



Llywodraeth Cymru  
Welsh Government



# EMPOWERING COMMUNITIES IN THE CONTEXT OF BREXIT: RESEARCH FINDINGS, ANALYSIS AND RECOMMENDATIONS FOR SUPPORT TO THIRD SECTOR ORGANISATIONS IN WALES

June 2019

Resources  
FOR CHANGE

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We would like to thank everyone who has contributed to this research, as well as the steering group members who have helped to guide the work.

## 1 INTRODUCTION

This report describes the findings, analysis and recommendations of research commissioned by Wales Council for Voluntary Action (WCVA), using funding secured from the European Transition Fund, to find how the Brexit process could impact on community services in Wales and to help the third sector to make suitable plans.

Resources for Change (R4C) began work in March 2019, gathering data until mid-May 2019.

The R4C team was supported by a Steering Group comprising WCVA, Welsh Government (Third Sector Unit, EU Transition WEFO) Welsh Local Government Association (WLGA), Wales Co-op Centre, Pembrokeshire Association of Voluntary Services (PAVS).

### 1.1 PURPOSE OF THE RESEARCH

The over-arching purpose of this research was to set the foundations to inform policy makers about what needs to be done to support the community sector in Wales in relation to the impact of Brexit. It was intended that the research would provide evidence and direction, based on as complete and robust a picture as possible.

The need for the work was originally identified by Welsh Government (WG) and WCVA, in terms of understanding how the sector can support communities to be better empowered, involved, prosperous and more resilient in a context where community services (which are vital to empowerment and resilience) are already under pressure but could be even more so as a result of Brexit, and where the communities which tended to vote in favour of Brexit are those likely to be most vulnerable to the impacts of the Brexit process. There was also concern that the focus of discussion to date about the impact of Brexit had largely focussed on economic issues, although there are also less well aired – but nonetheless significant - issues for communities and society.

In addition to helping to inform WG about what support is needed, it was intended that the research would provide the foundation of evidence and options from which WCVA could consider seeking additional funding from the EU Transition Fund next year to pilot emerging ideas for further sector support in relation to the impact of Brexit.

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#### 1.1.1 LIMITATIONS

There were some limitations to the work, which took place over a very tight timescale, between the 12<sup>th</sup> of March and the 24<sup>th</sup> May, when the first draft report was produced. This meant that

- The reach across the third sector was limited within the time and resources allowed for the research
- The quantitative data review provided more limited information than we would have liked but gives some basic insights, there is a lack of some potentially important datasets.
- Respondents had difficulty separating their perceptions of the impact of Brexit from the impact of on-going austerity
- It was not possible to articulate the risk of the loss of EU funding accurately, as we could not easily source data about the level and nature of dependence on EU funding. This is both in the context of individual organisations, geographical areas (e.g. rural communities) and subsectors of the wider third sector (e.g. long-term pathways into work). Further investigation around this could be considered in any next steps.

In addition, a decision was made to treat speculative information as valid for the purposes of this research, in that the organisations' perceptions are very likely to be informing their behaviour.

## 1.2 METHODOLOGY

### 1.2.1 RESEARCH FOCUS

The research was designed to focus on three main themes, namely the impact – positive or negative - of the Brexit process on:

1. The availability of (non-statutory) community services to people and communities
2. The financial viability of the organisations providing these services
3. The workforce of these organisations

However, it was recognised that there is a wider contextual situation, in particular the impact of the Brexit process on society and communities themselves, and that it would be important to try to separate out the impacts of Brexit specifically from the more general austerity-related operational issues facing third sector organisations. The research also explored whether there was a uniquely Welsh dimension.

### 1.2.2 RESEARCH APPROACH

The research approach aimed to gather both primary and secondary information, using a variety of methods, summarised here.

METHOD	DETAIL
Workshops	3 Third Sector Support Network events – with an average attendance of 15 at each, at Neath, Barry, Llangefni, . A workshop at Gofod 3, with 16 in attendance
Interviews	57 phone interviews, plus discussions with all VCS organisations exhibiting at Gofod3, together with representatives of statutory and other public bodies. Phone interviews held with representatives of medium and large third sector organisations, umbrella bodies, especially where those bodies represent their sector on the Partnership Council, those in receipt, and not in receipt of EU funds to deliver services; third sector infrastructure organisations; public sector bodies; Welsh Government.
Online survey	Sent out via WCVA, steering group members, and interviewees. This was sent to all recipients of EU funding under the Active Inclusion Fund, and more widely through the wider CVC/CVS network Total 62 responses (56 in English, 6 in Welsh). NB not all respondents answered every question in the survey
Quantitative data review	Focus on workforce and EU funding into the sector. See the Quantitative review for full details
Literature review	49 documents reviewed and 34 cited.

127 third sector organisations, including umbrella bodies, in total contributed, some through more than one method.

It was recognised that research findings would be limited by what data already existed and its quality, and what data could be gathered during the time available for the research. Also, it was likely that the information gathered would include both factual data and speculation;

### 1.3 SETTING THE CONTEXT OF EU FUNDING IN WALES

The context of EU funding for the third sector in Wales is complicated. The loss of EU funding into the sector will be a noticeable shock, and while it is recognised that overall, it is not the largest proportion of funding into the sector, the effect on some sectors and some geographical areas is disproportionate. EU funding is more significant in some sub-sectors (e.g. long-term pathways into work) and some geographies (e.g. rural communities), and is an important lever for bringing in additional funding to those areas.

By its very nature structural funds in Wales are to help the most deprived communities, this means that the withdrawal/reduction of any funding will have a disproportionate effect on these communities. Although some of the funding accessed by the sector is small in scale it is of huge importance to those communities. 80% of EU funding to Wales benefits fifteen Local Authority areas in the West Wales and the Valleys EU funding region, with the remainder benefiting the 7 other Local Authority areas.

There is a mixed bag of data which is available to use in creating a picture of the nature, scale and spread of EU funding in Wales. There is no single source of this data; in some cases, different data sources present conflicting information, and it was not always possible to source comparable datasets for a single time period or to find data for the most recent funding period. Therefore, this section attempts to provide a summary of relevant contextual information, including showing some of the issues relating to that information.

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#### 1.3.1 EU FUNDING IN WALES

As part of the UK, Wales pays into the EU, but there is a net benefit to the country:

*“Wales contributed £414 million to the EU but received £658 million in funding. So, there was a net benefit to Wales of around £79 per head in 2014.”<sup>1</sup>*

Over the period 2014 – 2020, the nation receives more than double the amount of money per person than any other region of the UK, currently at around £800 per head<sup>2</sup>, with the next highest amount per head being for Northern Ireland at around £350 per head.

With some other funding streams covering a variety of things from the arts to biodiversity, Wales Online reports that the country currently receives £680 million of EU funding each year, spread across three broad categories<sup>3</sup>. The funding, excluding RDP, requires a public and/or private sector match and is broken down as follows:

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<sup>1</sup> Cardiff University Wales Governance Centre: “Wales and the EU Referendum: Estimating Wales’ Net Contribution to the European Union”: <https://www.cardiff.ac.uk/news/view/327490-wales-net-benefit-from-the-eu-budget-estimated-at-around-79-per-head>

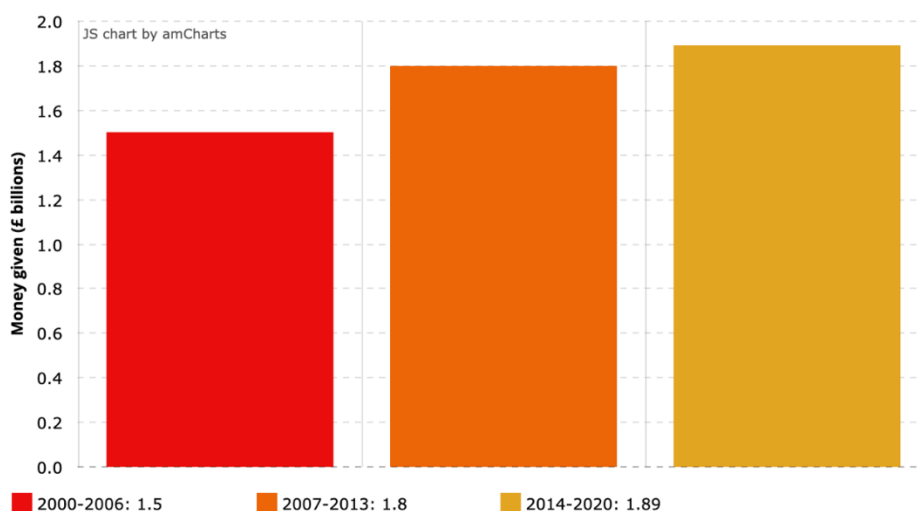
<sup>2</sup> National Assembly for Wales / Sheffield Political Economy Research Institute

<sup>3</sup> <https://www.walesonline.co.uk/news/politics/how-much-money-wales-gets-12765100>

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1. European structural funds - which funds such things as town centre improvements, training and supporting people into work, and is worth c£330 million per year. Funding is shared between the European Regional Development Fund (ERDF) and the European Social Fund (ESF).
2. Common Agricultural Policy, providing £200m.
3. Other funds e.g. biodiversity and the arts through LIFE, Creative Europe, Horizon, worth around £150m per year.

The same article shows that Wales has received £5 billion in structural funding since the year 2000:



Also, it recounts Welsh Government analysis that shows the following impacts for EU projects since 2007:

- Supported 229,110 people to gain qualifications
- Helped 72,700 people into work
- Created 36,970 (gross) jobs and 11,925 enterprises

WCVA's research describes three relevant funds<sup>4</sup>:

1. European Regional Development Fund (ERDF)
2. European Social Fund (ESF)
3. European Agricultural Fund for Rural Development, incorporating LEADER.

Rather than report in detail on the differences between the various funds here, it is more useful to see what the impact is for third sector organisations. The same WCVA paper describes the following for the period 2007 to 2013:

*“Third sector organisations have engaged with European Structural Funds 2007-2013 as:*

- *Lead project sponsors i.e. direct applicants to the Welsh European Funding Office (WEFO)*
- *Joint sponsors and contract delivery agents:*
  - *£98m of EU funding has been committed to 45 projects led by the third sector*

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<sup>4</sup> European Structural and Investment Funds 2014-2020:

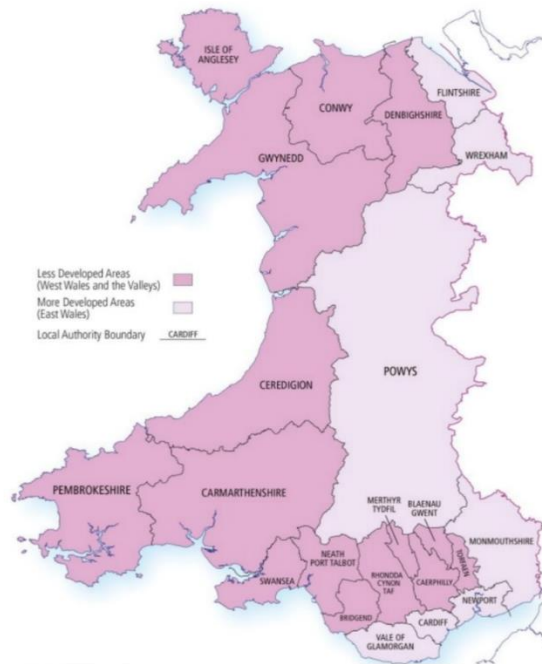
[https://www.wcva.org.uk/media/4587289/01\\_overview\\_of\\_esi\\_funds\\_2014-2020\\_e.pdf](https://www.wcva.org.uk/media/4587289/01_overview_of_esi_funds_2014-2020_e.pdf)

## EMPOWERING COMMUNITIES IN THE CONTEXT OF BREXIT

- *Approx £63.5m in EU grants/contracts has been allocated to third sector organisations through projects led by the public sector*
- *Approx £140.5m of contracts have been awarded to 421 third sector organisations.” [Edited]*

The paper explains that “Parts of Wales will also qualify for funding through the Rural Development Plan (RDP) and the Fisheries Fund” but gives no more detail.

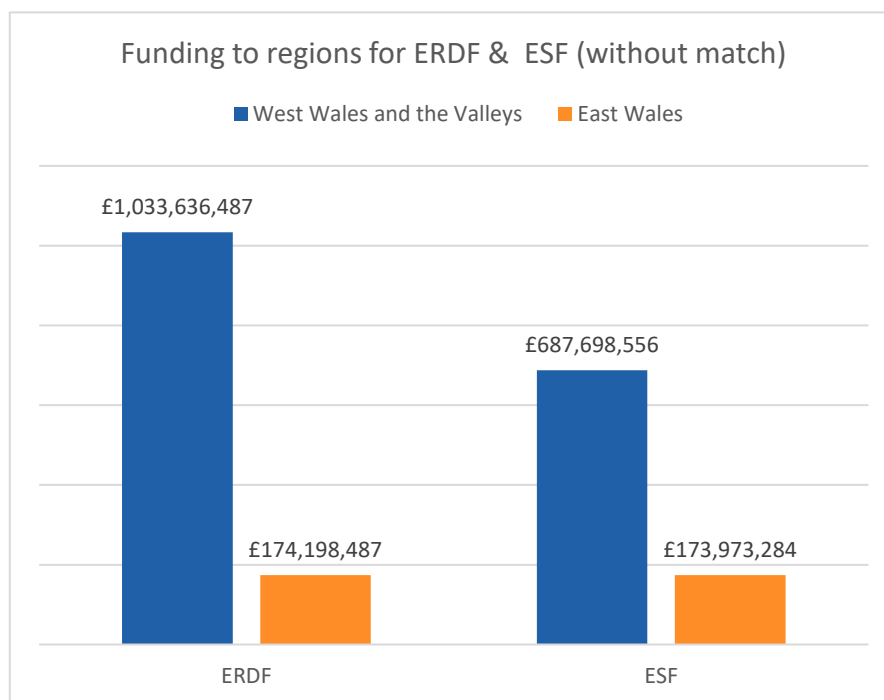
With matched funding, £3.2bn of funds are allocated to be spent in the period 2014 – 2020, across two funding ‘regions’<sup>5</sup> – West Wales and the Valleys, and East Wales:



Map from Welsh Government / WEFO publication

Without the matched funding, the EU funding for the period 2014 - 2020 is £2.069bn, and breaks down as shown here.

<sup>5</sup> European Structural Funds, WEFO: <https://gweddill.gov.wales/funding/eu-funds/2014-2020/?lang=en>



80% of EU funding to Wales benefits fifteen Local Authority areas in the West Wales and the Valleys EU funding region, with the remainder benefiting the 7 other Local Authority areas.

### 1.3.2 EUROPEAN STRUCTURAL AND INVESTMENT FUNDS (ESIF) INTO THE THIRD SECTOR

EU funding that flows eventually to third sector organisations comes under the umbrella of European Structural and Investment Funds, splitting into three funds relevant to this study:

1. European Regional Development Fund (ERDF)
2. European Social Fund (ESF)
3. European Agricultural Fund for Rural Development incorporating LEADER

The detail of how this is broken down is shown in the Quantitative Data Review appended to this document.

#### 1.3.2.1 ESF & ERDF FUNDING

EU funding through these schemes benefits a small proportion of organisations, by number, of the overall third sector in Wales. In 2016, WCVA identified around 32,300 active organisations, of which 421 are in direct receipt of EU funding<sup>6</sup>. The most recent WEFO list of approved projects shows a total of £80.84m awarded for 7 ERDF and 17 ESF third sector-led projects, running from 2015 to 2022; with match-funding, this is worth a total of £116.53m. These projects cover work in a number of priority areas: tackling poverty through sustainable employment; skills for growth; youth employment and attainment; renewable energy and energy efficiency; SME competitiveness; technical assistance. NB These include funding to organisations who are described as third sector organisations, but as they are bodies such as Development Trusts, some of this funding will be spent on non-third sector activity, such as making small businesses competitive.

<sup>6</sup> European Structural and Investment Funds 2014-2020:

[https://www.wcva.org.uk/media/4587289/01\\_overview\\_of\\_esi\\_funds\\_2014-2020\\_e.pdf](https://www.wcva.org.uk/media/4587289/01_overview_of_esi_funds_2014-2020_e.pdf)



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### 1.3.2.2 EUROPEAN AGRICULTURAL FUND FOR RURAL DEVELOPMENT (EAFRD) - LEADER FUNDING

Determining the amount of EU funding allocated to third sector organisations serving rural communities has proved tricky, because each recipient authority delivers and manages their LEADER programme differently, whilst remaining within the overall constraints of the EU rules. LEADER is presented as part of RDP funding but then as a separate fund, depending on who is asked and their organisational perspective. Although the funding is branded as EU RDP-funded at county level, it is often described under the LEADER title by the recipients, and some have the impression that although it will have been branded as EU funding, that it comes from the Local Authority.

An EU factsheet<sup>7</sup> on RDP explains that there is around £862 million covering the seven-year period from 2014 to 2020, with £574 million from the EU (this includes funds transferred from CAP direct payments) and £286 million of national (UK) co-funding. This is spread across six priorities of which priority six – social inclusion and local development in rural areas – is of most relevance to this study. LEADER spending is guided by ‘Local Development Strategies’ which are implemented by 18 Local Action Groups (LAGs). Detailed breakdowns of how the 18 LAGs are spending their LEADER allocations on priority six have not been found and there are no central records. Each LAG will have to be contacted in turn to find out what money is going to which third sector organisations and where.

Further detail of our estimates of the level of the funding reaching the third sector from this EU source can be found in the Qualitative Data Review document, appended to this report.

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### 1.3.2.3 WHERE THE MONEY GOES INTO THE THIRD SECTOR

It has not been possible to identify easily which parts of the third sector are benefiting, both directly and indirectly from EU funding. It appears that many organisations in receipt of EU funds are supporting, often on a one to one basis, individuals who have faced significant challenges in their lives; to move forward into becoming less reliant on public services, and more self-reliant. These include support to young people, older and unemployed people, people with ill health or disability, including mental health and those who have issues with drug and /or alcohol dependence. Without this support, individuals may remain "stuck" in challenging situations, and organisations explained they had evidence of subsequent decreases in those individual's health and well-being, when funding was withdrawn, and often a return to previous patterns of behaviour, some of which is damaging to both the individuals, and to society at large. An example of this might be individuals who have successfully completed a course to become non-dependent on drugs or alcohol, but without the type of *additional* support provided by third sector organisations using EU funds, cannot easily secure employment or training, which gives them the structure in their lives that allows them to remain drug or alcohol free. Further research would identify if any particular sector is at higher risk to the withdrawal of funding post-Brexit.

In addition, smaller amounts of funding, e.g. through LEADER, provide support at grass-roots community level, for example by supporting the sustainability of rural community centres. Again, because of the lack of detailed information it is not possible to project, for example whether some geographical areas may be more at risk than others.

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<sup>7</sup> Factsheet on 2014-2020 Rural Development Programme for Wales (United Kingdom) (no publication date): [https://ec.europa.eu/agriculture/sites/agriculture/files/rural-development-2014-2020/country-files/uk/factsheet-wales\\_en.pdf](https://ec.europa.eu/agriculture/sites/agriculture/files/rural-development-2014-2020/country-files/uk/factsheet-wales_en.pdf)

## 2 FINDINGS

This section presents the findings of the primary and secondary research; analytical commentary is presented in Section 3. It reports on responses relating to how the Brexit process is affecting communities already, or how it might do in future, with a focus on societal and community impacts, as distinct from economic impacts, and thinking about positive as well as negative impacts.

### 2.1 IMPACTS FOR COMMUNITIES

All sources to the research expressed concerns about negative impacts for communities as a result of the Brexit process.

#### 2.1.1 AN OVERVIEW

WCVA's 2019 Snapshot Survey reported that *'The majority of respondents (83%) are worried about the future prospects of their beneficiaries, with over half claiming to be 'very worried'.*' In the same vein, the Foundation for Social Improvement (FSI) found that amongst their respondents, more than half (54%) believed that Brexit would have a negative impact on their beneficiaries, compared to two per cent who thought that the impact would be positive<sup>8</sup>. Other research has, however, highlighted less concern on the possible impact on services.

This impact is unlikely to be felt evenly throughout Wales, with much evidence within the literature describing a fear that the most vulnerable in society would be affected to the greatest degree. In their study of local authorities' perceptions of Brexit in Wales, Grant Thornton (2019) state that *'any post-Brexit issues are most likely to disproportionately impact upon the most vulnerable in society'* (p.7). Similarly, Welsh Health Impact Assessment Support Unit's study of the public health implications of Brexit in Wales identifies people on low income, especially people living in food and fuel poverty, as being particularly likely to experience negative effects as a result of having *'reduced resilience to any economic impacts such as price rises, fall in real wages, reduced employment, and reduced access and uncertainty on replacement for EU regional funding'*<sup>9</sup>.

The Welsh Government raise similar concerns in their analysis of a range of possible Brexit scenarios, stating that *'without Government transitional support, in scenarios of big change, specific sectors may collapse quickly which will have wider consequences on community health and well-being'*, also noting the likelihood of increased food prices.

This sense of concern for the most vulnerable was echoed by respondents inputting to the research through interviews, workshops and the online survey, with comments such as,

*"If there is more austerity, or loss of jobs, then things will become tougher for the poorest people. We're already seeing an increase in domestic violence linked with austerity, this may increase."*

It can be difficult to attribute changes observed in communities directly to the Brexit process, and a number of respondents commented on this.

<sup>8</sup> Broomhead et al, 2017

<sup>9</sup> Green et al, 2019

*“It’s difficult to attribute anything to Brexit. We’ve had a significant increase in applications [to their grant programme]..... but we’re not sure of the reason”.*

Also, some respondents noted that Brexit was little mentioned in their organisation or amongst their beneficiaries.

*“For lots of people, it’s something that’s going on ‘over there’”.*

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### 2.1.2 MORE DIVISIONS, LESS TOLERANCE

This was a recurring theme within the research, coming out particularly strongly in the workshops and in some of the interviews, with further comment noted through the literature review.

Grant Thornton (2019) observe that *‘local authorities in Wales have seen Brexit place strain on existing tensions within communities. In some areas of Wales there has been an increase in far right-wing activity’*. While there is evidence of increased hate crime in the period immediately after the referendum<sup>10</sup>, it is also possible that the debate around Brexit has been the catalyst of these behaviours rather than the cause, with Lloyds Bank Foundation (2017) highlighting that *‘Brexit has been blamed for opening a Pandora’s box of social division. In truth, these social divisions in the UK are long-standing and deep-rooted’*.

Respondents expressed concern about increasing racism, including uses of derogatory terms and attitudes, including relating some personal experiences. The comments below illustrate the tone of many others.

*“It’s taken us back to darker times in terms of attitudes to race.”*

*“People’s attitudes have hardened and they feel they can say and do what they want following the vote....Attitudes have hardened and comments on social media reinforces group views”.*

*“Brexit has caused tensions in communities, and the discourse and tone of discussions, especially in the media and on social media, has fostered an ‘ugly’ attitude’ between people, giving rise to bullying behaviour and prejudice. An attitude of ‘us against them,’ and that negative behaviour is acceptable”.*

In reality, the evidence that could be sourced from respondents relating to community cohesion or divisive incidents was limited, e.g. increasing visibility of offensive posters in Neath Port Talbot; comments made by respondents tended to focus on their perceptions of an increase and their worry that it would increase, but were not often substantiated.

Police forces across the UK reported a spike in hate crime following the referendum in 2016<sup>11</sup>, and police forces in Wales have seen an incremental increase since that date. Data about hate crime for the whole of Wales sourced by the research team within the time available was patchy, but one respondent reported an increase across all types of hate crime in the central South Wales police area. Data from the past two years contributed to this research (verbally) by North Wales police shows an increase – see table overleaf. However, their spokesperson stated that there could be several contributory reasons as well as the Brexit referendum, including better recording by the police, improved confidence in the police’s

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<sup>10</sup> Divine, 2018

<sup>11</sup> O’Keefe, A., Home Office Statistical Bulletin 17/17, Hate Crime in England and Wales 2016/17

willingness and ability to take action, encouragement from the police and other agencies to report such crimes, together with the impacts of austerity.

Type	2017/18	2018/19	% rise
Total	672	849	26.5
Race*	449	547	21.8
Religion	17	30	76.4
Sexual Orientation	135	164	21.4
Disability	52	87	67.3

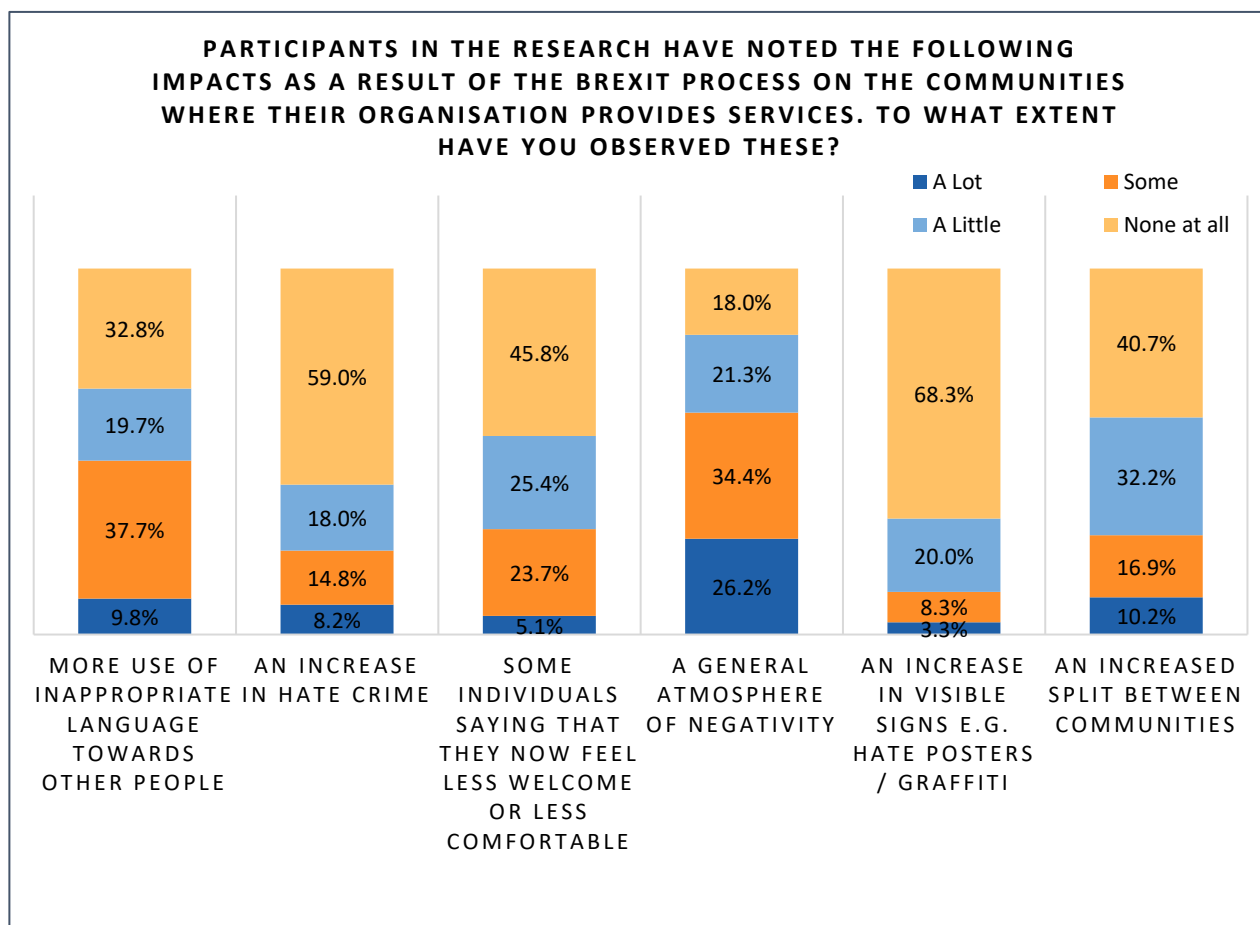
\*Include EU migrants.

There is a concern that the Brexit process has created divisions in communities, and even families, that will take much effort and many years to heal. Respondents see that there is a role here for the third sector:

*“We need to work to counteract splits and divisions, and the role of the sector is to be the voice about the importance of this”.*

*“Brexit has polarised society and one expects that there will be a role for the third sector in trying to ease the tensions and address the issues”.*

The online survey results showed that the most frequently observed impact so far in communities, attributed to the Brexit process by the survey respondents, has been ‘a general atmosphere of negativity’, followed by ‘more use of inappropriate language towards other people’.



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### 2.1.3 INCREASED POVERTY

Commentary within the literature review, as well as responses from interviewees, speculated that Brexit would lead to increased poverty for individuals and families as a result of the expected economic downturn. As one interviewee commented:

*“Economic impacts will be the biggest from Brexit, and will feed through society with increased poverty a particular issue. If businesses close, jobs are lost, household incomes fall, leading to poverty”.*

This sentiment is repeated in the literature:

*‘Concerns were also expressed about potential economic turbulence causing additional hardship for groups in society who are already struggling’.*<sup>12</sup>

*‘Charities should therefore prepare for continued dependence on the support they provide as some beneficiaries struggle to make ends meet in a challenging economic environment’.*<sup>13</sup>

*‘Councils identified that a disruption to food supply could increase the number of people needing to use foodbanks whilst also contributing to a decrease in donations at supermarkets (a key contributor to foodbanks) if they also experience supply issues’.*<sup>14</sup>

There was particular concern about impacts on rural communities around Wales, encapsulated in a comment from WLGA, *“Concern exists over post-Brexit support for rural development, without which many communities could struggle to maintain services, leading to a vicious circle of depopulation and declining service provision”.*

With, in most quarters, an anticipated economic downturn following Brexit, some areas are more likely to be severely impacted. These include rural areas, especially those with stronger dependence on upland sheep farming; and more generally, by a fall in sterling making imported goods more expensive, and increased unemployment (respondents reported a known link between economic pressures on families and domestic violence); a squeeze on the Exchequer as benefit payments rise and tax revenues fall, leading to additional pressure on public spending, in turn affecting central and local government’s ability to alleviate poverty.

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### 2.1.4 POPULATION

There is not expected to be a significant impact in terms of population numbers across Wales as a whole, because the proportion of EU residents is relatively small. It is estimated that there are 82,000 EU nationals living in Wales as of June 2018, out of an estimated population of 3.125 million<sup>15</sup>, making the percentage of EU nationals 2.6% of the population of Wales. Of all the parts of the UK, Wales has the second lowest proportion of its population born abroad, at 6.3%<sup>16</sup>.

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<sup>12</sup> ACEVO, 2016

<sup>13</sup> Birtwistle et al, 2019

<sup>14</sup> Grant Thornton, 2019

<sup>15</sup> ONS Population Estimate – Wales

(<https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/timeseries/wapop/pop>)

<sup>16</sup> House of Commons Library Briefing Paper, Number SN06077, 11 December 2018

However, some respondents noted that there could be localised impact where there were particular parts of the economy that tended to employ EU citizens, e.g. manufacturing and meat processing in north-east Wales, construction in south-east Wales, hospitality along the North Wales coast.

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### 2.1.5 VOLUNTEERING

There was differing opinion about whether the level of volunteering would be affected.

Some respondents felt that volunteering would suffer, citing a number of reasons including increasing negativity within communities, personal financial pressures, more of a focus on one's self during difficult times, and family pressures. *"It's already discouraging people from volunteering"*. And there was concern about the knock-on effects this would have for third sector and more widely, *"If you lose the volunteers, then you lose the light, the focus and the hope within communities"*.

Observation of the volunteering data across the UK held by NCVO suggests that the level of volunteering has held steady over the last 15 years, despite the changes in national and personal economic circumstances over that period.

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### 2.1.6 THE MOST VITAL AND THE MOST VULNERABLE COMMUNITY SERVICES

One element of the research brief focussed on making an assessment of the most vital and the most vulnerable services for communities, in relation to community empowerment, cohesion, resilience and prosperity. Whilst this is a substantial research topic in its own right, this research was able to hear interviewee and workshop participants' views on the subject.

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#### 2.1.6.1 THE MOST VITAL COMMUNITY SERVICES

In response to a question asking about which services respondents thought were most vital in relation to community empowerment, resilience, cohesion and prosperity, the most common answers included:

- Community hubs – including physical spaces and also those organisations and services that bring people together or somehow link people in a community; or are a key resource in supporting people to find the help they need.
- Work readiness services, in particular those supporting people starting at a long distance from the workplace.
- Advice services, covering a wide range of topics such as housing, benefits, Settled Status and related enquiries, rights etc.
- Services protecting and promoting people's human rights and equalities.
- Support services for individual community members, e.g. childcare, skills, financial advice, mental health, housing.

Whilst social care was frequently noted as a service which is potentially at high risk because of Brexit (see below), it did not seem to come to the fore as one described as most vital, perhaps because some respondents also reported it was the service most likely to be protected by statutory bodies.

There were frequent mentions of foodbanks, in terms of providing a service that could be increasingly in demand in a scenario of increasing poverty.

It was also noted that a specific Brexit-related service need was support around Settled Status, where it would not just be the traditional advice provision services that were called on to provide information, but also for example social services and housing associations.

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### 2.1.6.2 THE MOST VULNERABLE COMMUNITY SERVICES

Within the research, this question focussed on those services that respondents were most vulnerable in the context of Brexit.

Respondents appeared to consider vulnerability in terms of two different aspects. Firstly, vulnerability due to loss of EU funding, and secondly, due to anticipated additional pressure as a result of local economic circumstances and organisations taking on services that are dropped by the public sector. There is no clear delineation between the two, with some respondents reporting that they were vulnerable on both counts.

The services most frequently described as the most vulnerable were:

- Work readiness support, because respondents feared that replacement funding would not place this area of work as a priority; a large charity stated that their experience of a gap in funding between two EU programmes showed charity that where these programmes were not provided, there was a knock on impact on both statutory and voluntary services, especially around, health / addiction and crime.
- Equalities, including black and minority ethnic communities, because of the anticipated erosion of the legislative framework, combined with increases in intolerance within the community.
- Drug and alcohol support, because of increased demand for the services.
- Mental health support, because of increased demand for the services.
- Social care, because of the concern that the workforce may be affected, whether EU citizens or from other parts of the world.
- University towns and research, because of the knock-on effects on the universities and their town's economy as fewer EU students attend and fewer EU researchers are in post.

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### 2.1.7 A UNIQUELY WELSH DIMENSION?

There were varied views on whether there is anything uniquely Welsh about the impact of the Brexit process in Wales. A minority of respondents did not see anything special to Wales. For those that did see a uniquely Welsh dimension, a variety of facets were described.

It was noted that Wales has been unusual in the UK in being a net beneficiary of EU funds, and that therefore the loss will be potentially more significant. However, some respondents commented to the contrary, raising the point that economically deprived parts of England such as Cornwall or the north-east were also in receipt of substantial levels of EU funding, and their perception was that this was due to similar levels of poverty as in Wales. A few respondents also felt that community funding in Wales has to some extent been protected from the worst impacts of austerity because of Welsh Government's policies, and that if this cannot continue in future, there would be a 'double whammy' for third sector organisations and their beneficiaries.

There was concern that replacement funding might not be controlled in Wales or recognise specifically Welsh features, such as its culture, and also the fact that Wales' rural communities are a particularly important part of its make-up. Several respondents commented on the fact that through the funding, Wales has had a direct relationship with the EU and therefore some influence; they would like to retain that direct relationship, and they also want Westminster to respect Wales' capabilities to make funding decisions in the same way that the EU has respected Wales.

Others saw an opportunity, in that Welsh Government could potentially take a lead in strengthening some legislative frameworks, e.g. for human rights.

There was some mention of the Welsh language and culture, both positive and negative. One respondent talked about a perception that the use and acceptance of an additional language to English already has a positive influence in Wales on people's acceptance of other European languages in a way that may not happen elsewhere in the UK. However, another spoke of their fears for Welsh language and culture.

*"Yn ein hardal ni, sy'n Gymreig ac yn Gymraeg, rydyn ni wedi sylwi fod llawer mwy o son am brydeindod a fflagiau Jac yr Undeb ar fwydydd ac ati. Rydyn ni'n rhagweld colli ein hunaniaeth Gymreig o dan don o Brydeindod".*

*(In our area, which has a Welsh focus in both culture and language, we have noted more concerns about Britishness, and Union flags, and there is a concern we will lose our Welsh identity under a wave of Britishness).*

It was also noted that farming communities in many parts of Wales are the heartlands of Welsh language, and that decline in these communities and depopulation could pose a distinct threat to the use of the language in those areas.

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### 2.1.8 A LINK TO THE STATE OF THE ECONOMY

Whilst the purpose of this research was to focus on communities, the research showed that a link between communities, the third sector organisations supporting those communities, and the economy cannot be ignored. The literature review noted that commentators are fearful of the negative effect that economic trends could have on the operating environment of third sector organisations, their ability to function and provide services, and their longer-term sustainability.

*'It is expected that no-deal would also have immediate economic impacts, including the possibility of a recession. A recession could ultimately affect the public finances, and by extension funding for charities, but also increase demand for services.'*<sup>17</sup>

*'The biggest threat to charities would be a diminished economy, and the impact that would have on charities and the people they support.'*<sup>18</sup>

*'An economy unable to support the work that charities do in helping people build skills, find jobs and support the most vulnerable and disadvantaged will create major difficulties for our sector and the communities we serve.'*<sup>19</sup>

Comments were made from interview and workshop respondents in relation to concerns about increased need within the community and therefore increased demand for services, connected in part to wider negative economic changes such as increased unemployment or decreased public spending. For example:

*"If businesses fail, which we are starting to see, then there is an increased pressure on resources for welfare, mental health, etc".*

## 2.2 IMPACT ON THE AVAILABILITY OF SERVICES

The responses to this question showed that respondents expect both direct and indirect impacts on the availability of services delivered by third sector organisations.

Direct impacts include first and foremost those services which are currently supported by EU funds, in particular those for which there are few apparent alternative funding sources, and the concern is that these services will either be completely lost or dramatically reduced. The areas which were most

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<sup>17</sup> Birtwistle et al, 2019

<sup>18</sup> Costelloe, 2017

<sup>19</sup> Etherington, 2019



frequently mentioned as at risk were work readiness for those ‘a long way’ from employment, employment training for young people, other support for young people such as European exchanges, and community and economic development including in rural areas.

In addition, a number commented that previous reductions to community development programmes left disadvantaged communities more vulnerable to the loss of European funding.

*“With the demise of Communities First and no replacement, there’s no Welsh Government intervention into communities, therefore there’s no other buffer when EU money goes and nothing on the horizon to replace it. Now there’s nothing for community economic development or more general community development. Local Authorities can’t do it because they haven’t got the resource”.*

In the online survey, 18 organisations expected that one of the future impacts for their organisation of the Brexit process would be ‘Ceasing to provide services because there will be no more EU funding’. 25 organisations (18% of respondents to that question) expected ‘Increasing demand for their organisation’s services’. Just 4 organisations (3%) expected ‘Difficulty in providing services because of their organisation’s reliance on EU residents as employees or volunteers’. Commentary made additionally to this question noted that the extent of the impact will depend on the extent to which EU funding is replaced and what service areas will be funded.

Also, in the survey, respondents that expected to have to cease providing activities because of the cessation of EU funding were asked what types of services would be affected, and how much EU funding their organisation will be losing. The trend of these responses was echoed in those from interviewees.

The table immediately below show examples of potential amounts of funding loss that individual respondents to the survey are anticipating, and the types of services they assess will be affected, based on the services they deliver, and for which they have received EU funding. NB this does not reflect the total losses in the sector, which will be greater, but the actual losses anticipated by those who took part in the survey.

Type of services provided	Anticipated loss
Employment	£3m in total
Domestic Abuse	£1.5 m per annum
Business advice	£3.4 m per annum
Employability	c.£50K p.a.
Employability	Unsure of the amount, but the project would cease

The second table shows other responses given within the survey about the types of services that respondents expect to be affected by their organisations’ loss of EU funding, but where no amount was given.

<b>TYPES OF SERVICE AFFECTED<sup>20</sup> (NB These responses are from groups who receive EU funding via the Active Inclusion Fund, and so reflect their perceptions based on the type of service they deliver )</b>
Support for specific beneficiary groups to prepare for and enter the labour market, and other positive outcomes.
Employment
Employability
Communities for Work employment programme
Improving the environment for communities
Landscape scale conservation projects which impact on species, habitats and people
Educating people in diverse culture
Community transport for older and disabled people

*“We have a mixed funding model, however services will be lost when ESF Active Inclusion funding comes to an end. It will affect our employability skills programmes, especially for individuals with disability and/or autism”.*

However, not all respondents felt that the direct impact through loss of EU funding was likely to be the most significant factor:

*“The loss of EU funding will be minor because of UK Treasury guarantees that all commitments will be honoured. More key will be the impact of leaving the Customs Union and Single Market. Economic decline will lead to folding businesses and then to loss of services. There’s a potential loss of tax revenue from EU trade of £80bn per year; that loss of income in a declining government expenditure will have the biggest impact on services available to our communities”.*

*“If you’re an organisation not touched by EU funding, it’s more about the indirect effects, for example increased hate crime leading to needing to change the way they work. It’ll pull on people’s goodwill to continue to deliver their services”.*

There were also concerns relating to the anticipated gap between EU funding and its replacement, which would lead to a gap in service availability. Whilst organisations have commonly experienced a gap between EU funding rounds, there was anxiety that this was a different situation in that at present there is no clarity about what, if any, funding will be available in future. A significant concern is therefore that staff or contractors may leave for work in other locations or in other sectors, due to the uncertainty. This is exacerbated by concerns that better paying employment in other sectors and outside Wales will make staff and contractor recruitment harder, which in turn would affect organisations’ ability to deliver services.

*“Historically, [for this organisation] EU funding has been relatively low, however currently we have major projects supported through LIFE and SMS funding. There is a need for continuity, and if these services are lost [due to lack of funding] even for a few years, the benefits of current services will be quickly eroded”.*

<sup>20</sup> Please note that responses will be skewed in relation to the dissemination routes for the online survey, e.g. to all Active Inclusion Fund grantees.

Some respondents described expectations on increased demand for services, although it was not always clear whether this was directly attributed to Brexit or also a feature of the effects of austerity. It was not possible to identify services with confidence due to the small sample, but respondents included those working in the substance misuse field; with young people (especially NEETS); with people with mental health and with those with learning difficulties. Others noted that an economic downturn causes increases incidences of domestic abuse, so there could also be additional pressure on housing and support services from those affected.

*“We foresee an increase in the demand for services, more demand and bigger issues to deal with, especially as we are expected to take more of the strain off struggling public services due to austerity and potentially Brexit”.*

Although only indirectly linked to service availability, it is relevant to note that there was a strong perception amongst organisations, backed up by examples, that the attention of public sector officials was being drawn away from them and towards Brexit, and that this was having impacts on some very practical issues for them, including receipt of funding and having a known individual to work with.

### 2.3 IMPACT OF THE LOSS OF EU FUNDING ON THE FINANCIAL VIABILITY OF THIRD SECTOR ORGANISATIONS

The impact of the loss of EU funding is likely to have a more significant impact on particular sectors, including rural communities, where tariffs already announced and uncertainty about funding support are likely to impact on marginal agricultural dependent communities. In addition, there is likely to be an additional impact on particular sectors of support, such as long term pathways into work especially with individuals who face additional support needs, and for whom the withdrawal of support may mean a need for support to be provided from another (often the statutory) sector.

Also, it is important to note that within this research, it was not possible to articulate the risk of the loss of EU funding accurately, as we could not easily source data about the level and nature of dependence on EU funding, e.g. exactly how many organisations are in receipt of EU funding (because we could not easily source data about grant-funds allocated by intermediary organisations), the number of organisations whose primary source of income is EU funding, or the number of organisations whose financial viability would be compromised by loss of EU funding even if just a relatively small amount.

By its very nature structural funds in Wales are to help the most deprived communities, this means that the withdrawal/reduction of any funding will have a disproportionate effect on these communities. Examples of projects such as the Active Inclusion fund show that at any one time 100 projects or more could be running in the most deprived communities, and working with those most in need. Although some of the funding accessed by the sector is small in scale it is of huge importance to those communities, and its loss is likely to be felt most keenly and have a more significant impact.

There was no data explaining individual organisations’ relative dependence on EU funding. Respondents to this study talked about direct loss of income and that the most at-risk organisations were said to be those most dependent on EU funding, but there was limited detail provided.

*“Those with all their eggs in the EU funding pot are particularly susceptible”.*

*“Core costs and senior management of third sector organisations such as Menter Môn are heavily subsidised by EU funding, (e.g. grant funded projects don't contribute to CEO*

*salary). Lose the senior management and core funding of these organisations, and they become less resilient and less viable”.*

*“We’ve been able to grow, partly because of the role our major [EU funded] projects are supporting our core activities. If a number of these projects are lost, the effect could be catastrophic for the organisation”.*

It was noted that the impact of loss of EU funding was not simply the loss of that amount of funding, but also the leverage which that funding enabled.

The scope of this report did not specifically consider the reliance of individual organisations on structural funds. WCVA believes that 80% of the organisations funded through Active Inclusion are reliant on these funds to deliver services that are not funded in other ways. This subject will require specific research to fully demonstrate the extent of the reliance on structural funds.

Findings presented in the literature review suggest that the impact of Brexit on the financial sustainability of organisations is not likely to be felt evenly across the UK or throughout the third sector. The Directory for Social Change notes, for example, that *‘variations in funding levels across topics and regions means that the impact of a potential non-replacement of funding could disproportionately affect certain charities, causes or UK home nations’*<sup>21</sup>. Sectors that were felt to be particularly at risk (at a UK level) included care, social work, health and social care, and international development. There was concern about indirect impact, in that there is a strong expectation of more competition for the remaining funding streams, and that (due to their own financial pressures) Local Authorities will reduce the funding that will be available to third sector organisations, and that these issues together probably present a greater risk to financial viability than direct loss of EU funding. Also, it was noted that there is further risk presented if there is an economic downturn with knock-on effects for the third sector, and on top of existing pressures presented by austerity.

*“If Local Authorities and Welsh Government batten down the hatches, and pull delivery in-house, organisations will go”.*

*“It depends how reliant they are on EU support. The greater the reliance, they’re more at risk. They have more resilience if they have a more commercial model, however an economic downturn would hit their income and put them at risk”.*

*“It’s questionable if they will continue to be viable, with extra pressure and potentially less or different funding”.*

*“It’s much tougher as EU funding disappears and no confidence that UK Government replacement schemes will be adequate. More pressure on other grant-giving trusts and organisations will lead to increased competition for resources”.*

WCVA’s 2019 Snapshot Survey backs up these findings, with 82% of their respondents expressing the belief that Brexit would have a negative effect on their ability to access grants.

There is a further issue around financial viability, in terms of the financial uncertainty that many third sector organisations are feeling. This is not unique to Wales, but was a clear message from respondents to this research.

*“Much will depend on the extent to which EU funding is replaced/replicated/substituted by UK or Welsh Government funding programmes, if at all, which is currently unknown.”*

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<sup>21</sup> Cooney and Ferrell-Schweppenstedde, 2017

*“There’s no way of telling at the moment”.*

*“It’s difficult to know”.*

There is also some concern, but no data available to provide validation, that some organisations’ financial viability may be at risk but that they are not aware of it because they do not realise that they are in receipt of funding that originates from the EU. Typically, this would be a community group receiving £5 - £20k through a scheme such as LEADER / RDP, but managed by the Local Authority. Although information will have been received about EU funding, there may be a perception amongst the grant recipient organisations that the funding comes from the Local Authority.

*“The worry is for the smaller third sector organisations which may be getting funds from the EU but aren’t realising it’s from the EU, so they won’t be fully aware of the future ending of the funding”.*

One respondent raised the point that organisations with investment income may be at risk due to markets under-performing because of the economic uncertainty, which would then have a negative impact on organisations’ income; an example was given of one organisation which had reported a 13% drop in investment income that they directly attributed to effects of the Brexit process.

## 2.4 IMPACT ON THE WORKFORCE OF THIRD SECTOR ORGANISATIONS

This research attempted to find out what the impact of Brexit would be on the workforce, considering both employed staff and volunteers. It has proved impossible to get comprehensive and accurate data on the numbers of EU nationals employed in the third sector in Wales, although it is possible to draw out some indications through making estimations based on the number of EU nationals in the workforce as a whole, and from limited responses within our research.

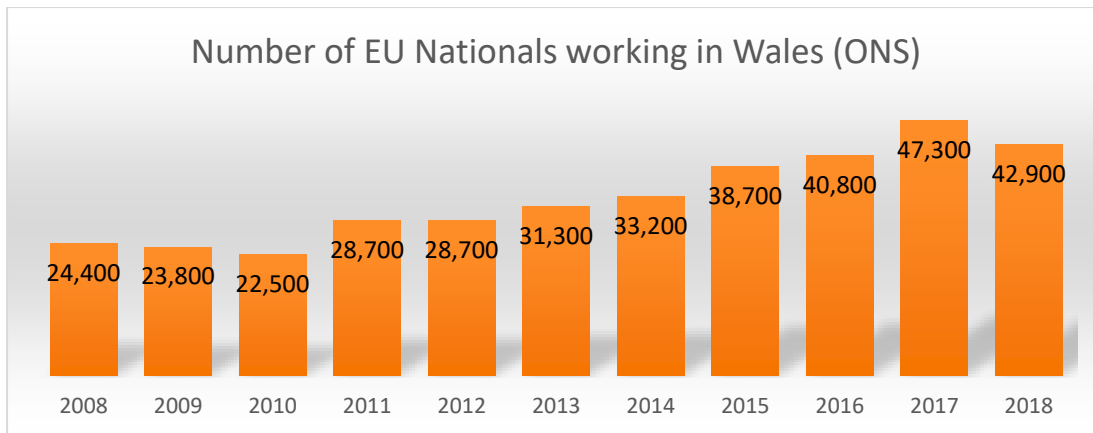
### 2.4.1 EU NATIONALS IN THE WORKFORCE AS A WHOLE

It is estimated that there are 82,000 EU nationals living in Wales as of June 2018, representing 2.6% of the overall population of 3.12 million population of Wales (ONS, 2018). The number of EU nationals that are reportedly in work in Wales is currently 42,900<sup>22</sup>, a drop from 47,300 in 2017, then the highest recorded number of EU nationals working in Wales. Stats Wales provides a different estimate, that of 55,400 EU nationals working in Wales in March 2019. As there is no requirement to register as an EU national for employment purposes, it is difficult to get accurate figures about the number of EU nationals that are working in Wales.

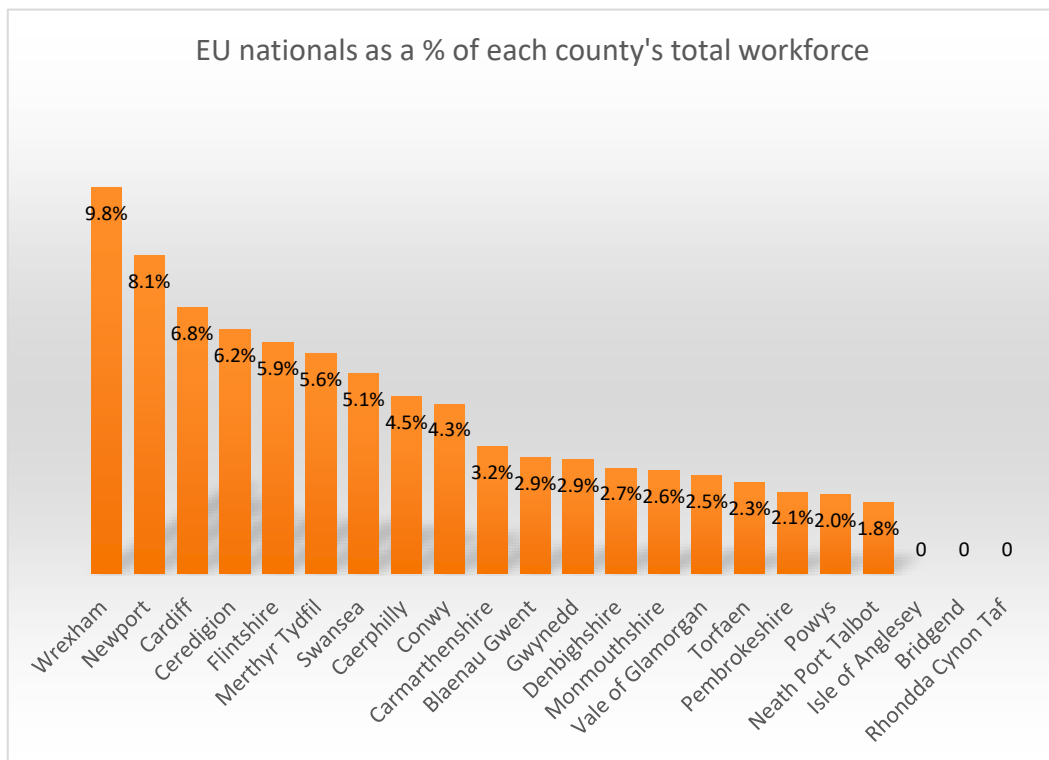
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<sup>22</sup> ‘Drop in number of EU nationals working in Wales, according to report on BBC (<https://www.bbc.co.uk/news/uk-wales-politics-45560584>) based on ONS statistics.

<https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/internationalmigration/bulletins/ukpopulationbycountryofbirthandnationality/2018>



There is data<sup>23</sup> that shows the breakdown across all but three Local Authority areas (Anglesey, Bridgend, Rhondda Cynon Taf), which shows significant variations in the proportion of EU nationals in each Local Authority area's workforce; unfortunately, data that might explain that variation is not available.



Cardiff has the largest number of EU nationals in their working population, at 11,000. All other authorities for which there is data range from 5,100 to 900. Wrexham and Newport have the highest proportion of EU nationals as a percentage of their total workforce, at 9.8% and 8.1% respectively (Stats Wales, 2018).

<sup>23</sup> Stats Wales: <https://statswales.gov.wales/Catalogue/Business-Economy-and-Labour-Market/People-and-Work/Employment/Persons-Employed>

## Employees in Wales by Country of Origin (UK/EU/Non EU &amp; Non UK) 2018

	UK Origin	EU Origin	Non-EU & Non-UK	Total
Cardiff	162,600	11,000	14,100	187,700
Rhondda Cynon Taf	105,200	-	4,000	109,100
Swansea	92,400	4,700	9,800	106,900
Carmarthenshire	77,600	2,500	2,500	82,700
Caerphilly	77,700	3,500	700	81,900
Flintshire	69,800	4,100	2,100	76,000
Newport	63,100	5,100	3,300	71,500
Wrexham	62,100	6,100	1,700	69,900
Neath Port Talbot	61,000	1,100	1,500	63,600
Bridgend	60,600	-	1,400	63,600
Vale of Glamorgan	60,000	1,500	1,900	63,400
Powys	59,900	1,200	1,400	62,500
Gwynedd	55,200	1,600	1,400	58,300
Pembrokeshire	53,100	1,100	1,100	55,400
Conwy	46,400	2,000	1,500	49,900
Monmouthshire	42,000	1,100	1,100	44,200
Denbighshire	41,000	1,100	1,500	43,500
Torfaen	39,000	900	1,200	41,100
Ceredigion	32,200	2,000	800	35,000
Isle of Anglesey	31,200	-	1,100	32,300
Blaenau Gwent	30,600	900	200	31,700
Merthyr Tydfil	25,000	1,400	900	27,300
<b>Totals</b>	<b>1,347,700</b>	<b>52,900</b>	<b>55,200</b>	<b>1,457,500</b>
The figures for this table are taken verbatim from Stats Wales' data (see footnote). Where there are small discrepancies in the table e.g. for Rhondda, these discrepancies are copied directly from the data				

#### 2.4.2 EU NATIONALS IN THE THIRD SECTOR WORKFORCE

It is not known how many EU nationals work in the third sector in Wales or how many EU nationals volunteer. We can make a crude estimate based on the number of EU nationals as a proportion of the overall workforce in Wales as a guide figure:

Number of EU nationals working in Wales: 42,900 to 55,400 (4.4 to 5.7% of the total workforce)

Number of people working in the Third Sector in Wales: 100,000<sup>24</sup>

Possible number of EU nationals working in Third Sector in Wales: 4,400 to 5,700

The Charity Finance Group (CFG) identifies the number of EU nationals working in UK charities as about 4% of the current charity workforce<sup>25</sup>, giving a figure of 4,000 for Wales.

Looking outside Wales, NCVO<sup>26</sup> reports that 4-6% of employees in the sector across the UK are EU nationals; the highest proportion geographically is in London, and the most dominant sector is social work.

The Charity Finance Group (2018) reported that EU nationals working in the voluntary and community sector in the UK are *'largely concentrated in social work, residential care, education and membership organisations, tending to be younger and more highly qualified than UK workers.'*

Data from the online survey within this research provides some very limited insights. Of the 29 organisations that responded to this question, the majority of whom are employing staff, only 2 organisations reported having EU nationals as employed staff; one of these organisations employs two EU nationals, the other did not specify how many. 4 organisations reporting having EU nationals in their volunteer workforce; of these, one organisation had one EU national volunteering, two organisations had two volunteers and one organisation had five.

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### 2.4.3 ANTICIPATED WORKFORCE IMPACTS

Responses to questions around workforce impact suggest that this is not a significant issue for respondents.

*"It's not a big issue; the EU migrant community is small, and not well represented in the sector".*

Only four respondents to the online survey (3% of respondents to that particular question) reported that they expected one of the impacts of the Brexit process on their organisation to be 'Difficulty in providing services because of their organisation's reliance on EU residents as employees or volunteers'. No further detail was provided through the survey, however in interviews, organisations which provide advice and support to migrants reported using EU nationals as volunteer translators especially for interventions relating to health and social care support. One interviewee in the environmental sector reported that amongst their membership, they expected that there would be *"quite a significant staff loss in terms of percentage"* but no further details were given.

Where organisations do have EU nationals in their workforce, they reported that they are using internal capacity to offer and, if required, provide support and advice in relation to Settled Status.

*"We've got 120 staff and only one EU national, who we're supporting through the process of remaining."*

*"EU citizens employed in the sector especially agriculture, health and social care. There's uncertainty for individuals which must be nerve-racking. People who have worked here*

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<sup>24</sup> 'People employed in the Charity/Voluntary Sector', WCVA Data Hub: <https://www.wcva.org.uk/what-we-do/the-third-sector-data-hub>

<sup>25</sup> The Charity Workforce in Post-Brexit Britain – Parliamentary Briefing: <https://cfg.org.uk/userfiles/documents/Policy%20documents/Briefing%20-%20Brexit%20Charity%20Sector%20Workforce%20Report%20-%20June%202018%20%282%29.pdf>

<sup>26</sup> UK Civil Society Almanac, 2019



*for years now need to register. However, there is no information for organisations on how to help and support their staff. We are an umbrella body for the 3rd sector and have had no advice or guidance on how we can/should support the sector”.*

Concerns about indirect impacts were also raised. There was particular anxiety in the social care sector that beneficiaries may struggle to access care support, even though it is suspected that relatively low numbers of EU nationals are employed in the voluntary social care sector, as a result of the knock-on effects of Brexit making the UK a less desirable place to work for any non-UK nationals, and also if potential requirements for minimum annual incomes for EU nationals working in the UK come into play.

*“We’re not sure. We feel that there is a significant workforce in the care sector, but not in the third sector. Some individuals use their PIP to purchase their own care, and some of this comes from EU nationals, so they are anxious”.*

It was also noted that a risk has been identified by some Local Authority social services departments that if the NHS nearby are trying to attract nursing staff to deal with workforce shortages, it could make recruitment into the voluntary social care sector more difficult.

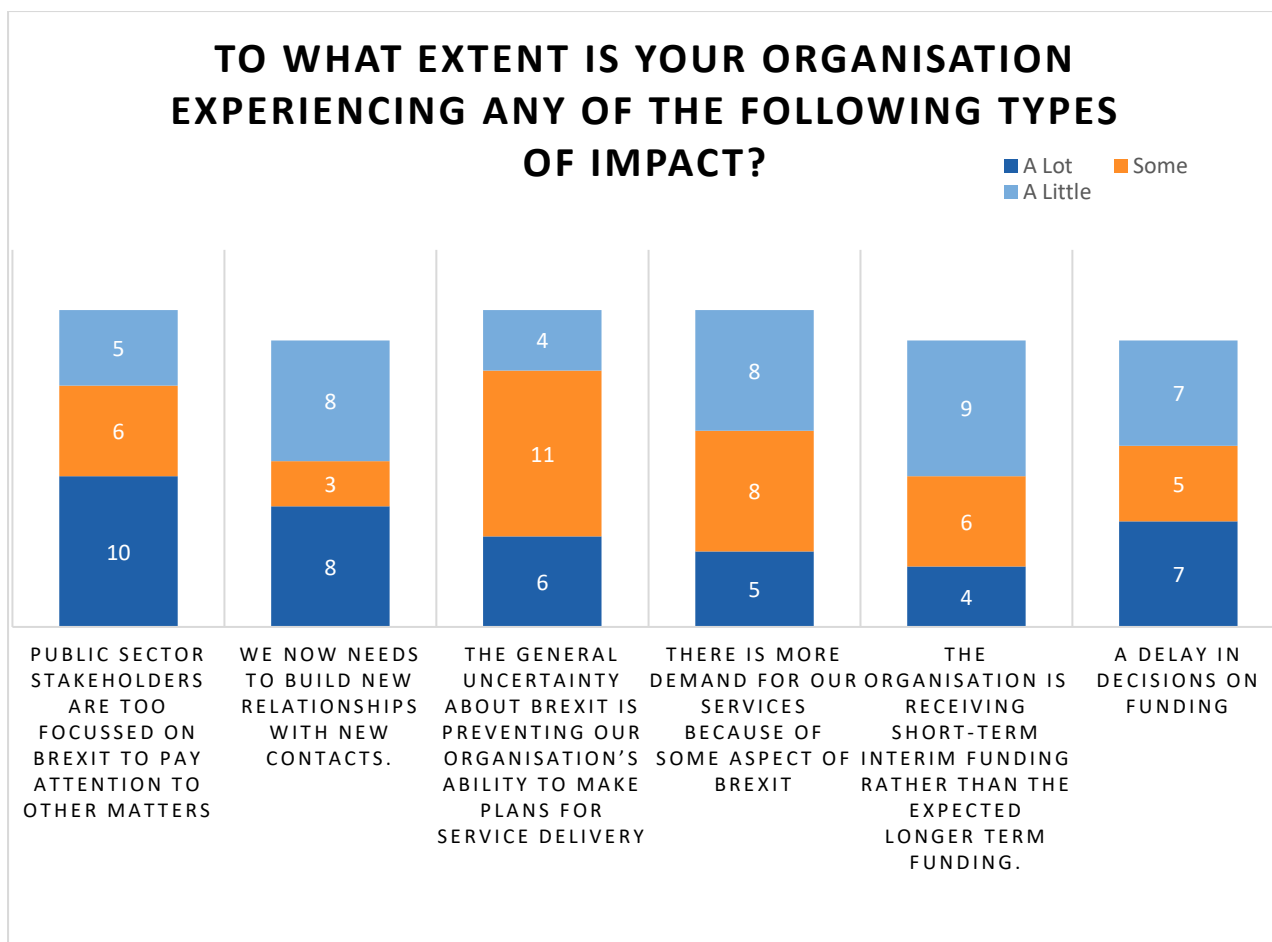
More broadly, there is a concern that the third sector may be a less desirable employment option due to anticipated increased funding issues in the sector. Also, it was suggested that with increased demand for services but limited resources for increasing the workforce to match, there would be increased stress on staff and volunteers.

*“Uncertain times for the workforce, not knowing what comes next. There’s a risk of losing staff from the sector, along with their skills and experiences”.*

### 2.5 THE TIMING OF IMPACT

63% of organisations who responded to the question in the online survey said that they were not yet experiencing any impacts.

Of those that talked about already experiencing impacts, the most frequent comments were around: uncertainty making it difficult to make longer-term plans for their organisation; impacts on their funding; diversion of public sector officials’ attention. However, it should be noted that only 21 organisations responded to this question.



For those organisations in receipt of EU funding, it was noted that the main impact will be felt when the current funding commitments come to an end, by 2022, although there could be earlier impacts if individuals look to move to new positions ahead of the end date of their projects. One organisation running EU funded projects reported increasing difficulty now in recruiting to staff positions, which they believe may be due to potential applicants not seeing them as long-term posts as it is highly likely that the projects, and jobs, will end in 2022, although they do note that a more buoyant job market may also be a factor.

Many respondents to the research felt that the timing of impacts more broadly would be very dependent on what happens with Brexit and when. Impacts would be very immediate if there is a 'no deal' exit. There was a suggestion that *"The trajectory of a 'no deal' and a 'deal' Brexit would be the same, but with a very different timeline"*. However, on the whole, there was a sense that the main impacts, as shown in the graph above, would be felt in the medium to longer term, and that all of the impacts will be felt over a long period, but that it was impossible to be precise about the nature or scale of the potential impacts because there are so many unknowns.

*"It's difficult to say without an understanding of what Brexit will be. With 'no deal', it could be fairly rapid; with a deal, it could be that there's a longer term effect on services, but it depends on the withdrawal agreement"*.

*"It will be felt for years and will affect the next generation. It's not going to be short and sharp, it's going to be long and painful....it's going to take years to get back on an even keel"*.

*"No idea. When will it happen? What will it look like?"*

*“It depends on how Brexit plays out”.*

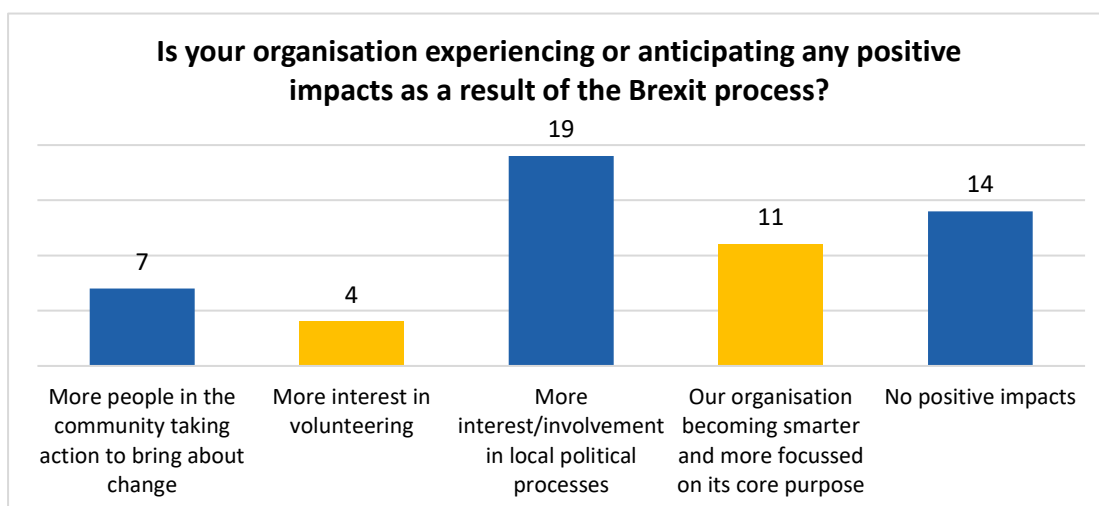
Impacts in the longer term are expected to be linked to impacts on the economy, in particular certain sectors; most frequently mentioned were agriculture, manufacturing and social care.

One respondent considered the potential of ‘remain’, in that if there were to be another vote and it was in favour of remaining, organisations would be ‘behind the curve’ in terms of getting prepared for new EU programmes, funding, legislation etc.

## 2.6 POTENTIAL POSITIVE IMPACTS AND OPPORTUNITIES

Whilst the majority of respondents to this research presented a gloomy outlook, this was not universally the case, and the research included questions designed to find out whether respondents do see any potentially positive impacts and opportunities, and if so, what these are.

In the online survey, the most frequent response to a question about positive impacts showed that ‘More interest/involvement in local political processes’ was the most frequent response, although 14 organisations did say that they had not experienced any positive impacts.



The types of positive impact or opportunity that respondents described included:

- Economic opportunities, including more employment opportunities, opportunities to grow a more skilled workforce, and domestic manufacturing opportunities that could be taken up by social enterprises.

*“It’s a good opportunity to discuss how to get procurement right in Wales. There could be opportunities for local investment and local procurement. New trading relationships can lead to new services and products, e.g. care services, ways of building homes”.*

- New and different funding opportunities and income generation, including replacement funding designed in Wales to suit Wales and with less bureaucracy, more development of social enterprise approaches.

*“Maybe it’s a chance to write our own rules on procurement and the policy framework”.*

*“It should be a golden opportunity for Wales to step out on its own and do something different”.*

*“Forcing organisations to take a long hard look at how they generate their income”.*

*“Accessing EU funding is very difficult, time-consuming and small organisations struggle to apply, and it’s very very burdensome to manage. We could improve that with future funding schemes and remedy the problems, i.e. restructure the admin”.*

- Developing new relationships, whether collaborations within the third sector, or looking externally to the private or public sector.

*“What they’re facing is essentially a paradigm shift, e.g. engaging with the private sector”.*

- The opportunity to promote the value of the third sector within the wider economy to policy makers.
- An opportunity for new and different conversations with policy makers, and to bring about policy change.

*“It’s helped to galvanize the campaign for a human rights approach in Wales, and maybe a bit of a change in tone from Welsh Government”.*

*“In Wales specifically, Brexit has directly triggered conversations and projects that wouldn’t otherwise have occurred, e.g. community cohesion, equalities. Maybe there are opportunities for legislation in Wales and could lead to human rights instruments being integrated into Wales legislation”.*

- New ways of working and thinking, taking very different approaches to trying to solve long-standing issues in communities. There were a number of references to the potential offered by the ‘foundational economy’ model.

*“It could be an opportunity for the third sector to be something different, alongside public and private sector. Not just delivering public policy more cheaply than the public sector.....We need to think about how we support place much more imaginatively”.*

*“A different way of working with our communities, including co-production, asset-based, place-based. Maybe there’s now an opportunity to gain traction in Welsh Government for these ideas. And it presents opportunities for a wide debate about how to empower our community”.*

## 2.7 THE SUPPORT ‘ASK’

This section presents what respondents suggested in terms of the support that they thought would most help third sector organisations to cope with the impacts of the Brexit process. (See Section 4 for the research team’s support recommendations). Respondents were encouraged to consider elements other than simply more funding, and to think carefully about their needs specifically in relation to the impacts of Brexit.

In the online survey, the most popular responses related to funding, followed by clarity about what will happen after Brexit to enable organisations to plan, and the sector’s relationship and communication with Welsh Government.

## EMPOWERING COMMUNITIES IN THE CONTEXT OF BREXIT

	Responses
Longer-term funding	33
Funding for tried and tested approaches/activities, not just for innovative work	25
Less complicated reporting requirements for funding received	13
A requirement that the third sector is an equal partner in any funding that Welsh Government requires to be partnership-based	16
Helpful communications from Welsh Government about the value of third sector work in communities	10
Clarity about what will follow after the Brexit process, so that organisations can plan effectively	18
Jargon-free explanations of the Brexit process and what follows after	8
Welsh Government engaging meaningfully with the third sector in decision-making about what follows after Brexit	18
Welsh government engaging meaningfully with the sector about what works well in a culture of reducing resources	11
Welsh Government working cross-sectorally and not in silos	17

The responses during workshops and interviews to a large extent reflected the online survey findings, but with more emphasis on voice for the sector and enabling organisational resilience than was possible through the survey question.

Looking in more detail about funding-related support priorities, the responses included:

- A strong desire to have funding which covers organisations' core costs, which were seen as fundamental to an organisation's capacity and sustainability.  
*"Recognition of, and support for, the 'overhead' costs associated with maintaining an organisation and its governance to the standard which the public sector, funders, and the general public quite reasonably expect. Not just robust accounting and reporting capability, but also less obvious and non project-specific things as updating/review of policies, maintaining secure and up-to-date IT systems, etc., which can be very challenging even when full-cost recovery is permitted for individual programmes".*  
*"Assembly politicians realising that a vibrant third sector is part of a civil society and overcoming their hang-ups around core funding. Recent decisions have knackered some third sector organisations with consequent loss of skills, services and a poorer environment".*
- Making grant-funding easier to manage, with less bureaucracy.
- Funding over longer periods than at present.  
*"Fund long-term planning, rather than short-term fixes. Be brave; invest properly into people's futures".*  
*"The short-term nature of funding is unhelpful to service users; raises them up and then drops them".*
- Decision-making about funding allocation at a level close to the grantee.  
*"Welsh Government (and WLGA) needs to ..... get funding and decision-making down to a more local level (and significantly more local than PSB level). It needs policy change to*

*support and incentivise this, otherwise everything will be scooped up and held on to by the 'big' players and we will get the same as usual".*

In relation to information, the main ask was seeking clarity about Brexit, whilst recognising that at present there is no clarity, but that when the situation is more settled, it will be important for organisations to receive information about Brexit which is in itself clear and comprehensible, unbiased and delivered in a timely fashion. In order to do this, there needs to be capacity within the third sector to provide this service to its organisations.

*"Good quality and timely information. Because the sector doesn't know what's happening, it is unable to plan".*

*"Clear information, when it's available, and entirely factual so that organisations can make informed decisions".*

*"Put the Brexit process into words everyone can understand, jargon-free so people can make a rational decision".*

There was a clear ask in relation to helping organisations to become more resilient, including taking on new ways of thinking and working. Suggestions for support included: mentoring and training in order to building capacity, knowledge and skills in relation to enterprise as a means to generate income; helping organisations to review and understand their income generation options, and then to make them happen; helping organisations to improve their strategic planning skills; support around sound governance, e.g. policies, systems and processes.

*"Small organisations are far more likely to think about grant applications than trading, i.e. how to develop a market for the services they provide, including bidding for commissions. So, support for bidding, collaboration, thinking differently. Including working with trustee boards who see themselves as a charity and not a business, and are concerned about undermining their charitable ethos".*

There were many responses on the topic of having a voice in any discussions that take place about Brexit-related changes that affect the sector, such as funding arrangements, and these take in a number of different aspects:

- Ensuring that the voice of the sector as a whole is strongly carried across to Welsh Government  
*"Meaningful dialogue with the third sector about what is needed and how best it can be delivered".*  
*"The sector hasn't got the capacity to engage with debates, and needs to have its voice put into the debates. [We need to] draw the sources out and take those opinions and their issues, and amplify them, so they can influence decisions".*
- Being courageous in presenting challenges to Welsh Government, when necessary, which may be difficult if organisations fear that it could result in losing their funding.  
*"We seem to have lost the spirit of campaigning and openly challenging Welsh Government.*
- Being effective in communicating and demonstrating the value and offer of the third sector to Welsh Government and others.  
*"Better ways to explain what the outcomes of services are, so people value them more In the Brexit campaign, the third sector wasn't good at explaining the value of what would be lost. The third sector needs to be better at communicating".*
- Ensuring that third sector organisations are directly engaged in the discussions about any future funding schemes, as well as more broadly in decision-making.

*“Involve us in the process of developing solutions...and use our knowledge, experience and expertise”.*

*“Place the sector at the heart of decision-making”.*

*“This sector needs to occupy its rightful place as an equal at decision-making levels such as PSBs”.*

- Having an *“honest broker”* who will pass on messages accurately, act without bias, is accessible, and is trusted by all parties.

There was also an ask of Welsh Government, in terms of how it works, as well as how it understands, perceives and values the third sector. Respondents feel that a more joined-up approach across Government would be helpful, as would being able to have consistency in their relationships with officials. They want officials to be more aware and show more understanding of the difficulties that face third sector organisations, particularly in the way that it ‘takes up the slack’ in service delivery as Local Authorities and other public services reduce their activities. They also feel that there is a need for more understanding about the value provided by the third sector, combined with a willingness on the part of officials to work collaboratively with third sector organisations.

*“Is Welsh Government creating an environment that allows third sector organisations to come together, collaborate, flourish, work in partnership with public sector organisations?”*

Some respondents suggested support for particular areas of third sector services, making an argument for their particular value or vulnerability in the context of the circumstances that they see developing as a result of the Brexit process. These included community hubs/facilities/services which bring people in a community together, health and social care, advice, and services aimed at more vulnerable groups in society, e.g. LGBT, BAME, people with disabilities.

### 3 ANALYSIS

In this chapter, we present the key messages that the R4C team has drawn out from the research findings, including commentary on what this may mean for the third sector and its stakeholders.

#### **Creating an atmosphere of negativity and division in communities**

Third sector organisations are, by their nature, working to do positive things in communities. There is a worrying picture presented by respondents to this research, who reported increasing community atmospheres of negativity, decreasing tolerance towards difference, and increasing divisions, which they attributed to effects of the Brexit process. In effect, this ‘undoes’ years of community development in many communities, and makes positive progress more difficult. The Brexit process is bringing uncomfortable issues to the fore, which are already presenting as practical needs for some organisations whose focus is around equalities, human rights and advice, but which may be increasingly felt by other organisations over time.

#### **The health of communities and the third sector relates strongly to the health of the economy**

Previous experience has demonstrated this strong linkage, so there is great value in understanding which of Wales’ economic sectors are most likely to suffer negatively as a result of Brexit and which geographical areas are most dependent on those most (potentially) vulnerable sectors. This then gives a helpful indication of the places where communities are most likely to feel negative effects and where third sector organisations’ support and input is most likely to be needed. Respondents to the research indicated that there are particular concerns for areas which are most strongly dependent on agriculture and manufacturing, both of which are disproportionately represented in the Welsh economy. Further Welsh Government data which provides Brexit modelling information across the Welsh economy is likely to be publicly available in the near future, and is expected to provide a very helpful steer about the geography of economic impact.

#### **“The perfect storm”**

This phrase was used a number of times by respondents to explain their speculation about the situation that they felt was likely to develop as a result of the Brexit process. They noted that an economic downturn is projected and that as a result, they expect the demand on services to increase (based on experience of other times of economic pressure), but at the same time, they expect that there will be reduced funding available to support them to meet this increased demand. Their worry about the situation is compounded by the lack of information and knowledge about the Shared Prosperity Fund.

#### **Fears about replacement funding**

Even though a large proportion of Welsh third sector organisations are not in receipt of EU funding, there is considerable concern in the sector about what might – or might not – replace it, how much money there would be, when it would be available and over what time periods, what its focus would be, who would make the decisions, whether it would offer the same opportunities for match-funding leverage etc. There is a fundamental concern that the positive values exhibited by the process and focus of EU funding will be lost, in particular that Wales will lose control over decision-making, that future funding will not recognise the particular needs of communities in Wales (especially rurality) or Wales’ unique cultural features.

#### **Fears also about the erosion of legislative frameworks**

This is an issue particularly for campaigning organisations, organisations providing advice and those providing support around human rights and equalities. The immediate concern is that the high standards introduced through the EU will be gradually reduced as the UK takes over, but also on a more practical level, that organisations may need help to stay abreast of any changes as they are introduced and ensure that they remain compliant.



### **Attention previously directed toward the third sector now diverted to Brexit instead**

The direction of our research did not make it possible to confirm whether the strong perception of Welsh Government and local authority officials' attention being diverted to Brexit is or is not actually true, and if it is, the potential extent of the issue. Regardless, it is important to understand that this perception is strong, and is informing how organisations are thinking and behaving. It demonstrates that there is a need for public sector officials to consider how their capacity and resources directed towards the third sector are affected by Brexit, and what they should be communicating to third sector organisations in respect of the effect.

### **Compounding the problems brought about by austerity**

It was clear that organisations are already feeling the effects of austerity, that they expect this to continue, and that the Brexit process is magnifying and bringing to the fore issues already raised by austerity. However, it is likely that Welsh Government's policies and approaches in recent years may have to some extent shielded third sector organisations from the impacts of austerity in a manner not experienced elsewhere in the UK, and that if this cannot be continued in future, third sector organisations in Wales may be subject to deeper austerity measures than felt so far. The effect overall is that austerity has laid difficult foundations for expected additional negative impacts of the Brexit process.

It is evident that organisations struggle sometimes to differentiate between austerity and Brexit, and it is possible that issues may be attributed to Brexit – either now or in future - that are in fact not related.

### **Not enough planning?**

Only some organisations are making plans to cope with the anticipated negative impacts of Brexit. There seem to be two main reasons why some organisations are not making plans: not having enough capacity to do so, and feeling that there is such a range of possibilities and that they don't have enough information – either about Brexit itself, or the Shared Prosperity Fund - to be able to make useful plans.

Looking beyond the third sector to the public and private sectors, it would seem that arguably the third sector is 'performing' less well in terms of making plans, however, this was not a key focus for this research and as a result, we don't have meaningful data to make sound comparisons or even to articulate clearly whether there is a significant problem with a lack of planning, or the nature of the gaps.

### **Putting EU funding into perspective**

Although loss of EU funding into the sector will be a noticeable shock, it should be recognised that overall, it is not the largest proportion of funding into the sector. However, EU funding is more significant in some sub-sectors (e.g. long-term pathways into work) and some geographies (e.g. rural communities), that is an important lever for bringing in additional funding, and respondents from organisations working in these fields feared that replacement funding might not have this same focus, and/or that there would be increased competition for other funding.

Also, it is important to note that within this research, it was not possible to articulate the risk of the loss of EU funding accurately, as we could not easily source data about the level and nature of dependence on EU funding, e.g. exactly how many organisations are in receipt of EU funding (because we could not easily source data about grant-funds allocated by intermediary organisations), the number of organisations whose primary source of income is EU funding, or the number of organisations whose financial viability would be compromised by loss of EU funding even if just a relatively small amount.

### **Data/evidence is in short supply**

The value of this research is – to some extent – in clarifying exactly what the data and information gaps are. Looking forwards, the most important thing will be to decide which of those gaps are really necessary

to fill, i.e. what information is actually needed for effective strategic and operational decision-making, and to decide where the available resources for more research are best directed.

For example, given that the indications are that there are relatively few EU nationals in the sector, it does not seem that it would be time or money well spent to try to get more accurate data about workforce. However, resources might be better spent on finding out whether there is a genuine issue with grassroots organisations failing to understand whether they are in receipt of EU funding, and therefore being unaware of their dependence on a funding source that will shortly cease to exist.

**It's not all negative; there could be a silver lining in the Brexit cloud**

Whilst the mood is undeniably gloomy, there are individuals who see opportunities, so care must be taken not to let their voice be overwhelmed. The biggest potential positive is to see the crisis as an opportunity, which could have a number of different aspects: an opening for the sector to think differently and to work differently, e.g. collaborating more within the sector, and with the private sector; creating more resilient organisations, because of being forced to tackle internal issues as an organisation experiences increasing external pressures; organisations taking on more enterprise-based attitudes and ways of working, as an alternative form of income generation; designing new ways of administering funding, which reduces the bureaucracy and therefore encourages wider involvement.

#### 4 RECOMMENDATIONS FOR SUPPORT TO THE THIRD SECTOR

Combining insights from stakeholders across the sector with the R4C team's experience, this section suggests a number of different routes for providing support to third sector organisations and the sector as a whole, that individually and together could help with preparation for Brexit, resilience to cope with the negative impacts that are anticipated as a result of Brexit, and inclination to take advantage of opportunities.

It is likely that some of the support suggestions come as no surprise; they recognise the on-going issues present in the sector, some of which have been magnified and brought more to the fore as a result of the Brexit process.

For the purposes of presenting our suggestions, we have devised six categories; in reality, there are 'fuzzy boundaries' between these categories.



We have not presented any prioritisation, either between the categories, or within them. We believe that these are decisions that should be made by WCVA and key partners.

Also, we have not provided detail about the suggestions, as we think that there could be a variety of ways to implement many of these suggestions, and again, the choices about which are most desirable and appropriate rest with WCVA and partners.

Some of the suggestions relate to support that is required as a direct result of the impacts of the Brexit process (shown in bold type, with grey shade); others are required because Brexit has exacerbated existing challenges (shown in plain type).

## VOICE

- Get third sector organisations a 'voice at the table' with Welsh Government and others who are making plans for Brexit-related support; ensure that that voice articulates the needs of the whole sector; "amplify" the voices of the small organisations.
  - Raise awareness at a policy level of the unique needs of rural communities and the consequences for local third sector organisations, and service delivery.
- 
- Consider identifying two-way regional 'link organisations' to hear from and inform local organisations; find out what improvements/support may be needed for these link organisations to fulfil this role as effectively as possible.
  - Think about how to ensure all levels of organisations have meaningful representation in discussions related to Brexit-related future planning and preparations.
  - Facilitate dialogue between public and third sector organisations about the realities of their inter-dependence, and opportunities for future working.

## SUPPORTING COMMUNITIES THROUGH THE IMPACTS OF THE BREXIT PROCESS

- Enable effective local infrastructure organisations which:
    - Provide the information community groups need around Brexit, and
    - Pro-actively identify gaps in community support needs which result from Brexit and work to enable those gaps to be filled.
  - Recognise and mitigate the impact of the diversion of Welsh Government officials on Brexit and away from community-focussed work.
- 
- Enable a funding environment that supports the retention of facilities and services at a grassroots level that bring the community together (seen as particularly important in a situation where the Brexit process is perceived to have exacerbated cohesion issues) and enables them to take a lead in developing the most appropriate services for their needs.

## INFORMATION ABOUT BREXIT

- Agree a protocol between WCVA and Welsh Government about the timely provision and subsequent dissemination of information relating to Brexit.
- 
- Get information about Brexit out to organisations in as timely a fashion as possible, presented in a way which is clear and succinct, and without jargon.
  - Explain which of the circulating 'information' about Brexit is fact, and which is really important.

## PLANNING AND PREPARATION FOR BREXIT

- Enable organisations to create the capacity to be able to think about what they need to do to prepare for the impact of the Brexit process.
- Ensure that local level organisations are aware if they have funding that originates from EU funds.
- For the sector as a whole, consider what data is really necessary to evidence the impact of the Brexit process, and how this could be collected.

- Ensure that WG and Local Authorities are fully aware about the ability and capacity of the third sector to prepare for the impact of the Brexit process, and that third sector organisations understand the issues facing Welsh Government and local authorities as a result of the Brexit process.

- Help organisations to understand the many different facets of operation they need to think about, in order to best cope with the impacts of the Brexit process.

## ORGANISATIONAL RESILIENCE TO DEAL WITH THE IMPACTS OF BREXIT

- Build the skills and capacity of staff and trustees to recognise how best to build their organisation's resilience to deal with the impacts of Brexit, including:
  - Enable and encourage organisations to have the staff and trustee time to focus on growing their organisations' resilience relating to Brexit
- Build the capacity of organisations currently in receipt of EU funds to create an exit strategy from EU funding.

- Help organisations to consider alternative funding models and collaborations to improve their resilience following Brexit.
- Look at the evidence about what sort of funding is most effective in enabling organisational resilience, and take these findings into future conversations.

## THE EVIDENCE BASE

- Identify the information that is likely to help significantly in identifying and illustrating the impact of the Brexit process on the third sector, including:
  - a) The scale and nature of reliance on EU funding
  - b) The Brexit views and experiences of the micro- and hyper-local third sector organisations.
  - c) Continuing the growth of the evidence base about the impact of the Brexit process begun by this research.

The over-arching purpose of this research was to set the foundations to inform policy makers about what needs to be done to support the community sector in Wales in relation to the impact of Brexit. It was intended that the research would provide evidence and direction, based on as complete and robust a picture as possible. Within this, the research was designed to focus on three main themes, namely the impact – positive or negative - of the Brexit process on:

1. The availability of (non-statutory) community services to people and communities
2. The financial viability of the organisations providing these services
3. The workforce of these organisations

Now at the end of the research period, we can reflect on the results of the study.

It is clear that stakeholders within the third sector believe that the Brexit process will have a negative impact on **the availability of their services** to people and communities around Wales, in large part because they have concerns about their ability to continue to provide those services currently funded through EU monies. They noted that they do not know whether the proposed Shared Prosperity Fund will fill this gap, and there is a widespread belief that there will be increasing competition for other sources of funding for all third sector organisations (regardless of whether they are seeking replacement funding or not). Additional concerns relate to the loss of not only the EU funding, but also the additional monies levered in to accompany EU funding, and given the focus of the EU funding on the most disadvantaged people living in the poorest areas of Wales, there are also concerns for what some respondents described as a “perfect storm”, i.e. potential increases in demand for their services (because of knock-on effects of an anticipated downturn following Brexit) at the same time as the possible reduction in available funding. The timing of these impacts is unknown because there is no clear timetable around the Brexit process, although the guarantee of EU replacement funding to 2022 was noted as giving a degree of certainty about funding for those organisations currently in receipt of EU funding.

In relation to whether the Brexit process will impact on the **financial viability of third sector organisations** providing non-statutory community services, there is limited evidence. At a UK level, there is expected to be variation in the impact spatially and across different parts of the sector, relating to the patterns of existing EU funding, and this might be expected to be the case in Wales. Although loss of EU funding into the sector will be a blow to those organisations who receive it, it should be recognised that overall, it is not the largest proportion of funding into the sector. However, in rural communities, and for organisations delivering in particular sectors e.g. long-term pathways into work; fears were expressed that that replacement funding might not have a similar focus, and/or that there would be increased competition for other funding. By its very nature structural funds in Wales are to help the most deprived communities, this means that the withdrawal/reduction of any funding will have a disproportionate effect on these communities, 80% of the EU funding to Wales benefits fifteen Local Authority areas in the West Wales and the Valleys EU funding region, with the remainder benefiting the 7 other Local Authority areas.

In terms of potential **impact on the third sector’s workforce**, there is no data available which clearly outlines the numbers of EU nationals working either in paid roles or as volunteers in the third sector in Wales. However, indications from other available data and our own research suggest that numbers are very low and that therefore there will be little overall impact in this regard. Some concerns were raised about indirect impacts, in particular in the social care field, in that existing recruitment pressures could increase if the third sector’s anticipated funding issues make it less attractive as an employer than alternative options in the public or private sector.

As we suspected would be the case, the evidence that could be found within the time and resources of this research was sometimes patchy, but nonetheless we believe sufficient for providing sound direction to inform decision-making. Clear themes emerged from our primary research, and these findings reflected the tenor of the content of documents studied through our literature review. The quantitative data review provided more limited information than we would have liked, but gives some basic insights. There were some limitations to the information-gathering, such as the difficulty of separating out respondents' perceptions of the impact of the Brexit process from the impact of on-going austerity, the lack of some potentially important datasets, the reach across the third sector that was possible within the time and resources of this research. However, despite its limitations, we believe that this research has real value. For the first time, it paints a picture of the current and potential future impact of the Brexit process on organisations in the third sector in Wales which are delivering non-statutory services, with the aim of making a positive difference in terms of community empowerment, cohesion, resilience and prosperity.

Further work could identify more clearly exactly which geographic areas, which may be sub-areas within existing EU funded areas; and which areas of work, e.g. supporting people with additional needs due to illness or disability into work would be the ones to target with scarce resources. It might also identify the best way of targeting those resources, to mitigate the expected impacts. This is particularly important given the more severe impact expected in some areas, and with some client groups.

The report clarifies where the evidence gaps lie, making it possible for the sector to decide which of these gaps are sufficiently important to merit seeking and allocating resources to filling them.

Also, looking to the future, the work enables WCVA, its partners and its supporters to prioritise their actions, in terms of how best to support the third sector to cope with the anticipated negative impacts of the Brexit process, and also to enable and encourage organisations to see opportunity and to move forwards in a positive way; thinking, planning and working in new ways for the ultimate benefit of the people and communities around Wales.

## 6 APPENDICES

## 6.1 CONTRIBUTORS TO THIS RESEARCH

Abolish Welsh Assembly	Ffrind i Mi
Age Connect South East Wales	Futureworks
Age Cymru	Glamorgan Voluntary Services
All Wales Forum for People with Disabilities	Glynneath Training Centre
Antur Nantlle	Gofal
Antur Teifi	Groundwork North Wales
Architectural Heritage Fund	Gwynedd Council - Brexit
Barod	Innovate Trust
Barry RAF Association	Interplay (Integrated Play and Leisure)
Bridgend CVC	Isle of Anglesey Council - Brexit
British Liver Trust	Leonard Cheshire
Building Communities Trust	Letitia Cornwallis charity
CAIS	Lloyds Foundation for England and Wales
Calan Domestic Violence Services	Local Environmental Records Centres
Cardiff Community Housing	Medrwn Môn
Carers Trust	Melin Community Trust
Carers Wales	Melincryddan Conference Centre
Carmarthenshire Citizens Advice	Menter Iaith Casnewydd
Carmarthenshire Council - Brexit	Menter Iaith Cymru
Carys Mair Thomas	Menter Môn
Ceredigion CVC	
Children in Wales	Merthyr CVC
Chwarae Teg	Môn CF
Citizens Advice Cymru	Monmouthshire County Citizens Advice
Citizens Advice Neath Port Talbot	Mudiad Meithrin
Citizens Advice Swansea Neath Port Talbot	National Lottery Community Fund (2)
Clwyd Alyn Housing Association	Neath Port Talbot CVS
Community Housing Cymru	
Co-Production Network for Wales	Neuadd y Pentref
	Newlink Wales
Council for Wales of Voluntary Youth Services	Newport Mind
Cymru versus Arthritis	NICVA
Deafblind UK	North Wales Police Commissioner's Office
Development Trusts Association Wales	North Wales Regional Equality Network
Dewis	North Wales Wildlife Trust
Disability Wales	NPTCVS
DOVE Workshop	NWAMI
Early Years Wales	Ovarian Cancer Action
Eco Vision Penarth	PACTO (Pembs Association of Community Transport Organisations)
Eco-Synergy	Pembrokeshire Association of Voluntary Services
Eden Project	Pembrokeshire Council - Brexit
Ethnic Minorities and Youth Support Team Wales	Pembrokeshire People's First
Expanding Horizons	



People and Work Unit  
PLANED  
Plantlife Cymru  
Pobl Group  
PONT  
Promo Cymru  
Quilt Association  
Race Council Cymru  
Ramblers Cymru  
Recovery Cymru  
Revise Consultancy  
Shelter  
South Denbighshire Community Partnership  
Street Games  
Swansea Autism Movement CiC  
Swansea University  
Tai Pawb  
Tempo Time Credits  
TGP Cymru  
The 3 million  
The Salvation Army - Employment Plus  
Thrive Women's Aid  
Torfaen CVC  
Urdd  
Vale 50+ Strategy Forum  
Wales Co-op Centre  
Wales Environment Link  
Wastesavers  
WCVA - SMT, European team  
WEFO  
Welsh Civil Society Forum on Brexit  
Welsh Government - Equalities  
Welsh Government - Financial inclusion and Advice  
Welsh Government - Migration  
Welsh Government - Third Sector  
Welsh Local Government Association  
Welsh NHS Confederation  
Wild Elements  
Wildlife Trusts Wales  
Wrexham CVC  
YMCA Cardiff  
Ynys Mon CF

