

Agenda – Culture, Communications, Welsh Language, Sport, and International Relations Committee

Meeting Venue:

Committee Room 3 – Senedd

Meeting date: 16 January 2025

Meeting time: 09.15

For further information contact:

Lleu Williams

Committee Clerk

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Hybrid

Pre-meeting registration

(09.15 – 09.30)

Public

1 Introductions, apologies, substitutions and declarations of interest

(09.30)

2 Scrutiny of the Welsh Government Draft Budget 2025–26: Evidence session with the Cabinet Secretary for Finance and Welsh Language

(09.30 – 10.30)

(Pages 1 – 40)

Mark Drakeford MS, Cabinet Secretary for Finance and Welsh Language

Bethan Webb, Deputy Director Cymraeg 2050

Jeremy Evas, Head, Prosiect 2050

Attached Documents:

Research brief

Letter from the Cabinet Secretary for Finance and Welsh Language – 13



December 2024

Welsh Government written evidence

3 Motion under Standing Order 17.42 to resolve to exclude the public from item 4 of this meeting

(10.30)

Private

**4 Scrutiny of the Welsh Government's Draft Budget 2025–26:
Consideration of evidence**

(10.30 – 10.50)

Break

(10.50 – 11.00)

Public

**5 Scrutiny of the Welsh Government Draft Budget 2025–26:
Evidence session with the Minister for Culture, Skills and Social
Partnership**

(11.00 – 12.15)

(Pages 41 – 111)

Jack Sargeant MS, Minister for Culture, Skills and Social Partnership

Ruth Meadows, Director, Tertiary Education, Welsh Government

Jason Thomas, Director, Tourism, Marketing, Events and Creative Wales –
Welsh Government

Steffan Roberts, Deputy Director Arts and Sport – Welsh Government

Nicky Guy, Deputy Director, Culture – Welsh Government

Attached Documents:

Research brief

Welsh Government written evidence

Annex A

Annex B

Annex C + D

6 Papers to note

(12.15)

6.1 Inter-Institutional Relations Agreement

(Page 112)

Attached Documents:

Copied correspondence from the First Minister to the Chair of the Legislation, Justice and Constitution Committee: Notification of the 42nd Summit meeting of the British-Irish Council – 6 December 2024

6.2 Forward work programme

(Pages 113 – 132)

Attached Documents:

Correspondence from Global Welsh: Copy of its 'Brain drain to brain gain' report – 2 December 2024

Correspondence from Dr Neta Spiro, Reader in Performance Science: Sharing new research and policy recommendations on the role of music in supporting the health and wellbeing of families during the beginning of life – 4 December 2024

6.3 Welsh Government international relations

(Pages 133 – 138)

Attached Documents:

Ministerial International Engagement – November 2024

Letter to the First Minister: Requesting additional information to inform the Committee's international relations work – 23 December 2024

Letter to both the First Minister and the Cabinet Secretary for Economy,

Energy and Planning: Relating to the Welsh Government's planned long-term subsidy investment funding for Cardiff Airport – 23 December 2024

6.4 Royal Welsh College of Music & Drama Junior Department

(Pages 139 – 145)

Attached Documents:

Correspondence from Patricia Keir: Regarding the closure of the Royal Welsh College of Music & Drama's Junior departments – 12 December 2024

Correspondence from Bryony Black: Regarding the closure of the Royal Welsh College of Music & Drama's Junior departments – 17 December 2024

6.5 Welsh Government Draft Budget 2025–26

(Page 146)

Attached Documents:

Copied correspondence from Cymdeithas yr Iaith to the Welsh Government: Regarding the implications of budget cuts to broadcasting – 17 December 2024 (English Translation by Senedd Commission)

6.6 Charging for exhibitions

(Pages 147 – 148)

Attached Documents:

Letter to the Minister for Culture, Skills and Social Partnership: Seeking clarification around charging for visitor experiences and exhibitions by Amgueddfa Cymru – 20 December 2024

6.7 Ministerial scrutiny sessions

(Pages 149 – 151)

Attached Documents:

Letter to the Minister for Culture, Skills and Social Partnership: Seeking further information following the Committee's evidence session with the Minister on 28 November 2024 – 09 January 2025

6.8 Culture and the new relationship with the EU

(Pages 152 – 164)

Attached Documents:

Letter from the Cabinet Secretary for Economy, Energy and Planning:
Providing the Welsh Government's response to the Committee's inquiry
report on culture and the new relationship with the European Union – 10
December 2024

Letter from Sir Chris Bryant MP, Minister for Creative Industries, Arts and
Tourism: Providing the UK Government's response to the Committee's inquiry
report on culture and the new relationship with the European Union – 06
January 2025

**7 Motion under Standing Order 17.42 to resolve to exclude the
public from the remainder of this meeting and for the meeting on
29 January 2025**

(12.15)

Private

**8 Scrutiny of the Welsh Government Draft Budget 2025–26:
Consideration of evidence**

(12.15 – 12.35)

Break

(12.35 – 12.45)

**9 Scrutiny of the Welsh Government's Draft Budget 2025–26: Welsh
Government International Relations Budget briefing and
consideration of evidence**

(12.45 – 13.05)

(Pages 165 – 191)

Attached Documents:

Research brief

Letter from the First Minister and Welsh Government written evidence – 20
December 2024

**10 UK–EU implementation review of the Trade and Cooperation
Agreement: Consideration of consultation responses and next
steps**

(13.05 – 13.15)

(Pages 192 – 208)

[UK–EU implementation review of the Trade and Cooperation Agreement
written consultation responses](#)

Attached Documents:

Research brief

Document is Restricted

Mark Drakeford AS/MS
Ysgrifennydd y Cabinet dros Gyllid a'r Gymraeg
Cabinet Secretary for Finance and Welsh Language



Llywodraeth Cymru
Welsh Government

Our ref: MA/MDFWL/11046/24

Delyth Jewell MS
Chair
Culture, Communications, Welsh Language, Sport, and
International Relations Committee

13 December 2024

Dear Delyth,

Thank you for your letter of 18 November on the scrutiny of the Welsh Government's 2025-26 draft budget which was published on 10 December.

The enclosed paper provides detail on Welsh Language plans set out in draft budget together with further information on specific areas requested by the Committee.

I look forward to providing an update to the Committee at our evidence session on 16 January 2025.

Yours sincerely,

A handwritten signature in black ink that reads "Mark Drakeford".

Mark Drakeford AS/MS
Ysgrifennydd y Cabinet dros Gyllid a'r Gymraeg
Cabinet Secretary for Finance and Welsh Language

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Rydym yn croesawu derbyn gohebiaeth yn Gymraeg. Byddwn yn ateb gohebiaeth a dderbynnir yn Gymraeg yn Gymraeg ac ni fydd gohebu yn Gymraeg yn arwain at oedi.

We welcome receiving correspondence in Welsh. Any correspondence received in Welsh will be answered in Welsh and corresponding in Welsh will not lead to a delay in responding.



Culture, Communications, Welsh Language, Sport, and International Relations Committee

Evidence paper on Draft Budget 2025-26 – Welsh Language Budgets

Evidence session: Thursday 16 January 2025 – 9:15-10:45

This paper provides information to the Culture, Communications, Welsh Language, Sport and International Relations (CCWLSIR) Committee on budget allocations relevant to the Welsh language in proposals outlined in the draft Budget 2025-26, published on 10 December 2024. It also provides an update on specific areas of interest to the Committee.

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1. Commentary on Actions and detail of Budget Expenditure Line (BEL) allocations

The table below summarises the 2025-26 draft budget allocations as relevant to Welsh language policy.

Table 1 Cymraeg 2050 budget allocations 2025-26

Budgets Relating to the Welsh Language – Summary	2025-26					
	2024-25 Final Budget Restated (Sept 2024)	Baseline changes	Revised Baseline	Additional Allocations	Other Changes	Draft Budget (Dec 2024)
	£000s					
Central Services & Administration (CSA) MEG						
Fiscal resource (revenue)	37,157	76	37,233	4,596	50	41,879
Non-Fiscal resource (non-cash)	121	0	121	26	-9	138
Resource Total - CSA MEG	37,278	76	37,354	4,622	41	42,017
Education MEG						
Fiscal resource (revenue)	16,211	7	16,218	19	-1,100 ¹	15,137
Resource Total - Education MEG	16,211	7	16,218	19	-1,100	15,137
Total Resource - Cymraeg 2050	53,489	83	53,572	4,641	-1,059	57,154
Central Services & Administration MEG						
Capital	50	0	50	0	0	50
Total Capital - CSA MEG	50	0	50	0	0	50
Total – Cymraeg 2050	53,539	83	53,622	4,641	-1,059	57,204

This information is consistent with the budgets presented to the Committee last year, although budget lines are now split across two MEGs: the Education MEG (Welsh in Education and Cymraeg 2050 (LAEG) BELs) and the Central Services and Administration (CSA) MEG (Welsh Language and Welsh Language Commissioner BELs) following the Cabinet changes announced in September. Whilst excluded from the *Cymraeg 2050* budgets presented above, it is recognised that other BELs within the Education MEG (including the Education Infrastructure BEL and Teacher Development and Support BEL) and BELs across other Ministerial portfolios also support Welsh language policy delivery (see Other information section).

The total indicative budget for *Cymraeg 2050* as presented above stands at **£57.2m** for 2025-26, which includes fiscal resource (revenue) of £57.016m, non-fiscal resource (non-cash) of £0.138m and capital of £0.05m. Across both MEGs, this represents an increase of £3.5m on resource (6.7%), however this increase is impacted by the transfer of £1.1m within the Education MEG (see footnote 1). Taking the CSA MEG alone, there is an increase in

¹ Reflects an administrative transfer to the Teacher Development and Support BEL within the Education MEG to develop and deliver national professional learning for Welsh-medium practitioners and to develop the language skills of all practitioners.

resource of nearly £4.7m (12.5% increase) for 2025-26 when compared to the revised baseline for 2025-26.

As requested by the Committee, a detailed breakdown of 2025-26 draft budget allocations, together with 2023-24 final outturn and 2024-25 forecast outturn (as at Period 6) by MEG, Action and BEL is attached at [Annex A](#). This confirms the final outturn in 2023-24 for *Cymraeg 2050* budgets within the previous Education and Welsh Language MEG of just under £49m, together with a forecast for this financial year of £54m.

The revised baseline used for the 2025-26 Draft Budget is the 2024-25 Final Budget (restated September 2024) adjusted for recurring baseline adjustments for 2024-25 to support 2024-25 public sector pay award and increases to pension contributions from April 2024 due to a change in rate called Superannuation Contributions Adjusted for Past Experience (SCAPE). This has resulted in baseline changes for 2025-26 for the Welsh Language Commissioner, Adnodd and *Cymraeg 2050* staff.

Welsh Language BEL

The purpose of the Welsh language BEL (within the CSA MEG) is to support the delivery of *Cymraeg 2050* in relation to Theme 2 and 3 of *Cymraeg 2050* – to increase language use and to secure the best conditions and infrastructure to deliver the strategy. The indicative budget for the Welsh Language BEL is **£38.534m** in 2025-26. This represents a cash increase of £4.55m (13.4%) in 2025-26 when compared to the revised baseline.

The funding in this BEL support activities to deliver *Cymraeg 2050*, including funding for key stakeholders to:

- deliver Welsh language training through the National Centre for Learning Welsh (NCLW);
- the Coleg Cymraeg Cenedlaethol, following the transfer of this budget from the Welsh in Education BEL as part of the Cabinet restructure;
- Eisteddfod Genedlaethol Cymru and Urdd Gobaith Cymru;
- increase the use of Welsh, through grants to key partners including: the network of Mentrau Iaith and Papurau Bro (Welsh-medium community newspapers); Merched y Wawr; Cymdeithas Eisteddfodau Cymru; Cymdeithas Cyfieithwyr Cymru; and the Young Farmers Clubs Movement;
- *Cymraeg i Blant* (*Cymraeg for Kids*) via Mudiad Meithrin to support parents, prospective parents and other family members in using Welsh at home, transmit Welsh to their children, and to support children's linguistic development in a social and educational context;
- deliver the Welsh Language Technology Action Plan;
- national activities related to the Siarter Iaith which supports and promotes the informal use of Welsh amongst school-age children (with £0.5m now in *Cymraeg (2050)* LAEG BEL);
- *the* Welsh Language Communities Housing Plan; and
- research, evaluation and marketing in respect of the strategy.

We need the collective support of our partners to achieve our *Cymraeg 2050* goals. Of the increase to the BEL, £3.5m relates to the reinstatement of funding reprioritised to reserves as part of last year's budget. This will be used to provide stability across the entire Welsh language sector to ensure that infrastructure is maintained, which is critical to support the Welsh Language and Education (Wales) Bill and the [recommendations](#) of the

Commission for Welsh-speaking Communities. A further £1m will be used to support existing commitments against the BEL, including support for Welsh language technology and the Urdd's National Youth Theatre. The budget also reflects the £0.05m recurrent transfer in from the Education MEG to fund Welsh language digital support for the FE sector via the Coleg Cymraeg Cenedlaethol. Further details on allocations to stakeholders is outlined in the 'Specific Areas' section of the paper.

Welsh Language Commissioner BEL

This budget (within the CSA MEG) supports the Welsh Language Commissioner, with further detail provided in the 'Welsh Language Commissioner' section.

Welsh in Education BEL

The Welsh in Education BEL (within the Education MEG) supports delivery of Theme 1 related to Welsh-medium and Welsh language education within *Cymraeg 2050*. The indicative budget for 2025-26 is **£6.537m**, a small increase (£0.019m) from the revised baseline specifically in relation to Adnodd, to provide them with additional support for the next round of public sector pay awards in 2025-26. The BEL supports:

- funding for Mudiad Meithrin to increase Welsh-medium childcare provision as a pathway into Welsh-medium education;
- the continuation of funding for the e-sgol programme (£0.6m per annum);
- the implementation of the 10-year Welsh in Education Strategic Plans (WESPs); and
- Adnodd, which became operational on 1 April 2023, responsible for commissioning bilingual teaching and learning resources in support of the curriculum and its qualifications.

Cymraeg 2050 (LAEG) BEL

The Cymraeg 2050 (LAEG) BEL was established from 2024-25 as part our new grant approach for pre-16 education grants with the creation of the Local Authority Education Grant (LAEG), delivering on our Programme for Government commitment to reduce the administrative burden on local authorities. This strand of the grant combines funding for the Welsh in Education Grant, Professional Learning, late immersion provision and the Siarter Iaith, and will support delivery of the forthcoming Welsh Language and Education (Wales) Bill.

Whilst the budget reduces by £1.1m to £8.6m in 2025-26, this reduction relates wholly to an administrative transfer to the Teacher Development and Support BEL within the Education MEG. In October 2024, the Cabinet Secretary for Education announced her intention to bring together the current functions of the National Academy for Education Leadership and some of the functions of the regional consortia and local authority partnerships into a national body. This body will be responsible for designing and delivering professional learning and leadership support on a national level in response to changing practitioner and Welsh Government priorities. As a result, the £1.1m will still support professional learning for Welsh-medium practitioners and develop the language skills of all practitioners, but instead be allocated to develop and deliver national professional learning.

2. Other Information

Information on how spending and delivery of the Welsh language portfolio is monitored and evaluated to demonstrate value for money.

In terms of value for money, clarity over how we use our resources effectively is central to delivering the priorities set out in *Cymraeg 2050: A million Welsh speakers* and the Programme for Government. Once expenditure is planned in line with my priorities, I have well-established processes in place to ensure that resources are used effectively for the purposes intended. The governance and monitoring procedures in place reflect the nature of our relationships with delivery partners.

Progress against the [Cymraeg 2050 Work Programme for 2021 to 2026](#) is monitored annually through a process which includes the publication of an annual [Action Plan](#) at the beginning of the financial year, followed by an [Annual Report](#) at the year end to report back on the actions detailed in the Action Plan. Regular reviews to monitor expenditure and outcomes are undertaken to ensure that any available resources are reprioritised to deliver the strategy.

The Welsh Language Partnership Council plays a role in advising on progress towards the 2050 targets and the efficacy of our programmes and interventions. The Cymraeg 2050 Programme Board within the Welsh Government is tasked with assessing risks and identifying steps to mitigate them and mainstreams the strategy in each of the Government's policy areas.

Information on allocations (and their location) in your portfolio, as well as allocations in other Ministerial portfolios that directly impact on Welsh language policy delivery and support Cymraeg 2050 targets. This should include information on how the Cabinet Secretary plans to monitor the impact of spending decisions across ministerial policy areas.

Since launching *Cymraeg 2050*, we have been working towards a series of milestones to achieve our targets of a million Welsh speakers and doubling daily use of Welsh by 2050. We follow a trajectory that was developed based on the 2011 Census. At the outset, we committed to pause once we had the 2021 Census results in order to take stock and review our work plans and the trajectory to reach a million Welsh speakers as necessary. We are now considering the Census data alongside other sources of information for example the Annual Population Survey to ensure that we remain on track with our aim of doubling the daily use of our language and reaching a million Welsh speakers by 2050.

Following the 2024-25 draft budget scrutiny session with the Minister for Education and Welsh Language on 11 January 2024, the Committee requested further information on the budgets across government departments that are contributing to *Cymraeg 2050*. The response issued to the Committee on 5 March 2024 outlined that *Cymraeg 2050* is mainstreamed into all Welsh Government portfolio areas and there is already expenditure on the language embedded in delivery within many other ministerial portfolios, including health, housing and early years. It therefore recognised that it is not possible to identify total spending on the Welsh language across Welsh Government given the intrinsic nature of funding. For example, the culture and arts sector contributes to the delivery of *Cymraeg 2050* and information on the allocations for this sector is set out in the Minister for Culture, Skills and Social Partnership's evidence paper to this Committee. *Cymraeg 2050* officials

stay in close contact with colleagues across Government to monitor the impact of spending decisions on *Cymraeg 2050*.

Information on how, if at all, the review of the Welsh Government's Grant Scheme to promote and facilitate the use of the Welsh language has impacted on allocations for 2025-26.

The review of the grant scheme to promote and facilitate the use of the Welsh language, provided an insight and evaluation of the grant processes currently in place by the *Cymraeg 2050* Division. Consideration of the findings and recommendations of the review is ongoing. The review highlighted the need for a longer funding period. Currently the grant is allocated on a yearly basis, and work will be undertaken in 2025-26 to examine the possibility of extending grant allocations for up to three years.

In addition, our regular discussions with grant partners have concluded that the financial challenges they face because of not receiving inflationary increases are negatively impacting their ability to retain staff and to fully implement their work programmes.

As a result of the uplift to the Welsh Language budget, we propose that partners receiving grants to promote and facilitate the use of the Welsh language receive a minimum 5% uplift in 2025-26. In addition, some organisations will receive additional support to help increase their impact on the *Cymraeg 2050* objectives. For example, we propose that the minimum grant allocation to the mentrau iaith will increase from £60k to £100k.

Commentary on commitments in the Welsh Government's Programme for Government in relation to the Welsh language, and an outline of current or provisional funding implications for these specific commitments:

Many of the Programme for Government commitments relating to the delivery of *Cymraeg 2050* are detailed throughout this paper for example:

- Create a Welsh Language Communities Housing Plan.
- Expand the Pupils Immersion Programme.

Below, we include additional information on some of the specific commitments requested by the Committee.

- Increasing apprenticeships in care and recruiting more Welsh speakers.

The main source of funding is the mainstream allocations for apprenticeship provider. Aligned to the wider post-16 delivery network, apprenticeship providers have been impacted by increasing costs over recent years. In response to these pressures, framework values increased by 5% in 2022/23 and 2023/24 and by 3.5% in 2024/25.

For 2024-25, we are investing £144m in the apprenticeship programme. This budget should enable us to maintain the number of targeted apprenticeships starts for young people during this Senedd Term. For 2025-26 draft budget we have maintained our investment in our apprenticeship programme at £144m.

The apprenticeship programme supports delivery via the medium of Welsh or bilingually. The funding model applies an uplift for apprenticeship provision delivered bilingually or through the medium of Welsh and apprenticeship providers have targets to increase delivery in priority sectors, including Health and Social Care, Childcare, Construction and Agriculture.

The role of the Coleg Cymraeg Cenedlaethol has been expanded to provide targeted support for the further education and apprenticeship sectors. As a result of our additional investment in 2022-23 and 2023-24, the Coleg Cymraeg Cenedlaethol has provided funding for 21 assessors in priority apprenticeship sectors including Health and Social Care, Childcare, Business, Creative Arts and Hospitality.

The additional posts funded by the Coleg should lead to a continued growth in the numbers of apprenticeship learners accessing Welsh-medium or bilingual provision as part of their apprenticeship programme. We will be regularly monitoring the number of apprenticeships starts during this financial year; albeit we do not expect to have a full picture until year end.

The National Centre for Learning Welsh's Cymraeg Gwaith (Work Welsh) programme provides dedicated support for learners in the Health and Social Care and Childcare Sectors to Learn Welsh and improve their Welsh language skills. Further information on the Cymraeg Gwaith programme is set out under the 'Specific areas' section below.

- Legislation to strengthen and increase our Welsh language education provision.

There is no specific ring-fenced funding for implementing the Welsh Language and Education (Wales) Bill, with costs being met from existing BELs within the Education MEG and the Central Services and Administration MEG.

The implementation of the Bill is a long term policy aim to contribute to the target of a million Welsh speakers by 2050. Costs associated with this Bill will fall at different points between Royal Assent (expected in Summer 2025) and 2050 and I, along with other Ministers, will be required to make financial decisions during that time frame.

A Regulatory Impact Assessment (RIA) detailing the costs and benefits arising from the provisions of the Bill was laid before the Senedd upon the introduction of the Bill on 15 July 2024. This set out total costs associated with the legislation of £103m over the 10 year appraisal period from 2025-26, which includes costs for the Welsh Government, local authorities, schools, Estyn and the National Institute for Learning Welsh, which will be established by the Bill. In line with the RIA, it is our assessment that the Bill will be affordable over the appraisal period.

- Implementing Welsh Language standards on public transport, health sector regulators, newly established public bodies, & water companies & begin work on implementing standards on housing associations.

During this Senedd term, Welsh Language Standards Regulations have already been approved for healthcare regulators and for water and sewerage undertakers who provide services to members of the public in Wales. In addition, legislation establishing the Corporate Joint Committees and Medr (the Commission for Tertiary Education and Research) has also included these bodies within existing Regulations.

Draft regulations to add more bodies to existing standards regulations were consulted upon earlier this year, and Regulations will be laid before the Senedd early in 2025. We are continuing to work through the standards programme outlined in the Programme for Government and are currently undertaking policy work to prepare standards for housing

associations. Subsequently, we will move on to preparing regulations for public transport providers.

The costs for the Welsh Language Commissioner of implementing these regulations will need to be met from the Commissioner's resource budget. The RIA, which will accompany the Statutory Instrument, will outline any financial implications of the regulations on the bodies subject to them.

- Supporting an increase in Welsh speaking spaces, including workplaces.

The National Centre for Learning Welsh

The National Centre's Cymraeg Gwaith (Work Welsh) programme provides courses ranging from online self-study taster courses to intensive learning courses. As well as increasing the number of Welsh speakers and Welsh language use, Cymraeg Gwaith also allows organisations to provide better Welsh language services to their users.

The strength of the Cymraeg Gwaith programme is its ability to respond to the needs of a diverse range of employers and workplaces. The Scheme has expanded in recent years to include a new Cymraeg Gwaith Academy, which is a dedicated resource to support employers. As a result, increasing numbers have been reached, leading to wider engagement and use of Welsh in workplaces across Wales. In 2023-24, 578 employers were supported under the Cymraeg Gwaith scheme.

2023-24 also saw the launch of a dedicated programme for workers in the Health and Care Sector. The National Centre has worked in partnership with local health boards to establish schemes to increase the Welsh language skills of the NHS Wales workforce, including the Codi Hyder scheme which aims to build confidence amongst NHS staff. During 2023-24, 1,514 employees were supported to develop their skills under the Health and Care Sector programme.

In addition to the support outlined for education practitioners (see 'Specific areas' section below), our funding to the National Centre for Learning Welsh also supports a range of interventions for the post-16 workforce, including the Cymraeg Gwaith scheme delivered in conjunction with the Coleg Cymraeg Cenedlaethol. During 2023-24, 901 practitioners were supported to develop their skills, with 7 universities and 11 further education colleges committing to the scheme. A further 212 practitioners followed self-study courses with the help of a tutor.

The increase to the Welsh Language BEL in 2025-26 will support an uplift in the funding we provide to the National Centre. It is proposed that £2.625m will be allocated within the Welsh Language BEL in 2025-26 to support the Cymraeg Gwaith scheme, a 5% increase of £0.125m on the funding allocated for 2024-25. A further £1.758m will be allocated to the National Centre to support the Ymlaen Gyda'r Dysgu scheme, which provides free Welsh language lessons for young people aged 16-25 and the education workforce. This is in addition to the £1.1m which will be allocated from the Teacher Development and Support BEL in 2025-26 (see 'Specific areas' section below).

Cwmpas

During 2024-25, we have allocated funding of up to £0.35m to Cwmpas to continue their work of supporting people to establish new Welsh language spaces, i.e. cooperatives that encourage the use of the Welsh language at a community level. More information regarding Perthyn is in section 3 under the *Welsh Language Communities Housing Plan*. Out of the £0.35m allocated to Cwmpas, £0.15m provides a specialist advisory and support service to community groups, whilst the remaining £0.2m provides a small grant scheme to help develop new social enterprises and cooperatives. For 2025-26, in line with the proposed minimum 5% uplift for our grant partners, it is proposed that funding for the Cwmpas advisory and support element increases from £150,000 to £157,500.

We have continued to fund (£67,000) Bangor University to develop the ARFer programme – a behavioural pledge programme, which encourages Welsh speakers to use their language more frequently in the workplace. Bangor University have also received funding to develop an app to facilitate wider adoption of the programme thereby contributing to the creation of more bilingual and Welsh language workplaces.

Our ‘Leading in a Bilingual Country’ programme, which promotes the integration of *Cymraeg 2050* values and practices into organisational culture, has ended its pilot phase and we will launch a 5-year iteration of the programme in 2025-26. It’s a joint programme between Academi Wales and the *Cymraeg 2050* Division to an estimated sum of £380,000 over 5 years, subject to a forthcoming procurement procedure.

Welsh Government

In terms of the Welsh Government itself as a workplace, our internal Welsh language strategy *Cymraeg. It belongs to us all*, commits us to becoming a truly bilingual organisation by 2050. Since we published the strategy in 2020, we have:

- transformed how we offer Welsh learning to staff, by offering a more extensive and flexible programme, with methodologies to suit different learning styles.
- as a result, we have seen a 758% increase in staff pursuing formal learning at work (from 73 in 2020 to 627 learners in 2024),
- focused on leadership in the Senior Civil Service and getting senior leaders to model exemplar behaviour in their use of the Welsh language with staff; and
- revised exactly how we recruit in terms of Welsh language requirements, emphasising that Welsh language skills are an asset to working in the Welsh Government no matter what the role.

3. Specific Areas

Updates on allocations in the 2024-25 budget

An analysis of the impact of budget reductions across Ministerial departments on policy delivery and initiatives aimed at meeting Cymraeg 2050 targets.

The UK Government's budget on 30 October provided a much welcome investment for Wales, with our settlement being £1.7bn higher over 2024-25 and 2025-26. The additional funding allocated to Wales through the UK Budget has meant that all Ministerial portfolios have received an uplift in funding for 2025-26 to support our Government priorities. I am not aware of any budget reductions for 2025-26 across other Ministerial portfolios which will impact on delivery of our *Cymraeg 2050* targets.

Grant allocations from the Welsh Language BEL for key stakeholders that promote and support the Welsh language, including Mentrau Iaith Cymru, yr Urdd and the National Eisteddfod for 2024-25 and allocations to these stakeholders over the past 5 financial years.

The increased funding to the Welsh Language BEL will support all our grant partners, with a proposed minimum uplift in funding of 5% for 2025-26. This will provide support to these organisations to manage inflationary cost pressures and make plans for a pay award in 2025-26.

Mentrau Iaith

The annual core grant allocations for the network of mentrau iaith is £2.368m and has remained the same over the last five years. The grant allocation is distributed between 22 local mentrau iaith as well as funding for Mentrau Iaith Cymru, the umbrella organisation for the mentrau iaith. In 2022-23, an additional one off payment of 4% was provided to the mentrau iaith to help with inflationary pressures and wage increases. The mentrau iaith provides a wide range of activities to support the language in the community. These activities are usually developed after a language profile exercise has been undertaken to determine the linguistic needs of their local areas. The funding allocations for individual mentrau iaith range from £0.060m to £0.160m, with the minimum grant expected to increase to £0.1m from 2025-26. The total funding in 2025-26 for the mentrau iaith is expected to increase by £0.428m.

Eisteddfod Genedlaethol Cymru

Since 2020, Eisteddfod Genedlaethol Cymru (National Eisteddfod for Wales) has received revenue funding in excess of £1m per annum. Prior to this five-year period, the National Eisteddfod received approximately £0.6m per annum. The significant increase in investment has not only ensured that the Eisteddfod was able to fully recover from the pandemic, but also allowed it to expand its artistic programme and the reach of its community engagement activities that happen all year round. The strengthening of the organisation's structures has allowed it to forge new partnerships and deepen its work within each Eisteddfod area. The Eisteddfod also acts as a producer and catalyst for broader Welsh-medium arts and cultural activities, all while bringing Welsh communities closer to the language and supporting the delivery of *Cymraeg 2050*. We also provided the Eisteddfod with £0.640m in capital funding

in 2021-22 to strengthen the festival's infrastructure. In recent years, we have also supported the National Eisteddfod in broadening the festival's reach and accessibility by offering funded tickets free of charge for low-income families. The sum has varied year on year depending on the budget available and the needs of the local community. In addition to a proposed uplift of 5% for 2025-26, a further £0.2m is also proposed next financial year to support free entry to low-income families to widen access to new audiences to the language.

Urdd Gobaith Cymru

The Urdd is recognised as an integral partner in delivering *Cymraeg 2050*. Since 2020-21, the Urdd's core grant from the Welsh Government has increased from £0.990m to £2.4m per annum. Additionally, in 2022-23, we committed to providing an additional £0.2m per annum for 5 years for the Urdd to re-establish their National Youth Theatre, Y Cwmni up to the end of 2026-27. Over recent years, the Welsh Government has also funded the Urdd to support the government's international strategy. The Welsh Government's investment is used by the Urdd to provide a range of unique and dynamic opportunities for children and young people across Wales to use the Welsh language and to experience the language as a vibrant cultural component of Welsh life. The Urdd's gwersylloedd (residential camps) have also received significant capital funding from the Welsh Government in recent years; from the redevelopment of Pentre Ifan in Pembrokeshire to the opening of a new residential wing, canteen, and activity space at Llangrannog. For many children, their visit to the Urdd's gwersylloedd will be the first time they stay away from home independently, with Welsh culture and the language at the heart of their visits. Similar to the National Eisteddfod, the Welsh Government has also supported the Urdd Eisteddfod in broadening the reach and accessibility of the Eisteddfod by providing a grant to allow the Urdd to offer tickets free of charge for eligible families to enjoy what the Urdd Eisteddfod has to offer. In addition to a proposed uplift of 5% for 2025-26, a further £0.2m is also proposed next financial year to support free entry to low-income families to widen access to new audiences to the language.

Coleg Cymraeg Cenedlaethol

The core grant allocations the Coleg Cymraeg Cenedlaethol for the past 5 financial years are shown below.

Table 2: Coleg Cymraeg Cenedlaethol - Core Grant Allocations from 2020-21

BEL	2020-21	2021-22	2022-23	2023-24	2024-25	Total
Welsh Language					£9,888,000	£9,888,000
Welsh in Education	£6,370,333	£7,303,000	£8,513,000	£9,838,000		£32,024,333
Total	£6,370,333	£7,303,000	£8,513,000	£9,838,000	£9,888,000	£41,912,333

The Coleg's core funding supports its higher education programme and its Welsh-medium scholarship scheme. In higher education, its funding directly supports Welsh-medium provision across universities and subject areas, with essential support provided through Coleg branches to lecturers, staff development and publications.

In the post-16 sector, the funding supports the delivery of the Coleg's Further Education and Apprenticeship Welsh-medium Action Plan, which provides development grants in priority areas including Health and Social Care, Agriculture, Childcare and Public Services.

Within its core funding, the Coleg provides training and mentoring through Sgiliaith, to enable tutors and assessors to gain confidence in teaching bilingually and support for the apprenticeship sector. Additional grant funding from other areas is provided for digital and other resource development, the ambassador project and support for developing Welsh as a subject and Welsh-medium teachers.

In 2024-25, additional funding provided under the Co-operation Agreement was maintained at 2023-24 levels, with £2.825m provided to the Coleg and £1.675m to the National Centre for Learning Welsh. Maintaining the budget at 2023-24 levels allowed us to reprioritising funding to protect core services to support our ambitions for *Cymraeg 2050*. In particular, we were able to maintain funding linked to the Welsh Language and Education (Wales) Bill, Mudiad Meithrin and the Welsh in Education budget to support Welsh language delivery.

As a result of our additional investment in 2022-23 and 2023-24, the Coleg has provided funding for additional practitioners in the FE sector as well as assessors in priority apprenticeship sectors including Health and Social Care, Childcare, Business, Creative Arts and Hospitality.

The draft budget for 2025-26 includes a proposed allocation of £10.382m for the Coleg Cymraeg Cenedlaethol, which includes an increase of £0.494m for front-line delivery. This additional funding will allow the Coleg to re-start the work of extending provision by expanding its programme of development grants for further education colleges and apprenticeship providers.

The National Centre for Learning Welsh

The National Centre's core grant allocations for the past 5 financial years are shown below.

Table 3: National Centre for Learning Welsh - Core Grant Allocations from 2020-21

BEL	2020-21	2021-22	2022-23	2023-24	2024-25	Total
Welsh Language	£6,216,525	£10,337,100	£13,465,000	£14,885,000	£14,885,000	£59,788,625
Welsh in Education	£5,686,475	£2,913,000				£8,599,475
Total	£11,903,000	£13,250,100	£13,465,000	£14,885,000	£14,885,000	£68,388,100

The draft budget for 2025-26 includes a proposed allocation of £15.629m for the National Centre. This is an increase of £0.744m (5%) on its allocation for 2024-25 and is broken down as follows:

Cymraeg Gwaith (Work Welsh)	£2,625,000
Ymlaen Gyda'r Dysgu (additional funding supporting provision for 16-25 year olds and education workforce)	£1,758,750
Operational Grant (running costs of the Centre)	£1,995,000
Recurrent Grant (grants for Learn Welsh providers)	£9,250,500
Total	£15,629,250

The National Centre's Recurrent Grant supports its mainstream Learn Welsh delivery through its network of 11 course providers across Wales. The number of people learning Welsh with the National Centre continues to increase and additional funding of £0.450m has been allocated for 2025-26 to support this delivery.

£2.625m will be allocated within the Welsh Language BEL in 2025-26 to support the Cymraeg Gwaith scheme, this represents an increase of £0.125m or 5% on the funding allocated for 2024-25.

The £1.759m for Ymlaen Gyda'r Dysgu builds on the additional funding provided under the Co-operation Agreement in 2024-25 and will be used to further extend provision for 16-25 year olds and the education workforce in order to provide free access to Welsh courses. As part of the offer, eligible learners aged 18 and over will be able to access the mainstream Learn Welsh courses in the community. Provisional data indicates that 1,633 young learners accessed provision during 2023-24.

The National Centre began offering free courses for teachers and other workers in the education sector in September 2022 and the additional funding has enabled the Centre to extend this provision for 2023-24. Provisional data from the National Centre shows that 1,613 individuals accessed provision during 2023-24. A further £1.1m will be allocated from the Teacher Development and Support BEL in 2025-26 to provide Welsh language learning for education practitioners. Further information on this allocation is set below.

Details on funding allocations in 2024-25 to develop Welsh language skills and capacity of the education workforce, and how the 2024-25 budget impacted on the work to deliver an increase in the number of teachers who can teach Welsh as a subject and teach through the medium of Welsh.

Within the Cabinet Secretary for Education's portfolio, there is funding available within the Teacher Development and Support BEL to support the implementation of our 10-year Welsh in education workforce plan. The total funding available in 2025-26 is £8.72m.

Approximately £3.8m will be prioritised to support the aims of the plan and will be mainly targeted at increasing the number of Welsh-medium teachers. Funding will be prioritised for the following activities:

- continuation of the primary to secondary conversion programme;
- continuation of the grants to schools to develop innovative solutions to addressing teacher shortages;
- funding to support the viability of Welsh A Level provision in schools and FE Colleges;
- the third year of the teacher retention bursary; and
- funding for CYDAG to support collaboration across Welsh-medium schools in a number of policy areas.

The Coleg Cymraeg Cenedlaethol will continue to allocate £0.150m from their grant (Welsh Language BEL) in 2025-26 to develop two specific projects to continue to:

- deliver the Addysgu'r Dyfodol project to provide mentoring for undergraduate learners to support them to prepare for ITE through the medium of Welsh; and
- develop the Cadw Cyswllt network to engage with Welsh-speaking graduates studying in England and promote opportunities for them to return to Wales to prepare to teach.

Professional learning is a key feature of our approach to strengthening Welsh-medium teaching capacity and supporting practitioners to develop their Welsh language skills in line with the Professional Standards for Teaching and Leadership. We are working with our partners to ensure that practitioners are identified and supported to engage with professional learning in order to improve the teaching of Welsh in English-medium schools and to support all schools to move along a continuum.

Approximately £3.8m will be allocated within the Teacher Development and Support BEL in 2025-26 to the Sabbatical Scheme to deliver intensive Welsh language and language teaching methodology professional learning for practitioners. Courses are available on a range of levels for teaching assistants and teachers. The majority of this budget funds the supply costs related with releasing practitioners from schools to undertake the courses.

Funding allocated to the National Centre for Learning Welsh also delivers access to free Welsh language lessons to all education practitioners. During 2025-26, the Centre will continue to develop new bespoke provision to meet the needs of the sector. For example, a pilot course for secondary teachers in English-medium schools with some Welsh will be developed to be delivered flexibly and a short on-line confidence / 'gloywi' course for those teaching in a range of settings. £1.1m will be allocated from the Teacher Development and Support BEL in 2025-26 to support this work. This is an additional £0.5m in 2025-26 and is funded through the transfer out from the Cymraeg 2050 strand of the LAEG.

£5.9m will be allocated to LAs as part of the Cymraeg 2050 strand of the LAEG to support the delivery of local authority Welsh in Education Strategic Plans (WESPs) and the ambitions of the Welsh Language and Education (Wales) Bill. This funding includes £1.4m for professional learning and £4.5m for the Welsh in Education Grant (WEG), which was re-established in 2023-24 following discussions with local authorities. With 30% match funding from LAs, the total value of the WEG is £5.85m.

We recently published an updated data analysis document that sits alongside the Welsh in education workforce plan. We are making some progress in supporting the increase in Welsh-medium teachers and to develop the Welsh language skills of practitioners, however, the impact of a number of the activities funded need to be measured on a medium to long-term basis. Over the next year, we will continue to monitor the immediate uptake in the funded activities and will also be working closer with local authorities to analyse the data on a local level to understand key trends and priorities to inform the National Framework proposed in the Welsh Language and Education (Wales) Bill and revised targets.

An analysis of take-up and expenditure on the Iaith Athrawon Yfory scheme, as well as other schemes to incentivise people to enter the Welsh-medium teaching profession.

The Iaith Athrawon Yfory incentive scheme provides a £5,000 grant to students who undertake an eligible secondary postgraduate initial teacher education (ITE) programme enabling them to teach through the medium of Welsh. The scheme is available to both full-time and part-time students. The incentive payments totalling £5,000 is made in 2 instalments:

- £2,500 on successful completion of an eligible PGCE and the award of QTS.
- £2,500 on successful completion of induction in Wales (in a Welsh-medium secondary school or in any maintained secondary school if teaching Welsh as a subject)

Table 4 provides a summary of claimants and expenditure to date.

Table 4: Iaith Athrawon Yfory incentive scheme expenditure

Academic Year	QTS Payment instalment Claimants	Induction Payment instalment Claimants	Spend to date
AY2018/19	60	45	£140,000
AY2019/20	95	80*	£435,000*
AY2020/21	130	110*	£597,500*
AY2021/22	105	85*	£470,000*
AY2022/23	75	50*	£317,500*
AY2023/24	85		£215,000*
Total Claimants	550	Total spend to date	£2,174,500

Table notes:

- Claimant numbers rounded to the nearest 5.
- Only claimants who received a QTS payment instalment are eligible for the Induction payment instalment. In addition, to be eligible for the induction payment instalment, the teacher should have completed their statutory induction period working in a Welsh-medium or bilingual setting or in teaching Welsh as a subject in an English medium setting.
- * denotes that this figure is subject to change as the deadline for claiming the induction instalment has not passed (correct as of 25th November 2024)

The Priority Subject incentive scheme provides a £15,000 grant to students who study on a postgraduate ITE programme in specific subjects (priority subjects). The priority subjects include Welsh as a subject. The scheme is available to both full-time and part-time students. The incentive payments totalling £15,000 is made in 3 instalments for full-time students, or 4 instalments for part-time students paid at the following points during their ITE programme and early career:

Full-time students only:

- £6,000 following completion of the first term of the PGCE.

Part-time students only:

- £3,000 following completion of the first term of the PGCE.
- £3,000 following completion the first year and the first term of the second year of the PGCE.

Both Full-time and Part-time students:

- £6,000 on successful completion of the PGCE and award of QTS.
- £3,000 on successful completion of induction in a maintained setting in Wales

Eligible individuals can avail themselves of each of Welsh Government's incentive schemes. In academic year 2024/25 and next academic year 2025/26, a total amount of £25,000 is available to those that meet the requirements of all three schemes:

- Priority Subject Incentive scheme (£15,000)
- Iaith Athrawon Yfory scheme (£5,000)
- Minority Ethnic Incentive scheme (£5,000)

An update on grant allocations in support of the Welsh Language Communities Housing Plan, and an assessment on spend, impact and value of specific grants such

as Perthyn for initiatives that support the Welsh language in communities across Wales.

Creating a *Welsh Language Communities Housing Plan* is one of the priorities of the Programme for Government. It was published in October 2022 and includes a number of interventions to support communities and address issues related to affordability, second homes and the Welsh language.

For 2024-25, a budget of £0.560m has been earmarked for the *Welsh Language Communities Housing Plan* as follows:

Perthyn

Cwmpas has been responsible for delivering Perthyn since 2022. It is a project aimed at providing support to Welsh-speaking communities with high numbers of second homes to develop social enterprises, community-led housing and Community Land Trusts. We allocated up to £0.350m to Cwmpas to deliver both elements of the project in 2024-25:

- The 'Perthyn Small Grants' scheme (£0.2m):
The small grant scheme is available to support Welsh-speaking communities with a high number of second homes to turn ideas into viable social enterprises. The response to the consultation on the *Welsh Language Communities Housing Plan* showed the need for a small pot of revenue funding to help communities develop their ideas to support their social, economic and linguistic needs. The total grant allocations available to each group is £10,000. To date, the Perthyn small grant scheme has supported a total of 47 community groups. Up to 16 community projects will receive financial support through the Perthyn small grants during 2024-25.
- A bespoke advice and support service (£0.15m):
The bespoke advice and support element of Perthyn is to support specific community groups to turn their ideas into viable social enterprises and community-led housing projects. The core element of this project is to help empower communities to develop solutions to the social, economic and linguistic challenges they are facing. This is done by providing an early-stage advisory service. Since establishing this project, we have seen new community groups being established as well as individuals becoming effective community leaders.

A further £0.210m is available to support other projects within the *Welsh Language Communities Housing Plan* (including research and evaluation of the plan) including the Commission for Welsh speaking communities, Cultural Ambassadors and the 'Fair Change Scheme'.

An update on grant allocations to support the Arfor 2 scheme, and any recent evaluation of impact and value for money.

Arfor funding for this financial year is £7m, with £2m of that being capital. The primary purpose of ARFOR 2 is to support the communities that are strongholds of the Welsh language to flourish through economic interventions that will also contribute to increasing opportunities to see and use the Welsh language daily basis in Ynys Môn, Gwynedd, Ceredigion and Carmarthenshire.

The ARFOR 2 programme has sought to build on the experience of the earlier pilot programme and the independent evaluation undertaken of it, whilst also complementing

existing or planned interventions which are of relevance. The following strategic objectives were agreed for the ARFOR 2 programme which aims to:

- create opportunities for young people and families (35 years old or younger) to stay in or return to their local communities - supporting them to succeed locally through enterprise or developing a career and ensuring a livelihood that meets their aspirations;
- create enterprising communities - supporting commercial and community enterprises that aim to preserve and increase local wealth;
- maximise the benefits of collaborative activity – by establishing a mindset of learning by doing and continuous improvement, learning from an activity in one area to extend it to other areas; and
- strengthen the identity of communities with a high percentage of Welsh speakers - by supporting the use of the Welsh language and ensuring it is more visible, whilst emphasizing what is common across the region.

The programme comprises of five key elements:

- Llwyddo'n Lleol (Succeeding Locally)
- Cymunedau Mentrus (Enterprising Communities)
- Cronfa Her ARFOR (ARFOR Challenge Fund)
- Bwrlwm ARFOR
- Independent evaluation / Lessons Learnt

The programme is currently in delivery and the ongoing evaluation has yet to conclude. Discussions are taking place with partners regarding the future of the programme and the opportunities for mainstreaming the learning from it.

4. Welsh Language Commissioner

Allocations and commentary in respect of the budget allocation for the Welsh Language Commissioner in 2025-26, including any additional revenue or capital funding provided.

In line with Welsh Government planning assumptions, and to ensure a cross-government approach to funding of our Commissioners, we have uplifted the revenue budget for the Welsh Language Commissioner by 3% (£0.096m) to support funding the next round of public sector pay awards in 2025-26. We have also baselined into 2025-26 funding for public sector pay and increased pension costs in 2024-25 totalling £0.060m. This provides a total revenue budget for the Commissioner of £3.345m for 2025-26.

There have been no changes to the Commissioner's capital budget which remains at £0.050m for 2025-26.

The Commissioner's non-cash budget has increased by £0.017m to £0.138m in 2025-26, which reflects additional funding for the implementation of the accounting standards for leases IFRS16 (£0.026m) and to support depreciation costs as outlined in the Commissioner's estimate (-£0.09m).

Commentary on how the Commissioner's budget estimate for the financial year is reflected in the draft budget.

The Commissioner submitted a Financial Estimate for 2025-26 to Welsh Ministers on 23 October. I have examined the Estimate, and it was laid in the Senedd on 10 December.

The 2025-26 Estimate requested an additional revenue allocation of £60,000 to the 2024-25 allocation of £3.189m, bringing her revenue budget for 2025-25 to £3.249m. This was to fund increased employer pension contributions and the pay award. In this instance, I am pleased to be able to award the Commissioner an allocation of £3.345m.

5. Capital Expenditure in relation to the Welsh Language

Progress on expanding capacity and opening of new Welsh-medium schools, the distribution of the Welsh Medium Capital Grant and progress to date across local authorities in Wales.

Details of any other capital expenditure to support and promote the Welsh language.

The Welsh-medium capital budget is funded from the Education Infrastructure BEL of the Education MEG. Its aim is to increase capacity in Welsh-medium schools, establish new Welsh-medium provision, support late immersion provision as well as support learners of all ages to improve their skills and confidence in Welsh.

A Welsh-medium capital funding grant was established in 2018 to support *Cymraeg 2050* and WESP implementation. Over £128m of Welsh-medium capital funding has been approved to date to increase Welsh-medium education provision across Wales.

This funding aims to increase the capacity of Welsh-medium schools, establish new Welsh-medium provision and support Welsh-medium late immersion provision as well as helping learners of all ages improve their skills and confidence in Welsh.

There are commitments in the WESP to open 23 new Welsh-medium schools and expand 25 that already exist. Since 2022, Band B investment and the Welsh-medium Capital Grant have supported 39 projects to increase Welsh-medium provision across Wales, including:

- 14 new schools have opened or been relocated to increase their capacity to accept more learners.
- 25 projects to expand Welsh-medium provision have been completed which also include some childcare projects.

The next phase of the Sustainable Communities for Learning Programme is designed to go hand in hand with the 10-year Welsh in Education Strategic Plans. Careful collaboration has taken place with Sustainable Communities for Learning Programme officials to ensure that plans for the 9-year Rolling Programme reflect the requirements and targets of the 10-year WESP. All authorities' schemes have been approved, except for Torfaen, who haven't submitted their scheme yet.

Future Welsh-medium Capital Grant funding will be targeted to fund priority areas such as Additional Learning Needs (ALN), immersion, temporary expansion and adult education.

It is important that when we consider local authorities' school planning proposals, that we continue to look at the bigger picture, e.g. the impact of moving or introducing new Welsh-medium education provision on a local community; travel needs; suitable Welsh-medium nursery provision. All of these matters need to be considered and examined carefully to assess their impact on Welsh-medium education.

6. Summary

The budgets as relevant to the Welsh language in Draft Budget for 2025-26 is presented to the Committee for consideration.

Mark Drakeford MS

Cabinet Secretary for Finance and Welsh Language

7. Annexes

Annex A – Budgets relating to the Welsh Language breakdown by Action and BEL for 2023-24, 2024-25 and 2025-26

Resource

		2023-24	2024-25			2025-26							
Action	BEL Description	2023-24 Final Outturn	2024-25 Final Budget (June 2024)	2024-25 1st Supp Budget (Oct 2024)	Forecast Outturn (Period 6)	2024-25 Final Budget Restated Sept 2024	Baseline changes	Revised Baseline	Transfers to/from other MEGs	Transfers Within MEG	Additional Allocations from Reserves	Transfers to Reserves	Draft Budget (Dec 2024)
£000s													
Central Services & Administration MEG													
Welsh Language	Welsh Language	26,271	33,968	33,925	33,925	33,968	16	33,984	50	0	4,500	0	38,534
	Welsh Language Commissioner	3,279	3,189	3,183	3,183	3,189	60	3,249	0	0	96	0	3,345
	Welsh Language Commissioner - Non Cash	187	121	147	147	121	0	121	0	0	26	-9	138
Total Welsh Language BEL (CSA MEG)		29,737	37,278	37,255	37,255	37,278	76	37,354	50	0	4,622	-9	42,017
Education MEG													
Pre-16 Education LA Support	Cymraeg 2050 (LAEG)	0	9,700	9,880	9,880	9,700	0	9,700	0	-1,100	0	0	8,600
Total Pre-16 Education LA Support BEL (Education MEG)		0	9,700	9,880	9,880	9,700	0	9,700	0	-1,100	0	0	8,600
Welsh in Education	Welsh in Education	19,238	6,511	6,424	6,865	6,511	7	6,518	0	0	19	0	6,537
	Welsh in Education - Non Cash	4	0	0	0	0	0	0	0	0	0	0	0
Total Welsh in Education BEL (Education MEG)		19,242	6,511	6,424	6,865	6,511	7	6,518	0	0	19	0	6,537
TOTAL BUDGETS RELATING TO THE WELSH LANGUAGE		48,979	53,489	53,559	54,000	53,489	83	53,572	50	-1,100	4,641	-9	57,154

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Capital

		2023-24	2024-25			2025-26							
Action	BEL Description	Final Outturn	Final Budget (Sept 2024)	1st Supp Budget (Oct 2024)	Forecast Outturn (Period 6)	2024-25 Final Budget Restated Sept 2024	Baseline Adjustments	Revised Baseline	Transfers to/from other MEGs	Transfers Within MEG	Additional Allocations from Reserves	Transfers to Reserves	Draft Budget (Dec 2024)
£000s													
Central Services & Administration MEG													
Welsh Language	Welsh Language Commissioner	94	50	50	50	50	0	50	0	0	0	0	50
Total Welsh Language Commissioner BEL (CSA MEG)		94	50	50	50	50	0	50	0	0	0	0	50
Education MEG													
Welsh in Education	Welsh in Education	13	0	0	0	0	0	0	0	0	0	0	0
Total Welsh in Education BEL (Education MEG)		13	0	0	0	0	0	0	0	0	0	0	0
TOTAL BUDGETS RELATING TO THE WELSH LANGUAGE		107	50	50	50	50	0	50	0	0	0	0	50

Document is Restricted



Culture, Communications, Welsh Language, Sport, and International Relations Committee

Welsh Government Draft Budget 2025-26

16 January 2025

Culture, Sport and Heritage Budgets 2025-26

This paper provides information on the decisions taken in setting the Culture, Sport and Heritage Budgets within the Economy, Energy and Planning MEG for the 2025-26 Financial Year.

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1. Budget Overview

As part of the 2025-26 Draft Budget £5m revenue has been allocated to priorities in this area along with a further £18.4m in capital allocations.

1. Our **cultural, heritage and sport sectors**, particularly our arm's length bodies (ALBs) and Cadw, have been critical in supporting local, regional and national economies, communities and supporting our agenda to tackle inequalities, particularly racial inequalities and enabling greater access to communities across Wales. They provide great places for people to live, visit, work and study. Funding through our cultural and sporting bodies benefits the lives of children and young people, who are active consumers and contributors to arts, heritage and the cultural sector. Through this Draft Budget I have allocated an **additional £5m revenue and £18.4m capital** to culture, heritage and sport activities.
2. Of the additional revenue provided, **£3.8m** has been allocated to uplift revenue budgets across cultural, heritage and sport bodies allowing these organisations to manage inflationary cost pressures, make plans for a public sector pay award in 2025-26 and to contribute to the ongoing running costs of **Celf**. A further £1.2m revenue has been allocated to the Local Culture and Sport budget. An allocation of £0.2m of this represents a comparable uplift for local museums, archives and libraries development agency function delivered in-house by Culture Division, including the staff funded to deliver key activities and programmes.
3. The wider inflationary pressures which drive up costs for cultural, heritage and sport bodies also impact on the value of services, salaries and outputs supported by the grants Culture Division manages in its development agency role. The remaining **£1m** will be used to take forward actions under the **Priorities for Culture** (focusing on key areas highlighted in the consultation such as access to culture and collections, the cultural workforce and responding to the climate and nature emergencies, whilst delivering outcomes supporting the Prif Weinidog's Priorities), and to support delivery of Celf - National Contemporary Art Gallery for Wales at nine galleries. This restores part of the funding lost through the 2024-25 Final Budget which impacted our ability to take forward our Priorities for Culture in 2024-25. We will also continue to deliver our statutory and development agency functions and commitments to support an anti-racist Wales.
4. Within the additional **£18.4m capital allocation for culture, heritage and sport, £8.1m** will be allocated in 2025-26 to the cultural capital programme which significantly addresses geographic inequalities by enabling access to our national collection especially closer to where people live, work and visit. Widening access to, enjoyment and understanding of culture, sport and the historic environment for people of all backgrounds is a priority. Infrastructure investment promoting cultural activities will support mental health and well-being and ensure greater access for people across Wales closer to their homes.
5. The **cultural capital investment programme** includes major developments in north Wales including Theatr Clwyd in Mold, the Football Museum for Wales in Wrexham and the National Slate Museum in Llanberis, and across the country via Celf and the

Transformation Grants for local museums, libraries and archive services. These investments significantly increase the opportunities for people across Wales and help to support the Welsh language.

6. The allocation of an **additional £8.1m** will enable an increase in activity in the following areas:
 - To increase investment to support **Priorities for Culture** capital projects. This will be used to accelerate capital investment to protect the buildings and capital assets our local museums, archives and libraries rely on, in particular supporting decarbonisation by reducing energy consumption. The funding will also support digitisation, digital preservation, investment in capital assets needed to explore opportunities in Artificial Intelligence for our sectors and potentially digital support centres. Investment may include digital display equipment to allow the digitised national collection to be accessed from more venues locally for example through Celf ar y Cyd, as well as expanding the digital collection through the addition of locally held assets and provide funding for cultural venues to support the installation of credit card donation boxes to increase donations to support the sector. This will include funding to develop and commence implementation in 2025-26 of a records and digitisation programme. This will aim to improve standards of document preservation and access, along with developing solutions for future needs and reducing costs.
 - Increasing capital investment in **Amgueddfa Cymru** during 2025-26, to support the much needed and overdue capital investment in sites across the estate, including, but not limited to, the work required at National Museum Cardiff and for the National Slate Museum. Amgueddfa Cymru is one of our national treasures and this will show a real commitment from Welsh Government to help address the significant investment needed for redressing the lack of investment and making improvements across its sites. This will help ensure that the sites are safe to the public, that the national collections in Amgueddfa's care are safe, and that the historical sites and buildings across their estate are cared for using the appropriate skills and techniques.
7. The Wellbeing of Future Generations Act includes the goal to create a healthier Wales, and a society in which people's physical and mental well-being is maximised. Recognising the preventative power of sport and physical activity in relation to health and wellbeing, we will reinforce our Programme for Government commitment to use capital funding to invest in facilities, particularly focused in more disadvantaged areas. In doing so, we will promote equal access to sport and tackle inequality in all its forms. A further **£2m**, bringing the total investment to £10m, is being invested in sports facilities through **Sport Wales** in this budget.
8. In 2025-26, I have allocated a further **£6.3m** to **Cadw's** capital budget to invest in the historic environment that contributes strongly to the economic well-being of Wales and of its communities. The funding includes support for the second phase of the development of Caerphilly Castle as a world class heritage destination which is integral to **Caerphilly Town 2035** regeneration. The additional investment will also help to conserve Cadw's wider historic estate and the grant programme for wider historic sites at risk – allowing them to contribute to wider economic and social outcomes. Investment also supports the Priorities for Culture and the Tourism strategy **Welcome to Wales: priorities for the visitor economy 2020 to 2025**.

9. Various studies have shown that engaging with heritage, whether through visiting historic sites, volunteering, or participating in heritage-related activities, can have several positive impacts on both individual and community wellbeing. The capital investment will contribute to growing audiences and promoting wellbeing through widening access to, enjoyment and understanding of the historic environment for people of all backgrounds.
10. The table below provides high level information on the changes made through the 2025-26 Draft Budget. A breakdown at BEL level is provided at Annex A. Annex B includes explanations at BEL level.
11. 2025-26 baseline adjustments will baseline allocations due to be made at the Second Supplementary Budget of 2024-25 to provide additional financial support to meet the impacts of the 2024-25 pay award and the additional costs as a result of the changes to the SCAPE discount rates which have impacted unfunded public sector pension schemes since the change was enacted in April 2024. A baseline adjustment has also been made to Financial Transaction Capital budgets to budget for the repayments due on outstanding loans in 2025-26.

Culture, Heritage & Sport					
Budget Expenditure Line	2024-25 Final Budget Restated	2025-26 Baseline Adjustments*	2025-26 Revised Baseline	Changes Draft Budget 2025-26	2025-26 Draft Budget
	(A)	(B)	(C = A + B)	(D)	(E = C + D)
	£000s	£000s	£000s	£000s	£000s
Near Cash	111,816	1,071	112,887	4,999	117,886
Non Cash	10,162	0	10,162	2,028	12,190
Total Resource	121,978	1,071	123,049	7,027	130,076
Capital	55,366	0	55,366	18,421	73,787
FT Capital	-1,231	1,231	0	-500	-500
Total Capital	54,135	1,231	55,366	17,921	73,287
Total	176,113	2,302	178,415	24,948	203,363
AME	20,000	0	20,000	4,000	24,000

Value for Money

12. Clarity over how we use our resources effectively is central to delivering our priorities. Since being appointed the Minister for Culture, Skills and Social Partnership in September I am excited about the positive developments we have in progress and I am extremely passionate for the portfolio. This despite the challenging context of the past 12 months.
13. The policy areas within my portfolio reach across many aspects of government and have the potential to make profound and lasting change to the lives of people and communities across Wales. 'Culture', 'Heritage', 'Creative' and 'Sport' are essential components of our national life and are an integral part of our individual and collective identity and well-being. Museums, archives, libraries, theatres, music venues, sports clubs, and historic sites are often the focal point for many communities throughout Wales.
14. I want to be ambitious about ensuring people from more deprived communities have access to culture and to challenge our cultural institutions to ask what they are doing to achieve this. Arts, culture and creative industries broaden the mind and bring with them so many opportunities in life.

15. I am keen for the employment opportunities created by the huge growth in these sectors to be open to everyone.
16. Since being appointed as Minister I have regularly stressed that every person in Wales has the right to access, create, participate in, and see themselves reflected in the cultural and sporting activity of our nation. We all recognise that these have been tough times and that years of austerity damaged our cultural as well as social fabric. As we build the foundations of recovery, we must remember the benefits of delivering growth should be done inclusively by ensuring that everyone can access and benefit from our wonderful cultural and sporting scene.
17. Sectors within my portfolio make a significant contribution to wider social outcomes including community cohesion, mental health and wellbeing. I am very clear that my portfolio can contribute positively to the First Minister's four priorities. Examples include:
 - **Iechyd Da** - Alongside continued investment in sports facilities and improving access to sport, research shows that culture, the arts and our historic environment has a positive impact on people's health and well-being. The Culture and Sport ALBs, local sector museums, archives and libraries and Cadw deliver a range of activities to support positive mental health and wellbeing including Cadw's award-winning volunteering programme, as a partner in the Hapus project, social prescribing, Arts, Health and Wellbeing in Wales and House of Memories Cymru to support dementia. The Books Council of Wales supports the delivery of the Reading Well scheme and makes an important contribution to our health and wellbeing objectives. Creative Wales is working with priority sectors to improve health and wellbeing in creative workplaces, through the Wellbeing Facilitators project and the alignment of funding mechanisms to the Economic Contract wellbeing pillar.
 - **Green jobs and Growth** - Our ALBs play a vital leadership role in tackling all aspects of the climate and nature emergencies by helping the public engage through exhibitions and supporting our cultural organisations and sports clubs to become more energy efficient and enhance biodiversity. Cadw leads research into the impact of climate change on historic assets and is helping to develop National Occupational Standards, retrofit qualifications and training materials for those working in the renewable energy sector. Through its own work programmes and capital grants, Cadw provides work for skilled conservation practitioners. Creative Wales continues to work closely with key partners to deliver against the recommendations in the Screen New Deal Transformation Plan for Wales, to support a sustainable future for the Welsh production sector.
 - **Opportunity for every family** - Education is at the heart of the work our ALBs, local museums, libraries and archives undertake, both in terms of formal and informal lifelong learning. For example, Amgueddfa Cymru is the biggest delivery body of education outside the school system in Wales and alongside investment in the local library network, we also fund literacy schemes including the Summer Reading Challenge. On housing, the skills developed on Cadw capital projects are transferrable and can be applied to the thousands of traditional buildings which make up a high percentage of our national housing stock. In publishing, the Books Council's work on the promotion of reading and the provision of books and educational resources plays an important part in improving literary standards and educational attainment. Creative Wales is supporting a range of projects to develop skills and talent, in an inclusive, open and accessible way.
 - **Connecting Communities** - Some responses to the Priorities for Culture consultation stress the importance of transport in relation to access to culture – this will inform

implementation. Cadw brings communities together by making its historic sites available free of charge for community events, many sites are located at the heart of communities and are therefore ideal locations for local events. Local libraries are now regarded as community hubs in many areas and are therefore crucial in bringing communities together. Creative Wales' support for the broadcasting and independent screen sector makes an important contribution to social cohesion and inclusion, connecting people from different backgrounds, as well as building a sense of national identity and belonging.

18. Once expenditure is planned in line with my priorities, I have well-established processes in place to ensure that resources are used effectively for the purposes intended. The governance and monitoring procedures in place reflect the nature of our relationships with delivery partners.
19. Key priorities for each ALB are set out in their remit letters, which they use as a basis for their operational plans and key performance indicators. I meet at least biannually with each of the organisations, and officials formally monitor progress against their operational plans at quarterly meetings and more regularly through close working relationships with the senior executive teams at the arm's length bodies. At the invitation of the bodies, officials also attend Board meetings as observers, allowing Welsh Government to maintain a good overview of potential issues. Monthly grant in aid claims are scrutinised to ensure that progress is being achieved against specified lines of expenditure.
20. Major projects and activity are monitored using Welsh Government's Business Information Report Tool. Each major project has governance arrangements in place related to the specific project. These are frequently reviewed to ensure they reflect the stage of the project. Major capital investments are supported by business cases which are scrutinised to ensure they are robust. This includes a range of Welsh Government officials and independent review via gateway reviews. Smaller capital and revenue grants and contracts are awarded based on either an open application process or a direct commission. They are monitored by officials throughout the project life cycle, with agreed deliverables and check in points.
21. An Evidence Plan presents the research, evaluation, and data collection projects that the Culture Division is either undertaking or committed to. It is updated yearly, based on discussions with staff and wider stakeholders, to ensure activity is supporting key divisional priorities and Programme for Government commitments.
22. For Cadw, all complex high value capital projects are subject to project governance, which includes key gateway decisions and major changes subject to assessment by the Cadw Capital Programme Board for approval. Individual projects must demonstrate value for money as well as deliver measurable benefits aligned with Cadw and Welsh Government objectives. Cadw is also supported by an independent Board with non-executive members which meets quarterly to scrutinise Cadw's performance against its business plan and financial reporting and provide challenge and advice.
23. There are processes in place for Creative Wales funding schemes, to assess applications against criteria covering economic impact as well as delivery against broader thematic priorities. Monitoring arrangements are in place, during delivery and post completion, to assess achievements against intended outputs. An independent evaluation of the Creative Wales production funding is underway to assess its impact. In addition, Creative Wales is in the process of commissioning an evaluation of its development funds across the screen, digital and music sectors and skills function.

Preventative Spend

24. I recognise the on-going need to make hard choices. The continuing pressure on public finances and on the level of funding available to this area, more specifically, mean I am under no illusions on the challenges we face.
25. These budget proposals reflect my continuing commitment to protect and prioritise investment that supports preventative measures as far as possible. The spending decisions have not only considered how best to meet the current demand for services but have also focused on supporting interventions that are able to prevent problems arising in the future. This preventative approach is an important part of our planning for public services, both now and in the future.
26. Heritage and culture contributes to individuals' and communities sense of belonging, cultural identity and social cohesion. Capital investment decisions recognise the connection with mental health and well-being and the positive contribution for health expenditure. For example, investment in Neath Abbey is in partnership with the local authority and intended to maximise the opportunities for community recreation and wellbeing. The Abbey has developed strong links with the schools through their Young Custodians programme.
27. Investment in Cadw's monuments includes measures to adapt to climate change and change the way greenspace is managed to improve biodiversity and help respond to the nature emergency.
28. From the outset of my Budget preparations, I have focused on how best to meet the growing needs of key service areas within my portfolio in the face of another challenging budget. Over successive years, prioritising preventative spending has been a way of avoiding more costly interventions at a future point and improving the quality of people's lives over the long term.

Health and wellbeing

29. The importance of culture to promoting positive wellbeing and physical health was dramatically underlined by the pandemic, and again this year in relation to the sector response to the rising costs of living. Culture and heritage provide an outlet for many during these difficult and uncertain times, and our sector always demonstrates innovative and creative responses to supporting individual and community well-being.
30. Some examples of how our sectors have delivered preventative policies and programmes in 2024-25 include:
 - Maintaining warm hubs in libraries, including beyond the initial funding period.
 - Providing books on prescription through the 'Reading Well' scheme.
 - Developing the House of Memories Cymru app which uses museum collections to support people living with dementia.
 - Undertaking a demonstrator project based on the 'Change Minds' methodology to engage people with poor mental health with archive collections
 - Supporting #Crowd Cymru project to enable remote volunteering opportunities

- Through our investment in sporting facilities, we are increasing participation rates in sport and using the preventative power of sport to support the health and wellbeing agenda
 - Continuing with the Arts Council of Wales partnership with Health Boards to provide a range of tailored programmes to support well-being.
 - Supporting the framework for Social Prescribing through tailored volunteer programmes.
 - Active participation and engagement in heritage programmes.
31. 2025-26 looks challenging in terms of the financial flexibility available to our sectors to support preventative activity outside of their core purposes, but the focus on well-being, and on delivering a number of Welsh Government policy priorities such as ArWAP, the LGBTQ+ Action Plan, the Age-Friendly Wales strategy, and tackling loneliness and isolation are already deeply embedded in day-to-day activity.
32. Examples of projects that we envisage will be funded directly in 2025-26 include extending the books on prescription offer in collaboration with Child and Adolescent Mental Health Services (CAHMS) and The Reading Agency, which will include a new booklist supporting perinatal and postnatal health and wellbeing. Evaluation of books on prescription is undertaken by the Reading Agency as part of the grant monitoring.
33. The Fusion programme in 2025-26 will engage with individuals and communities in areas of deprivation. The new Priorities for Culture will offer a fresh strategic lens for the Fusion programme's operational planning in 2025-26.
34. Sport can be a very effective preventative health tool, but greater cross-sector prioritisation is needed to create the long-term sustainable shifts in participation. The Healthy and Active Fund and Healthy Weight: Healthy Wales Delivery Plan are two recent examples of success in this area. We are also investing in facilities through our education and communities' budgets. Sport Wales will continue to invest funding and resource in the Welsh Government's 'Healthy Weight: Healthy Wales' delivery plan, including the delivery of the 60+ Active Leisure scheme.
35. The creative industries play an important role in supporting health and wellbeing and positive outcomes. The Books Council of Wales' Reading Well scheme and its work on the promotion of reading and the provision of books and educational resources plays an important part in improving literary standards and educational attainment. In the screen sector, Creative Wales' support for the broadcasting and independent sector makes an important contribution to social cohesion and inclusion, connecting people from different backgrounds, as well as building a sense of national identity and belonging. Creative Wales is working with priority sectors to improve health and wellbeing in creative workplaces, through the Wellbeing Facilitators project and the alignment of funding mechanisms to the Economic Contract wellbeing pillar, as well as supporting a range of projects to develop skills and talent, in an inclusive, open and accessible way.

Legislation

36. Assessing the costs of legislation and the impact on those it affects is an essential part of the policy development process. I recognise there cannot be a blank cheque for legislation and that every new commitment in this area will have to be paid for by a cutback somewhere else.
37. This is why every bill is subject to a robust assessment of costs and benefits, achieved through consultation and engagement with our stakeholders in the development of the regulatory impact assessments prepared for Government Bills. This is to ensure our decisions are informed by the people who will be affected by them.
38. Steps are being taken to improve the clarity and consistency of RIAs but changes to the bill during scrutiny and other factors will inevitably result in some variances between estimated costs at the published RIA stage and actual costs during implementation. In accordance with the commitment given by the Cabinet Secretary for Finance and Welsh Language to the Finance Committee, a table showing the cost of implementing legislation proposed by the Welsh Government is included in the Budget Narrative document published on 10 December. There are no implementation costs associated with any legislation in this area for 2025-26.

Financial context

39. Cadw significantly benefited from EU funding to develop visitor infrastructure of monuments in west and north Wales. Whilst Cadw is not able to benefit directly from the UK Government's Shared Prosperity Fund we continue to work closely with our partners. The opportunities to joint fund programmes and projects and lever external funding is becoming more important to achieve shared outcomes, for example, at Neath Abbey. The Transforming Towns Initiative has opened up opportunities for funding, either directly for heritage projects or for projects that compliment heritage initiatives – for example the Placemaking Plan [Caerphilly 2035](#) is being delivered alongside the capital investment at Caerphilly Castle.
40. Visitor numbers are key to the achievement of financial sustainability in Cadw. Compared to 2022, the volume of trips taken in Wales in 2023 was 3% lower, whilst expenditure was 7% higher. The decrease in annual trip volume for 2023 is driven by a sharp decrease in trips taken during the fourth quarter of the year. However, international tourism to Wales is forecast to return to pre-pandemic levels in 2025. Anecdotal evidence suggests amongst other factors, lower disposable income caused by the cost of living crisis and bad weather have affected performance across the UK.
41. The Creative Europe programme has been superseded by the Global Screen Fund (GSF) which has run since 2021, with a budget of circa £7m per annum. While a small number of Welsh businesses have benefited from this programme, the overall benefit to Wales is limited. The UK Global Screen Fund continues to provide updates on regional activity and awards and have also held briefing session in Wales, However the devolved nations have raised concerns about their limited involvement in the programme delivery. There has been no direct replacement to date for the Creative Europe cultural sub-programme and that the

Welsh Government continues to engage with Department for Culture, Media and Sport and other devolved nations to raise issues and identify options for support for the sector.

42. Sectors across the creative industries continue to be affected by increasing costs and decreasing budgets. This includes broadcasters and Film and TV productions concerned that increased costs and inflationary issues are adding to existing budget challenges and wider impacts on trainees on screen productions who are struggling with the cost of living. The publishing sector is also being affected by increasing costs related to energy prices and the cost of materials, as is the music sector, which is also being hit by reducing revenues linked to changing trends in audience behaviour and reduced rates relief for venues.
43. The latest Museum Spotlight Survey (2022) indicated that *museum visitor levels overall have recovered to 69% of pre Covid-19 levels. National Trust, independent and university museums are at over 80% recovery.* In 2023-24 there were 1.56m visits across all Amgueddfa Cymru sites, which exceeded their yearly target of 1.46m visitors and represents an increase of 260,000 from 22-23.
44. Energy costs continue to cause significant concern. Since the cost-of-living crisis started, officials have been made aware of impacts such as local museums reducing opening hours, closing throughout the winter period, significantly decreasing heating levels on site, and increasing charges for services.. Some museums are also looking at the potential for redundancies. Many are not recruiting to vacant posts, even senior and crucial posts in the organisation.
45. Concerns are being expressed regarding knock-on impacts on the mental health and well-being of volunteers, community participants and visitors (many of whom are vulnerable) not being able to spend time at the museum due to cold or the cost of travel.
46. In February 2024, the Welsh Government undertook an evaluation of the impact of the Cost of Living grant fund. The main purpose of the evaluation was to assess the impact of the Fund on grant recipients and to determine the continued impact of ongoing economic pressure and rising costs on the wider museum and library sector. The evaluation found that the majority of grant recipients felt that the grant support provided was sufficient to help them manage inflationary pressures. All grant recipients confirmed that their organisation or service was still operating, which suggests the overarching objective of the Fund to support eligible organisations over the grant period has been achieved.

Priorities for Culture

47. An extended public consultation exercise was undertaken during the summer of 2024 on the draft Priorities for Culture. We received 376 responses, with good representation from sector stakeholders, individuals and community representatives. The Summary of Responses report will be published shortly.
48. The consultation findings indicated majority support for all the published draft Priorities and supporting ambitions. The more detailed feedback is proving useful in determining where we would like to focus our initial efforts in 2025-26.
49. Responses suggested that draft ambition 19 relating to the workforce, and draft ambition 20, relating to sector decarbonisation and responding to the climate and nature emergencies were challenging. Collections care and access to collections and to cultural

services more broadly were other areas of concern. These findings will feed into operational planning and underpin our budget spend for 2025-26.

Arm's Length Bodies

50. Welsh Government ALBs have a responsibility to support the delivery of our priorities, as agreed in their remit letters, and contribute to the goals set out in the Well-being and Future Generations (Wales) Act 2015. The culture and sport ALB remit letters cover the current term of government, from 2021-2026. In them, I have outlined our priorities and commitments to the people of Wales and set out our 'shared goals' for each ALB to consider in delivering their objectives. Alongside these shared goals, the remit letters outline other areas where the individual ALBs can contribute to delivering the Programme for Government.
51. Officials have reviewed the expectations set out in the culture and sport ALBs' remit letters and, following discussions with the organisations themselves, concluded their remit letters contain sufficient flexibility for each ALB to continue to deliver to it within their own operational plans. The remit letters continue to aptly set out our broad expectations for this term of government and provides strategic context. However, in light of the budget reduction they each received in 2024-25 as well as the recent reduction in their staffing numbers, I fully appreciate that more realistic objectives need to be set in relation to what the ALBs are able to deliver. In July 2024, officials asked each of the culture and sport ALBs to prepare or review its operational plan for 2024-25, demonstrating how it would deliver against the areas outlined in their remit letter. In doing so, my officials asked the ALBs to consider the good progress already made during this term of government as well as their budget for 2024-25.
52. The proposed budget allocations for the culture ALBs outlined in the Draft Budget for 2025-26 are more positive than those included in the 2024-25 budget. However, I acknowledge the ongoing impact of the reductions made in 2024-25. Therefore, as the ALBs work on their operational plans for 2025-26, officials will continue to discuss with them realistic expectations for how they can deliver against their remit letters during the next financial year.

2. Cadw

As part of this Draft Budget, I have increased Cadw's revenue budget by £0.43m and have increased their capital budget by £6.3m.

53. Cadw is prioritising its statutory responsibilities undertaken on behalf of the Welsh Ministers to maintain, conserve and provide safe public access to the 131 historic Properties in Care. It is also prioritising its statutory regulatory role in the identification, designation and management of historic places of national importance so that they are provided with adequate protection for future generations. In 2025-26 the additional revenue of £0.43m will support pay, revenue generating activities for public engagement and inflationary pressures in maintaining and conserving the monuments.
54. In 2025-26, a further £6.3m capital above the baseline will enable investment in the historic environment for future generations, contributing to the economic well-being of Wales and of its communities. The funding includes support for the second phase of the development of Caerphilly Castle and investment in the ICT infrastructure at Cadw visitor centres and conservation depots. It will also help to conserve Cadw's wider historic estate and the grant programme for wider historic sites at risk in partnership with other heritage organisations – allowing them to contribute to wider economic and social outcomes. Investment also supports the Priorities for Culture and the Tourism strategy Welcome to Wales: priorities for the visitor economy 2020 to 2025.

Income Generation

55. Income generation is central to the financial sustainability of Cadw. The Draft Budget Plan in 2025-26 is predicated on an increased income target of 5% to achieve the target of £11.42m commercial income.
56. Alongside the revenue uplift, the income target will support many of the inflationary pressures that Cadw continues to face particularly on pay, public engagement and conservation to ensure our sites remain safe and well maintained to welcome visitors. However, the great majority of Cadw monuments will continue to be free.
57. Capital investment for conservation of monuments, health and safety measures and visitor facilities is an important priority in enhancing the Cadw offer and ability to generate income. The additional capital investment of £6.3m above the £10m baseline includes provision to continue to develop Caerphilly Castle as a world class heritage destination supporting the Caerphilly Town 2035 regeneration. This will contribute to growing audiences and promoting wellbeing through widening access to, enjoyment and understanding of the historic environment for people of all backgrounds.

Historic Assets

58. For 2025-26 the budget to support historic assets makes provision for existing grant projects, pipeline projects in development and special grants to respond to significant conservation concerns at high profile industrial heritage assets. There are more than 30,000 listed buildings and 4,200 scheduled monuments in Wales, the majority of which are in private ownership. These heritage assets range from prehistoric monuments to 20th century buildings all of which play a role in defining our cities, towns, villages and landscapes today. They are also an important legacy for future generations.
59. The listing of a building or the scheduling of a monument brings no automatic entitlement to grant assistance. As with any building, the maintenance liability is a matter for the owner. However, it is recognised that sometimes conservation interventions are needed to ensure that assets can be protected and maintained for the benefit of communities today and in the future. Cadw undertakes surveys to identify the state of conservation of designated historic assets from which it identifies monuments and buildings at highest risk. This is used to inform Cadw grant schemes to support conservation of historic assets at risk. The schemes target different types of assets and are based on selection criteria, value for money judgements against submission of costed estimates by the applicant, and expected outcomes, all assessed by Cadw's Inspectors.
60. To support historic asset owners Cadw has published an extensive range of guidance and signposting to available grant funding which can be downloaded without charge from the Cadw website. The grant funding is provided through the following capital grant schemes:
- **Historic Buildings Capital Grants** - for the repair of listed buildings at risk or in a vulnerable condition.
 - **Historic Buildings Maintenance and Repair Grants** – for small scale maintenance and repairs.
 - **Urgent Works for Buildings at Risk** – Grants for local authorities to meet the costs of preparing and serving Urgent Works Notices to secure the condition of at risk and vulnerable listed buildings.
 - **Historic Monument Grants** – to support owners of monuments in repair works and the conservation of sites ranging in dates from the Neolithic to buildings of the industrial revolution.

3. Amgueddfa Cymru and National Library of Wales

I have increased the revenue budgets of each of these organisations in 2025-26, £0.9m to Amgueddfa Cymru and £0.4m to National Library of Wales. Capital allocations of £5m and £2m have also been made to Amgueddfa Cymru and the National Library of Wales respectively along with additional capital for specific projects.

Amgueddfa Cymru

61. Whilst I appreciate that this remains a challenging time for culture sector in Wales, I anticipate that the increase to its revenue Grant in Aid in 2025-26 will help Amgueddfa Cymru to provide its workforce with an appropriate, consolidated pay increase, maintain staffing levels and retain specialist skills required to care for our national collections and help deliver Programme for Government commitments.
62. Free entry for national museums remains my policy to encourage a diverse range of visitors. Whilst this limits Amgueddfa Cymru's options to raise income, it sets annual income generation targets, and it continues to test a combination of options for further income-generation opportunities as well as developing its new income generation strategy.
63. I acknowledge the challenges that Amgueddfa Cymru colleagues are facing in caring for historic buildings and keeping our national collections safe. My officials have worked with them to prioritise maintenance requirements. In addition to maintaining the level of capital Grant in Aid funding at £5m, I am making additional funding available to Amgueddfa Cymru via the Local Culture and Sport budget to support capital works at National Museum Cardiff, St Fagans Castle, the National Waterfront Museum and for the redevelopment of the National Slate Museum.

National Library of Wales

64. The increase to its revenue Grant in Aid in 2025-26 will help the National Library to provide its workforce with an appropriate, consolidated pay increase. The Library does well in attracting charitable donations and bequests but finds the commercial income generation target challenging, with less on-site options for generating revenue when compared to Amgueddfa Cymru for example. It is not appropriate for the Library to charge for the majority of its services and it has limited means of generating additional funds except via donations, commercial activity or for project activities. Despite this, it has established a directorate to lead on fundraising and is developed a new fundraising strategy, which will include its income generation targets.

65. Thanks to the additional capital funding I have provided in 2024-25, repair work to the roof of the National Library is on track and will be completed in March 2025. The National Library's capital Grant in Aid for 2025-26 remains at £2m with additional funding also being made available from the Local Culture and Sport budget to allow the National Library to complete the urgent repairs needed to two of its bookstacks with potential for some further capital support for the Library.
66. The Royal Commission on the Ancient and Historical Monuments in Wales has also faced significant challenges following the reduction in its revenue budget allocation in 2024-25. The 3% uplift to the Royal Commission on the Ancient and Historical Monuments of Wales' revenue funding will help it retain its specialist staff and continue the important work it does on behalf of the people of Wales. Its capital funding allocation has been maintained at £50k with potential for additional capital support for specific projects from the Local Culture and Sport budget. The Royal Commission generates some commercial income e.g. through providing services and publishing books.
67. A review of the Royal Commission's relationship with Cadw is currently underway. I have committed to updating the Senedd on this in Spring 2025.

National Botanic Gardens of Wales

68. The National Botanic Gardens of Wales is not an ALB but receives a project grant on an annual basis. It will have an equivalent uplift in its revenue allocation and have its capital allocation maintained. This is designed to help it to meet staffing and inflationary pressures.

4. Libraries, Archives and Museums

Libraries', Archives and Museums' Strategies

69. The draft budget total allocations for Support for Local Culture and Sport are £7.88m revenue and £32.8m capital, excluding support for the ALBs and the National Botanic Gardens of Wales specified in the respective budget lines.
70. Public libraries are also a statutory requirement under the 1964 Public Library and Museums Act and Ministers have a responsibility to 'superintend' public library provision. Within Wales, this duty is fulfilled through the Welsh Public Library Standards (WPLS, or the Standards) and we will continue to uphold this responsibility with an updated framework of reporting. For archives there are statutory responsibilities in relation to provision for local government records and for Places of Deposit under the Public Records Act 1958. We administer the UK Cultural Property Schemes, including Acceptance in Lieu, and the Government Indemnity Scheme and fund the Portable Antiquities Scheme in Wales. Ensuring the discharge of these statutory requirements is a key activity within the budget allocation.
71. My primary priority is taking forward the Cultural Priorities. This is expected to include work to improve physical access and representation of diverse communities in our local sectors' displays and collections, utilising local collections for health and wellbeing and for schools' engagement, improving collections care and supporting the good governance and resilience of organisations. The dispersed network of galleries being delivered through Celf – The National Contemporary Art Gallery for Wales, will play an important role in taking this forward. I will invest in digital collections building and skills-raising to enhance resilience, access to collections through digitisation, and to increase engagement. Celf ar y Cyd provides a clear example of how access to digitised works can be improved and will continue to grow. In addition, intend to establish a new scheme to identify and recognise nationally significant items held in local museum collections for the first time.
72. This funding enables us to support local museums, archives and libraries in line with our responsibilities as the development agency for those sectors in Wales. We will work strategically with key sector support bodies to build capacity and resilience of the sectors, ensuring that statutory obligations are met, and professional standards maintained for the benefit of users. We support collaborative initiatives to provide efficiency, value for money, service resilience and ensuring equality of access to collections across the sectors. We will continue to support the sector to put in place the infrastructure to support the delivery of digital services.
73. Through funding partnerships with our key sector support bodies, training and workforce development and discrete projects and programmes, we will ensure the management, preservation, protection, accessibility of and engagement with both physical and digital assets within archives, museums and library collections.
74. Within the library sector, we will continue to support digital access to electronic resources through the National Digital Library Service. We will continue to support and develop access via public libraries to the Darllen Yr Well / Reading Well, which supports mental health and wellbeing. We will establish a new scheme to support

children's literacy and reading for pleasure through engagement with primary schools in public libraries, alongside continued promotion for the Summer Reading Challenge.

75. I intend to continue the Capital Transformation Grants programme to fund capital developments and improvements, including digital projects, to support decarbonisation and those to promote equalities. I also intend to fund further rounds of the Collections Management Capital Improvement Grants to enable local museums and archives improve their collections storage.

Review of Local Museums

76. The Expert Review is now almost ten years old. The Welsh Government's support of the local museums sector reflects the current financial and social environment in which both Government and museums now work, rather than solely seeking to implement the Review's recommendations.
77. Viability of many of the Review's recommendations hinged around implementation of the creation of three regional bodies recommendation '*to provide operational direction, management and support to locally delivered museums*' to improve service quality and delivery. This was a matter for Local Authority Members and Chief Executives across Wales to decide and in 2015 was not a priority for senior officials or elected members. Estimations of funding required to set up and then run regional bodies indicate significant cost implications for Welsh Government and local authorities. At the current time, recognising the immense financial pressures faced by the public sector, it has not been possible to progress this recommendation.
78. As we progress to the implementation phase of the new Priorities for Culture, there is an opportunity to consider the best options for ongoing support for local museums. In 2025-26, work will be undertaken that supports several of the Review's recommendations. Through the Culture Division's remit as museum sector development agency in Wales and its partnerships with key sector support organisations, strategic interventions and activity will be coordinated across local museums.
79. Using the Museums Accreditation Scheme as a framework, funding and opportunities to take part in programmes will be provided, focussed on improving collections care and visitor and user experiences. I will do this via provision of capital grant schemes, procurements and funding to sector support organisations such as Association of Independent Museums, Art UK, Group for Education in Museums and Kids in Museums. Work will focus on improving access both on-site and on-line, representation of diverse communities in displays and collections, collections care.
80. Building on the exploratory work undertaken over the last three years, I will establish a new scheme to recognise nationally significant items held in local museum collections. Funding will be made available to not only create and administer the scheme but also to build capacity for museums to undertake significance reviews on their collections, using the Welsh Government [Collections significance assessment: toolkit for Welsh museums](#).
[GOV.WALES](#).
81. The Welsh Government will continue to support the local museum sector through offering a high-quality workforce development programme, including training, advice and support, access to networks and grants to attend conferences via funding provided to the Federation of Museums and Art Galleries of Wales.

5. Arts and Arts Council of Wales

Through this Draft Budget I have increased the Arts Council of Wales' revenue budget by £1.095m to £31.588m.

Arts Council of Wales

82. Welsh Government funding for the arts is channelled through the Arts Council of Wales (ACW), who operate under the arms-length funding principle, within the strategic framework we provide.
83. The Draft Budget revenue allocation for ACW in 2025-26 is £31.588m, there has been an increase of £1.095m compared to the Final Budget in 2024-25 (adjusted baseline).
84. The Welsh Government recognises the challenges currently facing the arts sector in Wales, including due to budget pressures. As the development agency for the arts sectors in Wales, ACW distributes over 90% of its annual funding to the arts sector through multiyear funding and project support. Allocations made to ACW directly supports the arts sectors as well as impacting people's access to the arts across Wales.
85. ACW's core capital budget for financial year 2025-26 is maintained at £400,000. In addition, I am proposing an allocation for an Arts Sector Strategic Capital Investment with ACW through the Support for Local Culture and Sport budget, as well as for the National Contemporary Art Gallery. This proposal will be developed further with ACW. Funding to support the redevelopment of Theatr Clwyd will continue to be made through ACW.

Access to the arts

86. ACW supports arts activity based in every local authority across Wales and the allocations in 2025-26 will continue to support and promote the vital contribution that the arts make to Wales. Increasing and diversifying levels of access and participation in the arts continues to be a priority in the Government's Remit letter to ACW. ACW uses the majority of its Grant in Aid to core fund strategic arts organisations, and we expect them to continue to prioritise access and engagement work.
87. The Welsh Government is pleased that following ACW's Investment Review process for 2024-25, 81 organisations are now receiving multi-year funding via ACW, including 23 new organisations, which has led to a more diverse cohort of organisations supported.
88. ACW also continues to deliver its Widening Engagement Action Plan in collaboration Amgueddfa Cymru, which aims to widen engagement and access to the arts to people across Wales, with particular focus on semi-rural poverty, deaf and disabled people and Black, Asian and Minority Ethnic people.

89. Investment in major culture capital projects, especially Theatr Clwyd and the National Contemporary Art Gallery, is designed to tackle inequalities and provide better access, including particularly in north and mid Wales.

Income Generation

90. In addition to funding streams from the Welsh Government, ACW receives and distributes funding from the National Lottery and from charitable trusts.
91. All ACW grant applications for both multi-year and project funding require a budget from applicant organisations and individuals, and this is reviewed as part of the assessment process. ACW expects organisations to evidence how they have raised a proportion of the funding, and assessment of this forms part of the decision-making process. Applicants for multi-year funding are required to provide targeted audience and participant numbers as part of their annual survey returns. Anyone applying for single-year project funding is required to provide this information as part of the application process for Lottery funding. These figures are confirmed through the completion reports that are submitted by the grant recipient at the end of their projects.
92. ACW's Create Programme offers the opportunity for any organisation to apply for business development support and is open for applications all year round. Applications to Create often focus on how an organisation operates including how its financial model works and how it could be improved. In addition, through ACW's capital programme, venues are able to apply for funding for improved facilities and offer to increase performances and audience numbers.
93. ACW has recently published its commissioned [Economic Impact Assessment Report](#) conducted by independent research specialists, Deyton Bell. This report demonstrates that the funding it distributes on behalf of Welsh Government brings substantial economic benefit to the whole of Wales, giving a return of £2.51 back to the economy (as at 2023-24) for every £1 of public funding received by ACW. The report shows over the last decade, employment in the arts, culture and creative industries in Wales has increased by 28% - from 28,900 in 2014 to the currently reported level of 36,960. The arts and culture industry in Wales had a turnover of £1.64b in 2023-24.
94. ACW collaborates and partners with multiple organisations whose goals align with theirs. These relationships may be governed by Memorandums of Understanding (MOUs), Partnership Agreements, or Collaboration Agreements, which in turn, provide increased financial resources / opportunities and income generation for arts organisations and creative individuals, including National Contemporary Art Galleries - CELF and the Creative Nature Fellowships with Natural Resource Wales.
95. As stewards of public funds, ACW recognises its responsibility to deliver tangible and meaningful benefits to both the Sector and the public. The arts play a fundamental role in enhancing the quality of life for individuals, fostering social cohesion, and driving economic growth.

6. Media and Broadcasting

In 2025-26 Creative Wales' total budget allocation is £6.536 revenue and £7m capital.

Creative Wales will support its priority sectors through a range of funding mechanisms to drive increased growth in the creative industries, support the development of skills, promote diversity and equality, remove barriers to entry and take a lead role in marketing and promoting the creative industries in Wales to the world.

Creative Wales

96. The focus of my investment is on the priority sectors of screen (Film & TV), music, digital, including games and immersive and publishing alongside broadcasting and journalism commitments, as well as delivering on the Programme for Government commitments in improving skills for the industry.
97. Since the launch of Creative Wales in 2020, 51 productions have been supported (signed offer letters) with another two recommended by Panel (53 in 5 years). Since April 2024, I have invested in 11 capital projects totalling £5.8m from Creative Wales capital funding with over £79.4m in projected Welsh spend and creating 50 new jobs. The aim of the scheme is to support the growth of Wales as a destination for the production of world class content by supporting Wales-based production and games development companies who are looking to develop productions intended for international audiences, generating additional Welsh spend and creating jobs in Wales.
98. Working with Ffilm Cymru (FfC) £2m has been allocated to 9 projects from July 2022 to July 2024 and it is intended to extend the pilot with Ffilm Cymru to March 2025 in order to allow for appropriate scrutiny of the economic impact of the previously funded productions and to consider the most appropriate route to maximise the impact of the new IFTC for film production in Wales.
99. With the growth in productions looking to film in Wales, I also have a strategic priority to invest in studio infrastructure. Previous investments have been made in Aria Studios in North Wales in 2022 and also in Great Point Studios in 2023. Building work is yet to start but will see this site expanded to a total of 257,000 square feet.
100. We recently launched a funding scheme to support studios that are impacted by the Non-Domestic Rating Re-evaluation. The latest **UK Government NDR (Non-Domestic Rating) Revaluation** came into effect on 1 April 2023 and assigned revised business rates to reflect changes in rental market conditions. As a result of this change some sectors, including

studios, have seen significantly increased rates. This new fund means that Welsh Government support is available via Creative Wales to help mitigate the impact of these increases. The first grant award has been issued under this scheme and further awards are in progress.

- 101.I continue to provide funding to support the commercial music sector. The recent agreement to award £0.4m revenue funding to 11 innovative Music projects in 2024-25 takes Creative Wales total support for music venues and businesses to over £10 million since its inception in 2020. This is in addition to the £0.2m revenue via strategic support to programmes such as Focus Wales, PPL Momentum and Power up and Beacons programme delivery.
- 102.I continue to prioritise skills development in the sector in line with the Programme for Government Commitment, through the Creative Skills Action Plan and Creative Skills Fund. Round two of the Skills Fund was launched in Spring 2024 and supported a further 17 projects to the value of £1.5m of which £0.8m is legally committed in 2025-26 for the two-year programme which will have a particular focus on ensuring greater diversity and inclusion within the creative sectors in Wales.
- 103.This financial year (2024-25) 51 trainees to date have completed paid placements on Creative Wales funded productions with an additional 69 currently on placements.
- 104.In addition to this, Creative Wales worked in partnership with Sgil Cymru to secure £0.9m of funding from the British Film Institute (BFI) for the delivery of the Skills Cluster for Wales programme. This funding will be allocated directly from the BFI to Sgil Cymru to deliver the programme over the next two financial years. This partnership programme requires the match funding from Creative Wales of £0.15m in 2024-25 and 2025-26 which takes budget commitments on skills to over £1m per year.
- 105.Diversity and inclusivity is embedded in activity and the Creative Wales Non-Executive Board have set this as their number one priority. Creative Wales' ambitions for a more diverse and inclusive creative industries sector in Wales clearly align to the Programme for Government's commitments to maximise fairness for all, eliminate inequality and to celebrate diversity.

Media, journalism and broadcasting

- 106.In 2024-25, work is underway to support a second year of the Senedd reporter (£50,000). The budget is also funding the Wales Community Radio Network to deliver a £0.1m Community Radio Fund to support community radio stations across Wales.
- 107.A total of £3,555,350 has been awarded to the Books Council of Wales in 2024-25 to date to support the publishing sector in Wales. This includes annual revenue funding for the Welsh Language Digital News Service. To mitigate the impact of cuts to this budget, this also included an additional in-year allocation of £0.15m for Frankfurt and London Book Fairs.
- 108.Our work with the screen sector and broadcasters, including through our Memorandums of Understanding with the BBC and S4C has supported a suite of productions in 2024-25. The full list of productions supported to date is included in Annex C.

109. Given the importance of skills and talent development to the creative industries, in 2024-25 £0.5m of the broadcasting budget was also used to enhance the Creative Skills Fund. Of the 17 projects supported through the second round, five have a specific focus on improving accessibility in the screen sector.

110. The budget to support media, journalism and broadcasting for 2025-26, including for the Books Council of Wales will be agreed as part of the annual business planning process.

7. Support for film and television production

Through this Draft Budget we have increased the Creative Wales capital budget to £7m. This additional allocation, of £2m, will support further investment in productions, providing opportunities for Wales based crew and trainees, including freelancers, and support investment in our development funding programmes.

Pinewood Studios / Seren Studios

111. Pinewood / Seren Studios is now owned by Great Point Studios and is run as a private business. Therefore, I do not have information on latest revenue, projected revenue or occupancy rates.

Production

112. A full list of all projects supported is provided at Annex C. In summary, since 2020, £28m in production funding (which now also includes games investment as a result of amended criteria) has been provided to 51 projects, generating over £342m into the Welsh economy. On these funded productions, Creative Wales has supported a total of 364 paid placements.

Bad Wolf Studios

113. Total interest due on the loan arrangement is £1.064m and repayments commenced in 2020-21. Bad Wolf has repaid £875,174 of the interest loan and have a balance of £188,763. The latest financial detail is provided at Annex D.

Creative Wales

114. Production Funding continues to be the main mechanism for supporting screen activity in Wales with a new production funding model launched in May 2023. The aim of the scheme is to support the growth of Wales as a destination for the production of world class content. The funding supports Wales-based production and games development companies who are looking to develop productions intended for international audiences. It is also available to productions from outside of Wales that are seeking to use Wales as a location for filming. Whilst one of the main outputs continues to be the impact on the Welsh economy through spend on crew, facilities, locations etc, the fund also seeks to maximise the amount of training and skills development opportunities available on funded productions. The fund prioritises content that shows the best of Wales in Culture, language and geography, with this successfully being demonstrated by four of Creative Wales'

supported productions (Pren ar y Bryn/Tree on a Hill, Men-Up, Steeltown Murders, and Wolf) receiving the most Bafta Cymru nominations in 2024 and all of which showcased an authentic portrayal of Wales to network audiences. The Fund also prioritises the development of a sector that provides equal and diverse opportunities for a long term, skilled employment base and one that looks after the wellbeing of existing staff.

115. Also, in July 2022, Welsh Government entered into an agreement with Ffilm Cymru to administer the grant funding for feature films on our behalf. To date, £2m has been allocated to nine projects across the two-year agreement and work continues with the Ffilm Cymru team and project board on these projects.

Ffilm Cymru

116. Across the initial two-year programme, nine feature films have received production funding totalling £2m generating an expected boost to the Welsh economy of over £14.5m.

117. The first funded production, Timestalker, had its world premiere at SXSW in Austin, Texas in March 2024 and debuted to both critical and audience praise. The film was subsequently distributed into UK and Ireland cinemas by Vertigo in October and international sales are being handled by Hanway Films. Brides, a film co-produced by Cardiff-based ieie Productions was also chosen as one of the UK Great8 Showcase at Cannes in May 2024 and will begin a highly anticipated festival run in early-2025. In January and February 2024, The Man in My Basement, produced by Cardiff-based John Giwa-Amu of Good Gate Media, filmed in and around South Wales and starred Oscar-winning actor Willem Dafoe and Corey Hawkins. This film is currently in post-production and is intended for a 2025 festival run. Other productions currently work-in-progress include Mr Burton, a biopic of Richard Burton produced by Severn Screen and directed by Welsh director Marc Evans and Madfabulous, a period reimagining of the flamboyant life of Henry Paget, the 5th Marquess of Anglesey.

118. The SAG-AFTRA actors' strike of 2023 led to delays in principal photography for some of the funded productions, with some productions also collapsing and funding re-allocated to other projects. Due to the delays caused by the strikes, it was not possible to review the programme at the end of the pilot two-year period (April 2024) as not enough of the productions had progressed significantly enough to provide a balanced view of their economic impact and industry success. In addition, the UK Government launched the new UK Independent Film Tax Credit (IFTC) in April 2024 (subsequently approved by the new UK Government in October 2024) which led to a significant increase in the number of enquiries for film in Wales and included both Wales-made films and inward investment opportunities. As such, it is intended to extend the pilot with Ffilm Cymru to March 2025, in order to allow for appropriate scrutiny of the economic impact of the previously funded productions and to consider the most appropriate route to maximise the impact of the new IFTC for film production in Wales. It is intended that a new agreement will be in place for 2025-26.

8. Sport

In line with revenue allocations to the other arm's length bodies, I have provided a revenue uplift of 3% to Sport Wales. I have also increased the Sport Wales capital budget by £2m from £8m to £10m.

Sport Wales

119. Participation and engagement in sport is of importance to the Welsh nation. Participation, excellence, and spectating in sport generates great health benefits, binds communities, contributes to our sense of place in the world and plays an integral role in our economy.

120. A report published by Sheffield Hallam University, in September 2024, estimates sport in Wales is helping to deliver £1.9bn in Gross Value Added (GVA) for the Welsh economy, securing 38,345 full time equivalent jobs. When looking at the broader impact, including its indirect effect, those figures are calculated at £2.9bn and 58,997 jobs. As well as serving as an economic driver, sport is an impactful health prevention tool. A study, again by Sheffield Hallam University, in late 2023, reported a £621m health benefit through the prevention of over 113,000 cases of ill-health. It estimated the total social return on investment of sport to Wales to be £5.98bn annually, which means that for every £1 invested in sport there is a £4.44 return to the public and Government.

121. The Wellbeing of Future Generations Act includes the goal to create a healthier Wales, and a society in which people's physical and mental well-being is maximised. Recognising the preventative power of sport and physical activity in relation to health and wellbeing, I will reinforce our Programme for Government commitment to use capital funding to invest in facilities, particularly focused in more disadvantaged areas. In doing so, we will promote equal access to sport and tackle inequality in all its forms. A further £2m, bringing the total investment to £10m, is being invested in sports facilities through Sport Wales in this budget.

122. The £10m I am allocating to Sport Wales in the 2025-26 Draft Budget will be invested in existing and new sports facilities, including Artificial Grass Pitches, to create a modern sporting infrastructure that is financially and environmentally sustainable. The investment will safeguard local facilities, develop new and enhanced local community assets, and reduce the need for longer car journeys for families and individuals seeking to access sporting opportunities.

Prevention

123. Sport Wales recently held an event at the Senedd where Senedd Members and representatives from the sport and physical activity sector heard about the impact and role of sport on the preventative health agenda. The event was a catalyst for further discussions with National Governing Bodies, national Partners and key health organisations in the third sector on how sport and physical activity can be used to support health outcomes.

124. We will continue to work with our partners and stakeholders to understand how we can enhance the impact of sport and physical activity on the future health and wellbeing of our nation.

Other departmental funding

125. While Cabinet Secretaries and Ministers have specific portfolio responsibilities and Programme for Government commitments, we all share a collective responsibility for improving the lives of the people of Wales, including their health and wellbeing, and securing the wellbeing of future generations.

126. We will continue to explore opportunities to maximise the value of the investments we make across government, to promote equal access and opportunity for everyone to enjoy the benefits of a physically active lifestyle. We will build on existing relationships and seek out new collaborative opportunities to ensure the added benefits of sports participation are recognised more widely, and National Governing Bodies of Sport and other national partners have access to other funding streams to support their efforts to impact positively on the wider physical activity agenda.

127. The Welsh Government already provides specific funding streams aimed at health prevention through physical activity, including funding through our Healthy Weight Healthy Wales strategy, published in 2019. The strategy is a ten-year plan to prioritise early intervention and behaviour change at all levels, supporting preventative approaches to change our habits and promote healthy activity. It is a key commitment towards a cross-government approach to reducing obesity in Wales on a population scale and has been developed from evidence of what works.

128. Accompanying the strategy are a series of two-yearly delivery plans which span its lifetime. The sport and leisure sector have played a key role in delivering the objectives of the previous Healthy Weight Healthy Wales delivery plans, through schemes like FitFans and the 60+ Active Leisure Scheme.

129. The next delivery plan will continue to support programmes and interventions to encourage people to participate in physical activity. The plan will provide another opportunity for the sport and physical activity sector to engage in vital preventative approaches to reduce obesity and establish healthier lifestyle habits.

130. The Sustainable Communities for Learning and the Community Focused Schools programmes also support the drive to create modern and accessible facilities for culture and sport and there has been significant investment in these over recent years. We will continue to support the investment in school sports facilities through our Capital budget administered by Sport Wales, to ensure young people in communities across Wales have access to modern and motivational places to play sport and develop their sporting talent.

9. Programme for Government commitments

Progress towards the commitment to “push forward towards a million Welsh speakers, and enable our tourism, sports and arts industries to thrive”.

Black, Asian, and Minority Ethnic histories

131. The Culture, Heritage and Sport commitments in the Anti-racist Wales Action Plan (ArWAP), and associated specific Programme for Government commitments aim to make a measurable difference to the lives of Black, Asian and Minority Ethnic people. Our work has focused on widening access, participation, and engagement of Black, Asian, and Minority Ethnic people as well as building capacity and capability of our cultural and heritage sectors in tackling both institutional and systematic racism. Building capacity and capability has also extended to our grassroots organisations, supporting them in developing and strengthening grant application skills to access Welsh Government Culture grant funding. The funding enabled them to create, participate in, and develop cultural activities, reflecting the diverse cultural landscape of our communities. Through grant funding we supported more than 80 organisations, allocating just over £5m of capital and revenue funding for financial years 2023-25 to support our national, local, regional and grassroots cultural, heritage and sport organisations.

132. All projects receiving funding have a focus on co-production, demonstrating a commitment to placing lived experience at the centre of policy / service design, development, and delivery. We know that co-production with Black, Asian and Minority Ethnic people is not a matter for diversity and inclusion; it is a strategic imperative that leads to more equitable and culturally appropriate services and where our heritage offers a more balanced and authentic account of our past.

133. Significant strides have been made within the culture and heritage sectors delivering against our ArWAP goals and actions and related PfG commitments. The Arts Council of Wales and Amgueddfa Cymru published a joint Widening Engagement Action Plan 2022-25 | Arts Council of Wales, which is underpinned by work to address the current inequalities experienced by people, groups and communities, particularly those currently under-represented, in access to and participation in the arts. Whilst Cadw issued guidance for public bodies on public commemorations in Wales. This follows on from the monuments and street names audit that identified numerous examples of commemorations in public spaces that could be considered contentious.

Creative Industry Research and Development Fund

134. Creative Wales has facilitated a number of Research & Development (R&D) funding initiatives since inception. R&D was included as a key priority area as part of the development funding programme. 2021-22 Development funds have been fully allocated for

delivery throughout 2021-22 and 22-23 to the value of £1.1m to 51 creative companies. In July 2023, a second round of development funds was launched and 35 projects totalling over £0.980m for spend in 2023-24 and 2024-25. The TV and Digital Development Funding is designed to provide focused support to aid the growth of indigenous companies across TV and Digital, supporting companies to develop new products and IP and secure new business.

135. The £50m Media Cymru programme is funded through £22m from UK Research and Innovation's (UKRI) flagship Strength in Places Fund, £3m from Cardiff Capital Region, £0.5m from Welsh Government, through Creative Wales, and £23m match funding from industry and university partners. The Media Cymru programme, supported by Creative Wales, includes a work package to deliver a Wales wide R&D fund for the Creative Industries. This will be delivered between 2022 and 2026 and is delivering a range of R&D funding projects across Wales.

National Music Service

136. The National Music Service was established from 2022 and is supported by the **National Plan for Music Education** with ongoing funding from the Curriculum and Assessment budget in the Education MEG. In 2024-25, the Cabinet Secretary for Education is investing £4 million to deliver on this Programme for Government commitment. We want to see every child and young person from the age of 3 to 16 to benefit from opportunities to play a musical instrument, to sing, and to engage in music-making activities in schools and communities.

137. The Service, with the WLGA as its lead body, continues to support music education in schools through, for example, the 'First Experiences' programme in primary schools and 'Music Pathways' in secondary schools. This includes an important focus on engaging learners from low-income households and those with Additional Learning Needs. The 'First Experiences' programme has already engaged with over 75 per cent of primary schools in Wales. A detailed evaluation covering these initial years of the Service will be published later in 2025.

138. The Cabinet Secretary for Education has announced a new Curriculum for Wales grant support programme to provide focused support to schools and settings, from 1 April 2025. This new strategic approach to grant-funded curriculum support prioritises the National Music Service for forward funding.

139. Education officials are currently working with the WLGA on the development of options under the new grant support programme for a new full 3 financial year grant award. Further information on the specific grants and funding allocations awarded under the new programme, including for the National Music Service, will be announced by the Cabinet Secretary for Education in April 2025.

Invest in Theatres including Theatr Clwyd

140. The Welsh Government allocated £23.5m to support the redevelopment of Theatr Clwyd over the last three years between 2022-25.
141. Welsh Government funding of Theatr Clwyd represents a significant investment in the arts in Wales and recognition of the considerable social, cultural, and economic benefits Theatr Clwyd brings to Wales, particularly to communities in north-east Wales.
142. The Welsh Government remains fully committed to delivering the Theatr Clwyd capital project which is a key Programme for Government commitment.
143. In 2025-26, the Welsh Government has also made an allocation for an Arts Sector Strategic Capital Investment initiative with ACW through the Support for Local Culture and Sport budget which will enable necessary capital support to be made to arts organisations, including theatres.

Football Museum

144. In February 2023, a Welsh Government grant of £5.458m was announced for the Football Museum for Wales, to take it through content development and construction to delivery and opening (scheduled for March 2026). Last year the project team at Wrexham Museum secured funding from the National Lottery Heritage Fund, which together with funding from Wrexham County Borough Council, Welsh Government's Transforming Towns Fund, Wolfson Foundation and UK Shared Prosperity Fund has ensured the development of the museum and the associated redevelopment of the Wrexham Museum galleries is fully funded (£11.8m). The project completed a Gateway 3 assurance review as part of the Five Case Business Model, with a rating of amber-green and the Full Business Case was signed off in November 2024.
145. The Wrexham Museum building closed to the public and was handed over to contractors in July 2024. The development, building and fit out work will continue until the museum opens in 2026. While the main Welsh Government culture grant will end in March 2025, additional funding will be available in 2025-26 to ensure continuity of staffing in the key project posts of Football Curator, Engagement Officers, Project Manager.
146. Collecting and engagement activity will continue until opening, raising the profile of the project, and ensuring the objects and stories required for the museum are sourced, to tell diverse stories of the game, and that the grassroots and the international, the fan and the player stories are represented.

Celf - National Contemporary Art Gallery

147. The development of a National Contemporary Art Gallery for Wales is a commitment in our Programme for Government. It has three distinct elements:

- A dispersed network of nine galleries across Wales providing free access to the national collection, bringing contemporary art closer to communities.
- Host galleries which currently host the national collection of Welsh art i.e., National Museum, Cardiff and National Library of Wales, Aberystwyth.
- The online digital platform Celf ar y Cyd.

148.Plans for the anchor gallery have now been discontinued and the funding repurposed to meet the cost of emergency work required to protect and preserve Wales' national treasures, at the National Museum Cardiff and National Library in Aberystwyth (announced in July 2024).

149.Celf, the National Contemporary Art Gallery for Wales continues to receive investment across the nine sites around Wales. This work is being led by a collaboration between the Arts Council of Wales, Amgueddfa Cymru and the National Library of Wales in partnership with the nine galleries.

150.The geographically dispersed model will allow greater access to both contemporary art and the national collection by communities across Wales, bringing art closer to the people of Wales, in a far more equitable way.

151.Between 2017 and 2023, expenditure on the various elements of this programme totalled £1.76m, with £1.36m being capital expenditure. The updated grant award provides a further £6.3m to support the project through to its completion in March 2025. The three lead partners are working with the nine galleries in developing the requirements from April 2025 onwards, as the project enters its operational phase.

Media and journalism

152.The commitment to explore the creation of a shadow Broadcasting and Communications Authority for Wales was fulfilled in March 2024, when the Welsh Government responded to the Expert Panel to Explore the Establishment of a Shadow Broadcasting and Communication Authority for Wales' report. I am considering next steps following the publication of the Welsh Government's response and will provide an update in due course.

153.The Wales Public Interest Journalism Working Group has played an important role in helping to identify options to support actions to improve Welsh-based media and journalism, in the context of the challenges associated with government funding of journalistic content, due to matters of impartiality and editorial independence.

Broadcasting and communications

154.In 2024-25, Creative Wales has worked with broadcasting stakeholders including the UK Government Department for Culture, Media and Sport, Ofcom, public service broadcasters, Teledwyr Annibynnol Cymru and Pact to ensure Wales' needs are considered in the development of relevant regulation, policy and interventions. This has included continuing to press the case for a strong role in S4C Board appointments. The intention is for positive discussions to continue on this matter, with the new UK Government.

Culture, Heritage & Sport

Budget Expenditure Line	2024-25 Final Budget Restated	2025-26 Baseline Adjustments*	2025-26 Revised Baseline	Changes Draft Budget 2025-26	2025-26 Draft Budget
	(A)	(B)	(C = A + B)	(D)	(E = C + D)
	£000s	£000s	£000s	£000s	£000s
Near Cash	111,816	1,071	112,887	4,999	117,886
Non Cash	10,162	0	10,162	2,028	12,190
Total Resource	121,978	1,071	123,049	7,027	130,076
Capital	55,366	0	55,366	18,421	73,787
FT Capital	-1,231	1,231	0	-500	-500
Total Capital	54,135	1,231	55,366	17,921	73,287
Total	176,113	2,302	178,415	24,948	203,363
AME	20,000	0	20,000	4,000	24,000

Culture, Heritage & Sport					
Budget Expenditure Line	2024-25 Final Budget Restated	2025-26 Baseline Adjustments*	2025-26 Revised Baseline	Changes Draft Budget 2025-26	2025-26 Draft Budget
	(A)	(B)	(C = A + B)	(D)	(E = C + D)
	£000s	£000s	£000s	£000s	£000s
Arts Council of Wales	30,429	64	30,493	1,095	31,588
Amgueddfa Cymru - National Museums of Wales	25,504	276	25,780	920	26,700
National Library of Wales	11,093	129	11,222	400	11,622
Support for Local Culture and Sport	6,668	12	6,680	1,200	7,880
Broadcasting and Media	1,100	0	1,100	-1,100	0
Action :Total Support for Culture and the Arts	74,794	481	75,275	2,515	77,790
Cadw	8,547	468	9,015	430	9,445
National Botanic Garden of Wales	525	0	525	19	544
Royal Commission on the Ancient and Historical Monuments for Wales	1,656	57	1,713	60	1,773
Action: Total Support the Historic Environment	10,728	525	11,253	509	11,762
Sport Wales	20,978	65	21,043	755	21,798
Action: Total Sports and Physical Activity	20,978	65	21,043	755	21,798
Creative Wales	5,316	0	5,316	1,220	6,536
Action: Total Promote and Protect Wales' Place in the World	5,316	0	5,316	1,220	6,536
Total Culture, Heritage & Sport	111,816	1,071	112,887	4,999	117,886

Culture, Heritage & Sport

Budget Expenditure Line	2024-25 Final Budget Restated	2025-26 Baseline Adjustments*	2025-26 Revised Baseline	Changes Draft Budget 2025-26	2025-26 Draft Budget
	(A)	(B)	(C = A + B)	(D)	(E = C + D)
	£000s	£000s	£000s	£000s	£000s
Arts Council of Wales - Non cash	119	0	119	0	119
Amgueddfa Cymru - National Museums of Wales - Non cash	2,400	0	2,400	900	3,300
National Library of Wales - Non cash	1,250	0	1,250	1,118	2,368
Totla Support for Culture and the Arts	3,769	0	3,769	2,018	5,787
Cadw - Non cash	5,480	0	5,480	0	5,480
Royal Commission on the Ancient and Historical Monuments for Wales - Non cash	134	0	134	0	134
Total Support the Historic Environment	5,614	0	5,614	0	5,614
Sport Wales - Non cash	779	0	779	0	779
Total Sports and Physical Activity	779	0	779	0	779
Creative Wales	0	0	0	10	10
Action: Total Promote and Protect Wales' Place in the World	0	0	0	10	10
Total Culture, Heritage & Sport	10,162	0	10,162	2,028	12,190

Culture, Heritage & Sport

Budget Expenditure Line	2024-25 Final Budget Restated	2025-26 Baseline Adjustments*	2025-26 Revised Baseline	Changes Draft Budget 2025-26	2025-26 Draft Budget
	(A)	(B)	(C = A + B)	(D)	(E = C + D)
	£000s	£000s	£000s	£000s	£000s
Arts Council of Wales	400	0	400	0	400
Amgueddfa Cymru - National Museums of Wales	5,000	0	5,000	0	5,000
National Library of Wales	2,000	0	2,000	0	2,000
Support for Local Culture and Sport	24,700	0	24,700	8,100	32,800
Total Support for Culture and the Arts	32,100	0	32,100	8,100	40,200
Cadw	10,000	0	10,000	6,321	16,321
National Botanic Garden of Wales	200	0	200	0	200
Royal Commission on the Ancient and Historical Monuments for Wales	50	0	50	0	50
Total Support the Historic Environment	10,250	0	10,250	6,321	16,571
Sport Wales	8,016	0	8,016	2,000	10,016
Total Sports and Physical Activity	8,016	0	8,016	2,000	10,016
Creative Wales	5,000	0	5,000	2,000	7,000
Action: Total Promote and Protect Wales' Place in the World	5,000	0	5,000	2,000	7,000
Total Culture, Heritage & Sport	55,366	0	55,366	18,421	73,787

Culture, Heritage & Sport					
Budget Expenditure Line	2024-25 Final Budget Restated	2025-26 Baseline Adjustments*	2025-26 Revised Baseline	Changes Draft Budget 2025-26	2025-26 Draft Budget
	(A)	(B)	(C = A + B)	(D)	(E = C + D)
	£000s	£000s	£000s	£000s	£000s
Sports Capital Loans Scheme	-1,231	1,231	0	-500	-500
Total Sports and Physical Activity	-1,231	1,231	0	-500	-500
Total Culture, Heritage & Sport	-1,231	1,231	0	-500	-500

Culture, Heritage & Sport

Budget Expenditure Line	2024-25 Final Budget Restated	2025-26 Baseline Adjustments*	2025-26 Revised Baseline	Changes Draft Budget 2025-26	2025-26 Draft Budget
	(A)	(B)	(C = A + B)	(D)	(E = C + D)
	£000s	£000s	£000s	£000s	£000s
Amgueddfa Cymru - National Museums of Wales Pension	15,000	0	15,000	0	15,000
National Library of Wales Pension Provision - AME	9,000	0	9,000	0	9,000
Total Museums and Libraries Pensions	15,000	0	15,000	0	15,000
Arts Council of Wales Provision - AME	0	0	0	3000	3,000
Total Support for Culture and the Arts	0	0	0	3,000	3,000
Cadw Provisions - AME	0	0	0	1000	1,000
Total Support the Historic Environment	0	0	0	1,000	1,000
Sport Wales Pension Provision - AME	5,000	0	5,000	0	5,000
Total Sports and Physical Activity	5,000	0	5,000	0	5,000
Total Culture, Heritage & Sport	20,000	0	20,000	4,000	24,000

2024-25 Draft Budget Culture, Heritage and Sport

Explanations of movements at BEL level

This Annex provides an explanation of:

- changes made between the 2024-25 Final Budget (Restated in September 2024) and the Draft Budget for 2025-26. These include two types of changes:
 1. **baseline adjustments** made to the 2024-25 Final Budget (restated). These are predominantly due to allocations made in respect of the 2024-25 pay award and to meet the costs associated with the change in the SCAPE discount rate which impacts unfunded public sector pensions. A baseline adjustment as also been made to the Fuel Poverty BEL to transfer £1.255m to the Housing and Local Government MEG. This is a correction to budgets following the portfolio changes that took place earlier in the year.
 2. **Draft Budget allocations and transfers**; the descriptions of which are set out in the tables below.

Near-Cash

BEL	5800: Arts Council of Wales
Changes at Draft Budget 2025-26	A budget uplift of 3.6% (£1.095m)

BEL	5540: Amgueddfa Cymru – National Museums of Wales
Changes at Draft Budget 2025-26	A budget uplift of 3.6% (£0.920m)

BEL	5660: National Library of Wales
Changes at Draft Budget 2025-26	A budget uplift of 3.6% (£0.4m)

BEL	6170: Support for Local Culture and Sport
Changes at Draft Budget 2025-26	The budget has been increased by £1.2m £1m to take forward actions under the Priorities for Culture. A budget uplift of 3% (£0.2m)

2024-25 Draft Budget Culture, Heritage and Sport

Explanations of movements at BEL level

BEL	1070: Broadcasting and Media
Changes at Draft Budget 2025-26	The budget has decreased by -£1.1m due to a transfer of the funding from the Broadcasting and Media BEL to the Creative Wales BEL – to streamline activity under one budget.
BEL	2700: Cadw
Changes at Draft Budget 2025-26	A budget uplift of 5% (£0.430m)
BEL	2710: National Botanic Garden of Wales
Changes at Draft Budget 2025-26	A budget uplift of 3.6% (£0.019m)
BEL	6200: Royal Commission on the Ancient and Historic Monuments for Wales
Changes at Draft Budget 2025-26	A budget uplift of 3.6% (£0.06m)
BEL	5900: Sport Wales
Changes at Draft Budget 2025-26	A budget uplift of 3.6% (£0.755m)
BEL	3762: Creative Wales
Changes at Draft Budget 2025-26	The budget has been increased by £1.220m Transfer of £1.1m from Broadcasting and Media BEL to streamline activity. A budget uplift of 3.6% (£0.120m) to the baseline budget of the Books Council .

2024-25 Draft Budget Culture, Heritage and Sport

Explanations of movements at BEL level

Non-Cash

BEL	5800: Arts Council of Wales Non-Cash
Changes at Draft Budget 2025-26	No change

BEL	5540: Amgueddfa Cymru - National Museums of Wales Non-Cash
Changes at Draft Budget 2025-26	The budget has been increased by £0.9m to meet additional non-cash requirements.

BEL	5660: National Library of Wales Non-Cash
Changes at Draft Budget 2025-26	The budget has been increased by £1.118m to meet additional non-cash requirements.

BEL	2700: Cadw Non-Cash
Changes at Draft Budget 2025-26	No change

BEL	6200: Royal Commission on the Ancient and Historical Monuments for Wales Non-Cash
Changes at Draft Budget 2025-26	No change

BEL	5900: Sport Wales Non-Cash
Changes at Draft Budget 2025-26	No change

BEL	5900: Sport Wales Non-Cash
Changes at Draft Budget 2025-26	No change

BEL	3762: Creative Wales Non-Cash
Changes at Draft Budget 2025-26	The budget has been increased by £0.010m to meet additional non-cash requirements.

2024-25 Draft Budget Culture, Heritage and Sport

Explanations of movements at BEL level

Capital

BEL	5800: Arts Council of Wales
Changes at Draft Budget 2025-26	No change

BEL	5540: Amgueddfa Cymru - National Museums of Wales
Changes at Draft Budget 2025-26	No change

BEL	5660: National Library of Wales
Changes at Draft Budget 2025-26	No change

BEL	6170: Support for Local Culture and Sport
Changes at Draft Budget 2025-26	<p>The budget has increased by £8.1m</p> <p>The additional funding will include major developments in North Wales including Theatr Clwyd in Mold, the Football Museum for Wales in Wrexham and the National Slate Museum in Llanberis, and across the country via Celf and our Transformation Grants for local museums, libraries and archive services.</p> <p>Funding will also be made available for capital projects with the National Library of Wales and Amgueddfa Cymru.</p>

BEL	2700: Cadw
Changes at Draft Budget 2025-26	<p>The budget has increased by £6.321m</p> <p>The funding includes support for the second phase of the development of Caerphilly Castle. The additional investment will also help to conserve Cadw's wider historic estate and the grant programme for wider historic sites at risk.</p> <p>Investment also supports the Priorities for Culture and the Tourism strategy Welcome to Wales: priorities for the visitor economy 2020 to 2025.</p>

2024-25 Draft Budget Culture, Heritage and Sport

Explanations of movements at BEL level

BEL	2710: National Botanic Garden of Wales
Changes at Draft Budget 2025-26	No change

BEL	6200: Royal Commission on the Ancient and Historical Monuments for Wales
Changes at Draft Budget 2025-26	No change

BEL	5900: Sport Wales
Changes at Draft Budget 2025-26	The budget has increased by £2m The funding is being invested in sports facilities through Sport Wales in this budget.

BEL	3762: Creative Wales
Changes at Draft Budget 2025-26	The budget has increased by £2m Additional funding for productions, music and games, together with a fund to support studios to become more sustainable and accessible.

Financial Transaction Capital

BEL	6013: Sports Capital Loans Scheme
Changes at Draft Budget 2025-26	Planned repayments of -£0.731m relating to Financial Transaction Capital.

Annex C - WELSH SCREEN FUND INVESTMENT (as of 27 November 2024)

Financial Year of Offer	Name of Production Company (SPV)	Production Title (Wales Screen Fund)	Value of Offer £m	Anticipated Spend £m
2012-13	Tonto Films and Television Ltd	Da Vinci's Demons Series 1	0.495	3.823
2012-13	Urban Myth Films	Atlantis Series 1	0.250	4.026
2012-13	Pesky Productions Ltd (Boj & Buddies)	Boj & Buddies	0.200	1.003
2012-13	Fiction Factory (Hinterland Films Ltd)	Hinterland Series 1	0.215	3.691
2012-13	Tonto Films and Television Ltd (DVDS2)	Da Vinci's Demons Series 2*	0.990	15.000
2013-14	Avanti Media Group	Wonder World	0.127	0.763
2013-14	Urban Myth Films	Atlantis Series 2	0.250	4.026
2013-14	Lime Pictures Limited	Rocket's Island*	0.143	0.966
2013-14	Mirror Productions	Petroleum Spirit	0.051	0.358
2013-14	Modern Television	A Poet In New York	0.053	0.855
2013-14	Adastra Creative and Shrinking Cap Productions Ltd	Grandpa in my pocket	0.129	1.612
2013-14	Three Stones Media (The Rastamouse company)	Rastamouse Series 4	0.145	0.885
2013-14	Pure Grass Films Ltd (Drake Equation Ltd)	The Drake Equation*	0.740	5.208
2013-14	Lupus Films	Toot the Tiny Tugboat / Ethel & Ernest	0.550	3.034
2013-14	Green Bay Media Ltd	Castle Builders	0.045	0.320
2013-14	YJB Films (From a Jack to a King Ltd)	From a Jack to a King	0.100	1.229
2013-14	Hartswood Television Ltd	Lady Chatterleys Lover	0.125	0.813

Financial Year of Offer	Name of Production Company (SPV)	Production Title (Wales Screen Fund)	Value of Offer £m	Anticipated Spend £m
2014-15	Lime Pictures Limited	Rocket's Island Series 4	0.070	0.700
2014-15	Gritty Realism Productions Ltd	Heart of Darkness	0.150	1.794
2014-15	TCFTV UK Productions	The Bastard Executioner	2.500	10.000
2014-15	Cwmni Da Cyf	Country Fair	0.125	1.019
2014-15	Animortal Studio (Trampires Ltd)	Trampires	0.674	6.738
2014-15	Tiger Aspect Productions (Tiger Aspect (D&F) Ltd)	Decline and Fall	0.100	1.800
2014-15	RF Movie Productions Ltd	Robin Friday - The Movie*	0.200	1.950
2014-15	Touchpaper Television Ltd	Coming up	0.080	0.809
2014-15	Fiction Factory Films Ltd (Hinterland Films 2 Ltd)	Hinterland 2	0.304	5.300
2014-15	Fiction Factory Films Ltd (Hinterland Films 3 Ltd)	Hinterland 3	0.250	4.210
2015-16	Bad Wolf Ltd	Bad Wolf Productions	9.000	133.000
2015-16	Hartwood Films (Sherlock TV Ltd)	Sherlock Season 4	0.240	2.409
2015-16	Heel Stone Pictures Ltd	Crossing the Border	0.202	2.519
2015-16	Ninth Floor UK Productions Limited	Will Season 1	1.500	18.761
2015-16	Lookout Point Ltd (Pinewood Films 14)	The Collection	0.600	5.500
2015-16	Red & Black Films (Don't Knock Twice Ltd)	Don't Knock Twice	0.075	0.630
2015-16	Vertigo Television Ltd	Britannia VFX	1.100	11.149

Financial Year of Offer	Name of Production Company (SPV)	Production Title (Wales Screen Fund)	Value of Offer £m	Anticipated Spend £m
2016-17	Beakus Ltd	Toggle Top	0.076	0.944
2016-17	Cloth Cat Animation Ltd (Clothcat LBB Ltd)	Luo Bao Bai	0.225	3.183
2016-17	Riverstone Pictures (Showdogs Ltd)	Showdogs	0.362	4.737
2016-17	Vox Pictures (Keeping Faith Ltd)	Keeping Faith	0.328	4.250
2016-17	Green Bay Media	Mountains and Life	0.030	0.540
2016-17	New Pictures (Requiem Productions Ltd)	Requiem	0.400	5.016
2016-17	Severn Screen Ltd (Apostle Films Ltd)	Apostle	0.385	5.767
2017-18	World Productions (BTK 2016 Ltd)	Born to Kill	0.200	2.500
2017-18	The Forge Entertainment Ltd	Kiri	0.200	2.382
2017-18	Coracle Pictures Limited (Denmark)	Denmark	0.085	1.383
2017-18	Rondo Media Cyf	The Wall	0.045	0.363
2017-18	Touchpaper Television Ltd	4Stories*	0.040	0.631
2017-18	Illuminated Productions Ltd	The Rubbish World of Dave Spud	0.090	0.906
2018-19	Eleven Film Ltd	Schooled	0.485	3.879
2018-19	Boom Cymru	15 days	0.089	1.074
2018-19	Dream Horse Films Limited, Popara Films Ltd and Popara Films (DH) Limited	Dream Horse	0.350	4.384
2018-19	JJ Productions Ltd (Short Form Film)	Jamie Johnson Series 4	0.156	1.927
2018-19	Mad as Birds Ltd and Reliance Entertainment Productions Six Ltd	Six Minutes To Midnight	0.400	3.879
2018-19	Keeping Faith (Series 2) Productions Ltd (Vox Pictures)	Keeping Faith Series 2	0.300	4.654
2018-19	Hat Trick Productions	Warren	0.109	1.304
2018-19	Monterey Productions Ltd (HBO)	Brooklyn	0.220	2.412
2018-19	GOL Production Ltd (Pulse Films)	Gangs of London	0.350	4.209
2018-19	Iele Productions	Merched Parchus	0.041	0.444
2018-19	Blacklight TV	4Stories series 2	0.102	1.574

Financial Year of Offer	Name of Production Company (SPV)	Production Title (Wales Screen Fund)	Value of Offer £m	Anticipated Spend £m
2019-20	All That Limit	Brave New World	2.000	20.000
2019-20	Joio	Bang Series 2	0.190	2.300
2019-20	JJ Productions Ltd (Short Form Film)	Jamie Johnson Series 5	0.060	1.827
2019-20	Vox Pictures (Keeping Faith Series 3)	Keeping Faith Series 3	0.240	3.965
2019-20	WP Productions Ltd (World Productions)	The Pembrokeshire Murder	0.200	2.135
2020-21	Hartwood TV Ltd	Roald & Beatrix: The Case Of The Curious Mouse	0.225	2.247
2020-21	Illuminated Productions Ltd	The Rubbish World of Dave Spud Series 2	0.140	1.407
2020-21	Joio Cyf (Joio (Bang 2) Ltd)	Bang Series 2	0.190	2.302
2020-21	Lupus Films (Kensukes Kingdom Ltd)	Kensukes Kingdom	0.100	0.841
2020-21	Little Door Productions Ltd (Little Door (The Pact) Ltd)	The Pact	0.595	5.953
2020-21	One Tribe TV Limited	Wonders of the Celtic Deep	0.077	0.618
2020-21	Eleven Films (Starco TV 3 Ltd)	Sex Education Series 3	0.432	5.186
2020-21	WOTW2 Ltd- Urban Myth films	War of the Worlds Series 2	0.750	7.344
2020-21	Barking Lion Productions	The Trapper Keeper	4.000	40.159
2020-21	Bad Wolf (HDM3) Ltd	His Dark Materials Season 3	2.000	21.075
2020-21	Havoc Film Ltd	Havoc	2.150	25.004
2020-21	Short Form Film (JJ Productions) Ltd.	Jamie Johnson Series 6 & 7	0.335	4.651
2021-22	REP Productions SF Limited	The Almond and the Seahorse	0.100	0.935
2021-22	Cwmni Da Cyf	Rain Stories	0.042	0.337
2021-22	The Light Ltd/Y Golau Cyf	The Light/ Y Golau	0.528	5.289

Financial Year of Offer	Name of Production Company (SPV)	Production Title (Wales Screen Fund)	Value of Offer £m	Anticipated Spend £m
2022-23	Sex Education S4	Eleven Film	0.450	6.169
2022-23	Wolf	Hartswood	0.500	6.004
2022-23	The Pact S2	Little Door	0.330	5.502
2022-23	The Truth About My Murder	Yeti	0.250	0.342
2022-23	American Doomsday / Super Volcano	Wildflame	0.070	0.416
2022-23	Black Cake	CBS UK Productions/Kapital Ent.	0.750	10.000
2022-23	4 Stories: On the Edge S4	Blacklight TV	0.070	0.882
2022-23	Un Nos ola o Leuda/One Moonlit Night	Afanti Media	0.120	0.959
2022-23	Steel Town Murders (aka Kappen)	Severn Screen	0.400	5.200
2023-24	Newffion	Ceidiog	0.400	0.240
2023-24	Pren ar a Bryn / Tree on a Hill	Fiction Factory	0.500	6.262
2023-24	The Way	Little Door / Red Seam	0.510	5.282
2023-24	Lost Boys and Fairies	Duck Soup Films	0.500	5.148
2023-24	Creisis	Boom Cymru	0.169	2.038
2023-24	Until I Kill You aka Delia	World Productions	0.200	2.615
2023-24	The Rubbish World of Dave Spud S3	Illuminated Productions Ltd	0.120	1.148
2024-25	Men Up	Boom Cymru	0.150	1.950
2024-26	Bad Wolf Slate Funding	Bad Wolf Productions	4.000	60.000
2024-25	Mini Buds	Bumpy Box (*repayment)	0.130	0.470
New offers since December 6th 2023 to 27 November 2024			50.819	592.444

Financial Year of Offer	Name of Production Company (SPV)	Production Title (Wales Screen Fund)	Value of Offer £m	Anticipated Spend £m
2023-24	House of the Dragon S2	HBO	0.580	5.801
2023-24	Out There	Buffalo Pictures	0.310	6.446
2023-24	Ty Gwydr / The Greenhouse	Little Bird	0.060	0.359
2024-25	Cleddau / The One That Got Away	Blacklight TV	0.270	2.715
2024-25	Maid of Sker 2	Wales Interactive	0.150	1.166
2024-25	World's Biggest Cruise	Afanti	0.014	0.100
2024-25	Death Valley	BBC Studios	0.400	4.818
2024-25	Hafiach	Vox Pictures	0.090	1.272
2024-27	Whisper Slate	Whisper Cymru	0.781	6.248
2025-26	The Guest (aka Let Me In)	Quay Street Productions	0.415	4.981
2025-26	The Undeclared War S2	Playground Entertainment	0.500	7.411
2025-26	All the Burtons	Yeti	0.035	0.267
2024-25	The Peace Particle	Telesgop	0.030	0.180
2025-26	Young Sherlock	Motive	2.500	30.000
2025-26	Under Salt Marsh	Little Door	0.500	13.000
2024-26	Y Golau: Dwr (Still Waters)	Triongl	0.405	5.671
2024-25	Pictionary	Whisper North	0.050	0.403
2025-26	Prisoner	Binocular	0.500	10.000
		Total since last time reported to Committee	7.590	100.838
TOTAL (excluding withdrawn offers* and new wider funding)			58.409	693.282

Annex D – BAD WOLF STUDIOS INVESTMENT (25 November 2024)

Investment	Investment Value (£)	Drawn down to date (£)	To be drawn down in future years (£)	Accrued interest @ 7.52% to date (£)	Paid interest @ 7.52% to date (£)	Bad Wolf match funding (£)	Expected Welsh Spend (£)	Achieved Welsh Spend (£)
Repayable Advance	4,500,000	4,500,000	-	1,063,937	875,174	-	54,000,000	54,000,000
Further Grant	4,500,000	4,500,000	-	N/A	N/A	-	79,000,000	79,496,087
Purchase of Buildings 1 and 2, Trident Park	6,000,000	6,000,000	-	N/A	N/A	-	N/A	N/A
Acquisition fees	30,000	30,000	-	N/A	N/A	-	N/A	N/A
Studio Fit out Works	2,650,000	2,650,000	-	N/A	N/A	2,800,000	N/A	N/A
Pinewood Studio Wales Fit out Works	667,588	667,588	-	N/A	N/A	692,412	N/A	N/A
SAWS	80,000	40,000	-	N/A	N/A	-	N/A	N/A
Deposit	N/A	N/A	N/A	N/A	N/A	250,000	N/A	N/A
Youth Drama Network	20,000	20,000	-	-	N/A	-	N/A	N/A
His Dark Materials Season 3	2,000,000	2,000,000	-	-	-	-	-	-
Total	20,447,588	20,407,588	0	1,063,937	875,174	3,742,412	154,074,843	133,496,087



Llywodraeth Cymru
Welsh Government

Mike Hedges MS
Chair
Legislation, Justice and Constitution Committee
Senedd Cymru

SeneddLJC@senedd.wales

6 December 2024

Dear Mike,

Inter-Institutional Relations Agreement: 42nd British-Irish Council Summit

I am writing in accordance with the inter-institutional relations agreement to notify you of the 42nd Summit meeting of the British-Irish Council, which will take place this week and is being hosted by the Scottish Government.

The Cabinet Secretary for Economy, Energy and Planning, Rebecca Evans MS and I will be attending the summit in person. As well as the usual opportunity for a general update on issues, the theme of the Summit is 'Financing a Just Transition'.

A communiqué will be agreed by the Council at the Summit detailing the discussions held, and I will write to share these with you. I will also update the Senedd with a written statement in due course.

I have also copied this letter to the Climate Change, Environment, and Infrastructure Committee, the Economy, Trade and Rural Affairs Committee, the Finance Committee, and the Culture, Communications, Welsh Language, Sport, and International Relations Committee.

Yours sincerely,

Eluned Morgan

Bae Caerdydd • Cardiff Bay
Caerdydd • Cardiff
CF99 1SN

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Rydym yn croesawu derbyn gohebiaeth yn Gymraeg. Byddwn yn ateb gohebiaeth a dderbynnir yn Gymraeg yn Gymraeg ac ni fydd gohebu yn Gymraeg yn arwain at oedi.

We welcome receiving correspondence in Welsh. Any correspondence received in Welsh will be answered in Welsh and corresponding in Welsh will not lead to a delay in responding.



Brain drain to brain gain

Mobilising the Welsh diaspora as agents
of economic change

Dr Sarah Louisa Birchley | Toyo Gakuen University, Tokyo, Japan
In collaboration with Dŵr Cymru Welsh Water and GlobalWelsh



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Designed, edited and produced by Four Cymru (www.four.agency) from research conducted by Dr Sarah Louisa Birchley of Toyo Gakuen University, Tokyo supported by Dŵr Cymru Welsh Water and GlobalWelsh.

We used AI to help create this summary report from the original data and full academic research report. Humans then reviewed, edited, finalised and approved all copy.

Foreword



Wales stands at a critical juncture in its economic and social development. While much attention has focused on the continuing challenge of talent loss or 'brain drain', this extensive research reveals a more nuanced and ultimately more optimistic picture. Our findings suggest that Wales possesses an unprecedented opportunity to transform this historical challenge into a significant advantage for the nation's future.

Our extensive research has uncovered a significant appetite for members of our diaspora to return to Wales and have a huge impact on the economy. They have also provided insights into the perception of Wales that can feed into a future narrative that could better position Wales on the world stage as a destination and place to invest.

There is an extraordinary level of passion and commitment from the diaspora to the future success and prosperity of Wales. They are overwhelmingly proud to be Welsh. They treasure and, indeed, are playing their part in keeping the Welsh language alive and vibrant and they represent a highly educated, very talented and successful cohort of ambassadors for Wales.

I hope this unprecedented (and long overdue) research can inform policy and action from stakeholders right across our wonderful country to turn a tide of decades-long brain drain into future brain gain and accelerating prosperity for all.

Walter May
CEO GlobalWelsh
November 2024



I am excited to present the findings of this large-scale study on the Welsh diaspora, an effort that represents an important milestone in understanding and engaging with Wales's global community. This report is the first of many studies we aspire to undertake to explore the lives, contributions, and challenges of the Welsh diaspora and returnees comprehensively. Through these efforts, we aim to build a clearer picture of how Wales can better support and benefit from its global citizens.

The findings presented in this report provide the first empirical evidence to address the pressing issue of brain drain in Wales. Until now, discussions on this topic have been largely anecdotal, lacking the data-driven insights needed to guide effective policies. This study marks a significant step forward in starting to fill that gap.

Throughout this research, we have captured the voices of over 1,700 members of the Welsh diaspora, gathering insights into their experiences, professional paths, and connections to Wales. Their stories reveal not only a deep pride in their Welsh identity but also the barriers they face in maintaining or strengthening that connection. These barriers range from limited infrastructure and economic opportunities to a lack of global awareness about Wales as a distinct nation.

Importantly, this study is not only about challenges; it highlights opportunities for Wales to engage its diaspora in meaningful ways. The findings underscore the diaspora's willingness to contribute to Wales—through business networks, cultural engagement, and professional expertise—if the right structures and support are in place. For example, a significant portion of respondents expressed interest in professional events linked to Wales, heritage tourism, and language training. This enthusiasm reflects a strong desire to stay connected to Wales, despite the geographical distance.

Our hope is that the evidence and insights from this report will lay the foundation for future policy development. By understanding the perspectives of the diaspora, we can create strategies not only to mitigate brain drain but also foster brain circulation—where Welsh talent abroad remains engaged with and contributes to the development of Wales. We envision a future where Wales is a global hub of talent, innovation, and cultural vibrancy, supported by a well-connected and thriving diaspora.

I want to express my profound gratitude to every participant who shared their stories and insights for this study. Your voices are vital in shaping a brighter future for Wales, and this report is dedicated to honouring your contributions. I also extend my thanks to the teams and organisations that supported this research, recognising the importance of evidence-based policymaking in driving positive change.

This is just the beginning of our journey to understand and engage with the Welsh diaspora. We are committed to continuing this work, building on the insights from this study, and deepening our connections with Welsh communities around the world. Together, we can ensure that Wales remains not just a place of great history and culture but a thriving and inclusive nation that embraces its global citizens.

Dr Sarah Louisa Birchley
Toyo Gakuen University, Tokyo and GlobalWelsh board member
November 2024



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Introduction to the research

This study represents the most comprehensive investigation ever conducted into the modern Welsh diaspora. With an estimated 3-4 million Welsh people living outside Wales—equivalent to the country’s resident population—understanding and engaging this global community has become increasingly crucial for Wales’s future development.

The research addresses several critical questions:

- What is the composition and distribution of the Welsh diaspora?
- What motivates Welsh people to leave and what might bring them back?
- How can Wales better engage with its global talent network?
- What barriers exist to diaspora engagement and investment?
- How can Wales transform ‘brain drain’ into ‘brain gain’?

Defining the diaspora

Following the International Organization for Migration (IOM) framework, this study defines the Welsh diaspora as: “Individuals and members of networks, associations and communities who have left Wales but maintain links with their homeland. This includes settled expatriate communities, temporary migrant workers, expatriates with host country nationality, dual nationals, and second/third-generation migrants.”

Methodology

Research Design

The study employed a mixed-methods approach combining:

- Quantitative analysis of 1,709 survey responses
- Qualitative insights from 20 in-depth interviews
- Stakeholder consultation with 40+ Welsh organisations

Data collection

64-question survey, based on the IOM Diaspora Mapping Toolkit, via:

- GlobalWelsh communication channels
- Targeted email campaigns
- Social media networks
- Welsh associations worldwide

Participant Profile

Survey respondents represented:

- 45 countries across six continents
- All age groups (predominantly 25-64)
- Diverse professional sectors
- Various durations of time outside Wales

Interview cohort included:

- Four female and 16 male participants
- Representatives from major global markets
- Multiple industry sectors
- Welsh speakers and non-Welsh speakers

Executive summary

The research findings are overwhelmingly positive and reveal three transformative opportunities for Wales:

1

A dynamic entrepreneurial network

The study uncovered an unprecedented level of entrepreneurial activity within the Welsh diaspora:

- Nearly 500 businesses worldwide run by Welsh entrepreneurs (within the 1709 respondents)
- Diaspora operating across technology, finance, healthcare, creative industries, renewables, space, MedTech, FinTech, advanced manufacturing and AI
- Over 300 diaspora respondents already contributing to Welsh initiatives (c.20%)
- Strong appetite for business expansion and investment in Wales

2

Highly educated global talent pool

The Welsh diaspora represents a significant skilled workforce – far above the average:

Highly educated and skilled

- 45% hold master's degrees or higher
- 62% willing to engage in knowledge transfer back to Wales

In key growth sectors

- Technology (24%)
- Creative Industries (7%)
- Healthcare (6%)
- Finance (6%)
- Engineering and manufacturing (6%)

3

Strong cultural ambassadors

The research reveals powerful emotional connections to Wales:

- 92% proud to be Welsh
- Almost 10% maintain Welsh language use abroad
- Strong regional loyalties creating opportunities for targeted engagement
- 56% interested in participating in Welsh cultural events globally

“I built my company from scratch in California, now valued at \$200m. I'd love to create an R&D hub in Wales, but we need better infrastructure and support systems to make it viable.”

Silicon Valley Tech Leader

Key strategic findings

Three highly actionable, specific strategic imperatives emerge from the research which can inform policy makers and stakeholders right across Wales as they develop their work in coming years.

1

Return potential

There is significant interest from highly skilled diaspora in returning to Wales:

- 54% of recent emigrants would consider returning
- Primary motivators would be family connections, career opportunities
- Key barriers are economic conditions, social services, housing

2

Investment interest

There is a highly level of potential to generate business investment in Wales

- 25% likely to invest in Wales within 12 months
- Main barriers are knowledge gaps related to relocation funding opportunities, the Welsh entrepreneurial ecosystem, and availability of local talent
- Strong interest in mentorship and knowledge transfer back to Wales

3

Regional engagement

Beyond a pan-Wales impact there are significant opportunities for the regions of Wales

- Strong emotional connections to specific regions
- Opportunities for targeted regional development
- Potential for local diaspora investment initiatives

Critical success factors

To capitalise on these opportunities, the research indicate that Wales must address:

- 1 Infrastructure and connectivity
- 2 Economic conditions and opportunities
- 3 Investment frameworks and support
- 4 Public service quality
- 5 Housing accessibility
- 6 Cultural engagement pathways

“We need clear pathways for investment and engagement. Many of us want to contribute but find the current system opaque.”

Tech CEO, San Francisco

Demographic analysis of the Welsh diaspora

Gender

Sixty-six percent of 1,709 respondents self-identified as male, 32% as female, 2% non-binary. When asked how they would describe their race or ethnicity, 1,644 respondents stated White/Caucasian, nine respondents cited Black, 21, Asian. Of the 1,490 who responded to a question about sexuality, 85% stated they were straight, 4% gay, and 2% bisexual.

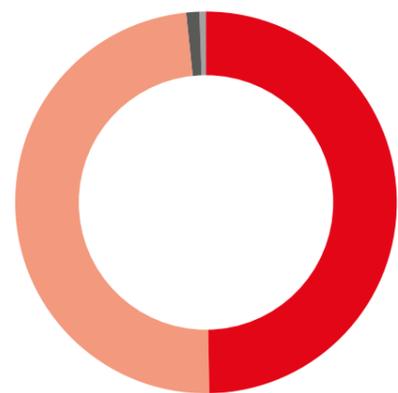
Age

Of the 1,709 respondents 3% are aged 18-24, 24% are 25-34, 21% are 35-44, 22% are 45-54, 20% are 55-64, 6% are 65-74 and 1% are over 75.

Geographic Spread

The research identified Welsh diaspora communities across 45 countries, with significant concentrations in:

Primary locations (% of respondents)



- England 49%
- Outside UK 48%
- Scotland 1%
- Northern Ireland 0.5%

Key International Concentrations

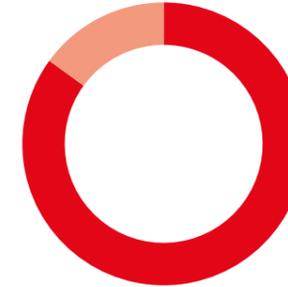
- 1 United States (171 respondents)**
 - Major clusters in California, New York, Texas
 - Strong technology and financial sector representation
- 2 Australia (112 respondents)**
 - Significant presence in Sydney, Melbourne, Perth
 - Diverse sector engagement including education and mining
- 3 European Union**
 - Germany 44 respondents
 - France 40 respondents
 - Netherlands 21 respondents
 - Growing technology and research communities
- 4 Asia-Pacific**
 - Japan 20 respondents
 - China 18 respondents
 - Singapore 11 respondents
 - Emerging fintech and education sector presence

Migration timelines

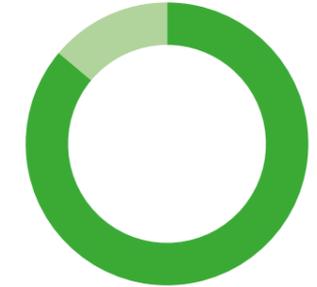
The study revealed distinct patterns in emigration waves:

Recent emigrants 2021-2024

- 70% under age 34
- 71% moved to England
- 24% left UK entirely
- 42% moved outside UK
- 21% gained permanent residency abroad



- Under 34: 70%
- Over 34: 30%



- Moved to England: 71%
- Left UK: 24%

Mid-term emigrants 2016-2020

- 61% aged 25-34
- 51% left UK
- 27% secured long-term residence permits
- Strong professional sector representation



- Aged 25-34 (61%)
- Other Ages (39%)



Long-term emigrants pre-2009

- 43% over age 55
- 48% outside UK
- Higher business ownership rates
- Established professional networks



- Over 55 (43%)
- Other Ages (57%)



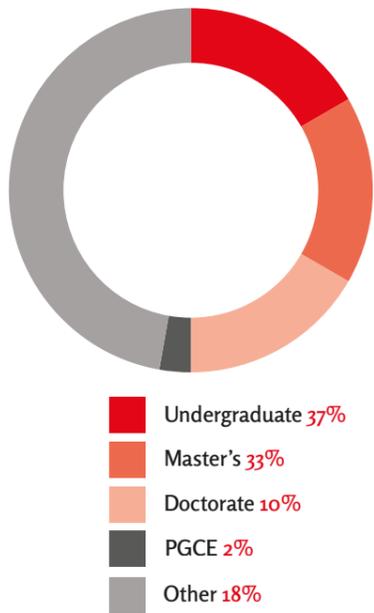
- Outside UK (48%)
- Within UK (52%)

Educational profile

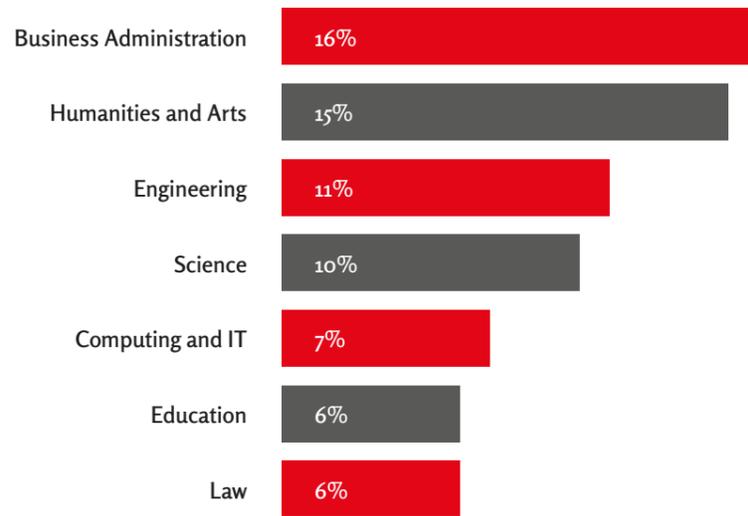
Academic Qualifications

The Welsh diaspora demonstrates exceptionally high educational attainment:

Degree distribution N=1,667



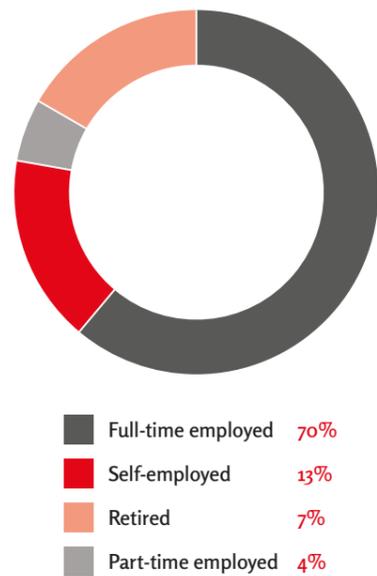
Fields of study



Professional profile

Employment Status

Current employment status among respondents N=1,709



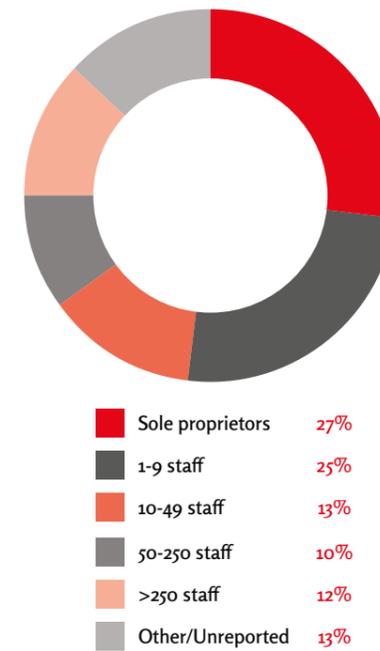
Sector distribution

Primary employment sectors

Sector	Percentage	Specialisations
Technology	24%	• Software development • AI/ML specialization • Digital transformation
Creative Industries	7%	• Media production • Design • Digital content
Healthcare	6%	• Medical professionals • Health technology • Research
Finance	6%	• Investment banking • FinTech • Wealth management
Engineering and manufacturing	6%	• Aerospace • Automotive • Sustainable technologies

Entrepreneurial activity

The study identified 437 business owners/managers:



Notable business types

-  Technology startups
-  Consulting firms
-  Healthcare innovations
-  Creative agencies
-  Manufacturing enterprises

Regional variations in education analysis shows interesting patterns in educational distribution:

Cardiff region

34% Master's degrees

Strong representation in business and technology

Swansea region

13% Undergraduate

Higher proportion in engineering and sciences

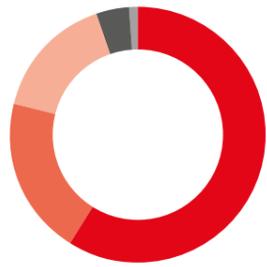
North Wales

6% PhDs

Strong representation in research and academia

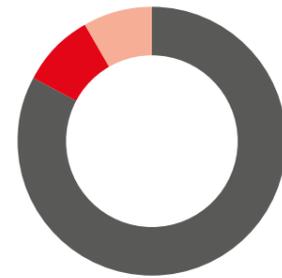
Family and cultural connections

Family status

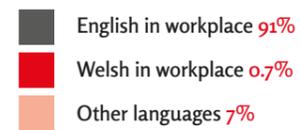
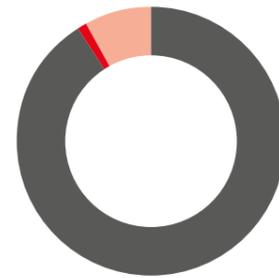


Language use

Home language

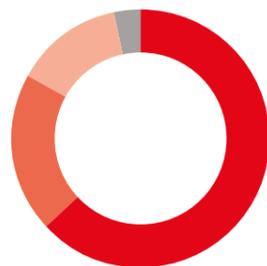


Professional language use

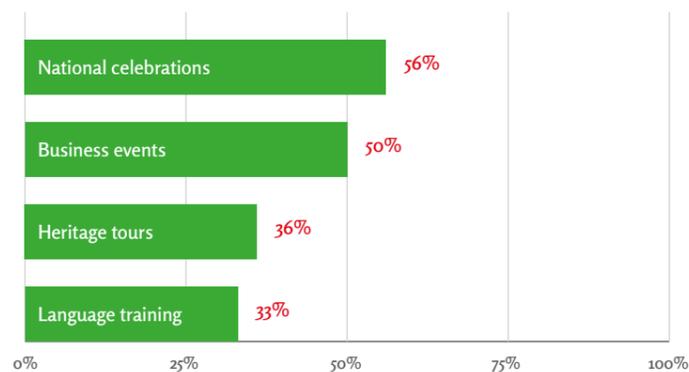


Cultural engagement

Pride and identity



Cultural activity participation



“There is tremendous power and potential in this data – and we are keen to share and develop it with partners right across Wales. The scope for investment, economic contribution and cultural connection is huge. Let’s act on it together.

Nan Williams, Chair, GlobalWelsh

Regional affiliations

The study revealed strong regional loyalties, particularly to:

Region	Respondents	Demographic
Cardiff capital region	1,097	47% aged 25-44 41% willing to return
Swansea Bay region	449	46% aged 24-44 Strong academic ties
North Wales	317	Higher proportion of business owners Strong cultural ties
Mid Wales	178	Higher proportion of retirees Strong agricultural connections

Emerging trends from the demographic data

Analysis of this research data reveals several significant patterns:

1 Technology sector dominance

The Welsh diaspora have a very strong presence and level of success in technology. This is clearly significant for the future success of any industrial strategy for Wales and bodes well for the ability of Wales to participate in future tech industries if the diaspora can be accessed and engaged.

- Growing concentration in global tech hubs
- Strong startup presence
- Digital innovation focus

2 Educational Excellence

The old adage “brain drain” appears to be literally that – the Welsh overseas appear very highly educated indeed and have a strong commitment to ongoing learning and skills development. This is a major opportunity if Wales can tap into this resource more effectively.

- Higher than average postgraduate qualifications
- Strong STEM representation
- Continuous professional development

3 Entrepreneurial spirit

We know that historically the Welsh created the world’s first mail order business, founded major US banks and have run some of the most significant investment funds in the world. Today’s diaspora appear no less active and have very high levels of entrepreneurial skill and activity.

- High business ownership rates
- Global market presence
- Innovation focus

4 Identity, culture and pride

A dynamo of soft power. Not to be underestimated, the sense of cultural pride in Wales, its language and institutions and organisations is a valuable lever for Welsh policy makers, businesses and other stakeholders. These are important motivational factors for the diaspora and represent a potential dynamo of soft power across the world if it could be mobilised.

- Strong Welsh language skills
- Active cultural participation
- Multi-generational engagement

These demographic patterns suggest significant opportunities for Wales to engage with its diaspora through targeted programmes and initiatives, which will be explored in subsequent sections of this report.

The potential for investment and economic impact from the diaspora

The entrepreneurial landscape

A key finding from the research is the very high level of entrepreneurial activity within the Welsh diaspora. More than a quarter of respondents (437/25.6%) identified as business owners/managers. Within that there are 110 female business owners. However, only three per cent currently maintain Welsh operations; with 109 actively seeking Welsh business opportunities at the moment.

This combination of results clearly presents a significant opportunity for economic development in Wales.

Sector distribution of diaspora businesses

Technology and innovation

- AI / ML companies
- SaaS providers
- Digital transformation consultancies

Professional services

- Management consulting
- Financial services
- Legal practices

Healthcare and life sciences

- Biotech startups
- Medical technology
- Healthcare services

When business owners were asked about their interest in investing:

- 25% were likely to invest in Wales within 12 months
- There is strong interest in tech and renewable sectors

The barriers to investment

Potential investors identified three main obstacles as barriers to investment:

1 Knowledge gaps 13%

- Limited awareness of opportunities
- Unclear regulatory environment
- Poor information accessibility

2 Management challenges 12%

- Remote operation difficulties
- Talent acquisition concerns
- Infrastructure limitations

3 Government support 9%

- Complex regulatory frameworks
- Limited incentive programs
- Administrative burdens

“I'd love to bring my family and business back to Wales, but we need assurance about healthcare, schools, and professional opportunities for my spouse.”

Tech Entrepreneur, Sydney

The dynamics of return migration

The survey analysed the potential for return migration and the results show varying patterns across different emigrant groups. The results are classified below by date of emigration from Wales:

Recent emigrants 2021-2024

- 54% would consider return
- Primary drivers:
Family 50%
Career 47%
- Strong interest in entrepreneurial opportunities

Established emigrants 2016-2020

- 49% open to return
- Focus on lifestyle factors
- Higher investment potential

Long-term emigrants pre-2009

- 40% consider return
- Retirement planning focus
- Strong philanthropic interest

The barriers to returning

Economic, social and personal considerations are all potential barriers to returning expressed by significant proportions of diaspora respondents. The most significant of these relate to economic conditions, housing, the quality of healthcare and educational standards:

Economic factors

- Overall economic conditions 54%
- Employment opportunities 41%
- Housing accessibility 18%

Social Infrastructure

- Healthcare quality 47%
- Education standards 47%
- Public services 24%

Personal considerations

- Family integration 24%
- Partner employment 24%
- Cultural readjustment 15%

“If Cardiff Airport had more regular connections to useful cities, I might live a hybrid life. I would consider commuting two days a week to Spain. If it was reliable I might also consider splitting my business between Cardiff and Spain instead of London (and setting up my headquarters there) but it's too much of a risk as the connections are so poor.”

Business owner, London/Spain

Knowledge transfer and professional engagement

The huge potential to unlock mentorship

The survey shows very strong potential to unlock mentoring from Welsh diaspora back into Wales to facilitate knowledge sharing, personal development and knowledge sharing with the purpose of accelerating success.

62% are willing to mentor Welsh professionals.

56% are interested in industry partnerships.

44% are open to academic collaboration.

Target areas for mentorship are:

Professional development

- Career guidance
- Industry insights
- Global networking

Business development

- Startup mentoring
- Market entry strategies
- International expansion

Academic collaboration

- Research partnerships
- Guest lecturing
- Curriculum development

Skills and Knowledge Exchange

The priority sectors in which respondents were able and prepared to offer skills and knowledge exchange are:

- Technology and digital transformation
- Sustainable energy
- Healthcare innovation
- Creative industries
- Financial services

Diaspora identified a variety of mechanisms through which such skills and knowledge exchange could be facilitated including:

- Virtual mentoring programs
- Short-term assignments
- Industry partnerships
- Academic exchanges

“I believe that there are many Welsh diaspora like me who have a great deal to offer to support Education. I am currently working in education on various programmes, both in the U.K. and internationally and would be passionate about supporting Wales with their education vision in the future.”

Master’s educated business owner, England

Cultural and linguistic engagement

Welsh language dynamics

The current usage of the Welsh language amongst the diaspora is striking. More than nine per cent of the diaspora maintain Welsh at home with a full 20 per cent interested in teaching their children Welsh. One per cent use Welsh professionally. Given the distances from Cymru and the absence of day-to-day language infrastructure, opportunity and governance, this compares very favourably to the 17.8 per cent of Welsh speakers within Wales (2021) according to the Welsh Language Commissioner (please note this latter figure includes children whereas the Diaspora survey was completed only by adult respondents).

Diaspora members identified a range of language development needs:

Digital learning resources

- Online platforms
- Mobile applications
- Virtual classrooms

Cultural integration

- Media content
- Literature access
- Cultural events

Professional development

- Business Welsh
- Technical terminology
- Industry-specific content

Cultural connection

Diaspora respondents identified their **top four preferences for maintaining cultural connection** with Wales as:

Cultural events 56%

Professional networking 50%

Heritage tourism 36%

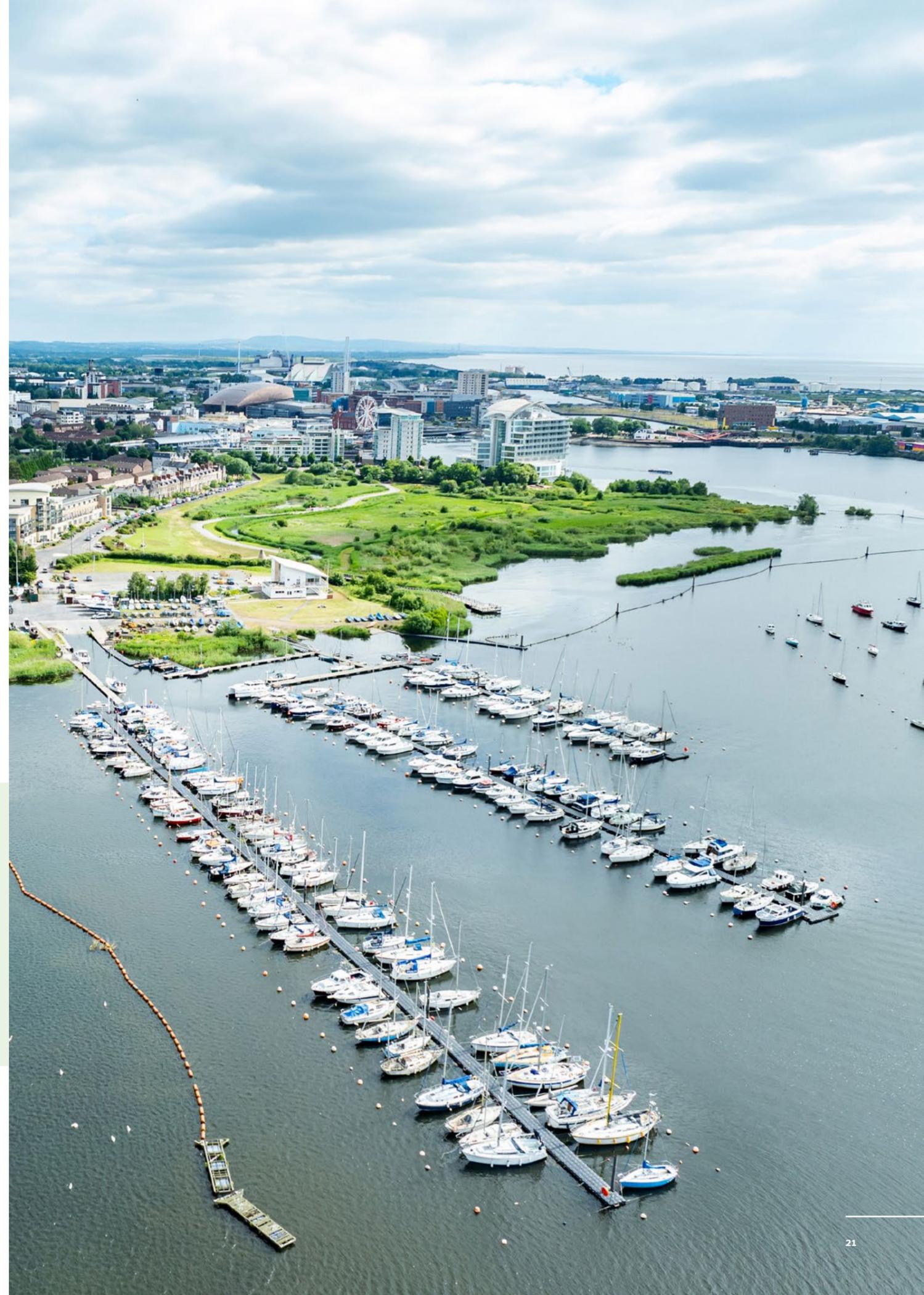
Language programmes 33%

The ways which diaspora identify with Wales are expressed in a range of ways, but primarily through interest in:

- Sport and recreation
- Arts and music
- History and heritage
- Contemporary culture

“I am raising my child as Welsh, with Welsh as her mother tongue and a sense of identity and belonging to Wales but will always find it challenging that I have essentially been priced out of providing a life for her in my home country due to second homes and tourism, and high financial thresholds for the extremely low number of affordable houses available.”

Finance professional, Germany



Regional analysis and implementation framework

The survey analysed the regional ecosystem across Wales and how diaspora connected with particular regions. The highlights are organised by region below:

CARDIFF CAPITAL REGION CITY DEAL		
Demographics 1,097 respondents	Education Profile	Professional Profile
<ul style="list-style-type: none"> 47% aged 25-44 53% located outside UK 41% willing to return to Wales 	<ul style="list-style-type: none"> 37% undergraduate degrees 36% master's degrees 8% doctorate level 	Strong representation in: <ul style="list-style-type: none"> Technology Professional services Financial services Creative industries
SWANSEA BAY CITY DEAL		
Demographics 449 respondents	Education Profile	Professional Profile
<ul style="list-style-type: none"> 46% aged 24-44 46% outside UK 41% considering return 	<ul style="list-style-type: none"> 41% undergraduate degrees 32% master's degrees 9% doctorate level 	Strong representation in: <ul style="list-style-type: none"> Manufacturing innovation Digital economy Education sector 23% business owners/managers
NORTH WALES GROWTH DEAL		
Demographics 317 respondents	Education Profile	Professional Profile
<ul style="list-style-type: none"> 49% aged 24-44 43% outside UK 50% considering return 	<ul style="list-style-type: none"> 34% undergraduate degrees 32% master's degrees 10% doctorate level 	<ul style="list-style-type: none"> Higher proportion of entrepreneurs (24%) Strong engineering presence Significant STEM expertise Energy and environment; tourism and hospitality; digital innovation (rural connectivity)
MID WALES GROWTH DEAL		
Demographics 178 respondents	Education Profile	Professional Profile
<ul style="list-style-type: none"> 47% aged 24-44 44% outside UK 48% considering return 	<ul style="list-style-type: none"> 41% undergraduate degrees 37% master's degrees 10% doctorate level 	<ul style="list-style-type: none"> 24% business ownership Rural enterprise Sustainable development Cultural tourism

Implementation Frameworks

There are three strategic priorities for regional development to attract diaspora which arise from the research. These are:

Infrastructure development	Business support	Talent Integration
<ul style="list-style-type: none"> Digital connectivity Transport links Business facilities Housing stock 	<ul style="list-style-type: none"> Investment facilitation Regulatory guidance Market entry support Professional networks 	<ul style="list-style-type: none"> Skills matching Professional development Family support services Cultural integration

“Cardiff’s tech scene has evolved significantly. With the right infrastructure and support, it could rival cities like Manchester or Dublin.”

FinTech Executive, London

Regional action plans

The report points to the need to develop / evolve further regional action plans over the short, medium and longer term. An outline of these phases and the focus of each is below followed by suggestions for associated key performance indicators and monitoring parameters.

Short-term actions 0-12 months

4 Digital platform development

- Opportunity mapping
- Network building
- Resource sharing

5 Support service establishment

- Investment advisory
- Business mentoring
- Family relocation

6 Network activation

- Professional groups
- Industry clusters
- Cultural associations

Medium-term actions 1 - 3 years

1 Infrastructure development

- Digital connectivity
- Transport links
- Business facilities

2 Program implementation

- Mentorship schemes
- Investment facilitation
- Skills development

3 Ecosystem building

- Innovation hubs
- Research networks
- Industry partnerships

Long-term actions 3 - 5 years

7 Economic Transformation

- Sector development
- Innovation ecosystems
- Global connectivity

8 Social Infrastructure

- Education excellence
- Healthcare quality
- Cultural facilities

9 Sustainable Growth

- Environmental leadership
- Social inclusion
- Economic resilience

Key performance indicators

- Economic Impact
- Social Development including
 - Return migration
 - Skills acquisition
 - Community engagement
- Infrastructure Progress

Success metrics

- Investment volume
- Business creation
- Employment growth
- Skills development
- Infrastructure improvement
- Community engagement

Conclusions

Key research insights

This groundbreaking study reveals the Welsh diaspora as a powerful, untapped resource for national development. Three critical findings emerge:

- 1 Economic potential**

The research uncovered unprecedented entrepreneurial and investment capacity:

 - Nearly 500 Welsh-led businesses globally
 - 25% of diaspora ready to invest in Wales
 - Strong presence in high-growth sectors
 - Significant knowledge transfer potential
- 2 Professional excellence**

The diaspora represents an exceptional talent pool:

 - 45% hold advanced degrees
 - Leadership positions in key growth sectors
 - Strong innovation and entrepreneurial mindset
 - Global network connections
- 3 Cultural connection**

Strong emotional and cultural ties create lasting bonds:

 - 92% express pride in Welsh identity
 - Active Welsh language use abroad
 - Powerful regional loyalties
 - Desire for deeper engagement

“This is our moment to reimagine Wales's relationship with its global citizens. Through collaborative action and strategic investment, we can create a new model for how small nations leverage their diaspora for economic and social development.”

Senior Policy Advisor, Welsh Government

Strategic recommendations

1 Establish a national diaspora framework

Priority actions

- Create a cross-sector diaspora task force
- Develop comprehensive engagement strategy
- Establish clear metrics and accountability
- Align public and private sector initiatives

Implementation timeline

- Immediate: Task force formation
- 6 months: Strategy development
- 12 months: Full programme launch
- 24 months: Impact assessment

2 Build investment infrastructure

Key components

- Diaspora investment portal
- Advisory support services
- Regulatory fast-track options
- Regional development funds

3 Enhance return migration support

Critical elements

- Family integration services
- Professional networking support
- Housing assistance
- Education guidance
- Healthcare navigation

4 Strengthen regional development

Focus areas

- **Cardiff Capital Region:** Technology and financial services
- **Swansea Bay:** Manufacturing and education
- **North Wales:** Energy and tourism
- **Mid Wales:** Rural enterprise and sustainability

5 Improve digital infrastructure

Priority Developments

- High-speed connectivity
- Remote working hubs
- Digital business platforms
- Virtual collaboration tools

6 Create Cultural Connection Programmes

Key Initiatives

- Welsh language resources
- Cultural exchange programs
- Heritage tourism
- Professional networks
- Regional ambassadors

“There's a hunger among Welsh entrepreneurs abroad to contribute back home. We just need the right frameworks and support systems to make it happen.”

Walter May, CEO GlobalWelsh

Implementation timeline

Immediate actions

0-6 months

- 1 Establish diaspora task force
- 2 Launch digital engagement platform
- 3 Create regional advisory groups
- 4 Develop investment framework

Short-term Goals

6-18 months

- 1 Launch investment portal
- 2 Implement support services
- 3 Create regional programs
- 4 Establish monitoring systems

Medium-term objectives

18-36 months

- 1 Scale successful programmes
- 2 Expand infrastructure
- 3 Deepen engagement
- 4 Measure impact

"I feel a sense of guilt for not living in Wales even though I speak and promote Welsh in work and social circles and travel back home often. I will move back home when I'm older, but just for now I need to accept that I have to save up to buy a house by climbing the corporate ladder in England as that is where the jobs are - once I've done that I'll be back and would love to start my own small business to support local communities."

Young professional, Bristol

Call to action

The success of this initiative requires coordinated action from multiple stakeholders:



Government

- Policy framework development
- Infrastructure investment
- Regulatory support
- Public service enhancement



Business community

- Investment opportunities
- Mentorship programmes
- Professional networks
- Knowledge transfer



Educational institutions

- Research collaboration
- Skills development
- Cultural programmes
- Alumni engagement



Cultural and sporting organisations

- Heritage programmes
- Language resources
- Community building
- Cultural exchange

Future outlook

Wales stands at a pivotal moment.

This research clearly demonstrates that the Welsh diaspora represents not just a community of global Welsh citizens, but a powerful force for national development. By implementing these recommendations and creating structured pathways for engagement, Wales can transform its historical ‘brain drain’ into a modern ‘brain gain’.

Together, we can build a stronger, more prosperous Wales by engaging our global Welsh community in meaningful and impactful ways.

Next steps

GlobalWelsh invites all stakeholders to:

- 1 Review these findings
- 2 Engage in strategic planning
- 3 Commit to collaborative action
- 4 Join the implementation task force

Contact GlobalWelsh to:

- Access the full, detailed research data (this is a paid for report) or commission bespoke further analysis into specific topic areas on a consultancy basis.
- Join implementation teams
- Contribute to strategic planning
- Partner in programme development
- Contact us at hi@globalwelsh.com



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Designed, edited and produced by Four Cymru (www.four.agency)
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Gakuen University, Tokyo supported by Dŵr Cymru Welsh Water
and GlobalWelsh.

We used AI to help create this summary report from the original data and full academic
research report. Humans then reviewed, edited, finalised and approved all copy.

The need for more equitable access to musical care during the beginning of life in England and Wales: Policy recommendations

November 2024

Key points

- The first 1001 days of life are critical in children's development. Too many families do not get the support they need to have the best start in life, with knock-on effects throughout their lives.¹
- Musical care is the role of music in supporting all aspects of people's developmental and/or health needs and is seen to be effective in supporting families.^{2,3,4} It includes a range of practices including music therapy, community music, music performance, concerts, and listening.
- Relevant and culturally appropriate musical care activities should be accessible to all and cater equally to different aspects of the beginning of life (during pregnancy, infancy, for mothers, fathers, and carers).⁵ However, new evidence set out in this paper shows that there are significant barriers to accessing and providing it.
- Recommendations set out in this paper include long-term funding for both universal opportunities and targeted interventions, place-based approaches, integration of music into relevant guidelines, and training and upskilling opportunities for the musical care workforce to ensure quality and safety.

Why is musical care at the beginning of life important?

- Musical care - both listening and music making - has been seen to be effective in supporting families during the beginning of life (pregnancy to infancy).^{3,4} This includes supporting the health and well-being of infants, caregivers, and the relationships between them, including physical and mental health, cognitive and behavioural development, and interpersonal relationships.
- However, there are many barriers to arts engagement and care services, a situation that has been exacerbated by growing economic and health disparities, which affect this period in families' lives in particular.⁵
- There are existing barriers to access that are common in the creative sector, for example geographic and socioeconomic⁷ as well as health inequities.

New research from Royal College of Music and City St George's, University of London

- 578 Parents (78% England, 8% Wales) and 50 Providers (92% England, 4% Wales) were surveyed to build an understanding of patterns of use of musical care activities during the beginning of life.^{8,9}
- Parents saw musical care as helpful for their baby and as an opportunity to meet other parents, be part of a community, and bond with their baby and/or partner. Some parents reported they were encouraged by a healthcare provider/midwife to engage with music, but most sought out the activities themselves.
- Barriers for accessing and providing activities include:
 - *Resource and logistical challenges* – high costs of attending, increased costs of facilitating and marketing groups preventing expansion provision, and a lack of activities that are close to home and at suitable times.
 - *Lack of inclusion and representation limiting reach and engagement* – a lack of *activities* that cater for a range of caregivers (fathers, grandparents), range of mental health needs of parents, and range of special educational needs of children, a lack of *spaces* that cater to access needs, and lack of *opportunities* to bring older siblings along.
 - *Coordination and collaboration challenges* – insufficient opportunities for facilitators to train and upskill, and limited pathways to collaboration that enable greater reach and impact.

Towards the implementation of musical care pathways

- There is a broad range of practices within musical care during the beginning of life. A stepped care approach¹⁰ could support more people to access them in ways that suit their needs.
- In a stepped care approach, more specialised professionals such as music therapists would provide more intensive/specialist services while community musicians provide lower intensity care. Individuals can move up and down the steps in relation to their needs.¹¹
- This would require sufficient funding, collaboration, training, and support to ensure the variety of musical care activities required across all steps are equitably accessible and sustainable, with continued investment in research for an evidence-based approach.

Recommendations towards musical care pathways

1. *Ensure long-term funding opportunities for musical care activities and research during the beginning of life, as part of a future strategy for musical care*
 - There have been insufficient levels of funding across health and creative industries, which has increased health inequality and deepened inequity in access to cultural activities. This necessitates musical care being accessible to support health, wellbeing, and development and also shapes what is possible for musical care delivery.
 - Where there is funding, it is often for specific parts of delivery and does not budget for marketing and outreach, evidence and impact, fair pay,¹² or long-term planning to ensure equitable scaling up across different places. This hampers efforts to support those who are underserved.
 - There should be greater investment in both universal access to musical care and targeted action for specific needs and conditions, such as postnatal depression. This should be included in a cross-departmental UK Government Creative Health Strategy, as recommended by the National Centre for Creative Health and the All-Party Parliamentary Group on Arts, Health and Wellbeing.⁷ This could draw inspiration from a memorandum between the Arts Council of Wales and the Welsh NHS Confederation, which includes raising awareness of the benefits of the arts in health and policy settings and offering training and support networks.¹³
 - Building on short term funding calls that includes arts and health,¹⁴ there should be longer term funding, across a variety of funders (public, private, and different disciplinary areas) dedicated to interdisciplinary musical care work. This would further the development of an infrastructure that would enhance the practice and training needed to improve equitable access.
2. *Create a collaborative environment for place-based approaches and community spaces*
 - Place-based strategies are needed to encourage strong collaborations and sustainable partnerships, with all voices and resources supported and valued. This would encourage a joined-up approach to addressing health inequalities, working with Integrated Care Systems, local authority public health teams, housing officials, and local Voluntary and Community Sector bodies.
 - Community spaces, for example family hubs and libraries, should be invested in and utilised for musical care, ensuring that they are community and culturally specific.
 - Community spaces and health services could host increased and up-to-date guidance that could also support parents with their own activities at home in a way that reflects their preferences and culture.

3. *Include and recognise musical care in quality standards and guidance to ensure a targeted approach that can recognise the importance of musical care*
 - Building on important steps taken to recognise the role of music therapy – one form of musical care – in dementia, steps should be taken to include musical care practices in NICE guidelines. This could include interventions to support parents with mental health conditions and infants with additional support needs.
 - The Creative Health Quality Framework¹² is a governing document that can support a clearer relationship with health and social care partners about what “good” looks like.
4. *Empower the musical care workforce with the skills they need for high quality and safe practice*
 - More training and professional development opportunities should be created and supported both for new and existing members of the musical care workforce, to ensure high quality and safe provision. This must be done in an inclusive way to ensure a diversity of people from different musical cultures can participate.
 - Many health professionals (from midwives and health visitors to nurses and speech and language therapists) should be upskilled as part of their professional development and training to increase awareness of how music can be integrated into care to support their patients’ needs.

Find out more about interdisciplinary insight into how musical care is understood and provided during different stages of the life course at musicalcareresearch.com

Project team

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 Policy Support Fund, Royal College of Music (UKRI)

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MINISTERIAL INTERNATIONAL ENGAGEMENT

NOVEMBER 2024

INWARD VISITS	
07 Nov	<p>Visit to Wales by Indian High Commissioner The Indian High Commissioner visited Wales to take part in Diwali celebrations in Swansea and Cardiff. During the visit the High Commissioner met with the First Minister to discuss the Year of Wales in India, growth in trade, our health and care sector, education and the Taith programme.</p>
12 Nov	<p>Visit to Wales by President of the Regional Council of Brittany The President of Brittany visited Wales to celebrate the 20th anniversary of the Wales-Brittany Memorandum of Understanding (MoU). The First Minister and the President held bilateral talks and discussed the Celtic Forum, Port Collaboration, Cyber collaboration and the Welsh Language. The Deputy First Minister co-hosted a reception with the President at Cardiff Castle to celebrate the relationship.</p>
OUTWARD VISITS	
10 Nov	<p>Cabinet Secretary for Economy visit to Germany The Cab Sec for Economy visited Dusseldorf for the Medica trade fair with Welsh Companies. The Cabinet Secretary hosted a networking reception for companies at the Wales Stand and hosted a networking dinner for state representatives from North Rhein-Westphalia. The visit also included a meeting with British Consul-General and German Investment company WEPA.</p>
21 Nov	<p>First Minister’s Dip Corp London Event The First Minister travelled to London to host a reception with the London-based Diplomatic Corp. The reception provided an opportunity for the First Minister to outline priority areas for Wales and emphasise the role that international engagement will play in achieving them. While in London the First Minister also held separate bi-lateral meetings with the Ambassador for Japan, the High Commissioner for Canada and the High Commissioner for Australia.</p>

Eluned Morgan MS

First Minister

Welsh Government

23 December 2024

Welsh Government International Relations

Dear Eluned,

Further to your appearance before the Committee for the Scrutiny of the First Minister on 13 December 2024, we would welcome some additional information on the following points to inform our international relations work:

International Strategy

During the meeting, we discussed the fact that you did not intend to undertake a refresh of the International Strategy early next year, but would instead focus resources on a delivery plan "...to make sure we land what we said we're going to land."

- It is understood that the delivery plan is still in development. Could you provide a timeline for the delivery plan?
- Would the Welsh Government provide a briefing to the Committee on the delivery plan?

During the meeting, you acknowledged the Committee's role in scrutinising the Welsh Government's delivery of the International Strategy. You also committed to provide detailed information in the annual report to allow the Committee to meaningfully assess the Welsh Government's progress in this field. We would ask:

- Whether the Welsh Government intends to outline its progress against the 270 actions supporting the International Strategy, as well as accompanying actions plans, in the annual report.



- If this is not the intention, we would ask what metrics will be used to monitor and report on delivery of the International Strategy, and how they will improve transparency and visibility for the public.

In his [letter to the Committee of 1 August 2024](#), the former First Minister discussed the International Strategy's cross-government approach. He said "...there are different delivery teams with responsibility for delivering the activity".

- Could the Welsh Government confirm the number of delivery teams which are active in delivering the International Strategy, and in which directorates they operate?

Implementation Review of the UK-EU Trade and Cooperation Agreement

In the aforementioned letter, the former First Minister also drew our attention to the creation of an EU and Trade working group, and stated "...officials have begun to explore where we think any potential changes to the TCA could benefit Wales in the longer term". Four priorities for the Trade and Cooperation Agreement (TCA) review have already been given by the Former Cabinet Secretary for Economy, Energy and Welsh Language, Jeremy Miles MS, and former Cabinet Secretary for Culture and Social Justice, Lesley Griffiths MS, who [wrote to the Committee](#) on 20 June.

- Could you confirm if further priorities have been identified?

In the [international relations scrutiny session](#) on 19 June, the Committee agreed to a Welsh Government technical briefing about the TCA implementation review, which the letter says will be "at the start of the Autumn term".

- Could a date for this briefing be provided to the Committee?

'Wales In' Years

The former First Minister advised us that officials would share further details about the independent evaluation of the 'Wales in France' year.

- Could you share this information?

In his letter, the former First Minister noted that "alignment to UK and international priorities and programmes is crucial to increasing reach, securing additional funding streams and ownership".

- Could you confirm what engagement there has been with the UK Government as part of the planning process for Wales In 2026?

The former First Minister noted that, "to date, the focus has been on countries where we have a presence in overseas markets. As the programme grows, an increased emphasis on monitoring and evaluation will further develop these criteria".

- How have the findings of evaluations to date influenced plans for 'Wales In' years, including future locations?

Wales Representative in Europe

- Can you provide an update on the future of the role of the Welsh Government's representative in Europe?

We would be grateful for a response to the issues raised in this letter by 24 January 2025.

Yours sincerely,



Delyth Jewell MS
Committee Chair

Croesewir gohebiaeth yn Gymraeg neu Saesneg.

We welcome correspondence in Welsh or English.



Eluned Morgan MS
First Minister
Rebecca Evans MS
Cabinet Secretary for Economy, Energy and Planning
Welsh Government

23 December 2024

International Strategy and Cardiff Airport

Dear Eluned and Rebecca,

Thank you for your letter of 2 October 2024, relating to the Welsh Government's planned long-term subsidy investment funding for Cardiff Airport.

The Committee acknowledges that there will be restrictions on what can be said publicly about the Welsh Government's intended investment package while the Competition and Markets Authority referral process is ongoing, and respects that some of the detail behind the new strategy for Cardiff Airport will be commercially sensitive in nature.

Nevertheless, we are disappointed with the response we have received, which fails to address a number of questions relating to the budgetary implications of this decision which were raised in our letter of 20 August 2024. Please can you explain:

- How will the investment relate to the International Relations budget?
- The Welsh Government has repeatedly told us that it faces a challenging financial situation and cannot plan beyond annual cycles, particularly in relation to other areas of our committee's remit such as the culture sector. How has the Welsh Government made these funds available?

- On what basis was the airport investment prioritised over other financial pressures such as the financial crisis in the arts, culture and sport?

I look forward to receiving your response by 24 January 2025.

Yours sincerely



Delyth Jewell MS
Committee Chair

Croesewir gohebiaeth yn Gymraeg neu Saesneg.

We welcome correspondence in Welsh or English.



Document is Restricted

To the members of the Culture Committee,

I am writing in regards to the full briefing submitted by the The RWCMD in relation to the sudden closure of it's Junior departments and the impact that this has subsequently had on the accessibility and provision of music and drama provision for young people and my concerns as to how stark the future of access to youth training in the expressive arts is becoming in our country.

My son was a student on the advanced/step 4 course at YRWCMD for nearly 6 years, he is a violinist and now 15 and his attendance was made possible by the provision of the bursary available. His entire music friendship base has been rent assunder by the closure and we know many families who have been affected by this. Some have felt forced to relocate to England so as to be able to facilitate their children's musical progression, others have had to curtail or abandon studies due to lack of availability or financial resources and many are now struggling with the effect that this has had on the mental health and well being of their children, as they no longer have community that they can relate to and are struggling with the isolation.

It is inarguable that Wales has now lost a major provision of training for highly talented young musicians and actors. The RWCMD itself recognises this and, states in page 4 of its response the importance of continuity of access and the need for regular ensemble experiences, it also acknowledges the critical decline of provision within state schools. Unfortunately, this is very true, it can be a challenge to find a state institution to accommodate the study of music at GCSE and A level. I do however question the College's stance on the importance of YRWCMD as a talent pipeline in preparation for undergraduate studies. The majority of young students progressed into professional training, and it is a very narrow view to judge this purely on entry into senior college at RWCMD with no recognition of other training bodies.

The RWCMD is quick to cite its project work, which is laudable in itself, but cannot seriously be seen as any kind of viable alternative and is still inaccessible to many younger musicians, especially those who are at an earlier stage of their musical education.

The College highlights the newly formed Acadami, located at Stanwell School, Penarth, as a 'local, sustainable initiative', in truth, it is, at present, a sticking plaster

for a severed artery. A considerable number of ex RWCMD students attend there, alongside my son, many of whom travel from far afield to access this level of training.

This new provision was pulled into existence within the space of 8 weeks through the amazing efforts of a group of ex RWCMD tutors who, with the help of CF Music Service, have managed to establish an alternative provision that is offering more than just 1-1 lessons, and where talented young musicians can work and develop and collaborate with equally talented peers. It is a delicate, fragile thing at present and deserves support to ensure success. Many who attend are working across split sites, either having piano tuition at Chapter Arts centre and then ensemble work at Stanwell (as Stanwell is a state school, and although well provisioned, is not in itself equipped for specialist music tuition), or individual tuition elsewhere and chamber or musicianship at Stanwell. The tuition is excellent, but limited. There is no provision for harp or other instruments that were previously on site at RWCMD such as larger percussion or double bass. Many families are not able to access training here (or are having to limit it), due to financial constraints. At present, funding is only available inline with CF Music provision (FSM and lowest income bracket). For families on modest or median income, there is no assistance.

In a recent BBC article <https://www.bbc.co.uk/news/articles/cdekn0g7y92o> Principal Gaunt herself calls for an increase in funding for the arts. Although it is somewhat galling to those families so directly impacted by the closure of the junior departments that this rallying cry comes now, instead of as an effort to save the departments from closure before the 'very difficult decision was made', her words speak true, we are on the cusp of losing an entire generation of talent.

More young people have been relegated to become bedroom musicians, isolated from the collaborative cohesion that is needed to thrive. The lack of accessible provision in schools and the wider community, cuts to transport for county ensembles, creative hubs such as Blackwood Miners Institute at threat of closure, all pose a distinct threat to the cultural health of our nation.

In the wake of the pandemic we are facing a mental health and educational engagement crisis amongst our youth, and the stripping of music, drama and dance provision only drives this generation further away from meaningful, societal cohesion and further into loneliness. It is dangerous to consider the performative arts as a non-essential frippery, it is the most basic glue that holds a society together and without funding we are facing it purely being accessible only to the privileged

minority and fuelled by elitism rather than the glorious diversity that Wales encompasses.

Yours sincerely,

Bryony Black,

The impact of the Budget on your Broadcasting Agenda

Dear Ministers,

We are writing to ask a question about the implications of the proposed cuts of £1.1 million to the 'broadcasting and media' BEL in the draft budget that you published this month. We would be grateful if you could answer the following questions:

- Is this the BEL that's supposed to pay for the proposals that [you published in a written statement on 12 March](#) this year to establish a Broadcasting and Communications Advisory Body?
- How do you plan to proceed with your proposals for the new Broadcasting and Communications Body in light of your new budget proposals, and what is the timetable for that?

Since the announcement in 2021 that the Welsh Government believes that 'broadcasting and communication powers should be devolved to Wales' and the findings of the Independent Commission on the Constitutional Future of Wales that 'robust work should continue on potential routes to devolution' of broadcasting, we have been pleased that there is cross-party support for our campaign to secure broadcasting and communication powers for our Senedd.

In light of the lack of information about our politics and the alarming increase in dangerous misinformation that contributes to the growth of far right wing forces allowed by the current flawed neo-liberal 'regulatory' system, we sincerely hope that you will continue to proceed with your proposals for a Broadcasting and Communications Body for the benefit of democracy and cultures of Wales.

In that regard, we would be grateful if you could say when there will be an announcement about the appointment of members to the Broadcasting and Communications Body and a timetable for their work.

Yours sincerely,

Carl Morris
Chair, Digital Group, Cymdeithas yr Iaith

Cc: Chair of the Senedd Culture Committee, Chair of the Finance Committee, Leader of the Welsh Liberal Democrats, Jane Dodds MS; Plaid Cymru Spokesperson on Broadcasting, Heledd Fychan MS.

Jack Sargeant MS
Cabinet Secretary for Culture, Skills and Social Partnership
Welsh Government

20 December 2024

Charging for visitor experiences and exhibitions by Amgueddfa Cymru

Dear Jack,

I write to seek urgent clarification about a policy, after your appearance at the Committee's meeting on 28 November 2024. The matter on which our Committee is keen to seek that clarification is about the Welsh Government's policy relating to the introduction of charges for curated experiences such as talks, tours, and exhibitions at Amgueddfa Cymru (that is, outside of the principle of free entry to the national collection at the point of access).

Specifically, I would appreciate clarification on the following points:

Governance and Decision-Making

- Is it your view that decisions relating to charges for visitor experiences and exhibitions fall solely within the remit of the governing body of Amgueddfa Cymru?

Ensuring Accessibility

In evidence to the Committee on 11 December 2024, Amgueddfa Cymru reported that 83% of visitors to Big Pit participate in the underground tour.

- How does the Welsh Government propose to ensure that any charges for this tour will not create barriers to participation, particularly for those visitors from disadvantaged backgrounds?

Charging for the underground tour at Big Pit

In oral evidence to the Committee on 13 November 2024, you said, "What I would be concerned about is if that did have an impact on access to culture. I'd be keen to understand if that is the case." In your written evidence for the evidence session on 28 November 2024, you said, "The admissions policy for a museum is a matter for its governing body."

- In what circumstances, if any, would you intervene in decisions taken by Amgueddfa Cymru about charging for visitor experiences and exhibitions?

Impact Assessment and Data Collection

During the evidence session, we noted and welcomed your commitment to providing the Committee with further information about the collection of comprehensive data by Amgueddfa Cymru for assessing the effect of charging trials on access and participation.

- Could you confirm when this information will be made available?
- Finally, could you confirm whether the Welsh Government will ensure that decisions to charge for visitor experiences and exhibitions will not proceed until the effects on access and participation have been fully assessed and considered?

Your prompt response on these matters would be greatly appreciated.

Yours sincerely,



Croesewir gohebiaeth yn Gymraeg neu Saesneg.

We welcome correspondence in Welsh or English.

Jack Sargeant MS
Minister for Culture, Skills and Social Partnership
Welsh Government

9 January 2025

Scrutiny of the Minister for Culture, Skills and Social Partnership

Dear Jack,

Thank you again for appearing before the committee on 28 November 2024. I write to seek clarification about some of the issues which were discussed during your appearance, and these matters are dealt with below.

Broadcasting

During the evidence session, you were questioned about the Welsh Government's policy position when it comes to the devolution of broadcasting. You mentioned plans to engage in further discussions with stakeholders to help shape your views on this matter.

- Could you please clarify whether, as it says in the Programme for Government, the Welsh Government will still "pursue the case for devolution of broadcasting and communication powers"? If not, could you please clarify why the Welsh Government has changed policy direction on this matter? Or if, conversely, the Welsh Government still intends to pursue the case for devolution in this field, could you please clarify how this aim is being pursued?

Welsh National Opera

The Committee is deeply concerned about the financial crisis facing the Welsh National Opera (WNO) due to significant funding reductions from Arts Council England and the Arts Council of Wales. Whilst we welcome the Welsh Government's September announcement of an additional £1.5 million for the Arts Council of Wales to help mitigate the financial pressures facing cultural bodies, we believe that further action is required to address the immediate challenges. We understand that the WNO has applied to the Arts Council for a share of this funding.

Beyond addressing these immediate challenges, however, we would strongly urge the Welsh Government to consider the need for additional, secure, long-term funding for the WNO. This funding must recognise the WNO's national status and its critical contribution to Wales's cultural standing on the global stage. Without decisive action, we, as a Committee, are in no doubt that there is a serious risk that Wales could lose a significant national asset.

It is important to emphasise that the current crisis extends beyond the loss of jobs: it also threatens Wales's international reputation, the cultural sector's skills base, and essential partnerships, such as those with health boards.

You told the Committee that, "...failure is not an option" for the WNO, and that the Welsh Government is "...absolutely committed to the cause". You did not, however, mention any policies you were considering introducing which might help the WNO, other than the £1.5 million of additional funding that had already been announced for the Arts Council. We would therefore ask:

- What specific interventions, beyond short-term crisis funding, the Welsh Government is considering introducing in order to safeguard the WNO's future?
- Whether the Welsh Government recognises the significance of the WNO's future in the context of Wales's international reputation and influence.

We are concerned that undue recognition has not been given to the broader implications that might arise from the WNO's loss, and we therefore call on the Welsh Government to act decisively to protect the jobs, skills, and talent inherent in this company, and to ensure the future security and sustainability of the WNO.

Sport

- How is the Welsh Government addressing the recommendations from the Committee's earlier report on participation in sport in disadvantaged areas to ensure equitable access to sporting opportunities across all areas of Wales?

Video Games Industry

During the evidence session, you stated that you do not share the University of South Wales's view that Wales is underperforming compared with other UK regions in the video games industry. Instead, you commented that Wales is "...performing very well and punching above our weight".

- On what evidence does the Welsh Government base this assertion?

Cultural diplomacy

The International Strategy's action plan on soft power focuses on cultural diplomacy.

- How have you been delivering on the strategy's cultural diplomacy aspirations, and what are your future plans for this area of work, including for the Strategy's future?

During the Committee's Culture shock inquiry, witnesses spoke about the need for diplomacy to counter perceptions that Wales and the UK are unwelcoming to creative workers from the EU and further afield.



- In light of the domestic pressures facing the sector, how will you ensure that Wales's soft power will not diminish on the world stage?

During the evidence session we discussed the fact that your written evidence includes a section relating to Wales-Ireland relations.

- Could you explain, please, how the new Cabinet is working on the refresh of the Wales-Ireland shared statement?
- Could you please clarify whether the First Minister will be overseeing that work?

I look forward to receiving your response by 6 February 2025.

Yours sincerely,



Delyth Jewell MS
Committee Chair

Croesewir gohebiaeth yn Gymraeg neu Saesneg.

We welcome correspondence in Welsh or English.

Agenda Item 0.8

Rebecca Evans AS/MS
Cabinet Secretary for Economy, Energy and Planning
Ysgrifennydd y Cabinet dros yr Economi, Ynni a Chynllunio



Llywodraeth Cymru
Welsh Government

Eich cyf/Your ref
Ein cyf/Our ref

The Chair of the
Culture, Communications, Welsh Language,
Sport and International Relations Committee
Delyth Jewell MS

10 December 2024

Dear Delyth,

Thank you for your letter and the copy of your 'Culture and the new relationship with the European Union' report.

I am responding as the Cabinet Secretary responsible for Trade Policy due to most of the matters within the report falling within my portfolio.

I have considered the recommendations and have outlined my responses in the enclosed document. I hope the responses are helpful to the Committee.

Yours sincerely,

Rebecca Evans AS/MS

Cabinet Secretary for Economy, Energy and Planning
Ysgrifennydd y Cabinet dros yr Economi, Ynni a Chynllunio

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Rydym yn croesawu derbyn gohebiaeth yn Gymraeg. Byddwn yn ateb gohebiaeth a dderbynnir yn Gymraeg yn Gymraeg ac ni fydd gohebu yn Gymraeg yn arwain at oedi.

We welcome receiving correspondence in Welsh. Any correspondence received in Welsh will be answered in Welsh and corresponding in Welsh will not lead to a delay in responding.



Response to the Culture, Communications, Welsh Language, Sport, and International Relations Committee's 'Culture Shock' report

December 2024

I thank the members of the Culture, Communications, Welsh Language, Sport and International Relations Committee (CCWLSIR) for their comprehensive report examining how the UK's departure from the European Union has affected our culture sector in Wales.

Culture is an integral part of how Wales establishes and develops relationships with the rest of the world. I welcome the opportunity the Committee's work provides in enabling us to consider the obstacles facing our cultural ambassadors.

However, it is important to highlight that several of the recommendations are broader in scope than the confines of the culture sector, as they cover Welsh Government's involvement in, and priorities for, the implementation review of the UK-EU Trade and Cooperation Agreement (TCA). It should be noted that the review is a review of the implementation of the TCA, rather than the agreement in its entirety, and we need to be realistic about the likelihood of significant changes being agreed. I hope the responses provided are informative and helpful.

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Responses to the Committee's Recommendations

Recommendation 1

We call on the Welsh Government to support the recommendation made by the Parliamentary Partnership Assembly in December 2023 (see paragraphs 58 and 59 of this report), and to use all available levers to encourage the UK and EU to progress its actions.

Response: Accept

The Welsh Government fully supports the recommendation made by the Parliamentary Partnership Assembly in December 2023. We are using all available levers to encourage the UK Government and the EU to ease the difficulties being faced by creative sector workers, particularly touring artists. This includes actively engaging with UK Government and the EU, to ensure that the interests of Welsh creative workers are represented and advanced.

Financial Implications: None

Recommendation 2

We call on the Welsh Government to set out what guidance and support it provides to creative workers on cross-border working post-Brexit. The response should include detail on what information is available on its website, the role of its export support and overseas offices, and any funding provided to third parties for advice services.

Response: Accept

Through the Business Wales website, the Welsh Government provides information to businesses on exporting of goods and services from Wales to overseas markets, including the EU. The website contains links directly to UK Government information on exporting procedures, including information about the requirements of the TCA. In addition, our Creative Wales team provides signposting to detailed sector-specific information, including a touring guide commissioned by Arts Council England¹. The guide provides detailed advice for touring artists on navigating new regulations, visa requirements, and tax implications.

Our export support programmes, including our overseas trade events programme and alongside our overseas offices, also play a role in assisting businesses to develop their exports, as detailed in the Export Action Plan for Wales. Moreover, Creative Wales offers

¹ <https://www.artsadmin.co.uk/touring-guide/>

specialist sector level support to businesses in the creative industries through a range of funding schemes and sector engagement programmes.

Wales Arts International (WAI) is the international arm of the Arts Council of Wales (ACW). It is a strategic partner supporting the Welsh Government to deliver the arts and cultural aspects of the International Strategy. WAI leads on Arts Infopoint UK, which offers free, practical information to support and helps artists, creative professionals, and organisations to understand the rules and administrative requirements for creative visits to the UK. A more detailed explanation of Arts Infopoint was provided in written evidence to the enquiry in February 2024:

[Welsh Government written evidence February 2024.pdf](#)

Financial Implications: None

Recommendation 3

We call on the Welsh Government to provide its assessment of Brexit's impact on the culture sector in Wales.

Response: Reject

No specific research has taken place on this. WAI has indicated that, with sufficient investment, future on-going research could be done through Arts Infopoint UK.

Financial Implications: None

Recommendation 4

We call on the Welsh Government to set out what steps it has taken to mitigate the effect of Brexit on the sector, including the financial implications, and what steps it will take in future, in response to this report.

Response: Accept

In response to the adverse effects of Brexit on the culture sector, the Welsh Government has taken several mitigation steps. Financial support schemes have been introduced to help affected organisations and individuals. We have also implemented initiatives aimed at fostering resilience and innovation within the sector.

For example, in 2023, Creative Wales introduced the Young Content Fund, a scheme designed to address the reduction in finance available to the children's animation and TV sectors following the closure of the UK Government's Young Content Fund. Although not a dedicated scheme to address Brexit issues, this fund did help to address the loss of access to EU production funding via Creative Europe.

Creative Wales also provides funding to the PRS Foundation, the UK's leading charitable funder of new music and talent development, to support Welsh artists. Some of this funding is directed at artists for costs such as touring.

The Association of Independent Festivals has received funding from Creative Wales to deliver training for organisers of music festivals in Wales and the freelance workforce.

Creative Wales also delivers an annual music trade mission to the SXSW festival in Austin, Texas, in conjunction with FOCUS Wales, the international showcase festival in North Wales.

Looking ahead, we will continue to monitor the situation closely and adapt our strategies to ensure sustained support for the cultural sector in Wales.

Financial Implications:

Creative Wales – The intention at present is to adapt current programmes taking into account the requirements of the recommendations and in the context of European trade. Where new programmes are identified in due course, additional financial requests may be made on the development of individual business cases.

Recommendation 5

We urge the UK and EU to prioritise new arrangements for creative workers in the upcoming implementation review of the Trade and Cooperation Agreement with a view to progressing the Parliamentary Partnership Assembly's recommendation on touring artists.

Response: Accept

The Welsh Government has a number of priorities for the upcoming implementation review of the Trade and Cooperation Agreement. Whilst we cannot publicly disclose technical details, I can provide reassurance that our high-level priorities include the mobility issues being experienced by a wide range of businesses and individuals. We are currently engaging with UK Government on these priorities.

It is important to note that our ongoing priorities, and those for any discussions with the EU on the TCA or other agreements outside of the TCA, will be determined by the context of relations between the UK Government and the EU. In turn, this will be dependent in part on the approach of the new European Parliament after the recent elections and a new European Commission, and on the approach of the new UK Government. Both parties need to be willing to negotiate to effect change.

Financial Implications: None

Recommendation 6

We call on the Welsh Government to include cross-border creative work as a priority in a clear, coherent strategy setting out its ambition for UK-EU and Wales-EU relations.

Response: Reject

We have previously outlined to this committee, and to the Legislation, Justice and Constitution Committee, that we do not agree that a separate Wales-EU strategy is needed. Our focus is on delivering the International Strategy, which includes our relationship with Europe. The retention of our office in Brussels, and the creation of a dedicated representative for the EU, affirms our commitment that Wales places a high value on our relations with Europe and the European Union.

The economic relationship between Wales and the EU is vital to us and should be enhanced by the relationship between the UK and the EU. The UK Government's emphasis on resetting the relationship between UK and EU is welcome, and we are working with the UK Government to ensure that Welsh interests and detailed positions are reflected in more detailed discussions of the future UK-EU relationship.

Financial Implications: None

Recommendation 7

We call on the Welsh Government to provide its current views on how Wales is represented in UK-EU governance structures in response to this report.

Response: Accept

The Welsh Government acknowledges the importance of Wales's representation in UK-EU governance structures. We actively engage with UK Government on the existing UK-EU governance structure. This includes engaging on the EU trade specialised committees and attending the committees we have an interest in, as an observer.

In 2024, Welsh Government officials attended approximately 18 specialised committees as an observer, with 12 of these relating to trade matters and 6 relating to non-trade matters. For many of these meetings, pre- and post- meetings were held between UK Government and Devolved Government officials to discuss the planned agenda items, with Devolved Governments invited to comment on those items pre-meeting and reflect on discussions post-meeting.

Engagement on the committees has increased recently and we hope that this will enable Devolved Governments to shape agenda items to a greater extent than has been possible previously.

Financial Implications: None

Recommendation 8

We call on the Welsh Government to champion these issues at intergovernmental meetings. It should take practical steps, such as suggesting the following as standing agenda items until the situation improves:

- i. improving post-Brexit arrangements for creative workers, including via the upcoming TCA implementation review; and*
- ii. UK association to Erasmus+ and Creative Europe.*

The Welsh Government should report to this Committee at least once a term on relevant intergovernmental discussions on these specific matters for the remainder of the Sixth Senedd.

Response: Accept in part

The Welsh Government will champion the issues highlighted in this report at intergovernmental meetings. We will take practical steps, such as suggesting the improvement of post-Brexit arrangements for creative workers as a standing agenda item until significant progress is made. This will include continuous advocacy during the upcoming TCA implementation review to ensure that our creative workers have the necessary support and freedom to thrive in the post-Brexit landscape.

Our Ministers have been clear on the ambition for Wales to have the possibility to participate in a much broader range of EU programmes including ERASMUS, Territorial Co-operation, and Creative Europe.

We will report back to the Committee when we have updates to provide. We may need to report to the Committee more or less often than once a term depending on the timings of intergovernmental meetings which is why we have not accepted this part of the recommendation.

Financial Implications: None

Recommendation 9

We call on the Welsh Government to confirm what data and evidence it is using to inform decisions in this area, including to include touring artists as a priority for the implementation review of the Trade and Cooperation Agreement.

Response: Accept

The majority of data and evidence we have been considering comes from WAI, as our strategic partner in delivering arts and cultural aspects of the International Strategy. A more detailed explanation was provided in written evidence to the enquiry in February 2024:

[Welsh Government written evidence February 2024.pdf](#)

Financial Implications: None

Recommendation 10

We call on the Welsh Government to provide its assessment of how its priorities for the implementation review of the Trade and Cooperation Agreement will address all of the elements that need to work together to facilitate cross-border creative work.

Response: Reject

The Welsh Government has a number of priorities for the forthcoming implementation review of the EU-UK Trade and Cooperation Agreement (TCA). However, as we have said, the implementation review is only a review of how the agreement is operating and is unlikely to provide opportunities to change the agreement text.

The UK Government is responsible for delivering on its commitment to reset UK-EU relations, including exploring how to alleviate the problems being faced by businesses and individuals due to Brexit. Therefore, the Welsh Government is making representations to the UK Government at every level to highlight and emphasise areas where problems are being faced by Welsh businesses and individuals engaging in cross-border trade, including those in creative sectors. Whilst we have previously outlined our priorities in more detail, we are not able to expand further at this time due to live, ongoing discussions we are having with the UK Government.

Financial Implications: None

Recommendation 11

We support the Legislation, Justice and Constitution Committee's call for the establishment of a new Welsh Government advisory group on UK-EU relations. This should include representative bodies from the culture sector.

Response: Reject

The Welsh Government already has a Trade Policy Advisory Group (TPAG), which provides advice to Cabinet Secretaries on trade policy matters. Although TPAG has historically focused on the UK's Free Trade Agreement programme, the EU has recently become part of its focus. We are actively considering updating the Terms of Reference and membership of the group to reflect this shift in focus, which includes inviting a representative from the culture and/or creative sector to become a TPAG member to provide specialist sectoral advice.

Financial Implications: None

Recommendation 12

We call on the Welsh Government to set out how it has engaged with stakeholders on the matters covered by this inquiry since January 2021, including key findings and steps taken in response.

Response: Accept

The Welsh Government recognises the need to engage with stakeholders on the ongoing challenges faced by the creative sector in the EU post-Brexit. Our Creative Wales Music team has regular stakeholder meetings with specific groups, but touring has not been raised as a priority issue at any of these meetings. Creative Wales also has stakeholder meetings with the film and TV and games industries, where these matters can be discussed. No significant matters have been raised through these forums on the screen and games side.

From a Trade Policy perspective, the focus of our TPAG has historically been on the UK Government's Free Trade Agreement programme, with the EU only recently becoming part of its focus. We will consider updating the Terms of Reference and membership of our existing TPAG, as detailed in the response to Recommendation 11, which will strengthen our engagement with cultural and creative sector stakeholders.

Financial Implications: None

Recommendation 13

We call on the Welsh Government to incorporate the Committee's findings into its future culture and international relations strategies.

Response: Accept

The Committee's findings will be considered during the development of any future strategies. Our draft Priorities for Culture recognise the importance of culture in how Wales establishes and develops international relationships, and in how we promote Wales to the rest of the world.

Where findings align with our delivery priorities, they will be incorporated to enable effective delivery of our future international relationships.

Where findings align with our economic development priorities for the Creative Industries, we will consider the findings alongside the development of current guidelines, new programmes and activities.

We will continue to engage and work positively with the UK Government to develop the EU relationship.

Financial Implications: None

Recommendation 14

We call on the Welsh Government to maintain a dialogue with the Irish Government on this issue as part of their ongoing and future cooperation, and to scope, where possible, what additional support could be jointly provided while awaiting a UK-EU-led solution.

Response: Accept

The Welsh Government, through our Dublin office and Wales-based teams, have a strong working relationship with Irish Government through the Irish Consulate in Cardiff, the Department of Foreign Affairs and other relevant departments in Ireland. Culture has been a key element of joint delivery within the 2021-2025 Ireland Wales Statement through activities in both Wales and Ireland. The recent Other Voices Festival in Aberteifi is clear example of how we celebrate the cultural ties between both countries. Both governments are committed to working on the development of a future shared statement, where Culture will again be a key theme for engagement. We will continue to work with the Irish Government moving forward to explore ways we can jointly work to support the sector. The First Minister, during her recent visit to Ireland, provisionally agreed future priorities for a new Shared Statement with the outgoing Taoiseach, and these will form the basis of discussions once a new government in Ireland has been established.

Financial Implications: None



Department
for Culture,
Media & Sport

Sir Chris Bryant MP

Minister of State
Department for Culture, Media and Sport
1st Floor
100 Parliament Street
London SW1A 2BQ

Delyth Jewell MS

Culture, Communications, Welsh Language, Sport, and International Relations
Committee

Senedd Cymru

6 January 2025

Dear Delyth,

I welcome the opportunity to respond to the Welsh Parliament's Culture, Communications, Welsh Language, Sport, and International Relations Committee report '*Culture shock: Culture and the new relationship with the European Union*'.

The UK Government is committed to accelerating growth to benefit every corner of the UK and breaking down barriers to opportunity across all sectors, including culture and the creative industries. Working in partnership with the Welsh Government and the other Devolved Governments is essential to deliver on these priorities. We recognise the value that Welsh organisations, such as the Welsh National Opera and BBC National Orchestra of Wales, bring to the diverse and rich cultural offering in Wales, across the UK and internationally.

The UK Government is committed to working with the European Commission and other European friends to strengthen ties, tackle barriers to trade, and build strong and wider cooperation in a range of areas. Following their meeting in Brussels on 2 October 2024, the President of the European Commission and the Prime Minister have agreed to put the UK-EU relationship on a more solid, stable footing. We will now work with the European Union to identify areas to strengthen cooperation for mutual benefit. Culture and the creative industries are vital sectors for both the UK and the EU, and we look forward to strong engagement and collaboration across these sectors to further our shared interests.

There will be issues which are difficult to resolve, as well as areas on which we will stand firm; we've been clear that there will be no return to freedom of movement, no return to the customs union and no return to the single market. However, we are committed to finding constructive ways to work together and deliver for the British

people. With this in mind, we will hold regular UK-EU Summits at leader level to review progress, starting in the first half of 2025. We recognise that delivering new agreements will take time, but we are ambitious, have clear priorities and want to move forward at pace. This approach underpins the UK Government's response to the Committee's recommendation. The UK Government is not responding to those recommendations for other bodies from the Committee's report.

Recommendation 5: We urge the UK and EU to prioritise new arrangements for creative workers in the upcoming implementation review of the Trade and Cooperation Agreement with a view to progressing the Parliamentary Partnership Assembly's recommendation on touring artists.

I fully recognise the scale of the challenges facing professionals, including Welsh artists, wishing to tour in Europe. I am particularly proud of the international reputation of our arts and creative industries, including bands such as the Manic Street Preachers and performing arts groups like the National Dance Company Wales. In order to maintain our global standing, artists need to be able to perform and promote themselves around the world. This Government is exploring how best to help touring artists, and improve arrangements for music, performing arts and culture touring across the European continent, without seeing a return to free movement.

We are already working collaboratively with the creative industries and culture sectors to address the key issues for our brilliant musicians, artists and their support staff, as detailed in your report. We are also engaging with the EU and EU Member States, with a view to improving arrangements for touring across the European continent. Our priority remains ensuring that UK artists, including Welsh talent, can continue to thrive on the global stage.

We have been clear that we want to look forward and make things easier for UK and EU businesses, including those operating in the creative and cultural sectors. However, the timeline and scope of this is something that we will explore together with our EU partners, to do more in our shared interest.

I am copying this response to the Paymaster General and Minister for the Cabinet Office, the Rt Hon Nick Thomas-Symonds MP.

Yours sincerely,

A handwritten signature in black ink, reading "Chris Bryant". The signature is written in a cursive, flowing style.

Sir Chris Bryant MP
Minister for Creative Industries, Arts and Tourism

Document is Restricted



Delyth Jewell MS
Chair
Culture, Communication, Welsh Language, Sport
and International Relations Committee
Senedd Cymru
delyth.jewell@senedd.wales

20 December 2024

Dear Delyth

I am writing in response to your invitation to attend an evidence session on 16 January regarding the scrutiny of the International Relations draft budget for 2025-26.

As with the approach taken by my predecessors, I am declining the invitation on the basis that I intend to appear in front of the Committee once every year.

I will meet with the Committee in June to discuss any questions concerning the development of our international engagement work and our approach to international sustainable development.

As the draft budget has just been agreed, I am working through the allocation of funding for individual activities, for example, Wales and Japan, with officials. I am very happy to continue answering any questions by correspondence and will welcome a conversation next year at the annual scrutiny session. Annex A contains my responses to the questions raised in your invitation letter.

Yours sincerely

Eluned Morgan

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Rydym yn croesawu derbyn gohebiaeth yn Gymraeg. Byddwn yn ateb gohebiaeth a dderbynnir yn Gymraeg yn Gymraeg ac ni fydd gohebu yn Gymraeg yn arwain at oedi.

We welcome receiving correspondence in Welsh. Any correspondence received in Welsh will be answered in Welsh and corresponding in Welsh will not lead to a delay in responding.

Annex A – Responses

Commentary on Actions and detail of Budget Expenditure Line (BEL) allocations

Q1. A breakdown of the 2025-26 draft budget allocations for international relations and international development by MEG, Spending Programme area, Action and Budget Expenditure Line (BEL).

The draft allocations, subject to approval of the budgets are set out as follows:

International Relations	£8,143,000
International Development	£1,050,000

International Engagement (including international short-term attachments)	£2,708,600
Overseas Operations	£4,684,400
Overseas Offices Activity	£750,000
TOTAL International Relations	£8,143,000
International Sustainable Development	£1,050,000

Q2. Final out-turns for 2023-24 and forecast out-turns for 2024-25.

	2023-24	2024-25
Budget (International Relations BEL)	£8,272,000	£8,093,000
Outturn / forecast	£7,708,743	£8,093,000
Budget (International Sustainable Development BEL)	£1,359,000	£1,050,000
Outturn / forecast	£1,358,112	£1,050,000

Q3. Commentary on the Actions within the MEG in relation to International Relations and International Development, including an analysis and explanation of changes between the First Supplementary Budget 2024-25 and the Draft Budget 2025-26.

The work of the International Relations BEL will support the delivery of the International Strategy as well as the activities and support for our overseas offices, including the running costs. This funding supports our priority relationships as well as our strategic partnerships.

Between the first supplementary budget and draft budget, the International Relations BEL has increased by £50,000 to reflect the impact of a 1.3% pay award and the impact of pension contribution increases. The International Sustainable Development BEL has not changed as there are no posts funded through this BEL.

Q4. Comprehensive breakdowns of planned spending within the BEL including International Engagement and International Offices.

The International Engagement budget will provide funding to support the delivery of the International Strategy and action plans, including work with our priority regional relationships, strategic partners and delivering the Wales in years.

This will include delivery of the Wales and Japan year, activities to promote Wales at World Expo as well as the proposed signing of a new MOU with Catalonia and a renewed MOU with the Basque Country.

International offices spend will be in line with the country plans being developed for delivery in the next financial year. These plans are for internal use only and will reflect the economic and cultural priorities for each individual market, as well as maintaining an element of flexibility to adapt to market conditions. All plans will align with the International Strategy and support the delivery of the objectives and action plans.

No additional breakdown or allocation of spend has yet been made as part of this budget to support the delivery of international engagement or the international offices.

Q5. Information relating to outputs, outcomes, impacts and value for money for each area of expenditure within the International Relations BEL.

The work associated with the International Relations BEL directly contributes to the delivery of the International Strategy and action plans. The priorities for the year ahead will be delivered through the revised International Strategy Delivery Plan which my officials are drawing up.

Due to the nature of international relations, outputs and outcomes can be difficult to quantify and measure. The annual overseas network report is just one of the methods that we have used to report on our outcomes.

Activities undertaken will support the presence of our offices overseas, further develop our priority regional relationships, and deliver activities being developed under the Wales and Japan year. In addition, we are working with the UK Government to deliver two days of Wales-specific activity at World Expo in Osaka.

Value for money is considered for all activities undertaken and the appropriate policies followed when procuring services.

Q6. Allocations and comparisons with planned spend for forthcoming year against the previous year.

	2024-25	2025-26
International Engagement (including international short-term attachments)	£2,658,600	£2,708,600
Overseas Operations	£4,684,400	£4,684,400
Overseas Offices Activity	£750,000	£750,000
TOTAL INTERNATIONAL RELATIONS	£8,093,000	£8,143,000
International Sustainable Development	£1,050,000	£1,050,000

Q7. An outline of further potential challenges and prioritisations the Welsh Government may need to take in future years.

We will prioritise spend and activities based on what will be set out to achieve within the International Strategy Delivery Plan being drawn up by officials. This will set out my delivery priorities for the remainder of the Strategy's extended lifetime. We prioritise our work to ensure we continue to deliver internationally with those countries and regions where the best outcomes for Wales can be achieved.

Dependent on budget allocation in future years, there may need to be consideration and prioritisation of the activities which can be delivered within the International Relations programme and where support can be provided externally.

Changing global situations can result in the focus of our work and funding changing in-year. We cannot anticipate when, or if, these could occur and consider any such changes resulting in the reprioritisation of funding as they arise. This flexible and responsive approach is taken across all our international activity and has meant that we have been able to respond positively to unexpected opportunities to raise Wales' profile as they arise.

Other information

Q8. Commentary on the implications of the ongoing effect of the UK's exit from the EU on international relations spending plans, including as it relates to the 'EU transition' BEL.

The EU transition BEL has been closed down and the budget previously associated with this BEL baselined into Welsh Government DRC/Staff Costs BEL in 2024-25. The work continues through the International Relations, Overseas Network and Trade Policy teams using existing resources.

Q9. Commentary on international relations commitments in the Welsh Government's Programme for Government, including draft budget allocations.

The work associated with the International Relations BEL directly contributes to the delivery of the International Strategy and two Programme for Government commitments. Work will focus on meeting the three ambitions of the International Strategy, to raise the profile of Wales overseas, grow the economy and establish Wales as a globally responsible nation through our action plans and the forthcoming International Strategy delivery plan, which will set out our priorities for the remainder of this Senedd term.

The two Programme for Government commitments linked to delivering our international relations agenda are:

- Retain the Welsh Government's office in Brussels
- Establish a Peace Academy – Academi Heddwch – in Wales

The commitment relating to our office in Brussels was delivered in March 2023, with the decision taken to renew the nine-year lease in order to continue our work on EU policy, delivering the Trade and Cooperation Agreement, promotion of Wales/Brand Wales, Trade & Invest activity and Regional/Network interests. The Overseas Operations budget includes funding for the lease on the Brussels office.

The commitment to establish a Peace Academy/Academi Heddwch has also been delivered, with funding for our strategic partnership with Academi Heddwch met by the International Engagement budget. Discussions with Academi Heddwch around funding for its work in 2025-26 are still ongoing.

International Strategy

Q10. Allocations and commentary in respect of:

a) A breakdown of the draft budget allocation to deliver the International Strategy.

All activity within the International Relations and International Sustainable Development BELs supports the delivery of the objectives of the International Strategy and associated action plans which provide the frameworks for all work programmes.

This will include delivery of the Wales and Japan year, activities to promote Wales at World Expo as well as the proposed signing of a new MOU with Catalonia and a renewed MOU with the Basque Country. No allocations have been made yet as part of this budget for individual activities such as MOUs or Wales and Japan.

b) A breakdown of the draft budget allocations to deliver the actions of each of the five accompanying action plans for the Welsh Government's International Strategy. This should include further breakdowns of:

- i. resources for external diaspora organisations.**
- ii. resources for each individual delivery partner tasked with supporting the delivery of the strategy.**
- iii. resources for external culture, arts and sports organisations to support the delivery of the strategy.**
- iv. resources aimed at promoting the Well-being of Future Generations Act internationally.**
- v. resources for engagement with priority regions and countries outlined in the International Strategy.**
- vi. resources for 'Wales in' years, with commentary on how the Welsh Government's evaluations of previous years have informed draft budget 2025-26 allocations.**

No allocations have yet been made as part of this budget for the four action plans which are delivered through the International Engagement and International Sustainable Development BELs. The work of the Export Action Plan is funded through the Export, Trade and Inward Investment BEL and is scrutinised separately by the Economy, Trade and Rural Affairs committee and evidence around this BEL has been presented to ETRA by the Cabinet Secretary for Economy, Energy and Planning.

(i, ii, iii and iv) Diaspora and Strategic Partnerships

No allocations have yet been made as part of this budget to support our strategic partners or diaspora.

(v) Priority Relationships

The relationships we have developed with our priority countries and regions underpin all our international work, from events and visits through to securing inward investment and exporting our goods and services.

Work with our priority relationships covers spend across all areas of International Relations, as well as the wider department and across government. This is reflected in different activities undertaken including, for example, hosting representatives from priority regions at

the Circular Economy Hotspot, visits to priority regions and countries including Baden-Württemberg, India, Brussels and Silesia, inward visits by representatives and diplomats to Wales and the ongoing work to develop new relationships when appropriate.

No allocations have yet been made as part of this budget to priority relationships.

(vi) Wales in Years

No allocations have yet been made as part of this budget to support our promotional years. Wales and Japan year in 2025, which will commence in January, will be supported through International Engagement. This year has been developed using some of the recommendations of the Wales in France evaluation, such as early engagement with external stakeholders, and the formation of a stakeholder group with key internal and external representatives who meet regularly in the planning phases of the year. Additional resources have also been brought in on the communications side to support the Wales and Japan year. This includes an internal team member with responsibility for the campaign and engaging external creative agencies, in Wales and Japan, to ensure the messaging and communications is strong. Similar to Wales in France, the campaign in Japan will take advantage of a global event in the World Expo in Osaka and will provide a key focus for the year.

Overseas Offices

Q11. Allocations and commentary in relation to:

a) the work of the overseas offices, and details of what outcomes will be delivered and how delivery of these outcomes will be measured.

The overseas offices of the Welsh Government play a crucial role in promoting Welsh interests abroad. Their work includes fostering trade relationships, attracting investment, and enhancing cultural ties. The success of these initiatives will be measured through a range of indicators, including economic impact assessments, trade volume increases, and cultural exchange metrics. Each office is tasked with setting specific, measurable objectives aligned with the overarching goals of the Welsh Government's international strategy.

More specifically, each country has a published office remit and we have internal country plans aligned to the priorities of the Welsh Government and opportunities in that country. These are cross government plans. There is a common remit to source inward investment opportunities and identify in-market opportunities for Welsh businesses to secure export deals and support the companies on the export journey. All teams undertake joint working with the Department for Business and Trade (DBT) and other partner organisations where appropriate to support Welsh companies in-market.

The international offices also work towards building diaspora networks within their markets. Overseas teams are able to support Welsh exporters by helping them understand the local market; navigate local laws/customs; and find opportunities and 'open doors' where access can sometimes be difficult. The network raises awareness of the opportunities Wales has to offer, particularly in those areas of the economy where Wales demonstrates international class capability including cyber security, compound semiconductors, fintech, life sciences, renewable energy and in value added / next generation manufacturing – thereby promoting Wales' strengths and selling Wales as a place to do business successfully. They proactively seek out potential inward investors that might consider Wales as a location to invest as well as forging and maintaining relationships with the parent companies/HQs of existing overseas investors with operations already in Wales, to reinforce the relationship, demonstrate our commitment to work closely with them and encourage further jobs and growth in Wales.

b) all planned Welsh Government engagement with major international events, including how the cost benefit of engaging with these events is evaluated.

The major Welsh Government engagement in international events for the next financial year will be associated with the Wales and Japan year and World Expo.

St David's Day events are also always a key calendar date for all of our offices; activity is published each year in our annual report on overseas activity. It provides an opportunity to showcase Welsh cuisine, culture, language and build economic relationships with our overseas partners.

The Welsh Government evaluates engagement with major international events by conducting thorough cost-benefit analyses. These assessments consider factors such as the potential for economic growth, opportunities for cultural exchange, and the enhancement of Wales' global standing. By strategically selecting events that align with our objectives, we ensure that our participation yields maximum benefits and delivers measurable outcomes. The recommendations of evaluations from previous Wales in years have been considered in designing the programme for Wales and Japan.

c) the draft budget allocations for individual overseas offices, and on what basis were decisions on these specific allocations made.

The proposed budget allocation for the overseas operations work to support delivery of all operational and logistical elements of the overseas offices including staffing costs is £4,684,400, however this is not broken down to specific offices, and delivered network wide to cover running costs.

A further £750,000 is allocated to the overseas networks split equally between the North America (£250,000), Europe (£250,000) and MENA (£250,000) (Middle East/North Africa) networks, and further amongst the 20 offices. Budgets are not allocated to individual offices, at the start of the financial year, rather they are allocated on a needs basis once activity has been identified.

Allocations for individual overseas offices will be determined based on their strategic importance, historical performance, and alignment with the Welsh Government's international priorities. Each office's allocation reflects its potential to contribute to economic growth, cultural diplomacy, and the promotion of Welsh interests on the global stage.

Wales and Africa Programme

Q12. Allocations and commentary in respect of:

a) resource provided to the projects and organisations supported by the Wales and Africa programme.

For 2025-26, Hub Cymru Africa will receive a grant of £349,000, as agreed in the 3-year grant award that was signed off by the Cabinet Secretary for Social Justice earlier this year. I have agreed a further allocation of (up to) £210,000 towards the Wales and Africa small grants scheme delivered under contract. No allocation has yet been made under this budget for other project activity, but I anticipate that funding will be provided for our safeguarding project support.

b) funding to support the development of pan-African Tree Planting projects, including the existing Mbale Tree Planting Programme.

Options are being considered for funding allocation to the pan-African Tree Planting projects, including the Size of Wales Mbale Tree Programme in 2025-26, now that the International Sustainable Development budget allocation has been agreed. No decision has been made at this time.

c) funding to support Wales as a Fair Trade Nation, and details of what outcomes will be delivered and how delivery of these outcomes will be measured.

A new three-year grant of £349,000 p.a. was awarded to Hub Cymru Africa in April 2024. The Hub Cymru Africa Partnership Board decides on the allocation for Fair Trade Wales to support delivery of the Fair Trade Nation campaign.

In 2023, Wales celebrated the 15th anniversary of being a Fair Trade Nation. The Welsh Government, in collaboration with Fair Trade Wales, the Scottish Fair Trade Forum and the Scottish Government, developed refreshed Fair Trade Nation criteria (set out below); information on this was published earlier this year, setting out the measures and indicators and the assessment process in order to be considered a Fair Trade Nation.

1. there is widespread awareness of Fair Trade
2. there is significant engagement with Fair Trade across different sectors of society
3. there is consumption and production of Fair Trade products
4. there is political support and engagement with Fair Trade
5. inequalities in global trade and society are challenged by Fair Trade

Agenda Item 10

By virtue of paragraph(s) vi of Standing Order 17.42

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