



**FORUM
FOR THE
FUTURE**



Forum for the Future Strategic Advice:

Engaging landowners in Oxfordshire to
advise on principles for a high integrity
framework for nature recovery in
Oxfordshire

June 2025



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Executive Summary

Forum for the Future engaged landowners Oxfordshire, gathering insights on their needs in relation to a marketplace for nature recovery in Oxfordshire.

This project (February - June 2025) included project scoping, stakeholder interviews and workshop design.

SCOPING STAGE SUMMARY

With contributions from staff across the councils in Oxfordshire, Oxfordshire Local Nature Partnership is undertaking a project to design a high integrity framework for a marketplace for nature recovery in Oxfordshire. As part of the project, they are proposing to develop a set of landowner-led principles that would inform the design of the framework.

OLNP are keen to ensure that any principles that are developed are informed by the landowners who would be selling into the marketplace, addressing their needs and ensuring equitable access to landowners of all sizes. They are also keen to ensure that the framework centres social outcomes alongside environmental benefits of nature recovery.

STATUS OF THIS REPORT

The insights and opinions represented in this report reflect the independent analysis of Forum for the Future and should not be interpreted as binding commitments or official positions of South Oxfordshire District Council and Vale of White Horse.

STAKEHOLDER INTERVIEWS

Despite good networks and connections, outreach and engagement with the project was a challenge. Over four months, nine interviews were conducted as part of the strategic advice.

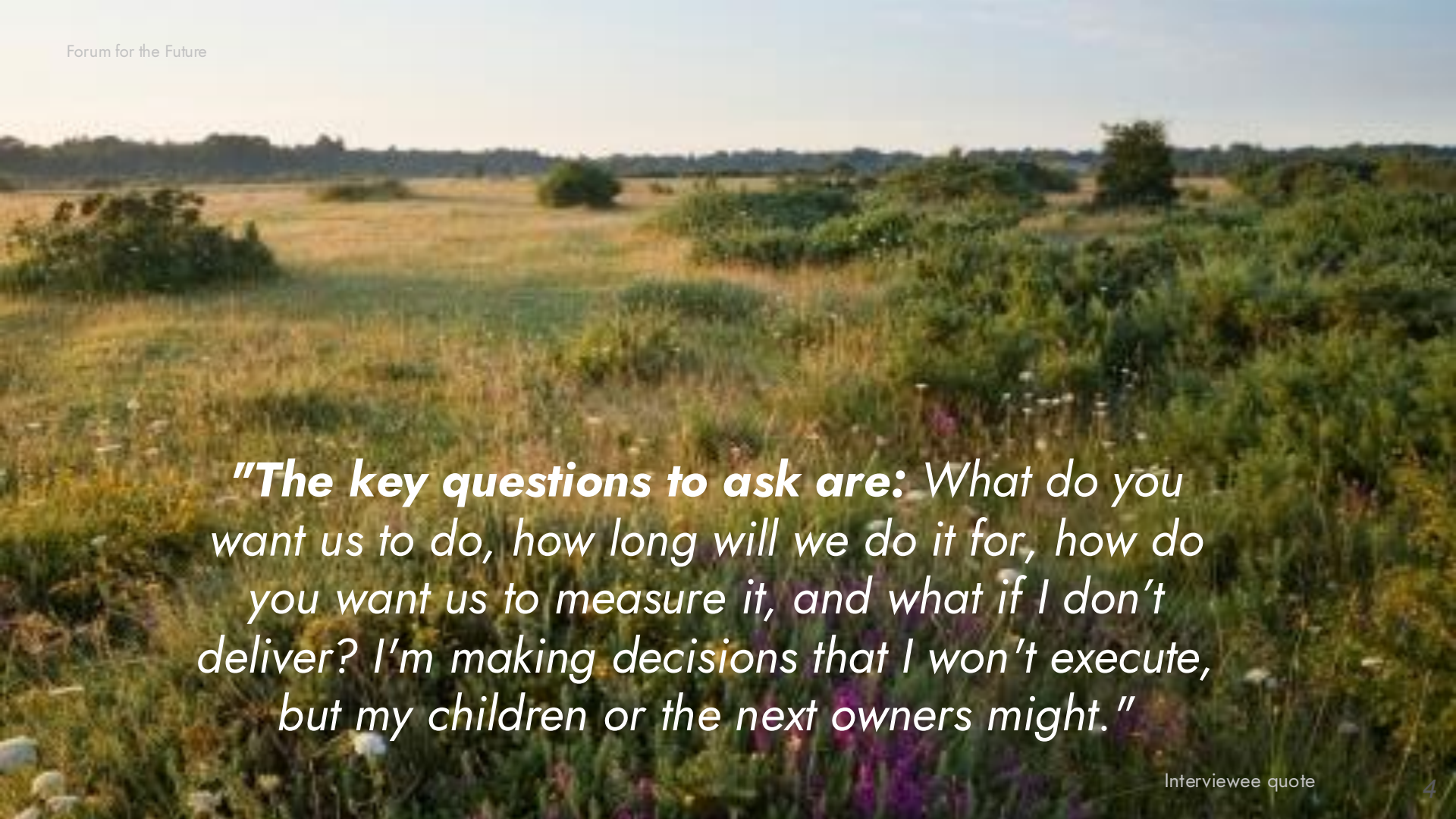
There was a good mix of landowner types and sizes, but landowner engagement was generally characterised by those who already had some experience of nature recovery projects or funding of nature friendly farming practices and were already on a journey towards nature friendly practices.

STAKEHOLDER INSIGHTS

The interviews explored challenges currently facing landowners in Oxfordshire and their experience of accessing funding for and delivering nature recovery projects or nature friendly farming practices. It also considered their needs in engaging with and gaining value from a marketplace of this nature.

There was general enthusiasm for the project and the outcomes that it could provide. However, there was divergence about how the marketplace should function, whose interests were most important to consider and what value could and should be placed on those interests and outcomes.

The insights shared in this report will be crucial in developing the principles for the framework. However, to accelerate the successful uptake of the marketplace, more engagement should be sought to ensure the scheme has buy-in and legitimacy in the eyes of a broad range of landowners in Oxfordshire, regardless of their size and capacity.



"The key questions to ask are: What do you want us to do, how long will we do it for, how do you want us to measure it, and what if I don't deliver? I'm making decisions that I won't execute, but my children or the next owners might."



PROJECT BACKGROUND

About the Organisations

FORUM FOR THE FUTURE

[Forum for the Future](#) is a leading international sustainability organisation with offices in London, New York, Singapore and Mumbai.

For almost 30 years we've been working in partnership with business, governments and civil society to accelerate the shift towards a just and regenerative future in which both people and the planet thrive.

One of our primary activities is supporting individuals and organisations to collaborate in order to tackle shared sustainability challenges.

BACKGROUND

This project was funded by Innovate UK as part of the [Net Zero Living](#) programme which aims to help regional authorities accelerate the transition to net zero.

Involve, Forum for the Future, Ipsos and Quantum Strategy & Technology were appointed to provide strategic advice to 25 'Fast Follower' local authorities with their work on visioning and citizen engagement.

Forum for the Future provided Oxfordshire Local Nature Partnership with strategic advice to support them to engage landowners in Oxfordshire, contributing to their project on a marketplace for nature recovery in Oxfordshire.

OXFORDSHIRE LOCAL NATURE PARTNERSHIP

The Oxfordshire Local Nature Partnership (OLNP) is an organisation of key partners working together to radically enhance nature, its positive impact on our climate and the priority it is given, helping to make Oxfordshire a county where people and nature thrive. The partnership is interested in financing nature and addressing the insufficient funding for nature recovery, estimated to be a deficit of over £800 million in Oxfordshire.

OLNP are working to develop a delivery framework for natural capital investment in Oxfordshire that has real integrity. This includes developing and supporting a pipeline of projects that can be invested in to enhance ecosystem service provision in the county.

OLNP's [nature finance strategy](#) describes how this market would function, illustrating how the success of the framework and market design depends on it meeting the needs of the various actors who would use it and ensuring that it is accessible so that it operates effectively and efficiently.

Methodology & process

OBJECTIVES

The primary objective of the Strategic Advice project was to support the Oxfordshire Local Nature Partnership team engage landowners across the District to gain their insights into:

- What makes different landowners more or less likely to engage with marketplaces
- Their needs and challenges in managing land for nature recovery and other environmental and social outcomes
- Landowner priorities in managing their land

These insights would be used to collectively develop a landowner driven set of principles for the high integrity framework via an in-person workshop.

The challenges the project addressed were:

- Engaging with local farmers and farmer groups across the District to understand their perspectives.
- Ensuring that the types of outcomes enabled by the framework respond to the needs of sellers who would be using the framework
- Understanding the perspective of smaller landowners and farmer groups to understand how the framework can be accessible and valuable to them.

PROCESS

The project methodology had three stages:

Project Scoping (February 2025)

This first stage involved research into the types of landowners in Oxfordshire and developing an engagement strategy with OLNP that identified landowners to engage in the project and designed the engagement process we would use, considering the types of questions we might ask of interviewees.

Interviews (March – April 2025)

We conducted a series of open, semi-structured interviews with stakeholders who came forward to participate in the project.

Workshop Design (May 2025)

We designed a workshop agenda to refine the interview insights into a set of principles for the high integrity framework. We included an option to pivot to an approach with further interviews if engagement was low.

Following the first round of interviews, the project team assessed that there wasn't sufficient appetite or capacity from the interviewees to justify a full day workshop. The team therefore made the decision not to run the workshop to refine a set of principles following the interviews.

An agenda for such a workshop is included on page 18 of this report, and we also provide some insights and recommendations on how to incentivise greater engagement with landowners in the future.

SCOPING AND RECRUITMENT INSIGHTS

Scoping a high integrity framework

ENGAGEMENT

Following initial research on landowners in Oxfordshire, the team created an engagement plan identifying four groups of potential stakeholders and contacts within those. In those categories, we contacted the following:

Large Estates

- 3 estate managers

Farmers

- 7 farmers
- 1 Equestrian farm

Farm Clusters

- 2 farm clusters

Other organisations

- 4 environmental NGOs / Universities

Of these we were able to interview the following. Noting that two of whom are not in Oxfordshire but on the boundary:

- 3 estate managers
- 5 farmers
- 1 farm cluster
- 1 environmental NGO

Land sizes ranged from 18 acres to 5,000 acres.

5 interviewees owned or managed land that was less than 750 acres and 4 interviewees owned or managed land that was over 1,000 acres.

Of those we interviewed, we noted that 8 of 10 had already started on a journey towards nature friendly farming practices or nature recovery projects on their land and they spoke about the journey that they have been on.

Given the decision to no longer run a workshop, budget was now available to offer interviewees an honorarium to recognise their time and contribution to the project beyond disseminating learnings. In the final stage of outreach, we therefore recontacted three landowners we hadn't heard from and offered them an honorarium for their time in engaging. Unfortunately, this offer still did not elicit a response.

"A lot of people won't connect until they see something tangible that is worth their time."

Interviewee Quote

INTERVIEW INSIGHTS

Interview insights

Forum for the Future gathered interview insights across four themes — the challenges facing landowners; their perceptions of marketplaces; their priorities; and considerations for the framework.

CHALLENGES FACING LANDOWNERS

Farmers who we spoke with were most concerned about:

- Cash flow, profitability and not receiving a fair price for what they grow, necessitating the need to rely on subsidies or run multiple business enterprises.
- The unpredictability of the weather and its impact on their crops and business.
- Animal health and welfare — for instance TB outbreaks and blue tongue.
- Short term government planning and impacts on funding schemes, noting that 3-year cycles aren't long enough to plan for farming or land-use transitions.
- The commoditisation of food and the impact of this on the choices farmers make in how to manage their land. One interviewee noted that net-zero commitments from retailers will have a big influence on the choices that farmers make in the future.

Estate and land managers were concerned about:

- Knowing and accessing advice on how to manage their land for the next 10 years

Interview insights

Forum for the Future gathered interview insights across four themes — the challenges facing landowners; their perceptions of marketplaces; their priorities; and considerations for the framework.

PERCEPTIONS OF MARKETPLACES

Farmers and land managers we spoke with had the following experience of marketplaces:

- Mixed experience with existing measurement tools. Some hadn't used any while others had used everything from AgriCalc, AgriCarbon, and Farm Carbon Toolkit, to Trinity's Sandy and Downforce.
- Many had mapped soil carbon and biodiversity particularly in bird species.
- Many had accessed BPS, CCS, SFI and were either selling or considering BNG credits.

Farmers we spoke with shared:

- Concerns about the calculations used to measure carbon and other environmental outcomes, suggesting they don't currently account for all variables, such as rainfall. There was also a conflicting concern that data needs to be standardised to avoid widely varying results.
- Concerns about the timeframes of schemes and how contracts can be passed on to future tenants (e.g. in BNG agreements or the Countryside Stewardship Scheme).
- At the same time, they stressed the importance of long-term agreements and guaranteed payments. If participants can exit agreements year to year, it risks undermining the scheme's viability.
- Concerns about whether the tasks asked of farmers are realistic and achievable.
- Concerns about covering the upfront costs of baseline surveys, advice, legal fees, etc., which can be hard for smaller farmers to afford.
- A view that payments from the community should stay within Oxfordshire, helping connect people to their food and supporting shorter supply chains as a path to commercial viability.
- The challenge that current environmental schemes support nature protection and restoration at the expense of food production.

Estate and land managers we spoke with shared that:

- Schemes were overwhelming and don't win hearts and minds.
- It is important to ensure that a wide range of people benefit from any proposed social outcomes and that communities and citizens are also engaged in the design of these schemes to inform priorities and outcomes.

Interview insights

Forum for the Future gathered interview insights across four themes — the challenges facing landowners; their perceptions of marketplaces; their priorities; and considerations for the framework.

LANDOWNER PRIORITIES

When asked about their priorities, farmers shared that:

- Farming is under financial pressure and sufficient financial reward / income is needed if food production is not the main output of .
- Farmers need financial support, skilled expertise, and advice to set up projects and measure outcomes. Ideally, they should be subsidised for any loss of production during this phase.
- The framework should be linked to food production. Some interviewees said they would only set aside land for nature recovery if it wasn't productive. Food production should go hand in hand with restoring and protecting nature.
- Projects need to be holistic and not just focused on a single species or outcome, even if all the benefits aren't known in advance.
- Projects should have a local and community focus, with buy-in from local people who can access the benefits.
- Farmers are making decisions that involve ecological, social, and economic outcomes, and weighing the trade-offs in each project.

Estate and land managers we spoke with shared that:

- Social outcome are important but they are hard to design for and the landowner needs to have the final say on decisions.
- All landowners have very differing businesses and priorities making a one-size-fits-all approach challenging. Not all projects are based on food production, and they also often consider peoples connection with nature, health and wellbeing. Each farmer ultimately chooses the approach.
- It's good to be able to show what projects are achieving and highlight the benefits - marketing and PR benefits
- Although some funding sources are controversial, it is often better to take the funding and deliver good outcomes.
- It is critical to offer stability. Long term guarantees including communicating and planning for any foreseen end to the framework will be needed.

Interview insights

Forum for the Future gathered interview insights across four themes — the challenges facing landowners; their perceptions of marketplaces; their priorities; and considerations for the framework.

CONSIDERATIONS FOR THE FRAMEWORK

Further to priorities for the framework, interviewees shared the following suggestions:

- A simple, accessible system is needed that enables communication between projects and funders.
- More can be achieved at the landscape level (with a minimum of 50 farmers) and clusters are a good way of doing this.
- Acknowledging that some decisions span 30 years, there needs to be strong governance mechanisms for sharing risk and benefits over the long-term, particularly between tenants and landowners, and mechanisms to sunset the scheme in a responsible fashion if necessary.
- How ideas are shared is important to consider when building trust and working with trusted partners will be critical. Those buying into the scheme should also have options to be connected to those delivering projects.
- There were mixed views on who should be allowed to buy credits in a nature recovery scheme.
- The framework should not set a minimum land size for sellers.
- Some held the view that nature recovery should be compulsory, and government regulated rather than organised via market mechanisms. Others felt that it should be funded by insurance companies.

"It has to be better than what we are doing now. For me it has to pay at least £2000 per hectare."

Interviewee quote

ANALYSIS AND COMMENTARY

Research analysis and commentary

Key takeaways from the interviews.

INSIGHTS ON FUTURE ENGAGEMENT

Getting broad engagement on the project was challenging. Even where honorariums were offered, landowners were not able or willing to prioritise contributing to the project - which was advertised as "Opportunity to contribute to developing a marketplace for nature recovery in Oxfordshire." Although we were not able to ask **what** deterred engagement it can be inferred that any future engagement should:

- Endeavour to meet farmers where they are rather than asking them to take time out of their day to contribute. ie joining an existing local producer or farmer cluster meeting.
- Frame the opportunity around the benefit that landowners will gain from a marketplace so that the opportunity cost of engaging can be fully considered.
- Utilise and financially reward the experience and knowledge of early adopters who can build trust with other landowners.

Landowners had differing priorities based on their land size and business model. There was no consensus on what the ideal outcomes and measures of success of the marketplace would be.

MOVING TO PRINCIPLES

Moving from landowner and land manager needs to a set of principles is an important part of the engagement process as it will create legitimacy and buy in for the design of the framework. A suggested agenda for moving from themes to principles is outlined on page 18 but given the insights on engagement, this may need to be designed as an agenda that can be run multiple times and then summarised, or via input from a survey.

INTERVIEW THEMES

The interviews uncovered a list of themes relevant to the interviewees. The workshop should validate and expand on these themes, before moving to articulating these as a set of core principles. The themes articulated by interviewees were as follows:

1. **Capacity to engage:** The marketplace needs to account for and be accessible to those with the least capacity to engage.
2. **Landscape approaches:** Working at a landscape level will be required to have impact and create a holistic picture of nature recovery (linked to LNRS).

Research analysis and commentary

Key takeaways from the interviews.

INTERVIEW THEMES - continued

3. **Flexibility of farming models:** The design of the marketplace needs to allow for the difference in types of farming and landownership models, enabling them all to engage in delivering the same outcomes.
4. **Community engagement:** Involving the community will create multiple benefits and will also support the inclusion of social outcomes in project design.
5. **Consistency:** The metrics and conditions (i.e. land size) used in the framework should be consistent with other national/voluntary schemes or tools.
6. **Linking buyers and sellers:** The framework should facilitate communication and connection between landowners (sellers) and buyers.
7. **Trust:** The framework will be most successful where it is developed and managed by trusted local people with good engagement processes and advice provided.
8. **Long-term commitments:** The framework must offer long term guarantees with contracting and governance mechanisms for
 - Contracting with different types of landowners,
 - exiting the framework,
 - sunseting the framework

9. **Upfront support:** The framework should provide a mechanism to financially support the upfront advice, expertise and costs associated with initiating a project.

OTHER CONSIDERATIONS

Further to the nine themes, the engagement and interviews highlighted the following three considerations:

- There was a call from farmers particularly, to consider their ability to earn a decent income from their land while also producing food. Interviewees felt that subsidising their income and meeting the costs of production through nature credits, can perpetuate inequalities in the food system and a mindset where food production and nature restoration is an “either / or” choice.
- There is a lot of activity around marketplaces for ecosystem services and it’s important to avoid duplication. Some considered the role of government in regulating this space in the same way as BNG schemes.
- There was disagreement on whether there should be any restriction or agency to decide who is eligible to purchase nature restoration credits from landowners. This should be explored further with landowners.

Workshop Agenda

Length: 2.5 hours (minimum)
Participants: 10-15 landowners (minimum)

WORKSHOP OBJECTIVE: To provide the opportunity for a diverse range of landowners who will be affected by nature markets in Oxfordshire, to articulate a set of design principles for Nature Markets, informed by their needs and experiences.

SUMMARY AGENDA

Welcome & Introduction - 5 mins
Check-in - 15 mins
Setting the Scene - 20 mins
Exercise: Themes - 30 mins
Break - 15 mins
Exercise: Principles World Cafe - 60 mins
Conclusions & Next Steps - 10 mins

EXERCISE DESCRIPTION

Exercise: Themes

- In pairs: spend 5 mins reviewing the 9 themes and identifying any missing themes
- In plenary: pairs share back and facilitators cluster any new suggestions for themes. (10 min)
- Voting: each person has 3 votes to place on the themes most important to them (5 mins)
- In plenary: facilitators count up votes and share results. Facilitators select the top 6-9 themes for the next round. (10 min)

Exercise: Principles World Cafe

3 x Breakout tables
3 x rounds of 20 mins each
After each round, participants remain seated, and the facilitators rotate between each table.

Round 1: Each breakout table takes a theme. For each theme, try to articulate a series of sentences:

- “As a landowner, I need to...” (“e.g. be able to easily access information”)
- “Therefore, a well-designed nature market would...” (e.g. “have simple guidance and free consulting support...”)

Round 2: The participants review the statements and discuss answers to the following questions:

- Which do you like the most? Which resonate with you?
- Are there any you strongly disagree with? (Facilitator removes option)
- Are there any you think are missing? (Facilitator adds option)

Voting: Each participant has 10 votes. Vote on the statements you feel are most important to capture in the final principles.

Round 3: Each breakout group takes the 2-3 statements with the most votes from the previous round and tries to formulate a draft principle that captures each statement. Combine statements where they overlap or are similar and split statements up where they feel too broad.

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