and improving green infrastructure on the holding in a toolkit, when designed. Guidance on mitigating the impact of humans on biodiversity particularly with regard to the impact of dogs, was especially important.

### **2. Whose role is it to offer advice and guidance about the creation of a strategic aspirational public access route?**

Participants were asked two multi choice questions about the source and delivery of advice and guidance for the creation of an aspirational access route.

**The first question** asked where they would go currently for advice about route creation. This question was not supported by suggestions about partners or delivery roles. In response, most participants said they would go primarily to their agent, advisor or farm consultant and / or to the Mendip Hills AONB. Defra's stated partners, who are expected to help deliver ELMs, were **not mentioned** as a source to deliver advice on public access route creation. Other organisations that might be expected to deliver advice on access creation were scarcely mentioned, or not mentioned at all, included landowner representative bodies (NFU / CLA), user groups (Open Spaces and British Horse Societies, Cycling UK, Ramblers etc). Only The Trails Trust was associated by participants with the delivery of advice for the creation of public access routes.

**The second question** was supported by a table listing Defra's delivery partners. Participants were asked if there would be a role for any of those listed in the creation of an aspirational route. 100% of participants said YES, with all of them 100% then indicating that Defra's National Parks / AONB partners should be the primary source of advice and guidance for creating public access.

The AONB unit was seen by participants as having an influential and important leadership role in co-ordinating the strategic access network, especially '*where local connections go off the hill*', facilitating collaboration amongst local partners, providing support to the whole AONB community, providing advice

and guidance on public access creation, heritage infrastructure, agreement to projects and planning issues, and checking for landscape and socio-economic impacts.

62% of participants then equally selected Natural England and the Rural Payments Agency but were clear that the roles of other partners such as NE / RPA ought to be streamlined and to complement the Mendip Hills AONB's primary role.

### **3. Delivery of an advice and guidance (A&G) toolkit.**

All the participants wanted an access and biodiversity A&G toolkit / handbook of some type to be produced. A written handbook available on and off-line was the most popular delivery choice. The majority also stated that in addition to a handbook, direct communication and expert advice are still required.

Participants said that the handbook must have all the advice needed for creating and improving access and biodiversity contained in one well laid out handbook, immediately accessible, easily navigable, *'all you need to know in one place'* with simple, clear language avoiding jargon and useful to print out. *'A handbook that is on the desk, immediately to hand that you can pick up and take with you on site – you can't really beat that'*.

It was noted that a handbook should be widely available being even more relevant for key advisors, agents, access facilitators and others, than for landowners / managers, as they were more likely to be overseeing the work and *'checking everything had been done properly'*.

### **4. Delivery of public access and biodiversity in partnership.**

The participants were asked if, assuming adequate A&G support was available to support them entering a scheme, would they prefer to deliver public access and biodiversity green infrastructure in partnership with others?

A large majority said 'yes' and a few were neutral. The majority indicated a preference for working with a facilitator followed by working with their agent / advisor, their neighbours, or with a user group.

As a group the participants said it was important to work and collaborate with others, particularly with neighbours, the support was more likely to initiate projects, partnership working was stronger to share responsibility and advice particularly for public benefit.

The importance of a paid facilitator, advisor, agent or specialist to liaise and co-ordinate with all parties whether neighbours, parish councils, wildlife trusts, user groups was again stressed as key to getting things to happen.

### **5. Conclusion of research (effective mechanism)**

**Effectiveness of the Advice and Guidance framework for a toolkit mechanism in supporting landowners and land managers to deliver green infrastructure for public access, and biodiversity, and nature recovery on their land holding.**

**100% of participants** thought that an A&G toolkit would be effective / very effective . One said *'nothing like this exists. I find it surprising that this does not already exist!'* Participants agreed that a toolkit needs to be available to help them make the right decisions, help to create a legacy, and *'ensure a broad and holistic understanding of how access, nature, biodiversity, and farming can co-habit'*. One thought that the (access) scheme would work best if on a controlled linear network basis not as open access.

The toolkit would be especially needed for those advising landowners and land managers in a scheme. Facilitation and refining the tool kit would make it easier to help busy people navigate through. Project initiators, facilitators and advisors would always be necessary due to having local knowledge and facilitation and the inclusion of diagrams, scenarios and pictures and chat bot would improve the tool kit for everyone.

## Participant quotes

H4 Conservation charity (ranger & countryside manager) *'it would be great to have a toolkit to reference as nothing like this exists. A facilitator will always be necessary to supplement and help with guidance as it's still a lot of information to navigate'* And *'this A&G framework as it stands needs some refining to make it easier to read and understand what is relevant to your scheme, but I imagine that would happen when producing a comprehensive toolkit / handbook. I find it surprising that this does not already exist!'*

H10 Family farm (owner) *'this framework is effective, I could work my way through it if we had a project in mind, even though as you know I don't spend time reading as always busy with the horses or on the farm. It would show me where to go if I or the farm consultant was stuck. Maybe there should be a chat bot for questions? It's important that this scheme is local, having local knowledge and facilitation in charge to help busy people navigate through it is important'*.

H7 Regeneration farm (owner): *'very effective with the proviso that it's carried out properly with a broad and holistic understanding / view of how access, nature, biodiversity and farming can co-habit. Education of the public is key – QR codes and control of dogs! This scheme will work best if on a controlled linear network basis not as open access'*.

H6 Quarry company PLC (regional estates manager) *'I like the idea of coexisting access and biodiversity, we would like to see written surveys and information and then a face-to-face discussion on how to implement'*.

H2 Landed estate (farm secretary & land agent) *'an online handbook would be useful but not nearly as useful as a handbook that is on the desk, immediately to hand that you can pick up and take with you on site – you can't really beat that'*.

H1 Landed estate (owner) *'the bodies in question (roles) might all have requirements and need to complement the Mendip Hills AONB and or may provide support or advice. I assume each would want / need to contribute to the process, but it needs to be clear who you need in what circumstance. This needs to be streamlined. The idea of dealing with 4 or 5 government bodies is not immediately attractive'*.

H8 Family farm (owner) *'I couldn't talk to any of these (roles), just thinking about talking to any of these or them having a role just gives me hives. The Landscape (FiPL) officer from MHAONB) – she was really nice, down to earth and helpful. Someone like that who knew everything and where to get advice would be so helpful without having to deal with all these people. Having so many unhelpful organisations involved would end up in a lot of dead ends and cul de sacs no-one would be bothered with a project or creating anything worthwhile'*.

Read the full advice and guidance framework for a toolkit analysis in T159A A&G framework report (3)

## Mechanism D participants payments & chart test



### Introduction to mechanism

T&T 159 (test 1) found that 45 / 50 (90%) of participants were willing or very willing to enter a scheme to create or improve green infrastructure for public access and biodiversity.

‘Willingness’ depended on a number of factors. These included being able to select the infrastructure location, good quality structure provision, engaging with the public to reduce impacts and liability issues, reasonable landowner reward, process and permanency to deliver habitat, community need and local economic benefit. It was notable that 47 / 50 (94%)

participants had a secondary diversification or employment and were not therefore totally dependent on income from their primary land-based operational purpose.

Research in T&T 159 (test 1) showed that the majority of land owners / managers preferred any aspirational green infrastructure route to be created within a corridor or along a margin / field boundary.

Valuing ‘reasonable reward’.

a) Creating access rights along green infrastructure routes or in open space / woodland

Linear access: the T&T 159 (test 1) participants as a group had agreed the valuation formula below as the basis for a landowner reward payment within an ELM scheme:

**V (land value) + L (operation loss) + R (recreational value) + D (legal dedication costs) + C (capital works) + A (annual improvements and maintenance activities).**

Access to open space / woodland: the T&T 159 (test 1) participants as a group agreed that valuation for access land should be based on the area over which rights were to be dedicated, but no valuation formula was agreed.

b) improving and maintaining green infrastructure for access and enhanced biodiversity

The T&T 159 (test 1) participants as a group were very willing to undertake works on newly created access, on existing access and to undertake annual maintenance in a scheme, (including biodiversity enhancements).

However, although participants agreed with the scheme setting payment rates for capital works and annual activities, the fact that schemes had not in the past, adequately covered the true cost of materials and labour or provided any element of profit, was a disincentive to participation.

In T&T 159A (test 2) research was undertaken to design valuation mechanism charts and to test the charts on participants to quantify the minimum and most incentivising rewards the ten holding participants expected for:



a) creating (dedicating) access rights along a specific aspirational permanent green infrastructure route across their land holding for multi – user public access and enhanced biodiversity, within a proposed strategic landscape scale network. (Noting that the freehold over which the green infrastructure was to be created remained with the landowner).

b) improving and maintaining green infrastructure for public access and enhanced biodiversity in the future.

### Participant response for a) creation (dedication) of permanent public access rights

Participants were tested on how to incentivise and value landowner & manager participation and collaboration in a scheme for:

- creating permanent access and biodiversity creation improvement,
- opinions on the mechanisms and valuations, suggested by the chart tests, including ORVaL,
- creation and improvement works (including annual works),
- creating and recording permissive access,
- opinions on the effectiveness of the discussion about environmental outcomes, benefits and opportunities, valuation mechanisms and rewards.

### **Participants taking part in the test**

15 landowner / land managers representing the ten holdings in T&T 159A (test 2) participated.

### **Key learning from T&T 159A (test 2) research.**

#### **1. Incentivising land managers through discussion**

1A. Discussion of the outcomes, benefits or opportunities that most incentivise participation and collaboration in improving public access and biodiversity / nature recovery in the Mendip Hills landscape.

As a group, participants agreed top incentives were receiving a financial reward, supporting the rural economy / tourism and the opportunity to enhance biodiversity & habitat.

1B. Discussion of development projects delivering environmental outcomes that most encourage participation.

As a group, participants agreed top development projects that would encourage participation were a scheme to carry out capital improvements, creating a new route so the public could avoid a busy road or access a direct crossing point equally with enhancing biodiversity along newly created, upgraded or existing routes, collaborating to provide a linear trail connecting communities, dedicating an existing permissive or customary route to preserve access for future generations, create a restricted byway corridor to provide permanent protection for access and wildlife.

#### **2. Mechanisms to determine value of access**

2A. Determining the value of permanent dedication of linear access

As a majority, participants said mechanism AB (land value plus 50% operational loss) determined the value of permanent dedication of linear access. A minority said A+B+C (land value + operational loss + recreational value) as *'some routes do have a high recreational value that should be recognised'*. The type

of access right (single use / multi use) made no difference to willingness to dedicate. Upgrading an existing right of way should attract the same capital payment as creating a new right of way. Mechanism A (the value of the land) established the minimum price. Land valuation for public access creation should be set by the market.

## 2B. Determining the value of permanent dedication of access and biodiversity in open space / woodland

There was no consensus amongst participants. This was difficult to value. Paradoxically, open access land offered high value through experiences to the public but a low land value as generally seen as poor-quality land. A number of participants would not entertain dedicating access rights over open land, it wasn't compatible with operations, a more restrictive, annoying and hassle factor for land managers than access along designated linear routes. No consensus either on a minimum price threshold for valuing access to a hectare of open space / woodland created. As a group they were not incentivised by former or current agri-scheme reward offers. Compared with linear access, the type of intended user made slightly more difference to willingness to dedicate open access land due to impacts envisaged.

## 2C. Determining the value of creation and improvement works

As a group there was strong agreement about funding the full costs of material, labour, legal costs and an element of profit, and all improvement activities that had been specified and agreed in the holding LMP. Larger schemes such as developing or restoring access and biodiversity corridors, needed to be individually valued, with funding available on agreement of application. Collaborative landscape scale projects would require specialist help to develop and were likely to require blended (public / private) finance and investment to ensure that all capital, labour, facilitation and collaboration costs were met. Payment expectations for smaller activities and specialist tasks needed to be charged at a rate determined by the contractors / the market, as these were too variable to put figures on.

## 2D. Valuing permissive access

As a group there was some consensus about how permissive access should be supported in a scheme. A question about capital payments for permissive access was indecisive, but discussion showed it was framed around proposed support for permissive access infrastructure, not payment of a reward for creating it, as is suggested for permanent access. No one argued for capital payments for the land space needed for permissive access.

There was agreement that there could be issues for the strategic network if support for a permissive connection was withdrawn, permanent access should be the goal and gold standard particularly on landscape scale strategic access projects.

A basic scoring mechanism was required to determine whether the proposed permissive access was needed. There should be financial support to create infrastructure and for it to be included in LMP improvement access and biodiversity annual maintenance agreements. The access should be shown on Ordnance Survey Maps and Apps so that the public can find it provided there is a mechanism to remove it, if withdrawn.

There was very strong agreement that permissive access routes and trials should be capable of being converted to permanent access, and rewarded with the capital payment through a scheme.

## **3. Barriers to incentivising a dedication across the holding.**

A majority of participants considered there were barriers to the permanent dedication of access rights. Such as higher maintenance standards and cost, impacts on sensitive sites such as SSSI and potential

damage and disruption to stock and wildlife. However, it was clear that identified barriers could be overcome by working out the best location for routes, choosing the correct agreement mechanism and structures, fencing and hedging a green corridor, getting good advice and being paid to maintain, and to carry out works to trees.

#### **4. Facilitator role**

As a group, participants strongly agreed that the facilitator role was very important to support the delivery of strategic access, biodiversity and nature recovery infrastructure. The group agreed that the facilitator should value project costs in development schemes on a single holding and especially on a landscape scale. The facilitator should be overseen by a local specialist panel, FiPL was a good model. Participants said that *'the facilitator role is vital', 'nothing would happen without a facilitator'*.

#### **5. Effectiveness of discussing environmental outcomes, benefits and opportunities, payment mechanisms and rewards**

As a group, the participants agreed that the effectiveness of discussing environmental outcomes, benefits and opportunities, payment mechanisms and rewards in incentivising the creation or improvement of public access in a scheme was very effective. Face to face discussion with a knowledgeable facilitator was invaluable to incentivising increased and well considered access in a strategic manner. *'Opening up these discussions are really helpful in breaking down barriers'*.

#### **Participant quotes**

H2 Landed estate (estate manager) *'incentivised to create a restricted byway corridor to provide permanent protection for access and wildlife. It is clear from COVID how little access to greenspace people really have. I spent part of my life in Bristol and it is shocking how little people in cities think that the countryside is for them. More effort should be made to develop pathways out of the city to the countryside'*.

H8 / P70 1&2 Family farm owners *'choosing option to create a new route so the public can avoid a busy road or access a direct crossing point - so important to get walkers, cyclists and horses off busy roads'*.

H7 Regeneration farm (owner) *'nothing clear or decisive regarding environmental values has come forward from government yet, it is like a lottery. How do you know what you have achieved in nature recovery? For example, adders, who knows if I have increased the numbers, who puts a value on this? I would like to know how you measure biodiversity credits or ecosystem credits?'*

H4 Conservation charity (ranger & countryside manager) *'delivery of permanent green infrastructure should be the goal and gold standard. Strategic bridleways and footpath routes are crucial links especially on a landscape scale, if these are permissive and that permission is withdrawn that affects a much wider network and could force massive detours. However there should be room to try short term permissive access in a scheme too as this can bridge gaps in the larger strategic network, the payment mechanism needs to differentiate between these two mechanisms'*.

H3 Estate (owner) *'the aspirational route (existing footpath) has a very high recreational value that should be recognised in the scheme as it connects the bridleway to a quiet lane . The bridle path leads directly into the AONB but the southern exit currently terminates on the main A39 and so the bridle path is not used'*.

H5 Organic Farm food to supermarket producer (agriculture team): *'the barriers that prevent dedication of public routes on our holding are the practical management issues, costs and delays that come with rights of way which make it massively difficult to work around them. Currently we are undertaking woodland works this is very expensive if we have to close a path for even a short period. Some slight re-alignment of paths*

*away from yards and along field boundaries should be made possible - this makes paths safer for the public and more practical operationally. It's interesting that government removed many of these costly / inflexible barriers for their own projects through the CROW Act but landowners are stuck with them with the rights of way network. Government could remove these barriers then permanent infrastructure provision would be more desirable'.*

*H10 / Family farm (owners) 'we see it (open access land) as scrub, poor quality land, we do not have any of that, it's a problem dogs go all over open access land and people leave the gates open'.*

*H4 Conservation charity (ranger & countryside manager) 'very effective discussion, this scheme is key in creating strategic public access and biodiversity corridors and benefitting landscape scale nature recovery. Opening up these discussions is really helpful in breaking down barriers. These schemes must be accessible to all landowners, it's really important to give everyone the opportunity to be involved in making space for people and nature. I think that the last two sections (interviews) that we have just done (constructing agreements and payments) are really important because they are starting to shape what the scheme framework and reward payments could really look like'.*

Read the full T159A participants payments & chart test report (5)

## Mechanism D continued: Investors co-financing and chart test



### Introduction to co-financing and chart test on investors

In T&T 159 (test 1), 47/50 (94%) landowner and manager participants agreed that additional funding needed to be available to facilitate collaboration within an ELM scheme. One participant said *'collaboration for rights of way, open space and biodiversity development projects will need the investment of a number of interested parties, including landowners and land managers, organisations specialising in biodiversity and nature recovery and user groups*

*and others in the local community'.*

In T&T 159A (test 2) the scope for incentivising stakeholder collaboration, participation and investment to deliver the public access and biodiversity network was investigated. Research looked at whether financial and non-financial investment from private, public and third stakeholder sectors could be used to bolster public sector funding.

Time was spent researching 'blended finance'. A definition is *'the strategic use of development finance and/or philanthropic funds to leverage private capital to invest in projects or enterprises that promote development outcomes by mitigating the risk of investment (de-risking)'* (World Economic Forum 2015).

Globally, blended finance is described as a detailed and complex means of blending public, private and third sector finance. Various organisations, including government, provide technical advice and guidance or will facilitate the delivery of a project and assist in managing projects and funding. Blended Finance has three main characteristics: social impact, financial returns and leverage.

Following this, key executives from the private, public, third sectors in the area were identified and invited to participate in T&T 159A. These stakeholders were interviewed to see if they could be incentivised to invest (co-fund), participate and collaborate to deliver the strategic green infrastructure access and biodiversity network through blended finance, land valuation, land management plan scenarios and other mechanisms. Individual interviews were requested through personal contact and a letter explaining the test research. Picture above T&T facilitator interviews a representative from a national house builder development company.

A similar set of questions to those asked of the T&T 159A holding participants, were asked concerning:

- Business mission, primary purpose, diversified purposes, land ownership / management, donations to charities and causes, motivation, types of causes, overall experiences of donating.
- Incentives to invest, participate or collaborate to help deliver a route or space, by considering a) public access outcome priorities, b) environmental measures to enhance biodiversity in the access space and c) opportunities or benefits that can stem directly or indirectly from network creation.

- Blended finance approaches that would support network delivery through a simple usable mechanism, identify barriers to a blended finance approach and ask if barriers can be overcome. The importance and type of advice & guidance delivery and of a facilitator role.
- Incentivising stakeholders to invest, participate or collaborate through increasing the profitability / brand awareness of the business, provision of land management plans at local, landscape scale or for best practice, importance to investment willingness of delivering permanent green infrastructure benefit for public and environmental good.
- Valuation chart test with mechanisms to value land and agree a minimum price threshold for land remaining in owner's title made available permanently for public access & biodiversity.
- Overall effectiveness of discussion.

## Participants taking part in the test

14 stakeholder investors participated. 9 from the private sector, 2 from the public sector, 3 from the third sector. A subset of 9 landowner / managers amongst the group of 14 was identified. The opinions of each set and subset was identified during research.

## Key learning from T&T 159A (test 2) research.

### 1. Serving the community

Stakeholders were incentivised by a strong commitment to support and engage with their local communities. Providing funding, leadership and mitigating concerns about social and environmental impacts from development and other operations and understanding what the needs of the local community are, were a high priority. This strong community commitment meant that the T&T 159A access and biodiversity network plan to connect communities was met with great interest and enthusiasm from the outset.

### 2. Incentivising stakeholder investment, collaboration and participation to deliver

Top incentives for stakeholders from discussions about public access priorities, environmental measures to improve biodiversity in the access space, network opportunities and benefits were:

- Top public access priority = delivering access to the countryside.
- Top environmental measure in the access route space = hedge planting.
- Top opportunity / benefit = a connected accessible network for all.

It was agreed that participating in developing the strategic network could increase the profitability or branding of their business or organisation. Further incentives were choice of appropriate land management plan (local, landscape scale and best practice) and delivering permanent routes, creating a permanent network, as an incentive to invest, was important or very important to stakeholder willingness to invest.

### 3. Blended finance approaches, mechanism and approaches to deliver the network

Stakeholders agreed that currently there is no joined up approach or funding mechanism to deliver public access with biodiversity / nature recovery.

Stakeholders agreed that a simple usable blended mechanism to deliver access and biodiversity could be created. They said that 'blended finance' is not the ideal term because contributions of experience, local knowledge, time and material is as important as finance and is also valuable for match funding. Non-financial contributions must be accommodated in a mechanism to incentivise business and community.

Equal preferred mechanisms for network delivery were applying S106 and CIL monies gained through planning processes and volunteer labour and time. However, serious concerns were expressed about S106 and CIL monies with the process said to be adversarial, drawn out and lacking local authority transparency and communication.

#### **4. Barriers and overcoming barriers**

A large number of barriers to creating the green infrastructure network for access and biodiversity exist. These were seen to be local government and government barriers which include lack of each of these: understanding, funding mechanisms, advice and guidance, facilitation, holistic approach and the exclusion of environmental net gain and ecosystem services by concentrating solely on biodiversity net gain.

Stakeholders agreed that creating the right advice and guidance, employing knowledgeable facilitators and having a simple blended finance mechanism would successfully overcome many barriers leading to successful delivery of an access & biodiversity network in any area and through any scheme.

#### **5. Valuation mechanisms determine the value of access and biodiversity green infrastructure space and establish minimum price thresholds.**

All 14 stakeholders agreed that mechanism A (the value of the land ) established the minimum price threshold for rewarding the creation of a linear right of way.

11 (79%) of stakeholders thought that mechanism AB (the value of the land and operational loss) should be used to value a one-off capital reward payment to landowners for offering land to create and accommodate permanent public access and biodiversity green infrastructure in a scheme.

8 stakeholders thought that mechanism C, ORVAL recreational / social welfare monetarised values and estimated visitor numbers, was priceless in enabling a public health and wellbeing value to be put on green infrastructure routes and space.

Mechanisms E and F for valuing access to open space and woodland did not attract or incentivise stakeholders. Valuing open space was seen as problematical and some stakeholders anyway preferred to support linear route development to create a connected network.

**At conclusion** 100% of stakeholders scored the discussion as **attractive or very attractive** in incentivising them to invest, collaborate or participate in delivering a green infrastructure public access with biodiversity network. They said that interviews were '*a good investment of two hours discussion*' and '*the access and biodiversity network is a really exciting scheme*' '*has great potential*' and '*I massively believe it is an opportunity*' and '*keep us engaged going forward*'.

## Participant quotes

Large Infrastructure (airport) - carrying 10 million passengers per annum) *'we only consider causes that impact the local community. In mitigating the large Infrastructure (airport)'s operation, we think we are giving back in the best sense by adding value to community funds. We receive positive feedback from donor recipients from evaluation and monitoring that we carry out'.*

Property developer (director) was very interested the strategic aspirational green infrastructure network map *'we have never really considered delivering public access before, as its always been on the too difficult pile and government emphasis has been on carbon capture and biodiversity net gain. I was not aware of the value of public access and biodiversity opportunities together, as shown by the map' and*

*'access to the countryside and connecting communities is very important when developing sites. If you can develop and improve routes which support the local economy, that is great for the community. Investing in access and biodiversity is a good investment...all the opportunities are important. Carbon capture is great but community need is really important and the approach needs to be properly joined up'.*

*'It is impossible for property developers to investigate how S106 contribution has been spent, as often 5 or even 10 years has passed. Management of net gain is difficult offsite because it is less cost effective as materials and machinery are not readily available as they are onsite. Sourcing off site land can be difficult and costly. The NPPF says either access or biodiversity. There has been no joined up thinking about the delivery of green infrastructure for public access and biodiversity together'.*

Community foundation *'we do not hold funds to enable funding an environmental project such as this access and biodiversity network development scheme. The barriers can be overcome however due to our local presence and the trust in us and our understanding of community. This gives us the opportunity to operate in ways larger, more remote, funders cannot. We can potentially help to unlock local philanthropic giving'. An asset-based community development model focusing on what members of the community have to offer in the way of assets, is the process that matters and who owns it'.*

Tourism providers pointed to current poor access provision, *'if improved, customers would extend their stay and return again to explore other access routes and more people would be attracted to visit. There are nearby bridleways which no horse riders or cyclists could access at the moment from the site as all the connecting rights of way near the site are footpaths for walkers only and 'a landscape scale public access network coupled with nature recovery plan could enable people to access the coastal path from the site which would be great in getting people exploring further outdoors'.*

Active travel route developer *'the ORVAL recreational value would be useful as an expression of community pressure for a new route, which is crucial in persuading reluctant landowners to participate in an access project'.*

Major energy infrastructure *'public access that is a permanent benefit to the community and environment is very important. We do like things to be long-term and permanent if possible, especially when planning for the future, but maintenance must be budgeted for and agreed'.*

Wildlife Trust *'we would want to see green infrastructure delivered on a permanent basis or at the very least, on a very long term (50 years+) agreement in order for ecosystems to thrive and maximum value to be delivered'.*

AONB Unit *'we are keen to ensure that the Unit project manage and facilitate any public access funded project. Local authorities have such a bureaucratic legal framework and focus with regard to rights of way'.*



*An approach and mechanism that focuses on supporting delivery could be developed into a useable mechanism. Possibly a team like the AONB's Farming in Protective landscapes (FIPL) could steer a blended finance mechanism'.*

Read the full Investors report and chart test report (6)

## Mechanism G: Blended Finance mechanism test and innovative mechanism



### Introduction to mechanism: analysis carried out in T159A (test 2).

Two groups were tested on the need for and development of an innovative mechanism to deliver blended finance and non-finance contributions mechanism for investment, collaboration and participation into green infrastructure creation for access, biodiversity & nature recovery

#### Group 1 private, public, third sector stakeholders.

Stakeholders from the private, public, third sector agreed as a group that preferred causes for their support were community, environment, sport and education. Stakeholders were highly incentivised to offer support to communities for projects, causes and other benefits, adding value to funds, engaging and providing leadership.

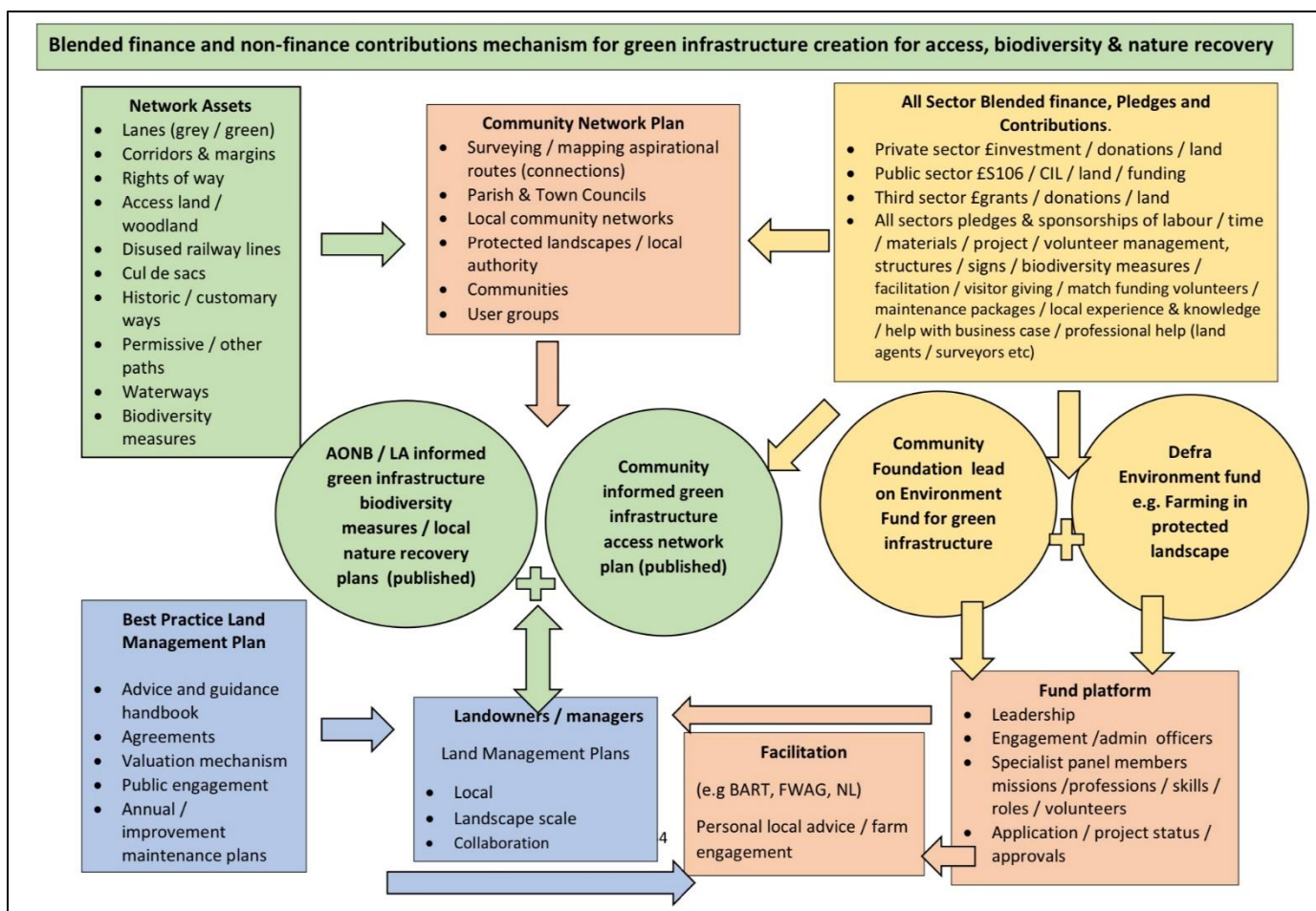
The T&T 159A access and biodiversity network plan to connect communities was met with great interest and enthusiasm. The network, if created would deliver on all the preferred stakeholder options for investment. It was agreed that the key to successful delivery and overcoming barriers was through designing a simple and well-defined mechanism. A blended finance mechanism should be able to cope with a mix of statutory and non-statutory funding and financial and non-financial assets. The T&T 159A blended finance mechanism was developed following the stakeholder investment research previously discussed and refined with the help of the Somerset Community Foundation.

#### Group 2 landowner and land manager T&T 159 (test2) holding participants.

The T&T 159A holding participants were asked in the LMP creation phase of the test, if the blended finance mechanism created by T&T 159A facilitators with the help of SCF, was good / useful / well planned.

The mechanism (reproduced for illustration purposes below) included:

- The need for a public access network plan created by community from available network assets (quiet lanes, rights of way, aspirational routes etc) combined with
- A nature recovery plan created by National Landscapes and or local authorities.
- Financial (statutory and non-statutory) and non-financial (voluntary) contributions.
- Two funding 'pots', a government pot blending with /enabling a local investment pot.
- Platform – leadership - specialist (local) panel, officers, manage applications and supply advice/ finance / volunteers / facilitation to enable LMP access & biodiversity outcomes.
- Best practice land management plan support for holding & landscape scale LMP outcome options decided by single or collaborating landowners / managers - informed by green infrastructure access network and nature recovery plans.



## Participants taking part in the test

- Group 1 = 14 private, public and third sector stakeholders in the co-financing and chart test on investors.
- Group 2 = 14 landowners and land managers representing ten holdings in the Mendip Test area participating in the T&T 159A (test 2) land management mechanism test.

## Key learning from T&T 159A (test 2) research.

### 1. Investing in the community

Throughout the research into co-financing investment mechanisms (paper 6) a key finding was the extremely strong commitment to deliver for local communities voiced by the public, private and third-party stakeholder group 1. They were incentivised by a strong commitment to support their local communities through prioritising funding, leadership and mitigating impacts from development or operations and understanding what the needs of the local community. Asked about the types of causes they often supported, the majority of causes suggested were supported, but preferred causes were community, environment, sport / education. The T&T 159A access and biodiversity network plan to connect communities was met with great interest and enthusiasm. The network, if created would deliver on all the preferred stakeholder options for investment. The discussion throughout the test was very effective in incentivising them to invest.

Stakeholders said:

*'the access and biodiversity network is a really exciting scheme' 'has great potential' and 'I massively believe it is an opportunity' and 'keep us engaged going forward'.*

## 2. Incentivising investment, collaboration and participation

Top incentives for investment in a green infrastructure network by group 1 stakeholders were:

- public access priorities (first choice option = delivering access to the countryside).
- environmental measures to improve biodiversity in the access space (first choice = hedge planting).
- network opportunities and benefits (first choice = a connected accessible network for all).
- creating a permanent network, the majority (93%) stakeholders indicated that permanency as an incentive to invest, was important or very important to their willingness to invest.

Both group 1 and 2 were tested on incentivisation through realisation of business benefits such as profitability or brand awareness from investing in or creating green infrastructure networks for access and biodiversity. 79% of group 1 stakeholders and 90% of group 2 landowner / manager holding participants agreed that helping to develop the network would increase the profitability or brand awareness of their business, perhaps not in a conventional sense but by offering customers / visitors well-being and happiness, pleasing members, helping nature to recover and being seen to care for the landscape. The network scheme could also be its own brand and self-promote through offering multiple opportunities to everyone.

## 3. Investing in Land Management Plan Mechanisms to deliver network creation and improvement

LMPs, informed and designed by group 2 landowners / managers on a single holding / local, landscape scale or best practice model basis are the vehicles to attract group 1 stakeholder blended finance and non-financial pledges and investment to create and improve the network infrastructure.

Group 2 landowner / manager participants said the mechanism based on templates to help prepare and deliver an access and biodiversity LMP for the holding was a very effective approach. One participant said about this process:

*'at last we have something and this something is so much better than nothing. Currently with regard to access / green infrastructure provision there is nothing – no coherent support, no help and no narrative. This is the whole reason why nothing gets done and good projects are not delivered!' And 'This T&T could be an effective start to more strategic planning, effective leadership to provide access for all, equality and inclusion are so important and we need to also think about farming pressures, there are so many threads'. We need an access focus across the landscape starting with the National Landscapes...'*

Both groups agreed that there is no joined up approach or funding mechanism to deliver public access with biodiversity / nature recovery. Several group 2 holding participants didn't know where they would go to access funding. The majority said Defra but then funding schemes *'didn't match this strategic network aspiration'*. Participants with significant acreages of land with obvious environmental outcomes potential, but no farm business, felt excluded from government schemes. The Farming in Protected Landscape scheme (FiPL) was an obvious fund for landscape projects with established facilitation and specialist panel, but the funding shortfalls and complex / long winded applications were unhelpful. In any case FiPL was due to be axed which was *'mad'*. There were other local and national funding avenues but facilitation was required to help access these opportunities.

Some participants thought it would be helpful to 'sell the strategic network concept as a whole (network) project, rather than investment in small sections of route in remote areas for example.

However, group 1 stakeholders tested on LMP scenarios agreed all LMPs types would attract investment:

- Local LMPs (most popular), for investment in local communities network connectivity, mitigating development and the application of local business expertise.
- Landscape scale LMPs to attract larger funding streams providing for long-term landscape and regional plan delivery, large scale connectivity and longer access routes.
- A best practice model LMP used nationally to enable the delivery of long distance sustainable active travel and biodiversity corridors across the country.
- Stakeholders with a national perspective said each of the LMPs was attractive at a different level supporting organisations who collaborate across the country on many different projects or to deliver core duties such as National Landscapes delivering nature recovery on a national scale.

#### **4. Creating a mechanism to blend finance and non-financial investment in LMPs**

Both groups strongly supported the need for a blended finance mechanism, a 'one stop shop' to fund environmental outcomes such as development of strategic green infrastructure networks for access and biodiversity. Somerset Community Foundation said that currently only 1% of the donors investing in the SCF had indicated that the money was to be spent on the environment. This was due to lack of a mechanism for donors to invest in environmental schemes, such as the strategic green infrastructure access and biodiversity network, so there was definitely an unexplored opportunity.

Group 1 stakeholders said all options quoted in the test to deliver the green infrastructure access and biodiversity network through a mechanism were attractive. Most attractive were equally leveraging in S106 CIL monies and applying all sector volunteer labour and time. However difficulties with S106 presented a barrier that needed to be resolved by government.

Public access needs to be properly referenced in the National Planning Policy to allow for Environmental Net Gain (ENG) not just Biodiversity Net Gain (BNG) This would then allow for strategic network public access & biodiversity net gain outcomes. A green infrastructure network for access and biodiversity is a long-term scheme. Combining access (environmental offset) with biodiversity net gain could be very beneficial and should to be facilitated. Finding common enthusiasm and the avoidance of bureaucratic legal frameworks were important.

Blending in the value of experience, skill, time and material and local knowledge was equally important so 'blended finance' was not the ideal term.

Group 1 stakeholders agreed 100% that financial and non-financial options could be blended into a simple but flexible blended mechanism. This would incentivise business whilst recognising the need to concentrate on their primary business and diversification.

A draft blended finance and non-finance mechanism for green infrastructure with key features being strategic access, nature recovery and land management plans, blended finance and non-finance 'pots' and a leadership platform featuring specialists, facilitation, farm engagement was created and tested on SCF. SCF said the mechanism could realise the benefits for landscape, community, health and visitor experience in a way that would engage and interest many charities and public sectors, incentivising them to engage. The Seattle model example should be explored.

SCF could hold financial investment in an environment fund 'pot'. This would be capable of bridging the funding gap with Agri environment money and also accepting monies from S106, bypassing the need for local government to hold the money derived from development schemes. Barriers to investment could be

overcome due to SCF's local presence, trust in SCF and its understanding of community, providing opportunities to operate in ways larger, more remote, funders could not.

Group 2 participants were tested on the revised mechanism. They agreed 100% that the mechanism was good / useful / well planned. It was simple but effective and could potentially work well in a local sense offering the traditional way of financing applications, where there were proper controls, ensuring project delivery. Using SCF to hold a fund was a great idea. There was enthusiasm for the inclusion of voluntary goods and services, not just money, this would help collate all of the separate funding / donation streams and voluntary help such as pledges of stone for access routes and tree planting.

One participant was concerned about blended finance in general, investment in biodiversity in one area just permitted green washing / bad practice and environment damage elsewhere, any finance offered needed to be ethical, traceable and accountable, otherwise it could negatively affect brand.

The mechanism created seemed to be an extension of FiPL following the same structure with additional funding held by SCF. FiPL and especially the officers and specialist panel should be retained.

**SCF strongly noted that Defra may design and set a payment scheme (FiPL) but they needed to recognise what a powerful lever this could be in enabling the community and others to contribute and match the finance.**

## **5. Providing leadership, facilitation and specialist help with the mechanism**

Key leadership roles to support the blended mechanism to ensure creation and improvement of the green infrastructure network for public access and biodiversity. These roles were identified:

- Delivery of Agri-scheme finance (pot 1): leadership is required from Defra to retain FiPL as the means to enable the mechanism to work as an extension of FiPL.
- Delivery of local / other finance contributions (pot 2): community Foundation leadership in holding financial investment including monies from S106 in an environment fund 'pot'.
- Management and recording of other funding and voluntary non-finance contributions and pledges (pot 3). National Landscapes units and managing partners leadership to capture offers of community voluntary help and pledges of materials, goods and services and to manage delivery of green infrastructure networks for public access and biodiversity creation and improvement.
- Investors and specialist panel leadership: group 1 stakeholder investors were incentivised by a strong commitment to support their local communities through leadership. Local non-agricultural business could be represented on the specialist panel and even the Protected Landscape Partnership to represent blended finance / investment opportunities and provide expertise. A specialist team like the Farming in Protective landscapes (FIPL) local assessment panel could steer a blended mechanism. Panel members have a clear leadership role within their own specialisms.
- Facilitation, engagement and support for landowners and land managers: both groups, tested individually and in separate tests, scored the facilitator role in delivering an access, biodiversity and nature recovery scheme as very important. A fund in the mechanism could be held for facilitation and a premium should be paid for a professional facilitator. Employment of a facilitator was crucial for professional project management, the basis for the green infrastructure scheme and vital to ensure

successful collaboration, especially important for delivery on a landscape scale. Group 2 participants said nothing would happen without a facilitator.

## Stakeholder and participant quotes

**Group 1** quotes from private, public and third sector stakeholders.

Tourism providers *'most of the suggested blended finance options could be linked together into a simple mechanism. 'By bringing people together businesses are more inclined to give whatever they can offer and to work together. A mechanism needs to be simple and well defined for people to be incentivised'*.

And *'there are many different skill-sets available and we would need a mechanism to identify who, how, what and when'*.

Developer *'we have projects where we are driving the S106 money back into the community. All companies need a mechanism to deliver and this helps us stay on track, makes them tight and simple. Finding common enthusiasm is important'*.

Sustainable travel routes developer *'a simple mechanism can be created, schemes need good facilitators and organisers for volunteer support'*. Another stakeholder said *'this (access and biodiversity network proposal) has great potential. I can think of many funds that could support this, including levelling up funds. There are so many opportunities for financing.'*

Community Foundation *'barriers to investment can be overcome due to our local presence and the trust in us and our understanding of community. This gives us the opportunity to operate in ways larger, more remote, funders cannot. Ownership and leadership of the process is important. An asset-based community development model focusing on what members of the community have to offer in the way of assets and ownership is the process that matters. Financial and non-financial support options could be blended into a simple mechanism such as The Seattle model where funding is provided to initiatives that are designed by communities, where their contribution is valued as match funding. The less prescriptive and restrictive the funder is, the more likely communities will freely give what they have to offer- the funder responds to the community not the other way around'*.

AONB unit *'we attract many volunteers who give some 6,000 hours of time per annum, we need to build on the access network, the existing network is not adequate for the number of visitors we have in the AONB'. An approach and mechanism that focuses on supporting delivery could be developed into a useable mechanism. Possibly a specialist team like the Farming in Protective Landscapes (FIPL) local assessment panel could steer a blended finance mechanism'*.

Community Foundation *'regarding FiPL Defra may design and set a payment scheme but they need to recognise what a powerful lever this could be in enabling the community and others to contribute and match the finance. Giving the community the means and opportunity to broker and pay for the green infrastructure and also apply to the panel to develop the public good, that is a very powerful mechanism'*.

**Group 2** quotes from landowners and land managers representing ten holdings participant.

H7 Regeneration farm (owner) *'where would I go for funding access and biodiversity? To the farming in Protected Landscape scheme – this has opened up a really good funding avenue for landscape projects with established facilitation and specialist panel, it seems mad to do away with it now everyone has got used to it and it is delivering great outcomes'*.

H5 Organic Farm food to supermarket producer *'would an access and biodiversity network help the profitability / branding of the business? Yes, the company produces a wide range of own brand and supermarket branded products. It's really important to give the public access so that they can see how healthy nutritious food is produced whilst still caring for biodiversity, nature and the landscape'*.

H4 Conservation charity (ranger) *'the charity considers that a good and inclusive visitor offer that welcomes everyone to accessible points along the Mendips, will give confidence in recommending those sites to others. This is very important in raising the brand awareness of the charity and increasing the numbers of people who come to enjoy and experience the landscape'*.

H1 Landed estate (owner): *'unaware of any Government / Defra scheme that could help with any tourism or environmental project. Agri schemes do not appear to be open to landowners who did not have a farm business despite owning land where obviously environmental projects could be undertaken and supported. Perhaps this was an omission that could be looked into and rectified?'*

H4 Conservation charity (ranger): *'I wanted to say Defra (for funding), but the schemes don't match this strategic network aspiration. FiPL is good, but the application is long and sometimes the full amount is needed. You couldn't ask a contractor to do 80% of the work. This (blended finance mechanism is useful, it's an extension and replacement for FiPL, following the same structure. That needs to happen and the officers and specialist panel retained. I suggest that having and using known Countryside Stewardship standards to refer to and apply for as the basis / starting point of grant funding would be a helpful and useful structure'*.

H3 Landed estate (owner): *'yes I approve of the blended finance model, this is the traditional way of financing applications where there are proper controls, funding held by a charitable organisation, a specialist panel assessing applications and facilitators to assist, this all means that projects get done'*.

H5 Organic Farm food to supermarket producer (estates manager): *'yes useful to see, it could add finance into (for example) the FiPL pot. However as a company we would stick to known ethical sources. I am generally sceptical about blended finance, concerned that investment in biodiversity in one area just permits green washing / bad practice and environment damage elsewhere. We would need to be very sure that any finance offered is ethical, traceable and accountable otherwise it could negatively affect our brand. As a company I think we would stick to GOV / Defra schemes and our own investment processes'*.

H8 Family farm (owners): *'blended mechanism brings everything together and it is simplistic. It includes a panel for overseeing the funding, using the Somerset Community Foundation to hold funds is a great idea'. Voluntary pledges of help could be really useful, it's good to include voluntary labour not just money'*.

H9 Family farm (owner): *'we like the idea of this (mechanism), it is very useful. We think it would help to sell the whole (network) project in a scheme. It could also help with our concerns on tax and inheritance'*.

H10 Family farm (owners): *'yes this is good but we also think this would be difficult to do as individuals. We would rely on a facilitator to guide us through the process. We think that it is easier to sell the strategic network concept (network of continuous routes on Mendips) for funding rather than a small section of route on a remote area on top of Mendips where our farm is located'*.

Read the full analysis in T159A Investors report and chart test (report 6) and T159A LMP Landscape scale (report 10)



## Mechanism E: Construction of long-term agreements mechanism test

### Introduction to mechanism



T&T 159 (test 1) research data showed that participants recognised community priorities for access, the wider benefits and opportunities deriving from a strategic multi user network and that concerns about the proposed access could be mitigated. At test conclusion 45 / 50 (90%) of participants were willing / very willing to join a scheme.

In T&T 159A (test 2) an informed specialist topical document about how to construct the long-term agreements to create, improve and maintain a strategic multi user network of green

infrastructure for access and biodiversity needed to be researched and tested.

The specialist topical advice document called 'Test 159A Long-term agreement construction mechanisms for public access and biodiversity' was researched written and tested on the holding participants. The document was laid out in four distinct sections covering an introduction, pre-agreement considerations, agreement components and access creation mechanisms. It also included:

- Case study comparisons of relevant information drawn from two public access schemes provided by government
  - The Paths for Community Scheme (P4C) which delivered permanent public access in a two-year period between 2011 and 2013.
  - Countryside Stewardship Scheme (CSS) which delivered permissive path agreements through ten-year agreements on a rolling programme for about 15 years, ending in 2010.
- Relevant research data from T&T 159 (test 1).
- Access voluntary creation agreement and conservation covenant mechanisms.
- Information from the Countryside Code such as advice on using countryside public access routes and open space, including route waymarking symbols as depicted in the picture above.
- Data drawn from The Trails Trust research and experience in developing public access routes.

The document contained a tool, called Table 16 (see picture following) which showed options for voluntary agreement mechanisms to create access, and to conserve biodiversity and heritage within the access space. Reproduced as relevant to explanation of key learning.

### Participants taking part in the test

15 landowner / land managers representing the ten holdings in T&T 159A (test 2) took part in the research.

### Key learning from T&T 159A (test 2) research.

## 1. The long-term agreement for public access and biodiversity construction specialist document

Section 2, which explored pre-agreement priorities, outcomes, benefits, opportunities, liabilities and legacy considerations, that could incentivise and inform landowners and land managers, when considering the creation / improvement of green infrastructure for public access and biodiversity, was agreed by participants to be effective in incentivising them to consider the creation or improvement of green infrastructure, for public access and biodiversity.

Section 3, which suggested components for the construction of long-term agreements including considering land designations, third party consents, notices and reports, works schedule, green infrastructure planning, annual improvement, maintenance and other liabilities, finance, capacity to enter agreements, and voluntary agreement mechanisms options, was agreed to be very effective in helping them consider green infrastructure creation, improvement and maintenance in a land management plan.

Section 4 provided details and case studies about voluntary agreement creation mechanisms, for public access and biodiversity and for conservation. When asked if these were easy to understand, as a group the participants agreed these were easy to understand.

Asked what pieces of information did they think was most helpful in the document, participants said table 16 (picture below) showing voluntary creation agreement mechanisms, followed by case studies.

TABLE 16 Voluntary agreements mechanisms that landowners can enter into to create public access and conserve natural / heritage features							
1. PERMANENT ACCESS (VOLUNTARY DEDICATION AGREEMENTS)				2. PERMISSIVE ACCESS (VOLUNTARY PERMISSIVE AGREEMENT)			3. CONSERVATION COVENANT
COMMON LAW	STATUTORY			ALLOWED / AGREED			LEGAL DEED
<b>1A EXPRESS DEDICATION</b>	<b>1B 1980 HIGHWAYS ACT SECTION 25</b>	<b>1C 1980 HIGHWAYS ACT SECTION 30</b>	<b>1D 2000 CROW ACT SECTION 16</b>	<b>2A ACCESS TRIAL</b>	<b>2B INFORMAL ACCESS</b>	<b>2C FORMAL ACCESS</b>	CONSERVE NATURAL OR HERITAGE FEATURES OF LAND LANDOWNER + RESPONSIBLE BODY e.g. local authority, charity, conservation organisation
LANDOWNER + PUBLIC	LANDOWNER + LOCAL HIGHWAY AUTHORITY	LANDOWNER + PARISH COUNCIL	LANDOWNER / LEASEHOLDER + NATURAL ENGLAND	TYPICALLY LANDOWNER + COMMUNITY / USER GROUP / PARISH COUNCIL		TYPICALLY LANDOWNER + INFRASTRUCTURE CREATION BODY	
CREATES PUBLIC RIGHT OF WAY			CREATES PUBLIC ACCESS RIGHTS	CREATES TRIAL FOR AN AGREED PERIOD EG 5 YEARS	CREATES INFORMAL ACCESS FOR AN UNDEFINED OR FIXED PERIOD	AGREEMENT FOR LICENCE OR LEASE FOR A NUMBER OR YEARS (10, 25, 50 ETC)	<ul style="list-style-type: none"> <li>MUST BE FOR THE PUBLIC GOOD</li> <li>HAVE CONSERVATION PURPOSE</li> </ul>
LINEAR ROUTES (RIGHTS TO PASS AND RE-PASS)			LINEAR ROUTES AND SPACE	PERMISSIVE LINEAR ROUTES OR SPACE			AGREED PERIOD
FOOTPATH (FP) (FOOT / DISABILITY CONVEYANCE)	BRIDLEWAY (BW) (FP + RIDDEN HORSE / BICYCLE)	CARRIAGEWAY (CW) / RESTRICTED BYWAY (RB) (BW + HORSE DRAWN VEHICLES)	RIGHTS ON FOOT, DISABILITY CONVEYANCE BICYCLE, HORSE / BIRD WATCH ETC	PERMISSIVE FOOTPATH, BRIDLEWAY / MULTI USE OR PERMISSION FOR SPATIAL ACCESS FOR AGREED USERS (FOOT / HORSE / BICYCLE ETC)			CONSERVATION OF NATURAL ENVIRONMENT / RESOURCES AND LAND SETTING

Asked if there was any information missing in the document that would help them decide, participants asked for more information on the right to roam, improvement and maintenance process / expectations, liabilities and access to a well-qualified advisor / facilitator.

## 2. Permanent access voluntary agreement mechanisms would safeguard investments in land use change and associated environmental outcomes through long-term agreements (30+ years).

Participants were asked to consider these voluntary access creation agreement mechanisms:

- Permanent access: 1A EDCL, 1B HA80 s25, 1C HA80 s30, 1D CROW s16.
- Permissive access: 2A trial, 2B informal, 2C formal (long-term lease).

As a group, participant response was that permanent access creation mechanisms were more attractive than permissive access creation mechanisms. All participants agreed that a permanent voluntary agreement mechanism would safeguard investments in land use change and associated environmental outcomes over 30+ years.

- Most attractive mechanisms were 1D (CROW Act S16), 1A (EDCL), 2B (informal permissive), 2A (permissive access trials before dedication).
- Least attractive mechanisms: 2C (formal permissive), 1B and 1C (Highways Act 80 s25 / s30).

As a group, participants agreed it was important that schemes offer **all** the voluntary agreement creation mechanisms. They said *'individual landowners and managers should be allowed to choose the best option for them'*, this would give *'the best chance to increase public access provision'* *'not everyone can or wants to do the same thing'*, *'different options could work across a number of land holdings'* *'it might put people off if some mechanisms are unavailable'*. The wide range of mechanisms used in The Paths for Community scheme *'proved that options can be included'*.

Participants are prepared to be adaptable in choice of mechanism when collaborating to safeguard landscape / land use change and associated environmental outcomes. They would enter an alternative agreement if others wanted to, however *'it would depend on the flexibility and requirements of a scheme and what payments may be available to the landowner for providing an alternative'*. A few thought this unnecessary as they had already chosen a permanent mechanism that would safeguard changes.

### **3. Attractiveness of voluntary access creation mechanisms**

- All access creation mechanisms: were attractive if flexible, familiar, there were good past experiences, cost-effective, quick, easy, straight forward and simple. It was important to have payment support, strategic network planning and access in the right location.
- Permanent access mechanisms 1A and 1D were attractive due to factors such as permanent community benefit and legacy, reduced liability, protection of long-term investment in landscape change, permanent protection for habitat and landscape, public value, rural economy support, better use of existing access (upgrading rights). 1A EDCL was especially notable for upgrading rights (e.g. footpath to bridleway). 1D CROW dedication was especially notable for allowing short-term cost-free closures (management benefits for woodland, river, quarry).
- Permissive access 2A and 2B were attractive due to provision for trials (allowing for dedication later if wanted), ability to cope with future changes, can be withdrawn, not giving away anything, keeping control, but unattractive due to poor value, unstructured, higher liability, nothing left if closed. 2A (trials) was notable for the ability to trial a route before agreeing a more permanent arrangement. 2B (informal) was notable for good past experiences, no issues, useful.
- Mechanisms 1B, 1C, 2C (highway authority processes, long leases) were unattractive due to identity of delivery partners (see roles), red tape, lease terms.

#### **4. Long term conservation covenants to protect biodiversity, nature, history and heritage.**

Participants were 'somewhat willing' to consider long term conservation covenants to protect biodiversity, nature, history and heritage in the public access space.

Examples given of possible willingness to protect through covenants on single holdings included protection of species in an area of land, habitats, hedges, ponds, trees, views, historic features (dew ponds, springs, washing pools) and things they made and wanted to preserve such as a stone circle.

Collaborating through covenants on a landscape scale - examples of features that could possibly be protected were old sycamore trees, river bank corridors and the restoration of historic green lanes (*'that might be the type of infrastructure that should be safeguarded for the public and nature'*).

Queries were raised about the sale of biodiversity credits, long-term implications and protection for green infrastructure through permanent path mechanisms instead of conservation covenants - indicating that more information is needed about conservation covenants.

#### **5. Creating green infrastructure for public access and biodiversity.**

As a group, participants highlighted the need for the provision of local advisors, properly trained in public access and funded through a scheme, *'to be able to help landowners make the right choices'* and *'to respond to queries'*. This was seen as crucial *'otherwise 'nothing happens'*.

Organisations thought to have a role in helping to create green infrastructure for access and biodiversity included the community and possibly Mendip Hills NL and Natural England. NE was associated with the most attractive choice of voluntary agreement mechanism (1D dedication under CROW Act 2000 s16 ), and for providing knowledgeable advisors through The Paths 4 Community Scheme. The FiPI scheme associated with Mendip Hills NL had provided a good facilitator.

Few participants envisaged a role for the local highway authority in creating green infrastructure for public access and biodiversity. The LHA was associated with the most unattractive mechanisms (1B and 1C dedication under Highways Act 80 s25 / s30) and with poor experiences of inflexibility, costly and time-consuming statutory rights of way processes. It was concluded that *'nothing would get done'*.

#### **In conclusion**

100% of participants said that the advice in the document was effective / very effective in helping them decide which voluntary agreements would work on their holding to deliver access and biodiversity in a land management plan, if they decided to create and improve green infrastructure in their LMP.

Long-term agreements (30+ years), could be constructed by reference to the pre-agreement considerations and agreement components and by offering the voluntary agreement creation mechanisms shown in table 16 and discussed in the document, and through the provision of locally delivered advice and guidance, which is a significant gap in the market. Natural England, protected landscape bodies, facilitators and communities can all play a critical role in delivery.

#### **Participant quotes**

H7 regeneration farm (owner) *'having a strategic network like this access scheme proposal is actually the answer, making better use of what we have, within this nature and the environment could be protected'*.

H5 Organic Farm food to supermarket producer (agriculture team) *'it is crucial that landowners understand and factor in the impacts & outcomes of long-term agreements. It's imperative that advisors and*

*facilitators are properly trained in public access and have the necessary expertise and skills to be able to help landowners make the right choice for them.'*

H8 Family farm (owners) *'very effective to discuss this with a knowledgeable third party. Section 2 raised more questions, so we need answers. I kept thinking I wasn't aware of that and reading it gave me a lot to churn over. Useful to have the different liabilities with each mechanism pointed out. Any advisor has to be really knowledgeable though, query how those are going to be found and' 'very important to offer the whole range of mechanisms as options in a scheme. Not doing so might put people off, if some mechanisms were not available. Very important though to have capable people giving advice as there is a lot for landowners to consider'*. Some discussion followed about the Paths for Community scheme and the wide range of mechanisms offered and used in a short period over the life of the scheme which *'proved that options can be included'*.

H5 Organic Farm food to supermarket producer (agriculture team) *'table 16 is very good and is the type of useful information sheet to pin on the wall. It could be expanded to include occupier's liability and helpful examples of best practice / usage and functional pros and cons to make decisions easier'*.

H4 Conservation charity (ranger & countryside manager) *'my choices reflect the need for flexibility, this is attractive to us. We also have a lot of woodland and the CROW Act dedication allows us to more easily and less expensively close routes for felling and maintenance'*. She and her co participant said that upgrading access rights through CROW Act 2000 dedication from walking to multi user to support horse riding and cycling should be incentivised in the scheme'.

H7 regeneration farm (owner) *'I don't care for the idea of permissive access, it doesn't work, it's too unstructured, there's a higher liability and it's poor value, there is nothing left once the scheme is over, it's hard to close it, people still want to use it, they still come here looking for the permissive route that we had under the stewardship scheme (which is now closed)'* and

*'very important to offer all options in a country wide scheme. On a local level there seems to be too many options, not many would want to use mechanisms connected to the highway authority for instance, never get done, so 1A and 1D are only really needed. 1A might be a good option for a mechanism offered by the Mendip Hills AONB on behalf of the public. A country wide scheme might need all these variations though, some might have a good authority to work with, could too many options lead to a fragmented network though? That's the issue we have now. Consistency is required in a scheme'* and

*'there needs to be sufficient encouragement in the scheme to upgrade routes from permissive to permanent and to upgrade existing footpaths, making better use of what we already have. Small realignments of existing paths would be really helpful. Maybe even selling the freehold - if I made a corridor on the holding boundary, that would get rid of all the liabilities. I would also need to look at any devaluation of the holding due to creating access, that would need to be compensated for'* and

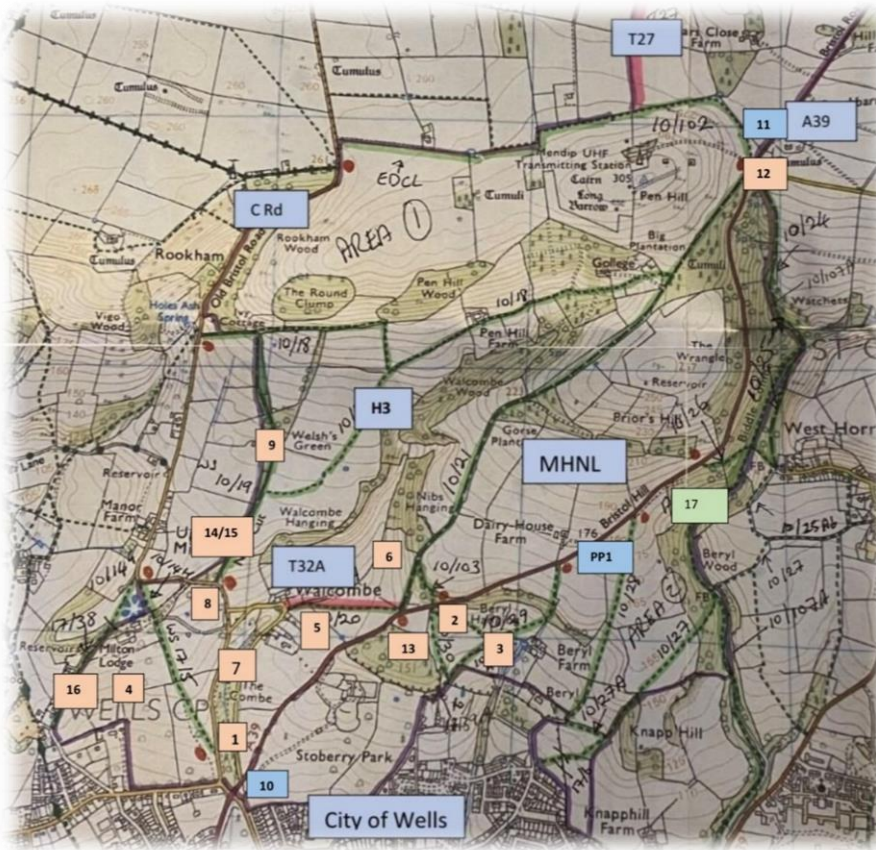
*'we also need to educate the people who come here about the history and heritage of the landscape, there is more than just 'now', the future looks really bleak, there is so much of interest here for people to engage with, such as the Roman lead mining and the monastery that was here, we are losing all our history. The strategic access network is the means by which this could all be shared with the public. We also need to be able to advertise our own products and engage with people who visit to buy them'*.

H8 Family farm (owners) *'I was really interested and agree with Tim's (Tim Haselden Mendip Hills AONB) conclusions on the need for permanent access / green infrastructure provision to protect habitat for the*

*future. This was a key piece of information for me. The older I get the more I care about this. This would be a reason for me to dedicate access with biodiversity’.*

Read the full construction of long-term agreements report (4)

## Mechanism F: Land Management Plan Creation mechanism test



### Introduction to mechanism T159 & T159A

T&T 159 (test 1) found that 45/50 (90%) participants were willing / very willing to enter an access and biodiversity scheme in ELM. Notably 47/50 94% had diversified into a secondary purpose.

T&T 159A (test 2) researched **how** an agri-scheme could support landowners and managers to create strategic public access, particularly for multi-use, together with undertaking existing access improvements and biodiversity enhancements in access spaces.

These activities would benefit everyone through removal of barriers and impacts, support

diversification / the rural economy and support nature recovery.

This final research piece explored LMP construction on a single holding / local, best practice or landscape scale through the development of a series of templates and accompanying holding maps (see picture above), designed to collect data from the holdings.

In the investor test, private public and third sector stakeholders said that local LMPs were the most attractive for them to invest, participate and collaborate in. They said that local LMPs were important for investment in community network connectivity, to mitigate development and to capture local business expertise and philanthropy, which is important for carbon footprint and the environment.

Depending on holding participant responses and the analysis of the baseline data collected, best practice LMP and landscape scale LMPs could be created by examining the commonality of baseline data collected.

The single holding LMP templates were designed and grouped to explore and collect data as follows:

- A: Commonality of land holding, business, participant engagement.
- B: Public access commonality, barriers, options for creation, improvement and biodiversity enhancement.
- C: Strategic network impact on increasing profitability, funding options.
- D. Participant ease of identifying data, LMP mechanism effectiveness and roles

Templates were discussed with holding participants at interview along with the appropriate support tools (map, access and biodiversity survey results, green infrastructure planning chart, blended finance mechanism – see 'tools').

## Participants taking part in the test

14 landowners and land managers representing ten holdings in the Mendip Test area participating in the T&T 159A (test 2) land management mechanism test plus data taken from interviews with private public and third sector stakeholders in the investor test.

## Key learning from T&T 159A (test 2) research.

### 'A' templates: single holding data

The ten holdings together owned 11081 acres, including 1920 acres of woodland. There was minimal commonality between business type, mission and purpose identified. Commonality of >50% showed that most landholdings had a least some land in an agri-scheme scheme and most used agent or consultancy support to advise their business. Most land holdings were within the protected landscape and included view-points, scheduled monuments / heritage sites, protected species, SSSI and woodland.

In T&T 159 (test 1) there was a high degree of willingness amongst all of the 50 participants to engage and collaborate in green infrastructure schemes or projects. By comparison the 10 T&T 159A (test 2) participants had higher willingness scores compared to the test 1 average. On average there was little difference in positivity / willingness between large and small holdings engaged in T&T 159A (test 2).

All participants agreed that the T&T 159A (test 2) mechanisms (A – G) were effective / very effective in supporting the creation and improvement of green infrastructure for access and biodiversity and overcoming barriers.

Three of the smaller holdings had engaged with a farm business survey. Larger holdings had not.

### 'B' templates: common base-line (environmental data) and options

A total of 119 impacts from public access of various types were regularly experienced. These were mapped by the holding land managers.

A public access data recognition test showed that few participants were familiar with well-known sources of access data. This included LHA access data (such as the ROWIP / ROAM), the 2018 British Standard 5709 for gaps, gates and stiles and the government's land manager countryside code, which outlines land manager responsibilities towards public access. However all participants were very familiar with, and used estate maps in connection with public access routes and space across the holding. The majority were relaxed about providing multi-user access, rather than just access for people on foot and about the customary multi- use of access land / woodland.

124 access routes and spaces were surveyed and an access report written for each holding. Surveys revealed major issues and potential opportunities as detailed below:

- Roads / rail / sustainability travel potential: 8 holdings had land and /or routes connecting the holding to a public transport (bus) route and 1 railway station connected to a national cycle and walking route leading into and through the National Landscape.
- Barriers to public access:
  - Highway exit / public access interface 7 locations across the holdings would require specialist help to increase public safety to cross the adjacent highway. Annual seasonal maintenance could improve 4 exits and be rewarded in LMP.



- Multiple accessibility issues were common to all holdings. Issues included lack of signage / poor or lack of waymarking, structure types / rotten condition / accessibility, surface erosion, obstructions and a lack of mobility vehicle access (only 3 out of 65 footpath routes were physically available for their use).
- Biodiversity enhancements in the access area. A majority of participants were familiar with the Mendip Hills NL nature recovery plan. MHNL unit officers assisted the test by updating T&T 159 (test 1) surveys to digitally compare the new Mendip Hills Nature Recovery Plan with the strategic and existing network.
- Facilities / attractions. T&T 159 (test 1) found that 47 (94%) participants had diversified from their primary business. Discussion about the wider benefits and opportunities that could stem at least in part from the community access network in attracting people to land holdings in future, generated an average of 62.5% increase in participant interest in facility and attraction provision.

Support and options were discussed. Participants indicated that support though a scheme is required including for collaboration to improve public access. Route creation and improvements to highway exits, signage, structures, surfaces, advice & guidance would remove many impacts such as unintended trespass, gates not being shut, issues with dogs. Support is also required in a scheme to cover tree, occupiers and maintenance liabilities, highway exits and crossing points and to help resolve criminal activity (wildlife crime, dumping / fly tipping, 4x4 abuse of access routes and farmland).

Access creation and improvement: most attractive options chosen by participants were the development of linear / community routes (these may need trials to avoid location issues).

Biodiversity enhancement in access spaces: most attractive options chosen by participants were creation or restoration of green infrastructure public access (including historic green lanes) with hedge, tree planting and surface improvements. Clarity is required about whether the Nature Recovery Plan data is sufficiently detailed, easily accessible or easily understood to support land managers in delivering biodiversity enhancements in the green infrastructure public access space. Specialist help / facilitation may be required with surveys and advice in a scheme.

Facilities / visitor attractions: most attractive options connected to the network were tourism accommodation, cafés (including pop up) / shop developments, event venues, horse livery, permanent car parks, points of interest, views, benches and picnic tables. It was agreed that the strategic community network would deliver multi-use mountain biking and trekking on a landscape scale.

#### **‘C’ template: funding a green infrastructure LMP**

The majority of participants agreed that developing a strategic green infrastructure public access and biodiversity network would increase the profitability of the business at least to some extent. A number of ideas for potential fund sources came forward, highlighting landowner / manager need for a blended finance mechanism. All participants 100% agreed that the blended finance mechanism was good / useful / well planned, there was enthusiasm for the inclusion of support through offers of voluntary goods and services in the mechanism.

#### **‘D’ template: further questions and discussions about LMPs**

Participants agreed it was difficult to identify the relevant baseline data discussed, therefore a third party, such as a knowledgeable facilitator, able to support delivery of environmental outcomes, economic development and funding, would be needed.

The majority agreed both paper and electronic mediums for LMP had value. Landscape scale plans should be developed, maintained and kept up to date locally possibly\* by Mendip Hills NL. Best practice plans should evolve through learning and partnership working and possibly\* be managed by Natural England or Defra (\*not full or enthusiastic agreement).

Participants scored the effectiveness of the T&T 159A LMP mechanism based on templates

**4.7 / 5 (very effective).**

One participant summed up by saying *'we found the face to face discussion and planning really helpful and the facilitation has been great, this is the only reason we are considering any scheme'*.

More participant quotes follow in the landscape scale LMP section.

In conclusion, the data collected through templates A,B,C and D showed what commonalities existed between holdings along existing and aspirational public access routes. Discussions with the holding participants showed an enthusiastic response for resolving issues. Single holding LMP construction, based on templates showed how access and biodiversity data could be collected and options and solutions could be recorded and incorporated into LMPs, was sufficiently effective to inform a best practice plan.

Read the full analysis of single holding LMP construction in T159A LMP creation report 8

## Mechanism F continued: Best Practice Land Management Plan



### Introduction to the best practice LMP

As a group, participants agreed that support mechanisms A-G, created and tested throughout T&T 159A (test 2), were effective in supporting land managers to overcome barriers and deliver combined access and biodiversity green infrastructure in environmental land management.

The single holding LMP construction template mechanism was found to be very effective. Commonalities existed between all holdings along existing and aspirational public access

routes. All participants had discussed solutions to resolve issues and chosen options from the templates tested. Participants said that *'the access and biodiversity LMP process has been really most interesting'* and *'a useful and effective interview to consider impacts and issues to be overcome and projects that could be undertaken in the future'*. The picture above shows one of very few routes (created under the FiPL scheme) that is accessible by all users, including mobility ATV, in the T&T Mendip test area.

However, the participants as a group agreed that accessing baseline data to inform them about access and biodiversity creation and improvement would be difficult, scoring an average of 1.8 out of 5 (difficult). A best practice plan, including templates, support mechanisms and other access and biodiversity data as discussed, should be available to land owners, managers, specialists, facilitators, user groups and others as a 'one stop shop' supporting access and biodiversity creation & improvement on a single holding, local, landscape scale or national collaboration.

The single holding templates were used as the basis for creating a Best Practice LMP, under the same section headings as the 'very effective' single holding LMP template mechanism with some slight adaptations.

### Participants taking part in the test

None. The best practice plan was created by analysing data from 14 landowners and land managers participating in the T&T 159A (test 2) land management mechanism test, and from interviews with 14 private public and third sector stakeholders participating in the investor test.

### Key learning from T&T 159A (test 2) research.

#### 1. Requirement for best practice LMP

Private, public and third- party stakeholders in the investor test agreed that a best practice model LMP is an important vehicle to attract individual investment of blended finance and non-financial pledges to support creation and improvement of green infrastructure networks for access and biodiversity.

A best practice model LMP could be used nationally to enable landowners / managers and other stakeholders to plan green infrastructure network projects on holdings delivering local and landscape scale

access and nature recovery plans, and long distance sustainable active travel and biodiversity corridors across the country.

The AONB Unit stakeholder said *'a local public access network would be our primary focus but we do work nationally. All AONB's work with Natural England on nature recovery plans. The unit does get involved with areas outside the AONB so we could also see a landscape scale public access network coupled with nature recovery plan. I can see a best practice land management plan that could be used nationally being developed. The Protected Landscape team's core duty is to work nationally so this could potentially be rolled out'*.

## **2. Construction of best practice LMP**

Researching the construction of just ten single holding plan examples has given insight into the construction of a best practice land management plan from:

- researching commonalities between holdings along existing and aspirational public access routes,
- showing how options and solutions to resolve issues can be recorded / supported and
- showing how the access and biodiversity data collected can be incorporated into LMPs.

Holding participants agreed that local and landscape scale land management plans based on templates, supported by a best practice model and informed by the landowners / managers was a very effective approach. However accessing baseline data to inform them about access and biodiversity creation and improvement would be difficult. Therefore facilitation and specialist help was also required.

## **3. Best practice LMP Information & support mechanisms to be included**

Participants agreed that mechanisms A-G, created and tested throughout T&T 159A offering support through advice and guidance, specialist topics, payment and constructing agreements, were effective in helping land managers to overcome barriers to access. Mechanisms to be included (in suggested publication order):

- Mechanism F - Best practice construction of single holding LMP templates, holding map examples.
- Mechanism D - Payment charts for rewarding activities.
- Mechanism C - Advice & guidance toolkit.
- Mechanism A - Pictorial images (overcoming barriers / impacts).
- Mechanism B - Topical advice packets examples e.g. highway exit advice mechanism.
- Mechanism E - Long-term agreement construction.
- Mechanism G - Blended finance, non-financial offers / pledges, accessing leadership & specialist help (Defra / NL / community panel), facilitation / farm engagement.

## **4. Options offered that could be included in LMP could be grouped thus**

- Public access creation / improvement and support projects.
- Biodiversity enhancement options in the access space.
- Highway exit interface improvement options.
- Facility & attraction options connected to an improved access & biodiversity network.

## 5. Responsibility for best practice land management plans

T&T 159A holding participants agreed that best practice plans should evolve through learning and partnership working. The organisation that should be responsible for developing, maintaining, and keeping up to date best practice plans possibly\* should be Natural England or Defra (\*not full or enthusiastic agreement).

### Final Best Practice Plan Templates

<b>Best Practice LMP Templates to complete</b>	
<b>Section A Participant, holding &amp; business profile</b>	
A1	Participant, holding & business profile
A2	Land designations and features
A3	Scoring participant engagement and opinions about public access
A4	Access & biodiversity support mechanisms
<b>Section B impacts, barriers, surveys and options</b>	
<b>Map</b>	Holding Map Preparation - start
B1	Land manager impact and barriers assessment
B2 A/B	A: Roads & transport assessment. B: Barriers to public access - impacts on users.
B3 A/B	A: Access data sources and B: provision for public access on the holding.
B4	Barriers to public access: impacts on users, access survey data
B5	Planning biodiversity enhancements in the access space
B6 A/B	A: Facility & attraction options linked to public access network that could be offered on the holding B: Need for farm business survey (FBS)
B7	Options for the holding LMP green infrastructure access & biodiversity layer
<b>Map</b>	Finalise access & biodiversity holding map
<b>Section C Funding an access &amp; biodiversity green infrastructure LMP</b>	
C	Funding options for access & biodiversity green infrastructure LMP

Read the full best practice LMP analysis in T159A LMP best practice report 9

## Mechanism F continued: Landscape scale land management plan



### Introduction to landscape scale LMP

Best Practice plan effectiveness was tested by reassessing the single holding LMP data against the final LMP templates to create a landscape scale LMP for the Mendip test area.

This landscape scale plan methodology shows how individual LMPS can feed into a landscape scale LMP to deliver landscape scale projects across different sizes and types of holding where participants may be involved with different schemes.

Combining nature recovery and strategic access creation and improvement planning are key components for the landscape scale LMPs. Two digitised plans are required:

- A strategic public access network planning (a ROWIP)
- A nature recovery plan

Private, public and third- party stakeholders in the investor test agreed that a landscape scale model LMP is an important vehicle to attract larger funding streams capable of attracting a more holistic type of finance stream from organisations located in larger conurbations. A landscape scale LMP would be attractive because of providing for strategic access and biodiversity green infrastructure delivery on a long-term landscape and regional plan delivery basis, large scale connectivity and for longer access routes.

### Participants taking part in the test

None. The landscape scale plan was created by reassessing data from 14 landowners and land managers participating in the T&T 159A (test 2) land management mechanism test, and from interviews with 14 private public and third sector stakeholders participating in the investor test.

### Key learning from T&T 159A (test 2) research.

#### 1. Landowner / manager willingness, familiarity with access

All participants owned their holding and most had some land in an agri- scheme. Throughout both T&Ts all participants, from both large and small holdings, showed a high degree of willingness to create, improve and maintain public access and to collaborate on delivering a strategic network. As a group they agreed that the mechanisms, produced by facilitators to support the creation and improvement of green infrastructure for access and biodiversity and overcome barriers were effective / very effective, useful / very useful or well planned.

All participants were very familiar with public access routes on their land, including unrecorded historic and customary access routes in use and most had provided permissive routes (for no reward). In contrast, most participants were unfamiliar with access data sources such as the government's land manager countryside code, the British Standard for gaps, gates and stiles, the LHA rights of way improvement plan and the reporting of issues on ROAM. These access data sources need to be included and highlighted in an A&G toolkit mechanism within the best practice plan LMP.

## **2. Landscape scale impacts from access, and barriers to access including to the public, reporting channels**

Participant interviews and surveys revealed

- multiple impacts experienced by land from the use of public access and
- widespread network accessibility barriers experienced by the public.

124 routes were surveyed. Nearly all, including rights of way of all designations, were inaccessible by disabled and less abled users (see picture at the start of section) . A strategic and common approach to improving both accessibility and public engagement across the landscape is indicated. Resolving accessibility issues due to lack of signage and waymarking, dilapidated structures, erosion around gateways and obstructions, would, in many cases, mitigate impacts on land managers from people getting lost, leaving gates open, impacts from dogs and heavy use experienced on honey pot sites.

Land managers indicated that a reduction in occupier liabilities, particularly for trees, and permitting small path realignments would be helpful in a scheme to overcome barriers. Promoting engagement with the public to overcome issues through a pictorial image mechanism and other educational signage would also be helpful.

Roads dissecting the landscape are also a severe barrier to public access. Identifying locations that require specialist attention and notifying local highway authorities is the first step to mitigation.

Surveys showed that user reports to ROAM about access issues had not been dealt with over a period of years, meaning that barriers remained in place. Conversations with access users met on the trail indicated that many had given up reporting issues, so that more barriers remained particularly deterring less able potential users.

This research proves the need for Defra / agri-schemes to provide support A&G mechanisms in a best practice plan. Support should include the pictorial image mechanism, specialist advice packages (highway exit interface mechanism), advice or help on reducing liabilities and on providing short path realignments (if even on seasonal permissive basis).

## **3. Landscape scale access and biodiversity green infrastructure network benefits for nature**

The participants between them owned about 1860 acres of woodland and the majority said they knew of protected species on the holding. All holdings recognised the connection between access and nature and the importance of delivering biodiversity enhancements within public access spaces. The MHNL provided a new style sample biodiversity report, following the publication of their nature recovery plan and digitising the aspirational public access network.

6 participants were familiar with the Mendip Hills NL nature recovery plan and 4 had accessed it. Of the 124 routes surveyed, 52 were existing corridor or margin routes – strategic access space which could be enhanced for biodiversity and to provide connections to deliver the nature recovery plan. Sections of this valuable infrastructure was historic green lane corridor which is very valuable for access and nature but most participants were unclear about who owned it or who was even responsible for it. This research proves the need for Defra / agri-schemes to provide specialist advice for biodiversity enhancements in access spaces to aid nature recovery, especially within green lanes.

## **4. Landscape scale sustainability and economic benefit**

8 holdings identified a bus service running through or adjacent to the holding which could provide a sustainable connection to public access, attractions and facilities. It was noted that the aspirational strategic multi-use community network would deliver mountain bike and horse trails on a landscape scale.

Discussions about provision of facilities and attractions showed that the 3 organisations, specialising in regenerative, organic and / or conservation practices. were the most public facing. Together they provided 37 facilities and visitor attraction options listed in the test. Discussions about provision of future options saw an average of 62.5% increase in participant interest, with family farms interest increasing by 400 % and the estates interest in increasing facilities / attractions by 73%.

This research proves an obvious priority for specialist advice and guidance regarding economic development of facilities and attractions, especially for family farms. It was notable that only 3 (all smaller farms) had previously engaged with a farm business survey. The surveys were 'interesting' but had not led to anything suggesting that support had not gone far enough.

## **5. Landscape scale Investment opportunities and strategy**

9 participants said that developing a strategic green infrastructure public access and biodiversity network would increase the profitability or brand awareness of their business at least to some extent, but there was uncertainty about where funding for LMPs would come from. 8 participants pointed to Defra schemes of all types but some landowners are excluded from schemes such as SFI as *'it doesn't apply to landowners who don't have a farming business'*. 5 participants pointed specifically to funding from the Farming in Protected Landscape (FiPL) scheme. It was notable that non-farming land owners (often with large acreages of land) were able to apply to this scheme to create and improve access and enhance biodiversity to enable nature recovery, and a reason that the scheme should not be discontinued.

Stakeholders participating in the investors test indicated their willingness to invest but lack of an environmental net gain mechanism is a barrier. The blended finance and non-finance contributions mechanism developed for green infrastructure creation for access, biodiversity & nature recovery indicated by stakeholders to overcome this barrier, was approved by all holding participants as offering a one stop shop.

This research proves that the FiPL scheme should be retained. Defra should explore expansion of the FiPL model with public and third sector stakeholders such as National Landscapes, Community Foundations and with private sector investors, to effect inclusion of blended finance and non-financial resources for access and biodiversity environmental gain.

Somerset Community Foundation said:

***'Defra needs to recognise FiPL as a powerful lever enabling the community and others to contribute and match the finance. Giving the community the means and opportunity to broker and pay for the green infrastructure and also apply to the panel to develop the public good, is a very powerful mechanism'***

### **Roles**

There are dichotomies between key points discussed. The landscape is, for many, inaccessible yet land managers are willing to create, improve and maintain access but are unfamiliar with current codes and standards. Effecting improvements would reduce many of the impacts on operations. The role and responsibility of land managers and local highway authorities for maintenance needs reassessment.

There are obvious benefits for nature in creating and enhancing a green infrastructure network across the landscape and for business through harnessing public and sustainable transport and recognising



opportunities that stem from the network. Stakeholders are willing to invest financial and non-financial resources to deliver the network, but there is no mechanism through which they can do this.

Defra should retain FiPL as the means to enable such a mechanism to work and to provide facilitators / facilitation / officers and the specialist panel. Employment of a facilitator was seen as crucial for professional project management, the basis the green infrastructure scheme and vital to ensure successful collaboration, especially important for delivery on a landscape scale.

The landscape scale LMP is an ideal mechanism / vehicle to involve MHNL, landowners and managers, investment stakeholders, volunteers, local groups and organisations such as parish councils to work collaboratively to deliver access improvements and nature strategy. Specialist help is required in some areas such as improving road exits and recognising economic opportunity. Leadership is required.

The majority of participants agreed that landscape scale plans needed to be developed, maintained and kept up to date locally. 50% agreed Mendip Hills NL responsibility but others thought MHNL having total control 'could cause more problems'.

**In conclusion** a landscape scale LMP was seen as a model to :

- plan the creation and improvement of strategic access and biodiversity green infrastructure networks that are accessible, connected and safe and works for landowners, managers, people and nature on a landscape scale.
- decide priorities for overcoming common impacts from public access, and to overcome barriers to access,
- decide options for green infrastructure creation, improvement and enhancement to connect landscape, communities and help nature recover and options to plan and deliver facilities and attractions,
- identify where collaboration, and common approaches to green infrastructure creation, improvement and maintenance agreements and to payments, are needed
- identify, incentivise and deliver public, private and third sector investment, participation and collaboration in the landscape scale delivery LMP process.

## Participant quotes

H3 Landed estate (owner) *'A lot of people wander around the estate, not on any recognised right of way, they aren't lost, they just think it's 'right to roam' I don't particularly mind this, most of the culprits do less damage and leave less litter than the rights of way users!'*

H1 Landed estate (owner) *'there are a number of customary routes that I am aware that the public used. Those nearer to the church and village are frequently used. The children from the school use one of them to go to their nearby forest school activities. The Mineries track has always been used by horse riders / occasional cyclists'.*

H5 Organic Farm food to supermarket producer (estates manager) *'tree management needs to be prescriptive, it would be helpful to have clear guidance / payment in a scheme and to ensure management in an LMP which includes inspection / action along all access routes / space'.*

H7 Regeneration farm (owner) *'most of the wide range of impacts suffered are on land grazed (mostly with sheep) in the MHNL away from the farm. Honey pot sites such as Dolebury Warren are the worst where there are continual issues with dogs off leads and people leaving gates open. You always have to plan for*

*the unexpected, cows are always an issue if no one (land manager) is present on land. Liability is a constant source of worry in these situations, the Government and Landowner representative bodies (NFU and CLA) need to work out how access, farm operations and liabilities go hand in hand'.*

*H8 Family farm (owners) 'the benefits of a small realignment of the footpath to the northern side of the boundary would benefit farming operations, as part of that field cannot be used for crops, and people as they are already walking along the boundary, it has a small buffer strip there. Realignment would also remove 2 structures and enable us to keep the route away from the horses, it's win-win for all'.*

*H4 Conservation charity (ranger) 'conservation grazing is important. However at Black Rock this had to cease because of two incidences of cows 'shoving' people. The problem happened at a pinch point where the field narrowed to a gate and track and the cows couldn't be avoided. The upside was that the cows had made the path very muddy so their exclusion has made the area more enjoyable for people'.*

*H4 Conservation charity (ranger) 'OS Explorer map is the easiest most user-friendly map, ideal for LMP planning as it shows everything needed, roads, access, woodland, field boundaries etc and most importantly contour lines, topography is really important when considering access improvements'.*

*H5 Organic Farm food to supermarket producer (estates manager) 'I was unaware of the BS5709 standard until very recently and only became aware because the T&T facilitator, who also represents public access on the FiPL panel, sent me a copy to especially note the rule about bridleway gate closing times. I wish I had known about this earlier because if we had realised that it was ok to sometimes just have a gap, we could have not bought so many gates and saved some money'.*

*H5 Organic Farm food to supermarket producer (estates manager) 'signage, waymarking, notices is considered to be a most urgent task, and we acknowledge waymarking to be misleading with missing, faded, confusing and wrong path designation waymarks. We have only recently purchased a lot of the land which has rights of way over it'. We would like help with signage / branding'.*

**Fed up user 2020 ROAM** (not resolved 2024) *'please could there be a proper horse accessible mechanism on this gate, it is near impossible to do from horseback and would also be easier for walkers. The mechanism I wanted to suggest is on one of two superfluous gates further up the bridle path. These gates serve no purpose as you can simply walk around beside them! However, they are dangerous as whilst trying to open the gates (that shut on you) a horse will try to walk through the 'pedestrian' (?) opening'.*

*H1 Landed estate (owner) 'it's difficult for a large estate where much of the land is tenanted, few people ever seem to report issues. Even if issues are reported to the highway authority it seems disinterested'.*

*H5 Organic Farm food to supermarket producer (estates manager): 'where can I locate Somerset Econet and the MHNL nature recovery plan? This holding is an exemplary example of 'putting the green into infrastructure' with outstanding work being done alongside roads, verges, green lanes, trails and paths and on the land in terms of stone wall restoration hedge planting / restoration / laying, buffers & margins / wild flower planting, wild areas left, tree works, dew pond restoration, woodland mob grazing and soil restoration. I am happy to explore an aspirational access route project and to assess how that could be enhanced for biodiversity'.*

*H10 Family farm (owners) 'if the aspirational route was delivered the biodiversity enhancement green infrastructure element would be delivered via SFI through sowing herbal leys, wild flowers and winter bird seed. We are not keen to plant trees or hedges due to the existence of historic traditional stone wall boundaries on the farm. Our farm is a struggling dairy unit needing to optimise any form of income*

*including wildlife / biodiversity and carbon capture opportunities. The green infrastructure access and biodiversity project / scheme would need finance and to fit with our business plan'.*

*H7 Regeneration farm (owner) 'I am planning a learning hub to teach the public and other land managers about regenerative farming. The green infrastructure route and network could help people travel to the holding in a sustainable way, which would be in line with our sustainable / regenerative values'.*

*H9 Family farm (owner) 'we are very keen to set up a farm shop and cafe (location 16) , the aspirational route could be an asset to these plans'. Plus benches at the best viewpoints'.*

*H4 Conservation charity (countryside manager) 'face to face discussion with a knowledgeable facilitator is invaluable to incentivising increased and well considered access in a strategic manner. The opportunity for a landowner to talk through the various options and implications of access across their land is vital for a successful scheme. All schemes need to be assessed on their public benefit and environmental gains rather than creating access for access sake. A strategic, landscape and collaborative approach is needed'.*

*H7 Regeneration farm (owner) 'this test and especially this LMP interview has provided a very useful insight into the provision of access and biodiversity infrastructure on the holding going forwards. It will be necessary to ensure that a specialist (consultant or facilitator) is available to help plan this type of public engagement without jeopardising the business'.*

*H4 Conservation charity (ranger) 'all the learning from the Mendip access and biodiversity test and trials should be applied to support a landscape recovery project that is being considered by members of a farm cluster in the SNR. The strategic network developed for the T&T could deliver on habitat creation and landscape connectivity for nature and people along with education and engagement to help people navigate and understand the countryside.*

*The delivery of access and biodiversity / habitat offers a unique focus. Much has been learnt since COVID, the mass use of the countryside caused traumatic damage to landowners and managers, things have calmed down though to a more normal pace but they now understood the need for countryside access. It feels like the right time to offer and deliver a strategic vision'.*

Read the full Landscape scale LMP analysis in T159A LMP Landscape scale report 10

## Mechanism F continued: T&T 159A workshop



### Introduction to the workshop

The initial concept of a workshop at conclusion of T&T 159A was to produce a Landscape Scale LMP template through working with participants and partners and using the best practice template as a guide, including considering any identified blended funded options.

However, as shown by the preceding LMP and blended finance mechanisms, this work has been satisfactorily concluded. The holding participants agreed that the T&T 159A support mechanisms (A – G) were effective / very effective in supporting the

creation and improvement of green infrastructure for access and biodiversity and overcoming barriers. In addition, when asked at the conclusion of their LMP interviews ‘overall, how effective has the examination of templates to be included in a single holding been in helping to prepare an access and biodiversity LMP for the holding?’ they emphatically responded **4.7 / 5 (very effective)**.

Results analysis from the ten single holding interviews showed that there was sufficient commonality of data and participant agreement and support for the templates designed and mechanisms developed, to ensure two further T&T 159A LMP objectives could be met, namely:

- Produce and test an access and biodiversity “best practice” template by using the data collected to test what commonalities exist between holdings along existing and aspirational public access routes, how options and solutions to resolve issues can be recorded and how the access and biodiversity data collected can be incorporated into LMPs.
- Assess how individual LMPS could feed into a landscape scale LMP for the purposes of delivering landscape scale projects across different sizes and types of holding where participants may be involved with different schemes. Test participant opinions on what organisation could be responsible for developing, maintaining, and keeping up to date a landscape scale plan.

This made production of a landscape scale template unnecessary since the best practice template, with supporting mechanisms, can be used in all scenarios to reward public access & biodiversity creation, improvements, maintenance, facilities and attraction options, in single / local and landscape LMPs, which will benefit the public, nature and landowners /managers.

Therefore the best practice LMP and landscape scale LMP (Mendip) example were produced without the need for second LMP interviews.

### Participants taking part in the test

However, the T&T 159 / 159A facilitators wanted to thank the participants representing the ten holdings for their generosity, patience, goodwill, time and most of all thoughtful and honest contributions to the two Mendip Test and Trials, which have run with their help over a four-year period.

The T&T agricultural facilitator, armed with Mary Rose wine (from the Alwick Estate here on Mendip (and a T&T 159 test 1 participant)), as a thank you present to one and all, sallied forth on a mobile workshop to gather final thoughts.

## **Key learning from T&T 159A (test 2) research.**

### **Access to The Mendips – Test and Trial 159A - Workshop**

Agricultural facilitator / consultant Mike Clements *'it was certainly challenging getting everyone to participate in a workshop after already discussing the process over 10 interviews but the feedback proved to be excellent and everyone felt the scheme was all pulled together by the Land Management Plans which were 'the fun part'.*

The feedback discussion fell into seven broad themes:

1. Participants who appreciate the need for access and hope the scheme will bring new focus on creating new routes.
2. The step by step process helped participants appreciate the landscape scale and vision of the project and made each step simple and easy.
3. The need for a biodiversity / wildlife corridor element and collaboration with neighbours.
4. Need for blended finance.
5. LMP/Mapping.
6. Need for facilitation.
7. Now see it through...when can we start?

### **Participant quotes**

Mike Clements *'94% of participants having diversified from farming it was felt there was a place for blended finance in its wider context and using volunteers, donated materials and people wanted any financial contributions to be approached on a landscape rather than a local basis'.*

H8 Family farm (owners) *'we were really pleased to see access as an option in future grant schemes for Landowners and hope it brings more focus to creating new routes in a collaborative manner.'*

H9 Family farm (owner) *'we were finally won over by the landscape scale of the trial, liaising with other landowners and neighbours and the sensible way the LMP was undertaken...'*

H6 Quarry company PLC (regional estates manager) *'we liked the step by step process which 'went to plan' and saved us a lot of time with things we would have had to research ourselves'.*

H10 (Family farm owners) *'with no PROW on the farm and budgets/ borrowing being critical, we have only completed the exercise due to the facilitators and their technical and local knowledge which was hugely important. The fact it was on a landscape scale was persuasive and each template and the LMP made each step easy and encouraged us to continue when in other circumstances we would have withdrawn'.*

H5 Organic Farm food to supermarket (estates manager) *'as a Company, we are already undertaking this work but the step by step process and LMP highlighted several areas we needed help on such as signage, waymarking and the need for ongoing maintenance.'*

H4 Conservation charity (ranger) *'the project has broadened my perspective on access and what that means for the Mendip Hills. I believe it's galvanised people to think about how it can work in tandem with nature recovery and that there needs to be space for the both to make it viable. Access and nature recovery needs to be strategic for people to get behind it and I think the project has demonstrated how that can be possible. Access for everyone needs to be more of a priority for everyone - it shapes the way people interact with our work as conservationists and landowners and directly impacts how those people behave, both positively and negatively. To go forward with the payment framework there's no reason why a set up similar to FiPL wouldn't serve as an existing model, landowners ought to be rewarded for good maintenance for access as a public service, particularly if it's serving for nature as well. Not every landowner has as much access to funds and knowledge as some other NGOs so a scheme like this is absolutely crucial for engaging them in the process of access for all and nature recovery'*

H6 Quarry company PLC (regional estates manager) *'we already provide material (stone and hardcore) for any ROW scheme but would not be prepared to approach any of our contacts for contributions locally. It should be 'sold' on a Landscape basis by the facilitators'*

H2 Landed estate (estate manager) *'at the start of the test the Estate was very non-committal but the templates/LMP generated a lot of debate/conversations on the Estate and not only changed our views but importantly...that of our agent. The Templates/LMP have helped move people's opinion who previously avoided ROW as being too difficult and confrontational!'*

H3 Landed estate (owner) *'Rachel (facilitator) has been magnificent, I could not have even contemplated this without her enormous help and would not have proceeded without her. The templates and the LMP have made the process easy and being on a landscape scale makes it very attractive'*

H7 Regeneration farm (owner) *'the success of the test was the fact that the facilitators were there to help, were based locally and knew their stuff!'*

H1 Landed estate (owner) *'it has been interesting being involved. As for whether it has been worthwhile I suppose that depends on what if anything results from it! I really hope you see it through!'*

H4 Conservation charity (ranger) *'this is a great start to this process, at last we have something and this something is so much better than nothing. Currently with regard to access / green infrastructure provision there is nothing – no coherent support, no help and no narrative. This is the whole reason why nothing gets done and good projects are not delivered! Every national landscape should have an access officer in the team. Our organisation could lead on that. There's an NGO here leading on nature recovery – SWT do that so why not an NGO lead for access? This T&T could be an effective start to more strategic planning, effective leadership to provide access for all, equality and inclusion is so important and we need to also think about farming pressures, there are so many threads. We need an access focus across the landscape starting with the National Landscapes, Parish Councils and involving organisations like ourselves, TTT and CPRE'*

H10 (Family farm owners) *'we found the face to face discussion and planning really helpful and the facilitation has been great, this is the only reason we are considering any scheme!'*

H6 Quarry company PLC (regional estates manager) *'I found the test/trial both informative and beneficial in terms of the processes and outcomes. I was happy to assist on behalf of The Company, as a large landowner and quarry operator on the West Mendips and hope that the project gets the full backing of Defra going forward'*

H5 Organic Farm food to supermarket owner *'replanting, biodiversity and creating multi-user paths for people to enjoy the countryside, perfectly matches our mission to produce natural, healthy food that nurtures and nourishes people and the planet!'*

These views were again expressed when hosting Her Royal Highness The Duchess of Edinburgh on a recent visit when meeting the Trails Trust Team and some of the holding facilitators. The mobile workshop coincided with this exciting visit. The facilitation team produced maps, plans and tools, created for the Mendip T&T's, for the visit - see photo at the start.

*Section 7 Key learning from mechanisms ends.*

## 8. Answering policy questions

### T&T 159A Policy questions

These are the Defra environment land management policy questions answered in T&T 159A. Defra has related policy questions to themes. However, research findings from mechanisms designed to support the creation, improvement and enhancement of access and biodiversity in ELM, often crossed themes to answer questions in a different theme.

#### Theme: Advice & Guidance

P1: What kind of advice is the market not so good at providing that may be important for farmers and foresters doing environmental land management? (e.g., where in the market might there be a gap?)

P2: What role do you think Defra's Delivery Partners should play (NE, EA, FC, RPA plus Historic England/ALGOA, NP and AONB)?

#### Theme: Land Management Plans

P3: Test the applicability of the common elements of an LMP (farm background, farm priorities, baseline environmental data, recommended options and need for a farm business survey).

P4: How will farmers and land managers develop a whole farm LMP that incorporates different funding mechanisms and what A&G, and support would they require to do this?

P5: How to construct long-term agreements (30+ years), potentially incorporating conservation covenants to safeguard investments in land use change and associated environmental outcomes.

#### Theme: Payments

P6: How to incentivise land manager participation and collaboration in Landscape Recovery projects and determine appropriate payment mechanisms

P7: How to blend public and private finance in funding projects

P8: What barriers, from local to landscape scale, are present with the blended finance approach across the Sustainable Farming Incentive, Local Nature Recovery and Landscape Recovery schemes?

P9: What mechanism to determine the value of an environmental outcome would be attractive to private sector stakeholders and land managers (incentivising investment and participation, respectively)?

P10: What are the mechanisms to establish minimum price thresholds for environmental outcomes and what is their impact on private sector interest?

#### Theme: New and Innovative Mechanisms

Blended Finance mechanism



## T&T 159A Policy questions answered and conclusions

### **1. The vision: a strategic linear green infrastructure network for the co-existence of public access & biodiversity on a landscape scale.**

#### **Strategic landscape scale network**

The T&T 159A (test 2) holding participants and stakeholder investors were very positive about the landscape scale of the proposed green infrastructure aspirational multi-user network being tested. They appreciated the vision of a connecting and accessible public access multi-user network plan, developed by the community, combined with a nature recovery plan, developed by Mendip Hills National Landscapes.

Both groups were enthusiastic about the strategy to promote delivery of environmental outcomes and eco services (access with biodiversity), rather than seeking investment to deliver small sections of green infrastructure route in remote areas (for example).

A common theme throughout interviews was the positivity and willingness to create this landscape asset on a permanent linear route basis, and a recognition of the legacy and benefits this could bring for all in the community and for nature. Stakeholder investors were particularly excited and incentivised by the strategic network aspiration as it would deliver on all their priorities for supporting communities, biodiversity and nature.

It was recognised by holding participants, that whilst permissive access has a place in an agri-scheme there would be *'issues for the strategic network if support for a permissive connection was withdrawn'*, and *'permanent access should be the goal and gold standard, particularly on landscape scale strategic access projects'*. Stakeholders were very highly motivated to invest in a permanent landscape scale network.

#### **Use existing assets**

Another common theme was the desire to make the best use of existing public access infrastructure assets. Holding participants thought that multi-user access could easily be accommodated through the upgrading and improving of existing infrastructure along public footpaths and along routes through open access and woodland. New routes should only be created where necessary.

One stakeholder said *'all the connecting rights of way near the campsite are footpaths for walkers only. If improved for all users, customers would extend their stay and return again to explore other access routes and more people would be attracted to visit'* and a holding participant said *'having a strategic network like this access scheme proposal is actually the answer, making better use of what we have, within this nature and the environment could be protected'*.

### **2. Incentivising land manager and investment stakeholder participation in Landscape Recovery**

#### **Policy questions**

P6 How to incentivise land manager participation and collaboration in Landscape Recovery projects (and determine appropriate payment\* mechanisms).

P9 What mechanism to determine the value\* of an environmental outcome would be attractive to private sector stakeholders and land managers incentivising investment and participation.

\* See valuation and payment in 5.

## **Incentivising landowner, land manager and stakeholder investor participation, collaboration and investment in the green infrastructure access and biodiversity network creation and improvement.**

One holding participant said *'we need to educate the people who come here about the history and heritage of the landscape, there is more than just 'now', the future looks really bleak, there is so much of interest here for people to engage with, we are losing all our history. The strategic access network is the means by which this could all be shared with the public. We also need to be able to advertise our own products and engage with people who visit to buy them'*.

Multiple factors incentivising both the landowner / manager holding participants and the stakeholder investors, emerged throughout the series of individual interviews.

### **Top Incentives for both holding participants and stakeholder investors**

Facilitation was the most important incentive for both groups. Threaded through every interview and conversation, was the need to provide professional and knowledgeable facilitators and specialists, through a scheme. Nothing would happen without facilitation (*see roles*).

Economic opportunity was important. Both groups agreed that developing a strategic green infrastructure public access and biodiversity network would increase the profitability of the business at least to some extent.

Delivering holistic co-existence and engagement of people, biodiversity / nature, food and farming.

Strategic vision, delivering a permanent network. Delivering permanent routes, creating a permanent network, as an incentive to invest, was important / very important to stakeholder willingness to invest (*see valuation*).

### **Incentives for holding participants**

Incentives to participate and collaborate in strategic network green infrastructure creation and improvement, included effective support mechanisms in the T&T, creating routes to help users avoid busy roads, collaborating to provide linear trails to connect communities, route location, educating people, capital improvements, supporting the rural economy / tourism, opportunities to enhance biodiversity & habitat along newly created, upgraded or existing routes, dedicating an existing permissive or customary route to preserve access legacy for future generations, create a restricted byway corridor to provide permanent protection for access and wildlife. The effectiveness of being able to discuss environmental outcomes, benefits and opportunities, payment / reward mechanisms and rewards a face to face discussion with a knowledgeable facilitator *'was invaluable to incentivising increased and well considered access in a strategic manner'*.

Common themes incentivising access creation throughout the T&T were that small realignments of existing paths would be really helpful, safeguarding stock and people. Upgrading existing access rights through from walking to multi user to support horse riding and cycling should be incentivised in the scheme.

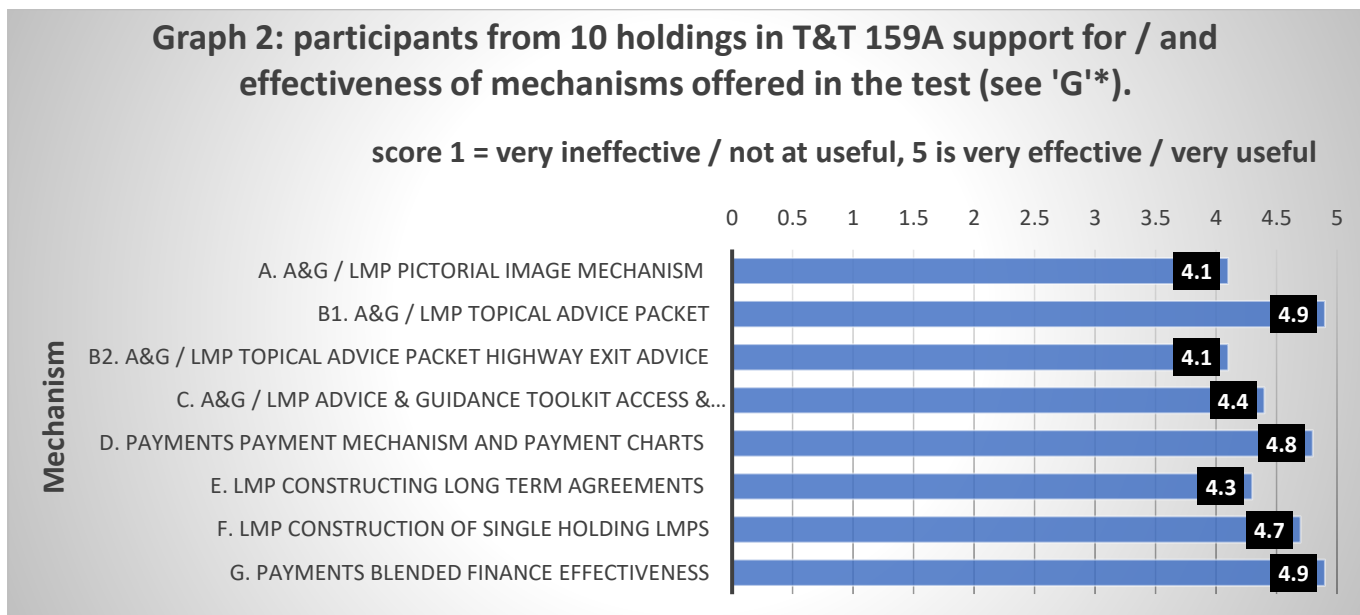
### **Incentives for stakeholder investors**

Incentives for stakeholder investors to invest, participate and collaborate in strategic network green infrastructure creation and improvement were a strong commitment to support communities and deliver for the environment, providing funding, leadership and mitigating concerns about social and environmental impacts from development, delivery of countryside access via a connected permanent accessible network for all, biodiversity enhancements - particularly hedge planting along routes.

The choice of appropriate land management plan was important. Local, landscape scale and best practice LMPs were all attractive at a different level.

### 3. Incentivising network creation & improvement through effective support from mechanisms (policy questions as 2. continued)

All the mechanisms (A – G shown in graph 2) designed by the T&T provided effective support in overcoming impacts and barriers and providing the essential building blocks for network delivery through a best practice land management plan in a scheme.



Holding participants said

*'all the learning from the Mendip access and biodiversity test and trials should be applied to support a landscape recovery project that is being considered by members of a farm cluster in the SNR. The strategic network developed for the T&T could deliver on habitat creation and landscape connectivity for nature and people along with education and engagement to help people navigate and understand the countryside. The delivery of access and biodiversity / habitat offers a unique focus. Much has been learnt since COVID, the mass use of the countryside caused traumatic damage to landowners and managers, things have calmed down though to a more normal pace but they now understood the need for countryside access. It feels like the right time to offer and deliver a strategic vision' and*

*'I think this test has made a very good start in the development of how access is delivered with biodiversity. There has been some inevitable conjecture and a lot of legalise to understand. It needs taking forward now with specialists refining what has been learnt and locally available advisors being trained to become specialists in designing access and biodiversity across land holdings and landscapes'.*

### 4. Advice & Guidance theme

#### Policy question

P1 What kind of advice is the market not so good at providing that may be important for farmers and foresters doing environmental land management? (e.g., where in the market might there be a gap?)

#### Advice & guidance gaps in the market

Holding participant interviews conducted to test mechanisms revealed a lack of A&G that would support landowners and managers planning to create and improve green infrastructure for access and biodiversity in land management plans. Lack of A&G is a barrier to delivering both the strategic network and improvements to the existing network. Mechanisms most affected by a lack of A&G were A,B,C and E. All mechanisms including D. valuation / payment, G. blended finance and F. land management plan mechanisms will all require A&G support in a handbook or toolkit to ensure there are 'no gaps'.

**Mechanism A pictorial mechanism:** a gap in the market due to a lack of government ownership, support or guidance for signs, signage design for public education and engagement on the countryside 'highway' network compared to government ownership of road 'highway' network signage. Suites of images covering ten common impacts from public access experienced by T159 (test 1) participants were produced by 3 designers to test the mechanism.

**Mechanism B (1) specialist topical advice packets (example highway exit advice:)** lack of provision of A&G specialist packets to support landowners and land managers participating in Environmental Land Management schemes (ELMs) achieved the highest effectiveness / usefulness mechanism test score of 4.9 / 5 (very useful). It was important that advice came from an '*authentic*' '*credible*' '*reliable*' source. Provision of the former countryside stewardship handbook was cited as an example of such a source.

**Mechanism B (2) highway exit public access interface mechanism:** a gap in the market due to long standing lack of guidance from government, local highway authorities and protected landscapes. Lack of highway exit specialist advice negatively impacts landowners / managers, user groups and rights of way departments who may be keen to improve and create public access, preventing route provision. Landowner offers of dedicated connecting access routes have been denied by local highway authorities. Highway engineers Transient Designs Ltd, developed a sample packet of specialist advice to test mechanism B (1 and 2). Work with Transient Designs needs to continue.

**Mechanism C A&G handbook:** lack of a handbook / toolkit is a gap in the market of very long standing . A handbook '*with all you need to know in one place*' should be widely available to help landowners, land managers '*make the right decisions*', '*help to create a legacy*' and '*ensure a broad and holistic understanding of how access, nature, biodiversity, and farming can co-habit*' and is '*especially needed for those advising landowners and land managers in a scheme*'. T&T facilitators created an A&G framework to test the mechanism.

**Mechanism E A&G specialist advice about the range of voluntary agreement mechanisms available** to create permanent or permissive public access available to landowners, is another gap in the market due to a long standing-focus on supporting short term permissive access in agri-schemes. Participants '*didn't know any of this*' and said '*individual landowners and managers should be allowed to choose the best option for them*', giving '*the best chance to increase public access provision*'. 'The wide range of mechanisms used in The Paths for Community scheme '*proved that options can be included*'. Mechanisms were explored in the long-term agreement specialist paper written by T&T 159A facilitators.

**A&G that does exist that doesn't land with intended audience.** Significantly, most holding participants were unaware of the British 2018 standard for gaps, gates and stiles, or of the government land manager countryside code, or of local government public access infrastructure fault reporting (via ROAM) and community requests for routes (via Rights of Way Improvement Plan) mechanisms. This shows that even where A&G does exist, it is failing to reach its intended audience. Standards, codes and information about ROWIPs could be included in a well-publicised 'one stop shop' A&G toolkit. An improved public fault reporting process is also required.

As shown by graph 2 all the mechanisms produced for T&T 159A (test 2) effectively filled 'gaps' in the market

## 5. Valuing and Payments theme

### Policy questions

P6 How to (incentivise land manager participation and collaboration in Landscape Recovery projects and determine appropriate payment mechanisms\*,

P9 what mechanism to determine the value of an environmental outcome would be attractive to private sector stakeholders and land managers (incentivising investment and participation, respectively\*)

P10 What are the mechanisms to establish minimum price thresholds for environmental outcomes and what is their impact on private sector interest?

\* See 2. Incentivising land manager and investment stakeholders

Note re policy question 'incentivising investment and participation, respectively'. There is an assumption that private sector stakeholders and land managers are separate groups of people. T&T 159 (test 1) established that 94% of the 50 participants had diversified into alternative or complementary businesses run alongside their primary land management operation. In the private stakeholder blended finance research 9 out of the 14 stakeholders were also land managers.

### Permanent access (voluntary dedication of right of way and rights to access land).

This research was carried out using charts, designed by T&T 159A facilitators, showing suggested mechanisms to value a one-off capital grant for dedicating permanent access, derived from government (green book), market (average land values) and ORVaL recreational / social welfare valuations. A holding participant noted '*permanent access could be incentivised through the offer of small realignments such as moving routes away from farm yards and through stock which many of the public were uncomfortable with travelling through, and through increasing the use of margins*'.

### Linear route valuation mechanism (environmental outcome example bridleway 1km length by 3 m wide 0.741 acre).

The value of the land established the minimum price for a capital payment for permanent green linear infrastructure for access and biodiversity (bridleway), agreed all the stakeholder investors and the majority of the holding participants as a '*fair starting point*'. Thus the 2023 average market valuation for a capital grant for a 3m x 1km bridleway started at £6903 and a 4m x 1km restricted byway £9204.

The value of the land plus 50% operational loss (loss suggested paid over 10 years) determined a fairer value for a capital payment to secure permanent dedication of linear access in a scheme. This mechanism and valuation was attractive to the majority of both investment stakeholders and holding participants. 2023 average market valuation 3m x 1km bridleway £10355 (£10.35/m) and 4m x 1km restricted byway £13806 (£13.81/m).

The chart showed the government and average market valuations to be very similar. The holding participants favoured the land valuation in a scheme to be set through a market mechanism, but the stakeholder investors slightly favoured the land valuation in a scheme to be set through a government mechanism '*if the value were to be set by the market, it would be too difficult and variable*'.

Holding participants said it made no difference to their willingness to dedicate access, whether the route was intended to be single use (footpath) or multi use (bridleway / RB), nor would they expect a lesser valuation if upgrading an existing right of way, for example footpath to bridleway, *'as clearly there would be more impact'*. A common theme throughout T159A (test 2) was how relaxed about and even keen the majority were regarding provision of multi-user access, rather than access for just people on foot, and about the customary multi- use of access land and woodland.

**ORVaL mechanism.** The majority of participants and stakeholders agreed that scheme payments should be flexible allowing for higher payments for routes that clearly have a high recreational value, that should be recognised. Use of the ORVaL recreational / social welfare valuation mechanism could be explored as the basis for determining recreational value. ORVaL *'was priceless in enabling a public health and wellbeing value to be put on green infrastructure routes and space'* and *'would be useful as an expression of community pressure for a new route'*. The average recreational / social ORVaL welfare value per annum for aspirational routes in the proposed network was £9.46/m. The argument for recreational layered payments was supported by an example of a short footpath connection that could be upgraded to bridleway (to avoid a road exit), near Wells City, valued at a much higher value of £58.18/m per annum.

### **Open access land valuation mechanisms**

There was no consensus amongst holding participants or stakeholders on valuation mechanisms or actual value. Access land was difficult to value as paradoxically, access land offered high value through experiences for the public, but a low land value. It was generally seen as poor-quality land with more impacts envisaged such as poor dog behaviour and gates left open.

There was no consensus either on a minimum price threshold for valuing access to a hectare of open space / woodland created for public use. Mechanisms suggested for valuing access to open space and woodland did not attract or incentivise stakeholders or holding participants. Valuing open space was seen as problematical and both holding participants and stakeholders anyway preferred linear route development to create a connected network.

### **Access and biodiversity green infrastructure improvement and enhancement valuation**

For smaller activities such as replacing stiles with gates, the full costs of material, labour and an element of profit should be paid.

Larger schemes such as developing or restoring access and biodiversity corridors, examples being creating a restricted byway corridor or restoring an historic green lane, needed to be individually valued with the assistance of a trained facilitator. The scheme should fund improvement options and activities that had been agreed in the holding access and biodiversity green infrastructure LMP.

### **Valuing annual / seasonal maintenance of access and biodiversity green infrastructure**

A common theme throughout both T&Ts was the very high landowner / manager willingness to create, improve and maintain access and biodiversity infrastructure, including highway exit visibility splays. Holding participants were keen to be rewarded to maintain, this would result in much higher maintenance standards (see land management theme).

Annual maintenance agreements and costs could be agreed and specified in the holding access and biodiversity LMP. One participant (contractor / family farm) said *'I would like to be paid to do this on my own land and it would also be good to carry out the contractor work for others, a facilitator could agree and organise it but I have the machinery and skills to do this for others'*.

The stakeholder investors agreed the importance of covering maintenance activities and costs. One said *'we do like things to be long-term and permanent if possible, especially when planning for the future, but maintenance must be budgeted for and agreed'*.

### **Permissive access (voluntary permission for use of land for recreational activities).**

Most holding participants had provided for (unrewarded) permissive paths across the holding with user groups or grants generally funding structures. Surveys showed that permissions were more frequently agreed for multi-user (shared bridleway access on foot, horse, bicycle), than for single-use footpaths.

The holding participants agreed that permissive access should be supported in a scheme alongside permanent options. The payment mechanism should reflect the difference between permissive and permanent access. No one argued for capital payments for the land space needed for permissive access infrastructure. Permissive access, including trials, should be rewarded through payment support for capital works, improvements and maintenance *'even though permissive access was a diminished public good compared to permanent dedication'*.

There should be a basic scoring mechanism to determine whether the proposed permissive access is needed. It could be included in approved holding LMP annual improvement access and biodiversity agreements *'as some routes can add value to the permanent aspirational route like a path to see a view'*.

Where public funds were invested in the provision of permissive access, it would need to be shown on Ordnance Survey Maps and Apps so that the public can find it, provided a mechanism to remove it, if the access was withdrawn. Converting permissive access routes and trials to permanent access and being rewarded with the capital payment through a scheme was very attractive to 94% of holding participants.

Participants said *'there needs to be sufficient encouragement in the scheme to upgrade routes from permissive to permanent and to upgrade existing footpaths'* and *'permissive access has higher liability and it's poor value, there is nothing left once the scheme is over, it's hard to close it, people still want to use it'*, and *'making the best use of what we have points to permanent dedication otherwise there is a difficult mix of liabilities on the same path (permissive / permanent)'*.

## **6. Land management plans**

### **Policy questions**

P5 How to construct long-term agreements (30+ years), potentially incorporating conservation covenants to safeguard investments in land use change and associated environmental outcomes.

P3 Test the applicability of the common elements of an LMP (farm background, farm priorities, baseline environmental data, recommended options and need for a farm business survey).

P4 How will farmers and land managers develop a whole farm LMP that incorporates different funding mechanisms and what A&G, and support would they require to do this?

### **Constructing long-term agreements**

Wildlife Trust (third sector stakeholder) *'we would want to see green infrastructure delivered on a permanent basis or at the very least, on a very long term (50 years+) agreement in order for ecosystems to thrive and maximum value to be delivered'*.

(Oldest test participant small family farm) *'I was really interested and agree with Tim's (Tim Haselden Mendip Hills NL) conclusions on the need for permanent access and green infrastructure provision to*

*protect habitat for the future. This was a key piece of information for me. The older I get the more I care about this. This would be a reason for me to dedicate access with biodiversity’.*

A specialist document ‘long-term agreement construction mechanisms for public access and biodiversity’ document’ researched and written by T&T facilitators was tested on holding participants. The document included pre-agreement considerations, agreement components and access creation mechanisms, practical case studies and case study comparisons between a Countryside Stewardship scheme, which delivered a single permissive access mechanism, and Paths for Communities which delivered permanent access using a number of voluntary dedication mechanisms. The holding participants agreed the document was effective if they decided to create / improve green infrastructure in their LMP. The voluntary access creation agreement mechanisms shown in a table (table 16) and case studies were particularly helpful.

### **Voluntary access creation mechanisms**

Voluntary access creation mechanisms that created permanent access were more attractive than permissive access creation mechanisms. Permanent mechanisms clearly safeguarded investments in land use change and associated environmental outcomes over 30+ years. The wide range of mechanisms used in P4C *‘proved that options can be included’*.

However mechanisms creating informal permissive paths and supporting permissive access trials should be supported as options in a scheme. *‘Schemes should offer all the voluntary agreement creation mechanisms giving the best chance to increase public access provision’*.

- CROW Act S16 dedication and express dedication at common law (EDCL) were the most attractive linear route creation mechanisms. Both offered permanent community benefit and legacy, reduced liability, protection of long-term investment in landscape change, permanent protection for habitat and landscape, higher value for public, rural economy support, and better use of existing access through upgrading rights. EDCL was especially notable for ease of upgrading an existing right of way (e.g. footpath to bridleway). CROW dedication was especially notable for short-term cost-free closures.
- Informal permissive access mechanisms were also attractive to some participants due to provision for trials (allowing for dedication later if agreeable), ability to cope with future changes, could be withdrawn, not giving away anything, keeping control, good past experiences, no issues, useful. However other participants were not attracted, due to this mechanism representing poor value as no legacy, being unstructured and a higher liability for visitors, compared to lesser liabilities for trespassers (CROW) and highway users (EDCL).
- Any mechanism which involved working with the highways authority as a partner (dedication under Highways Act 80 s25 / s30) was unattractive due to the identity of the delivery partner (see roles), inflexibility, costs and red tape. The formal permissive access mechanism was also unattractive, due to requiring formal lease agreements.

### **Conservation covenants**

Holding participants were somewhat willing to consider covenants on their own holding and to collaborate in a landscape scale covenant to protect biodiversity, nature, history and heritage in public access spaces. Queries were raised about the sale of biodiversity credits, long-term implications and protection for green infrastructure through permanent path mechanisms instead of conservation covenants - indicating that more information and advice is needed.



## **Applicability of common elements of an LMP (farm background, farm priorities, baseline environmental data, recommended options and need for a farm business survey).**

Common elements between holdings to inform single holding, best practice and landscape scale LMPs were explored using a series of templates and accompanying holding maps, designed to collect applicable existing and aspirational green infrastructure access and biodiversity baseline data.

124 access routes and spaces were surveyed across the holdings. Facilitator access reports and Mendip Hills NL biodiversity reports informed holding participant interviews to complete the templates.

### **Applicable commonality**

Interviews confirmed minimal commonality between holding business type, mission and purpose. Commonality was confined to most operating within the protected landscape and having at least some land in an agri-scheme scheme. Most used agent or consultancy support to advise their business.

There was commonality between all holdings in typical impacts experienced from public access and barriers suffered by the public to access. Multiple accessibility issues were common to all holdings. Issues included lack of signage, poor standards of waymarking, inaccessible and unnecessary structures / types (stiles, small kissing gates), dilapidated and broken structures, surface erosion, obstructions and gates adapted for fast and dangerous closing speeds. Lack of mobility vehicle access meant that 62 out of 65 footpath routes surveyed were inaccessible. Most routes with higher rights and with gates, were also inaccessible to mobility vehicles due to issues with structures.

Access creation, improvement and maintenance supported through a scheme would, in many cases, mitigate impacts on land managers from people getting lost, leaving gates open, impacts from dogs and heavy use experienced on honey pot sites, whilst removing many accessibility barriers the public, particularly less able people, face in trying to access the network with all the obvious benefits it can bring.

Land managers indicated that a reduction in occupier liabilities, particularly for trees, and permitting small path realignments would be helpful in a scheme to overcome barriers. Promoting engagement with the public to overcome issues through the pictorial image mechanism and other educational signage would also be helpful.

The majority identified a bus service running through or adjacent to the holding which could provide a sustainable connection to public access, attractions and facilities. It was noted that the aspirational strategic multi-use community network would deliver mountain bike and horse trails on a landscape scale.

### **Biodiversity commonality and support**

A majority of participants were familiar with the Mendip Hills NL nature recovery plan. MHNL unit officers had assisted research by digitising the aspirational multi-user strategic network. This enabled digital comparisons of the strategic Mendip Hills Nature Recovery Plan and aspirational and existing access space across the landscape. The Mendip Hills partnership has voted to attach the aspirational strategic multi-user green infrastructure plan to the Mendip Hills NL management plan, supporting delivery of the green infrastructure plan. This methodology allowed for improved biodiversity surveys of access space, intended to be created or improved, to be carried out for land managers. This service needs to be supported in a scheme.

The data collected through templates showed that access, biodiversity, facility and attraction commonality existed between all holdings along existing and aspirational public access routes. Discussions with the

holding participants showed an enthusiastic response for resolving issues. An improved system for the public to report would be helpful in resolving access issues more quickly.

All participants chose access and biodiversity green infrastructure creation and improvement options, along with improved facility and visitor attractions to explore in LMP. A participant said *'the access and biodiversity LMP process has been really most interesting'* and *'a useful and effective interview to consider impacts and issues to be overcome and projects that could be undertaken in the future'*.

### **Farm business surveys**

Three of the holdings, all smaller farms, had engaged with a farm business survey, which whilst interesting, had not led to any economic or other advantage, suggesting support had not gone far enough. Discussions about provision of facilities and attractions provided via the network showed that 3 organisations, specialising in regenerative, organic and / or conservation practices were the most public facing providing 37 facilities and visitor attraction options listed in the test. Discussions about provision of future attractions / facilities saw an average of 62.5% increase in participant interest, with family farms interest increasing by 400% and the estates interest in increasing facilities / attractions by 73%, showing that these participants could gain from better targeted farm business surveys and continued support.

### **Best practice and landscape scale LMPs**

The single holding LMP construction, based on templates and the commonality found between holdings was sufficiently effective to inform a best practice plan and to feed into and develop a green infrastructure access and biodiversity landscape scale plan for the Mendip Hills NL.

### **Developing a whole farm LMP that incorporates different funding mechanisms.**

#### **Best practice plan for green infrastructure creation and improvement**

Stakeholder investors agreed that the best practice model LMP was an important vehicle to attract individual investment of blended finance and non-financial pledges to support creation and improvement of green infrastructure networks for access and biodiversity.

A best practice plan, including the templates and support mechanisms, particularly the A&G templates, and other access and biodiversity data as discussed, should be available to land owners, managers, specialists, facilitators, user groups and others as a 'one stop shop' supporting access and biodiversity creation & improvement on a single holding, local, landscape scale or national collaboration.

An access and biodiversity scheme might need to include capital payments for access creation, operational loss, recreational enhancement, legal costs, capital payment for infrastructure works and possibly annual payments for improvements and maintenance agreed in a single holding LMP.

The holding participants agreed that even just accessing baseline data to inform them about access and biodiversity creation and improvement would be difficult, scoring an average of 1.8 out of 5 (difficult). They were clear that facilitation and specialist help are required to develop green infrastructure for access and biodiversity through a scheme in LMP. It is clear that facilitation would have to include advice on the different funding mechanisms included in schemes. (See also blended finance, roles, scheme following).

## **7. Impacts and overcoming barriers to access / future access**

### **Policy question**

P8 What barriers, from local to landscape scale, are present with the blended finance approach across the Sustainable Farming Incentive, Local Nature Recovery and Landscape Recovery schemes?

In T&T 159A (a landscape recovery test) barriers to and from access experienced by landowners, managers and by the public were researched. These barriers needed to be identified in order to apply a blended finance approach to resolving them through creating, improving and maintaining access and biodiversity in land management plans.

### **Holding participant barriers to access**

119 impacts from public access were experienced and mapped by the holding participants. They agreed that common impacts such as dog / dog owner behaviours, trespass and gates left open could be overcome by the pictorial image (mechanism A) plus use of QR codes and improved way marking. Impacts from criminal activities require improved engagement of police. Some barriers from occupier liability concerns could be removed, or at least reduced through a scheme.

Barriers to the permanent dedication of access rights were also identified. However participants agreed these could be overcome by ensuring the best location for routes, choosing the correct agreement mechanism and structures, establishing green infrastructure corridor to separate people, preventing potential damage and disruption to stock and wildlife, receiving good advice and facilitation and being rewarded to maintain, and to carry out works to trees. One participant said *'opening up these (access and biodiversity) discussions are really helpful in breaking down barriers'*

### **Barriers to public use**

Highway exit / public access interfaces are the most difficult and costly barriers to improving the connectivity, safety and accessibility of the green infrastructure access and biodiversity network. Some barriers can be overcome by annual maintenance to visibility splays rewarded in LMP. Others can only be overcome by specialist help funded in a landscape scale LMP. 7 locations where specialist help is needed were identified on the holdings surveyed.

Barriers on the network included multiple accessibility issues, as discussed. along with a poor reporting and long-winded reporting process. These could be overcome by supporting land managers and facilitators with the A&G handbook (standards and good practice), rewarding creation, improvement and maintenance in single holding and landscape scale LMPs in a scheme and providing the public with an alternative reporting of issues process.

### **Barriers to stakeholder investment (blended finance)**

Stakeholders identified a large number of barriers to creating the green infrastructure network for access and biodiversity, all erected by local government and government. These included lack of the following understanding, funding mechanisms, advice and guidance, facilitation, holistic approach, issues with S106 and CIL monies and the exclusion of environmental net gain and ecosystem services by concentrating solely on a narrow vision of biodiversity net gain.

Stakeholders agreed that government reviewing and improving its own processes and policy, creating the right advice and guidance, employing knowledgeable facilitators and the creation of a simple blended finance and non-finance pledges mechanism, would successfully overcome many barriers. This would lead to successful delivery of an access & biodiversity network in any area and through any scheme, whether Sustainable Farming Incentive, Local Nature Recovery and Landscape Recovery schemes.

See also blended finance following.

## 8. New and innovative mechanisms theme, financing the network, blended finance

### Policy question

P7 How to blend public and private finance in funding projects.

Stakeholder investors said that an effective blended finance innovative mechanism should be able to cope with a mix of statutory and non-statutory funding, and financial and non-financial assets. Stakeholders and holding participants agreed that there was no joined up approach or funding mechanism to deliver public access with biodiversity and nature recovery. One stakeholder said *'this (access and biodiversity network proposal) has great potential. I can think of many funds that could support this, including levelling up funds. There are so many opportunities for financing.'*

Lack of a mechanism for donors to invest in environmental schemes was an unexplored opportunity. Stakeholder investors strongly supported the need for a blended finance mechanism, and agreed that a simple usable blended mechanism to deliver access and biodiversity, could be created. 'Blended finance' was not the ideal term because non-financial contributions of experience, local knowledge, time and material were as important as finance, valuable for match funding and must be accommodated in a mechanism to incentivise business and community. The AONB unit agreed *'we attract many volunteers who give some 6,000 hours of time per annum, we need to build on the access network, the existing network is not adequate for the number of visitors we have in the AONB'*. A participant said *'we already provide stone and hardcore for any ROW scheme but would not be prepared to approach any of our contacts for contributions locally. It should be 'sold' on a Landscape basis by the facilitators'*.

A mechanism was designed, following blended finance research with the stakeholder investors group, with Somerset Community Foundation assistance. SCF thought the mechanism should be capable of bridging the funding gap with agri environment money, accepting monies directly from S106 and CIL and make provision for non-financial pledges. SCF said *'barriers to investment can be overcome due to our local presence and the trust in us and our understanding of community. This gives us the opportunity to operate in ways larger, more remote, funders cannot. An asset-based community development model focusing on what members of the community have to offer in the way of assets and ownership is the process that matters'*.

The final mechanism was tested on the holding participants. Most holding participants didn't know where they would go to access funding. The majority said Defra but then funding schemes *'didn't match this strategic network aspiration'*. Participants agreed 100% that the mechanism was good, useful and well planned. One said *'I approve of the blended finance model, this is the traditional way of financing applications where there are proper controls, funding held by a charitable organisation, a specialist panel assessing applications and facilitators to assist, this all means that projects get done'*.

## 9. Leadership and roles

### Policy question

P2 What role do you think Defra's Delivery Partners should play (NE, EA, FC, RPA plus Historic England/ALGOA, NP and AONB)?

This policy question is directed at the provision of A&G. However it has been broadened to consider the wider question of primary roles in the delivery of the strategic green infrastructure network, and improvements to the existing network.

### Roles envisaged

## **Facilitator role (primary local advisory and support role, overseen by specialist panel)**

The need for competent local facilitators, advisors and specialists threaded through every interview. Stakeholder investors and holding participants, tested individually and in separate tests, scored the facilitator role in delivering an access, biodiversity and nature recovery scheme as very important average 4.9/5 (very important).

Participants and stakeholder investors agreed 100% that *'nothing would happen without a facilitator'* and *'face to face conversation was imperative to support and guide decision making'*.

A facilitator should be professional, well trained in public access, with the ability to help identify relevant baseline data, plan projects, value proposed development, access funding, and help to prepare LMPs for single holdings, and especially an LMP on a landscape scale. Holding participants queried *'advisors and facilitators properly trained in public access and having the necessary expertise and skills to be able to help landowners make the right choice for them'* were to be found?

Participants said of the T&T facilitation *'we have only completed the exercise due to the facilitators and their technical and local knowledge which was hugely important. The fact it was on a landscape scale was persuasive and each template and the LMP made each step easy and encouraged us to continue when in other circumstances we would have withdrawn'* and *'the success of the test was the fact that the facilitators were there to help, were based locally and knew their stuff!'*

## **Primary leadership role**

Mendip Hills National Landscape unit/ partnership was viewed, by most participants and stakeholders, as the obvious local community leader to co-ordinate delivery of the strategic green infrastructure access and biodiversity network. Support for the MHNL was however qualified, some participants thought MHNL having total control *'could cause more problems'*.

The Mendip Hills NL would need to be funded, supported and guided where necessary by local specialists, stakeholders, businesses and users, and by other community leaders. FiPL was a good model to emulate (see scheme).

Half of the participants thought that the landscape scale LMP should be developed, maintained and kept up to date locally by Mendip Hills NL.

## **Natural England role**

Participants initially associated NE with landscape protection support. NE would have a limited, secondary role to then MHNL role in providing A&G to support delivery of the strategic green infrastructure access and biodiversity network.

However, as T&T159A progressed, and participants learnt about the successful public access scheme, Paths for Communities, which they were previously unaware of, NE was seen as having a more substantial role in the delivery of A&G and other support to guide network delivery.

P4C clearly showed that NE had provided advisors properly trained in voluntary access mechanisms. NE had delivered project development, options including permanent access, and good advice in P4C. NE were associated with developing and delivering the most attractive voluntary agreement mechanism, under CROW Act 2000 s16.

Most participants thought that a best practice LMP, evolving through learning and partnership working could possibly be managed by Natural England / Defra.

## **Community role**

The community has an important role in delivering the green infrastructure network and overseeing delivery on specialist panel. Stakeholder investors could provide local community leadership, funding, pledges of materials and other help and should be included on the panel. Local farm agents, advisors and consultants could effectively guide landowners and managers.

Infrastructure providers such as The Trails Trust (associated by participants with the delivery of advice for the creation of public access routes), wildlife and conservation charities, user/ voluntary groups, parish councils could all inform and deliver the strategic network plan, access surveys and works such as voluntary clearance way marking and project development.

However community resource depends on provision of a support scheme, mechanisms such as advice and guidance toolkit / handbook, and leadership and facilitation.

## **Landowner / manager collaboration**

Holding participants indicated that support for collaboration though a scheme is required in order to create the strategic landscape scale network and to improve existing public access. They were prepared to be adaptable in choice of mechanism when collaborating to safeguard landscape / land use change and associated environmental outcomes, dependent on reward and other factors such as route location and impact mitigation.

They were somewhat willing to collaborate through covenants on a landscape scale to protect features such as old trees, river bank corridors and to restore historic green lanes *'that might be the type of infrastructure that should be safeguarded for the public and nature'*.

The landscape scale LMP would be an ideal vehicle to involve MHNL, landowners and managers, investment stakeholders, volunteers, local groups and organisations such as parish councils, to work collaboratively to deliver the green infrastructure public access and nature strategic network. Collaborative landscape scale projects would require specialist support and facilitation to develop and were likely to require blended (public / private) finance and investment.

## **Local blended finance leadership role**

Somerset Community Foundation could manage a non-agri-scheme environment fund (see blended finance mechanism). SCF already manages the Mendip Hills Fund, a mechanism for raising funds for local community projects. The mechanism allows visitors to make donations and for event organisers and others to contribute. SCF could also distribute CIL / S106 monies through an environmental fund.

## **Payments**

Rural Payments Agency had an obvious role.

## **Government / Defra role**

Provision of scheme including effective mechanisms support as laid out in T&T 159A (see scheme).

## **No role envisaged**

Very few holding participants envisaged a role for local highway authorities in creating, improving or maintaining green infrastructure for public access and biodiversity. The LHA was associated with the most unattractive voluntary agreement mechanism (dedication under Highways Act 80 s25 / s30) and with inflexible, costly, time-consuming wasteful, processes and red tape, *'nothing would get done'*.

Public users were also frustrated with the LHA. Slow processes, lack of timely interventions failed to improve a decaying inaccessible, disconnected and unsafe network. Issues went unresolved for years.

Stakeholder investors had serious concerns too, about local authorities use of S106 and CIL monies funded through development. LA processes were drawn out, adversarial, non-transparent and lacked communication about the distribution of these funds, which could be used to support the strategic green infrastructure network to benefit local communities.

## **10. An access and biodiversity scheme (and conclusion)**

Organic/ regenerative farm food to supermarket) owner *'replanting, biodiversity and creating multi user paths for people to enjoy the countryside, perfectly matches our mission to produce natural, healthy food that nurtures and nourishes people and the planet!'*

T&T 159A (test 2) has shown how effective mechanisms can build on the high landowner / manager willingness in T&T 159 (test 1) to create a connected, accessible, multi-user and biodiversity enhanced green infrastructure network, and to improve and maintain existing public access, in a scheme.

The T&T facilitators are indebted to the participants representing the ten holdings, who continued this green infrastructure access and biodiversity journey with us and to the investor stakeholders who gave the test so much time. In the quiet of their farm kitchens and operational offices and through many hours of thoughtful individual interviews and inspired commentary, they helped shape the vision for a co-existing access, biodiversity, food and farming scheme.

The Mendip T&T access surveys found a landscape that is, for many users, particularly for equestrians, cyclists and less mobile people, disconnected, inaccessible and unsafe. The current network decay and disconnect is in stark contrast to landowner and land manager willingness to create, improve and maintain access. An A&G handbook, familiarity with current codes and standards, community leadership, facilitation, specialist help and blended finance, enabled through a scheme, would deliver the improvements that would reduce many of the operational impacts land managers face, and remove many of the barriers the public face.

As part of this process, the role and responsibility of land managers and local highway authorities for maintenance needs a complete reassessment. Government policy also needs reviewing. All too often it separates public access and biodiversity / nature recovery, viewing the former as too adversarial and costly to deliver, and the latter as the holy grail worthy of £ millions in investment. *'The LMP generated a lot of debate/conversations on the Estate and not only changed our views but importantly...that of our agent. The templates/LMP have helped move people's opinion who previously avoided ROW as being too difficult and confrontational!'*

Government has too often listened to vested interests who are keen to promote short term permissive access, rather than to country people and users of countryside trails. Permissive access does have a place but landowners, managers and public users know how priceless green corridors, lanes and margins are to nature and people. Linking these strategically across the landscape to permanently protect biodiversity really struck a chord with the participants and stakeholders. Natural England's Paths for Communities scheme was notable for delivering permanent access through a number of mechanisms and good advice.

### **Agri-scheme delivery of public access with biodiversity**

T&T 159 (test 1) participants said that access and biodiversity delivery needed its own scheme, delivered outside of agri-schemes, to include all landowners and managers who could contribute. When asked how

the strategic network could be funded the response was through Defra but then funding schemes *'didn't match this strategic network aspiration'*. Participants with significant acreages of land with obvious environmental outcomes potential, but no farm business, are excluded from agri – schemes except from Farming in the protected landscape scheme (FiPL).

### **Farming in protected landscape scheme**

In running concurrently with these test and trials in the Mendip Hills NL, FiPL has provided a very useful case study in how an access and biodiversity scheme could work and be funded. The creation of the strategic green infrastructure public access and biodiversity network in land management delivers on all four of the FiPL themes.

In the Mendip test area, FiPL has supported the restoration of green lanes and provision of margins for multi-user trails with biodiversity enhancements to drystone walls, works to hedgerows ancient and new and works to trees and accessible by all users, including mobility ATV. Participants said that *'FiPL was a good model'*. *'The FiPL scheme associated with Mendip Hills NL had provided a good facilitator'* and *'she was really nice, down to earth and helpful. Someone like that who knew everything and where to get advice would be so helpful without having to deal with all these people and unhelpful organisations'*.

FiPL was *'an obvious fund for landscape projects with established facilitation and specialist panel'* and *'possibly a team like the AONB's Farming in Protective landscapes (FiPL) could steer a blended finance mechanism'*. It was notable that non-farming land owners (often with large acreages of land) were able to apply to this scheme to create and improve access and enhance biodiversity to enable nature recovery, and *'a reason that the scheme should not be discontinued'*.

The stakeholder investors interviewed were incentivised by a strong commitment to support their local communities through leadership. Local non-agricultural business could be represented on the (FiPL) specialist panel and on the Protected Landscape Partnership to represent blended finance / investment opportunities and provide expertise. Panel members have a clear leadership role within their own specialisms.

The Somerset Community Foundation said that the blended finance mechanism created in T&T 159A following research with stakeholder investors *'seemed to be an extension of FiPL following the same structure with additional funding held by SCF. FiPL and especially the officers and specialist panel should be retained'*. A specialist team like the Farming in Protective landscapes (FiPL) local assessment panel could steer a blended mechanism. SCF strongly noted that *'Defra may design and set a payment scheme (FiPL) but they needed to recognise what a powerful lever this could be in enabling the community and others to contribute and match the finance'*.

Holding participants did have some concerns about FiPL. The funding shortfalls and complex, long winded applications were unhelpful. *'FiPL is good, but the application is long and sometimes the full amount is needed. You couldn't ask a contractor to do 80% of the work. FiPL was due to be axed which was 'mad'*.

This T&T 159 research proves that the FiPL scheme should be retained. Defra should explore expansion of the FiPL model with public and third sector stakeholders such as National Landscapes, Community Foundations and with private sector investors, to effect inclusion of blended finance and non-financial resources for green infrastructure access and biodiversity eco services and environmental gain.

**And finally** the conservation charity ranger said



*'The project has broadened my perspective on access and what that means for the Mendip Hills. I believe it's galvanised people to think about how it can work in tandem with nature recovery and that there needs to be space for the both to make it viable.*

*Access and nature recovery needs to be strategic for people to get behind it and I think the project has demonstrated how that can be possible. Access for everyone needs to be more of a priority for everyone - it shapes the way people interact with our work as conservationists and landowners and directly impacts how those people behave, both positively and negatively.*

*To go forward with the payment framework there's no reason why a set up similar to FiPL wouldn't serve as an existing model, landowners ought to be rewarded for good maintenance for access as a public service, particularly if it's serving for nature as well. Not every landowner has as much access to funds and knowledge as some other NGOs so a scheme like this is absolutely crucial for engaging them in the process of access for all and nature recovery'.*