

Agenda – Public Accounts and Public Administration Committee

Meeting Venue:	For further information contact:
Hybrid – Committee Room 5 Tŷ Hywel	Fay Bowen
and video conference via Zoom	Committee Clerk
Meeting date: 1 May 2025	0300 200 6565
Meeting time: 09.15	SeneddPAPA@senedd.wales

Private pre-meeting (09.00 – 09.15)

Public meeting (09.15 – 11.45)

1 Introductions, apologies, substitutions, and declarations of interest

(09.15)

2 Paper(s) to note

(09.15 – 09.30)

- 2.1 Letter from Chair, Legislation, Justice and Constitution Committee to Jane Hutt MS, Cabinet Secretary for Social Justice, Trefnydd and Chief Whip regarding the Welsh Government's Legislative Consent Memoranda on the Public Authorities (Fraud, Error and Recovery) Bill.**

(Pages 1 – 2)

- 2.2 Response from Jane Hutt MS, Cabinet Secretary for Social Justice, Trefnydd and Chief Whip to the Chairs of the Legislation, Justice and Constitution Committee and the Public Accounts and Public Administration Committee regarding the Welsh Government's Legislative Consent Memoranda on the Public Authorities (Fraud, Error and Recovery) Bill.**

(Pages 3 – 4)



2.3 Letter from the Future Generations Commissioner for Wales to the Chair with an update on recommendations 8 and 10 Scrutiny of Accounts: The Future Generations Commissioner for Wales 2022–23

(Pages 5 – 11)

2.4 Letter from Andrew Slade, Director General, Economy, Energy and Transport – Welsh Government regarding the Wales Life Sciences Investment Fund

(Pages 12 – 28)

2.5 Letter from Dr Andrew Goodall, Permanent Secretary – Welsh Government regarding Scrutiny of Accounts – Welsh Government 2023–24

(Pages 29 – 44)

2.6 Response from Dr Tracey Cooper, Public Health Wales to the Chair regarding Cancer Services in Wales

(Pages 45 – 60)

Break (09.30 – 09.35)

3 Cancer Services in Wales: evidence session with the Welsh Government

(09.35 – 10.35)

(Pages 61 – 101)

Nick Wood, Deputy Chief Executive of NHS Wales

Dr Keith Reid, Deputy Chief Medical Officer – Public Health

Professor Tom Crosby OBE, National Cancer Clinical Director for Wales

Iain Hardcastle, National Director of Planning and Emergency Planning, NHS Wales Executive

Research brief

Break (10.35 – 10.45)

4 Cancer Services in Wales: evidence session with Welsh Government (continued)

(10.45 – 11.45)

Nick Wood, Deputy Chief Executive of NHS Wales

Dr Keith Reid, Deputy Chief Medical Officer – Public Health

Professor Tom Crosby OBE, National Cancer Clinical Director for Wales

Iain Hardcastle, National Director of Planning and Emergency Planning, NHS Wales Executive

5 Motion under Standing Order 17.42 (ix) to resolve to exclude the public from the remainder of this meeting

(11.45)

Private meeting (11.45 – 12.00)

6 Cancer Services in Wales: consideration of evidence

(11.45 – 12.00)

Jane Hutt MS

Cabinet Secretary for Social Justice, Trefnydd and Chief Whip

21 March 2025

Dear Jane

Welsh Government's Legislative Consent Memoranda on the Public Authorities (Fraud, Error and Recovery) Bill

You will know that the Committee is currently considering the Welsh Government's Legislative Consent Memorandum and Supplementary Legislative Consent Memorandum (Memorandum No. 2) on the Public Authorities (Fraud, Error and Recovery) Bill.

At our meeting on 17 March 2025 the Committee noted that, in the Memorandum, you state that the Senedd's consent is required for clauses 1, 2, 5, 6, 7, 9, 10, 64, 65, 67 and 69 of the Bill, and Schedules 1 and 2 to the Bill.

The Committee is unclear why the Welsh Government has concluded that only some clauses in Part 1 of the Bill require the Senedd's consent while others do not. It would appear that the Minister for the Cabinet Office could use any of the powers in Part 1 of the Bill on behalf of a Devolved Welsh Authority. For example, you have stated that the Senedd's consent is required for clause 7, which allows the Minister to use powers in the *Police and Criminal Evidence Act 1984* to investigate suspected fraud against a public authority; as such, why is consent then not also required for clause 3, which allows the Minister to require a person to provide information for the same purposes?

The Committee would be grateful if you would clarify the basis for the Welsh Government's conclusion on consent, as set out in the Memorandum.

We would welcome a response by 17 April 2025.

I am copying this letter to the Public Accounts and Public Administration Committee.

Yours sincerely,

A handwritten signature in black ink that reads "Mike Hedges". The signature is written in a cursive style and is underlined with a single horizontal stroke.

Mike Hedges

Chair

Jane Hutt AS/MS

Ysgrifennydd y Cabinet dros Gyfiawnder Cymdeithasol, y
Trefnydd a'r Prif Chwip
Cabinet Secretary for Social Justice, Trefnydd and Chief Whip



Llywodraeth Cymru
Welsh Government

Ein cyf/your ref JH/PO/134/25

Mark Isherwood MS
Chair, Public Accounts and Public Administration Committee

Mike Hedges
Chair, Legislation, Justice and Constitution Committee.

28 March 2025

Dear Mark and Mike,

I am writing in response to the Committee's letters of 14 and 21 march in respect of the Legislative Consent Memorandum on the Public Authorities (Fraud, Error and Recovery) Bill ('the Bill').

I have reflected on the points raised in your letters and my response is set out below. To note, where I have used clause references from the Bill, these are consistent with the latest version, as brought from the Commons, dated 18 March 2025.

<https://publications.parliament.uk/pa/bills/cbill/59-01/0204/240204.pdf>

Legislative consent

I am pleased that the Public Accounts and Public Administration Committee concurs with the Welsh Government's view that Parts 2 and 3 of the Bill do not require consent (albeit with the exception of clause 99).

I remain of the view that, within Part 1 of the Bill, only clauses 1, 2, 5, 6, 7 (and Schedule 1), 9, 10, 64, 65, 67 and 69 (and Schedule 2) of the Bill as introduced which meet the SO29 Test. These clauses either confer functions on DWAs or relate particularly closely to the investigation of fraud against DWAs. Please note that of these clauses, clauses 1, 2, 7 (and Schedule 1), 9, 64, 65 and 69 (and Schedule 2) were identified by the UK Government as meeting the SO29 Test (as stated in paragraph 11 of the original LCM).

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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.

Regarding clause 99, I remain of the view that application clauses do not generally meet the SO29 Test because they have no legal effect separate to the provisions to which they relate.

Yours sincerely,

A handwritten signature in black ink, reading "Jane Hutt". The signature is written in a cursive style with a large initial 'J' and a distinct 'H'.

Jane Hutt AS/MS

Ysgrifennydd y Cabinet dros dros Gyfiawnder Cymdeithasol, y Trefnydd a'r Prif Chwip
Cabinet Secretary for Social Justice, Trefnydd and Chief Whip and Chief Whip

Public Accounts and Public Administration Committee

By email

28th March 2025

Dear Mark,

Re: Update on Recommendations 8 and 10 'Scrutiny of Accounts: The Future Generations Commissioner for Wales 2022-23'

Please find below the two responses due this month to the recommendations in your Committee's report 'Scrutiny of Accounts: The Future Generations Commissioner for Wales 2022-23' (March 2024). I am pleased to outline the progress we have made in the last twelve months on these matters.

Recommendations 8. We recommend that the Commissioner updates the Committee in a years' time on the delivery of his office's Leadership Academy and Welsh Government International Programme.

The **Future Generations Leadership Academy** is a transformative leadership programme, run by my office. The purpose is to nurture and inspire Wales' future leaders in their journey to achieve the aspirations of the Well-being of Future Generations Act.

The programme is leading to positive change. Feedback from participants consistently affirms that without the experience of the Future Generations Leadership Academy and the Alumni network, they would not have had the chance or skills to develop as they have. This link is the [latest article](#) on the Academy programme. This [webpage](#) and provides more information about the Academy.

I am immensely proud that the Academy has given access to exciting personal and career opportunities to underrepresented groups. The Academy includes an accessibility fund to help participants, who may otherwise experience barriers to participation, take part in the programme.

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The 4th cohort successfully graduated on 14th of March 2025; 36 young leaders aged 18-30 years old took part, all of whom are passionate about putting the Well-being of Future Generations Act into action.

The 4th Future Generations Leadership Academy enjoyed buy-in and support from sponsor organisations. The programme received sponsorship from both public and private sector organisations demonstrating cross-sector appetite for the service. It was run on a budget of £181k. Since its inception the Academy has generated £593,675 in sponsorship funding.

We now count 120 future leaders as part of the alumni of the Future Generation Leadership Academy. Alumni of the Academy report that the academy has helped their careers. Many have taken on leadership roles, becoming Trustees and Board member.

This year my team worked with the organisation called Leaderful Action who were contracted to analyse the feedback we collected throughout the year and compose the impact report, as well as design and deliver bespoke training.

My office has begun exploring partnerships and sponsors for the 2025/26 Future Generations Leadership Academy and is aiming to launch the next cohort in September 2025.

My office has exciting plans to grow and increase the reach of the programme. My team are designing a 3–5-year business plan and are exploring opportunities to work with external partners like the Open University, Cardiff University, Bridgend College and the Campaign for National Parks organisation, who all have similar aspirations for leadership academies.

Our **international programme** is dedicated to facilitating and supporting good practice exchanges between Wales and global stakeholders, enabling knowledge-sharing and collaboration on sustainable development, climate action, and well-being policies. By engaging Welsh public bodies with international counterparts, we strengthen relationships with governments, institutions, and organisations, ensuring Wales is recognised as a leader in long-term governance. In 2024-2025, our focus has been on enhancing these exchanges to support the effective implementation of the Well-being of Future Generations Act, both by helping Welsh public bodies share their challenges and learn from global best practices, and by raising the international profile of the Act by showcasing Wales' progress on the world stage.

This work has been made possible through £200,000 in specific funding from the Welsh Government's International Division in both 2023-2024 and 2024-2025, with an indication that a similar level of funding will be available for 2025-2026. However, as the Welsh Government undertakes a refresh of its International Strategy, the model of funding for future years is moving to a bidding process.

This year, our engagement with European cities and institutions has included engagement with the Irish and Finnish Governments on implementing national well-being frameworks. As a result, the Finnish Parliament's Committee of the Future recommended that Finland follows the model set in Wales by its own Well-being of Future Generations Act. As a follow-up to our engagement with the Irish Government on well-being budgeting, we are organising a session with the Welsh Government's Finance and Sustainable Futures teams to share insights from Ireland's approach of implementing budget tagging to align spending with well-being indicators. We are also facilitating a briefing for Irish officials on the local and regional applications of the Well-being of Future Generations Act.

As part of our commitment to knowledge-sharing, we recently facilitated exchanges between Public Health Wales and the Finnish Institute for Health and Welfare in Helsinki, as well as between Cardiff Council and Nantes Councils' Parks and Recreation teams on climate and nature initiatives. In public health, we gained valuable insights on effective prevention strategies, which we are now sharing with Public Health Wales and public bodies across Wales. Additionally, following the engagement between Cardiff and Nantes, both councils have committed to ongoing collaboration, continuing to exchange learning and good practices on urban climate resilience and nature-based solutions.

Beyond Europe, we have supported Welsh Government's Wales in India Year 2024 and Wales and Japan Year 2025. Our engagement has directly contributed to Maharashtra's efforts to introduce their own Future Generations Bill, which was formally tabled in June 2024. We have also helped connect universities in Maharashtra with Welsh organisations that provide courses on sustainable development, such as Black Mountains College and WJEC. Looking ahead, we will continue to support this collaboration through virtual workshops and a knowledge exchange between young people in Wales and India on climate change and sustainable development.

In our ongoing global policy engagement, we continue to promote Wales' leadership in long-term thinking and future generations governance. Recently, we attended the UN Summit of the Future in New York, where we met with UN officials, including the UN Under-Secretary General for Policy, Guy Ryder. During the Summit, we hosted a side event with UNESCO-BRIDGES, delivered a keynote speech alongside the Prime Minister of Jamaica, and moderated a panel discussion with the UN Futures Lab and the OECD. Ahead of the Summit, we also organised a Future Generations Forum, engaging over 50 Welsh stakeholders to ensure that Welsh voices shaped the Commissioner's contributions.

We remain committed to supporting the Welsh Government's International Offices in embedding the Well-being of Future Generations Act into their global work. Over the past year, we have briefed international teams in Ireland, Japan, Germany, France, North America, and India, providing guidance on sustainability and future generations governance, and connecting them with in-country stakeholders.

Finally, to ensure that young people in Wales benefit from our international engagement, the Future Generations Leadership Academy has incorporated an international dimension into its 2024–2025 programme, giving participants exposure to global perspectives on sustainable development.

Academy alumni have participated in international events, including European Union meetings in Brussels, a European sustainable development workshop alongside young leaders from Flanders, participation in the EU Together Stronger programme in London and meetings with members of the Maharashtra Legislative Assembly.

In the coming year, we will continue to expand our international reach, supporting public bodies in Wales to engage with global good practices and ensuring that Wales remains at the forefront of sustainable development and future generations governance. The focus and extent of this work will depend on the funding made available by Welsh Government.

Recommendation 10. We recommend that the Commissioner provides the Committee with an update, in a year's time, on the work and progress being made to attract and recruit disabled people in the workforce at the Commissioner's Office.

To further enhance the skills and knowledge of our existing team members, we are collaborating with Disability Wales to provide education awareness sessions on the Social Model of Disability in the next financial year. This is the model used by Welsh Government, having been formerly adopted in 2002. The social model defines that people are disabled by barriers in society, not by their impairment or difference.

The social model helps us recognise barriers that make life harder for disabled people and underpins how an equal Wales can be achieved. Our ongoing work with Disability Wales is helping us further embed the model in our own work to make us a more inclusive employer for disabled people as well as improving the advice and assistance we give to public bodies on implementing the equal Wales goal.

We have explored a number of specialist job boards for recruitment advertising purposes. These have included Evenbreak, Reach and Disability Jobsite. We also share our roles extensively with our networks, including the Future Leaders Academy Alumni and our equality stakeholder network. We do not experience a high volume of vacancies and since our re-structure in 2023 where we lost 18% of our workforce, we have not had any permanent job opportunities. That being said, we have increased the number of people with disabilities who work with us from 0 to 7.4% via temporary recruitment. We operate positive action measures which are reviewed each time a vacancy arises. This includes offering a guaranteed interview scheme to people with disabilities who meet our essential job criteria.

As talent leaders we have a responsibility to acknowledge the power dynamics that exist in the selection process and do our part to disrupt this pattern. As a result, we have taken steps to improve our hiring practices by sharing interview questions in advance. Doing so means that all candidates have access to the same information upfront. We help candidates know what to expect, how best to prepare, and what we are looking for. We pull back the curtain to create space for a candidate to think about their skills and match rather than fretting about what is coming next or trying to prepare for every interview question they could be asked.

Our relationship with Welsh Government's Disability Unit has also strengthened over the last twelve months. We recently reached out for some in-depth neurodiversity advice to help shape our offer to Future Generation Leadership Academy participants. As a result of this enhanced relationship, we have been able to build an improved neuro-inclusive learning environment, harnessing the potential of underrepresented neurodiverse talent. We also

spoke at length with the Disability Unit about the merits of the Disability Confident Scheme. This is something we are considering and would have to work towards becoming a Disability Confident Leader, an aspiration we hope to achieve in the future.

As part of our wider work around accessibility and inclusivity, we have introduced a policy for accessibility payments which applies to our work in a range of settings including our Future Generation Leadership Academy and initiatives such as commissions with freelance artists. The bursaries are applicable for a range of accessibility support including assistance to attend meetings, or payment for childcare.

Additionally, we have pledged to be part of the 10,000 Able Interns Programme, a UK based paid programme for disabled talent experiencing social and physical barriers to work. Alongside this, we are in discussion with a number of other public body organisations in Wales to consider a joint apprenticeship through the Cardiff and Vale College On-SITE (Supported Internships) scheme. Supported Internships are a transition to work programme committed to transforming the lives of young people with additional learning needs. This is a Welsh Government funded programme.

Finally, our office premises which are hosted by Tramshed have undergone a series of accessibility improvements over the last year. We were pleased to introduce Tramshed to Trevor Palmer, a Board member of Disability Wales with lived experience. He worked alongside Tramshed offering a series of recommendations to help advance inclusive building design. Inclusive design is about more than buildings and the space around them, it is about enabling everyone to participate equally, confidently and independently in everyday activities. It is vital to creating a sense of belonging and making society more equitable.

A series of building modifications were made to include, drop curves being removed from the highway so wheelchair access from train station to both main entrances to Tramshed Tech and the Production Hub are accessible without having to cross any roads. Ramped access to main areas was introduced, the whole building has been adapted for visually impaired people, Changing Places Toilet facilities have been introduced, automated door access was installed, a hearing loop has been made available in addition to a quiet room for neurodiversity. Tramshed are also looking to reduce the lumens of the lighting in the space over the coming months.

I hope you find this information useful and please feel free to ask for additional information if needed.

Yours sincerely,



Derek Walker

Future Generations Commissioner for Wales

Cyfarwyddwr Cyffredinol - Director General



Llywodraeth Cymru
Welsh Government

Mark Isherwood MS
Chair
Public Accounts and Public Administration Committee
Welsh Parliament
Cardiff Bay, Cardiff CF99 1SN

31 March 2025

Dear Chair

Wales Life Sciences Investment Fund

I am writing in response to your letter of 3 December 2024 in which you requested an update on developments with the Fund, following the earlier evidence session on this subject and additional information provided thereafter.

Welsh Government and DBW officials met with Audit Wales and the Committee's clerking team to discuss this matter, as you proposed, with the aim of ensuring sufficiently comprehensive information could be provided to the Committee so it can draw its interest in this matter to a close.

A full response to the Committee's specific questions has been prepared jointly with DBW and is now attached at Annex 1. I also attach (at Annex 2) a short report recently prepared for me by Giles Thorley, which sets out his final thoughts and key lessons on the Fund.

Yours sincerely

Andrew Slade
Director General
Economy, Energy and Transport

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Wales Life Sciences Investment Fund

Public Accounts and Public Administration Committee requests

1. Updated position and developments

1.1. Could you please provide an updated position of the fund (noting Companies House still shows that it is 'active'), the residual assets of the fund, including the current valuation of any assets still held by the Development Bank of Wales (DBW).

Updated asset valuations

We can confirm the Partnership has been dissolved, final tax return completed, and all assets distributed to the limited partners.

In the closure review, the value of the assets to be transferred to the Development Bank of Wales was forecast to be £1.8m at closure of the Fund. This was a point in time audited valuation. As discussed in the Committee evidence session on 27 September 2023 (transcript paragraphs 108 – 109) the movement from the previously issued figure of £2.5m to £1.8m was due to the list assets changing share price.

Below is a table summarising the latest valuation of assets distributed to DBW Investments (9) Ltd following the Fund closure and winding up of the Partnership. The distribution included £904k of cash proceeds.

Asset	Status	Latest estimate
Fund cash	Cash proceeds distributed to DBW Investments (9) Ltd.	£1.825m
Listed assets	ReNeuron is now in administration and valued at zero.	£0
Unlisted assets	InterRad and CeQur investments at fair value	£0
Deferred consideration*	Apitope International NV announced its intention to liquidate in 2019 and formally entering voluntary liquidation in October 2020. Assets of the company were acquired by Worg Pharmaceuticals in 2021, creating a deferred consideration,	£0
Total	The latest audited valuation of the assets transferred to DBW Investments (9) Ltd at (September 2024) and the cash proceeds returned.	£1.825m

*Deferred consideration refers to the distribution of proceeds for an asset as being delayed and dependent on future conditions rather than at the point of sale. In the case of Apitope, the legal entity receiving investment from the Fund ceased trading in 2020. Therefore, a waterfall of investors are the beneficiaries of the deferred

consideration if the purchased assets pass list of milestones set within the asset purchase agreement. DBW's position within the waterfall means crystallising of the deferred consideration is improbable and it will be valued at zero until a payment is made. As the legal entity was liquidated three years prior to the Minister's statement in February 2023, and the deferred consideration considered improbable, it was not categorised as a "remaining" investment.

2. Summary of the fund's transactions

2.1. Could you provide a detailed summary, by year, of fees/reimbursements paid to the fund manager/Arix (as a limited partner/investor) throughout the fund's duration. Additionally, please indicate how these fees were calculated and the purpose of any reimbursements.

Fees

Below is a summary of net General Partner Share paid by the DBW Investments (9) Ltd as limited partner and Holding Fund on behalf of Welsh Government, updated to include the final cash distributions and rebate amounts.

Fund Period	Net paid (less equalisation & rebates)	Actual annual charge
First close & set up fee	£5.6m	2.5%
Second close (final fee structure)	£2.1m	0.8%
Total (life of fund)	£7.7m	1.5%

The submission to PAPAC, dated 14 September 2023, and closure review estimated the final net fee to be equivalent of 1.7% per annum. Following the final rebates, this has reduced to 1.5%.

Below is the annual accrual of DBW Investments (9) Ltd share of the General Partner Share by period. Following the £5m investment from Arix BioScience and Limited Partnership Agreement variation, fees accrued and were only drawn from proceeds generated.

Fee period	Transactions description	Total
Setup fee	Set up cost	£0.5m
Feb 13 - Mar 14	General Partner Share for first fee structure period	£1.4m
Apr 14 - Mar 15		£1.3m
Apr 15 - Mar 16		£1.2m
Apr - Dec 16		£0.9m
Jan - Mar 17		£0.3m
2014-2017	Total for first close fee structure period	£5.6m
Apr 17 - Mar 18	DBW Investments (9) Ltd share	£1.0m
Apr 18 - Mar 19	DBW Investments (9) Ltd share	£0.8m
Apr - Dec 2019	DBW Investments (9) Ltd share	£0.4m
Jan - Dec 2020	DBW Investments (9) Ltd share	£0.5m
Jan - Dec 2021	DBW Investments (9) Ltd share	£0.4m
Jan - Dec 2022	DBW Investments (9) Ltd share	£0.2m
Jan - Feb 2023	DBW Investments (9) Ltd share	£0.0m
2017-2023	Total for second close fee structure period	£3.3m
Full Fund	Gross DBW Investments (9) Ltd share of fees	£8.9m
Equalisation	Paid to DBW Investments (9) Ltd as catch up on Fees after Arix £5m investment*	(£0.5m)
Rebates	Distributed in 2019* and 2023 following General Partner Share drawdown.	(£0.7m)
Total Paid	Net DBW Investments (9) Ltd share of fees	£7.7m

*The equalisation payment and 2019 rebate made up a proportion of the proceeds transferred from DBW Investments (9) Ltd to Welsh Government following the Simbec exit.

Fee structures

Below is an outline of how the fees were calculated and the purpose of the rebate mechanism.

Until the August 2017 Variation Agreement, payment of the General Partner's share operated in line with the original Limited Partnership Agreement. This original structure of fees for the first close of the Fund was set to continue until the realisation period. The realisation period was due to begin on 28 February 2018. Below is a summary of the original fee structure.

- **First close investment period** (Holding Fund Loan Commitment Period): 2.5% per annum of the aggregate Holding Fund Loan Commitment as at the date of the Limited Partnership Agreement less the aggregate of all amounts by which the Acquisition Cost of any Investments have been written down or written off in accordance with the Valuation Procedures.
- **First close realisation period:** 2.5% per annum of the Acquisition Cost of the Investments after deduction of (a) the Acquisition Cost of any Investments which have been sold or otherwise disposed of and (b) all amounts by which the Acquisition Cost of any Investments which have not been sold or otherwise disposed of have been written down or written off in accordance with the Valuation Procedures.

The fee structure changed when Arix BioScience invested £5m into the Fund and made the equalisation payment of £479,395 to DBW Investments (9) Ltd. Arix, as Limited Partner, then became responsible for its share of fees in proportion with their £5m investment into the Fund.

The new fee structure opened the Fund to private funding and kept the investment phase open to encourage further investment activity using privately sourced funding. The new structure was a gross 2.5% charge but introduced a performance-based rebate to reduce fees to the net position outlined above.

The rebate was a repayment of fees to the Limited Partners based on the performance of the portfolio. Repayment was the amounts required to reduce the fee in line with the first close realisation phase fee structure.

The new structure and rebate mechanism ensured that while the Fund had legal structures to remain open for further investment, it incentivised the Fund Manager to make commercially advantageous decisions. By only paying the accrued fee and consequent rebate when proceeds were generated from an exit, the new structure also addressed the cash flow issues noted in the 2016 Regeneris report.

As stated in the evidence paper, dated 14 September 2023, due to lower valuations and returns, fees were below that anticipated by the 2016 Regeneris report.

2.2. Could you provide a detailed summary of all divestments (either through the sale of investment or write-offs for liquidated companies) throughout the fund's duration.

As referred to in the evidence submitted to the Committee (see the table under the Specific investment detail section in response to question 6 of the Committees' questions), several businesses were divested prior to Fund closure through write offs and exits. The summary is of divestments and write offs prior to winding up of the Fund and distribution of assets is below.

Company	Original Investment	Trigger	Value	Summary
Apitope	£4.5m	Write down	nil	Business closed in 2019 with a milestone dependent Deferred consideration,
Rutherford Health	£10.0m	Write down	nil	Business closed in 2022 with no assets to be distributed to DBW9
Sphere Medical	£5.0m	Write down	nil	Business closed in 2019 with no assets to be distributed to DBW9
Simbec-Orion	£8.8m	Exit	£19.7m	Value transferred in specie following distribution process
Vernona Pharma	£4.3m	Exit	£2.3m	Repayment of loan
		Exit	£0.9m	Value transferred in specie following distribution process
ReNeuron	£10.0m	Write down	nil	Entered Administration proceedings in 2024.
Intelligent Ultrasound	£0.6m	Exit	£0.1m	Sold part of its business generating liquidity for DBW 9 to exit

2.3. Could you provide a detailed summary of all other transactions that have not been accounted for in previous evidence such as audit fees, brokerage costs, loans etc.

The General Partner was responsible for accounting administrative expenses for the Limited Partnership. This included accounting for custodianship fees, audit and tax fees, legal fees for investments or Partnership changes. DBW Investments (9) Ltd share of these administrative expenses for the Limited Partnership accumulated to circa. £783,000.

This £783,000 is a net figure made up of £178,900 for the first close period (after the equalisation payment) and £604,000 for the remaining duration of the Fund.

If, by brokerage fees, this refers to arrangement fees then these are separate from the Fund as they were charged to the investees by the Fund Manager. As stated in the evidence paper, dated 14 September 2023, “the Auditor General Wales acknowledged arrangement fees were a standard practice as part of a commercial negotiation between the Fund Manager and the investee companies.” There is more detail on these fees in that submission also.

The £3m loan referenced in the Regeneris report was repaid in full in 2016.

2.4. To support the response above around fees, we would welcome sight, or at least a summary of, the findings of the in-depth review of fees that the closure report says was conducted in 2023.

The in-depth review involved going back through the entire history of the Fund to reconcile all fees to ensure they were fully in line with the Limited Partnership Agreement.

The final output was an agreed General Partner Share and distribution reconciliation workbook. This workbook demonstrates the full history of fee accrual matched to the LP annual accounts and final distribution amounts before proceeding with liquidation. This confirmed the final net fee at £7.7m as stated above.

3. Support to invested business

3.1. We previously raised a question around whether any sums involved in the ‘co-investment at deal level’ figure of £273 million included any public purse monies beyond the Fund’s own investment. We also asked about any other direct public investment or wider grant support in any of the companies invested in by the Fund, but outside of the Fund itself. The Committee would still welcome confirmation of any public funding support that the various companies invested in by the Fund received from the Welsh Government or Finance Wales/DBW (in whatever form) during the lifetime of the Fund but outside of the Fund arrangements itself (i.e. under other programmes of support).

Between June 2006 and August 2014, Finance Wales invested £1.5m in Medaphor, now called Intelligent Ultrasound. Drawdowns of Finance Wales investments made into Medaphor while the Wales Life Sciences Investment Fund was investing were tranches of a round of investments which started in 2012, before the Fund investment period.

Companies invested in by the Wales Life Sciences Investment Fund during the lifetime of the Fund – Welsh Government funding support:

Company	Welsh Government funding support
ReNeuron Plc	<p>The 2016 Wales Audit Office Report notes the Welsh Government issued an ‘in principle’ support package of £7.8m related to ReNeuron in 2013. The 2016 Regeneris Review of the WLSIF also references this.</p> <p>The ‘in principle’ package comprised:</p> <ul style="list-style-type: none">a) non-repayable business finance of £1.8 million;b) training grant of £0.5 million;c) research and development projects of £1 million;d) clean rooms and manufacturing facility support worth up to £4.5 million. <p>The Welsh Government went on from this “in principle offer” and provided a joint offer to ReNeuron Group plc and ReNeuron Limited with business finance of £500k for job creation support in September 2014. The project completed on a reduced scale in January 2019 with £457,423 released based on the creation of 43 highly skilled jobs.</p> <p>Recipients of grant are required to maintain assets purchased and the jobs for a period of up to five years following the final payment, otherwise there is a</p>

	clawback of grant. ReNeuron is now in administration. This is expected to impact options for clawback.
Simbec Orion Group	2015 - £138,000 grant paid 14.5 jobs safeguarded Simbec's assets and job numbers were confirmed to be in place.
Intelligent Ultrasound (Medaphor)	2014 - Innovation Voucher £30,000.00 (a form of support to assist businesses invest in research and development activities) Trade support: c. £5,000 (assistance with export) As these awards were made over ten years ago, the outputs and outcomes are not available. However, they would have included the following: <ul style="list-style-type: none"> 1. New products and processes introduced 2. New overseas orders won. The company is still trading and employs over 60 people.
Rutherford Health (Proton Partners)	N/A
Sphere Medical	N/A
Verona Pharma Plc	N/A
Apitope International	N/A
InterRad Medical	N/A
CeQur SA	N/A

The jobs figures included in this table are outside the timeline of Fund investments for both ReNeuron and Simbec. We understand they are distinct from the job figures previously reported for the WLSIF investments.

4. Other matters

4.1. When we took oral evidence, we heard that DBW was planning an evaluation of the Fund and that it was aiming to complete this by the end of the 2023-24 financial year. You have since provided a copy of the closure report. However, some of the dates in this document suggest that it had largely been produced before our evidence session and that it had been due for submission to the Welsh Government by the end of September 2023 (although it also refers to submission by the end of October 2023). We would be grateful if you could confirm the chronology of the closure review report and its approval and whether there was ever any intention of producing any separate/broader evaluation report.

The review was mainly written following the Committee evidence session in September 2023 to ensure it met the requirements of Welsh Government and the details discussed in Committee.

It is standard practice for the development bank to undertake an evaluation at the end of a Fund, as it did with the Wales Businesses Fund

As stated in the Committee (paragraphs 223 - 226 in transcript) Development Bank were already in discussions with Welsh Government on a final review.

The discussions with the Welsh Government on a closure review were initiated in May 2023 aimed at establishing a terms of reference. The initial terms of reference were agreed by August 2023 with an initial draft deadline of October 2023.

Following the August invitation to appear at the Committee in September 2023, the draft deadline was postponed so the review could be better targeted at addressing points raised during the Committee evidence session.

The first draft was submitted in January 2024 and following an iterative process, was finalised and provided in May 2024.

4.2. We note the closure review states that DBW's responsibility is to pay the final fund returns to Welsh Government upon the end of the realisation term of the remaining investments at a date to be agreed by DBW and Welsh Government, which is no later than 31 March 2025. It also states that DBW will undertake an end of realisation review at that point. We would welcome an update on these arrangements and an overview of what the end of realisation review would cover in the context of some of our above requests and so that we can understand its potential relevance to the content and timing of any reporting by the Committee on the outcomes from the Fund.

All proceeds received from the assets into DBW Investments (9) Ltd will be paid to the Welsh Government by 31 March 2025. There are still potential receipts (currently valued at £0.1m) from the remaining assets held which will be returned to Welsh Government when they are received.

In supporting the Committee's inquiry, the bank and Welsh Government have submitted several evidence papers and responded to specific queries. Given the transparency of this information, we do not intend to represent this information and analysis again in an extensive end of realisation review.

The realisation review will include a final summary from the accounting officer at Development Bank of Wales setting out high level conclusions and recommendations relating to the Fund. Alongside a short summary of fund performance, the report will summarise key lessons emerging from the operation of the fund (as have already been shared with the Committee) which may serve as a valuable point of reference for any future proposal seeking support for a sector venture capital fund. To this end the report will not introduce any substantive new analysis or assessment not already shared with the Committee.

Andrew Slade
Director General
Economy, Treasury and Constitution
Welsh Government
Cc Duncan Hamer. Director Operations, Business and Regions

Dear Andrew,

As Chief Executive and accounting officer for the Development Bank of Wales I am writing to you regarding the Wales Life Sciences Investment Fund.

This offers my final thoughts and key lessons on the fund which should be considered should a similar fund be proposed in the future.

Yours sincerely,

Giles Thorley
Chief Executive, Development Bank of Wales

Development Bank of Wales Plc

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info@developmentbank.wales | developmentbank.wales



Mewn Partneriaeth â
Llywodraeth Cymru
In Partnership with
Welsh Government

Development Bank of Wales Plc is the holding company of a Group that trades as Development Bank of Wales. The Group is made up of a number of subsidiaries which are registered with names including the initials DBW. Development Bank of Wales Plc is a development finance company wholly owned by the Welsh Ministers and it is neither authorised nor regulated by the Prudential Regulation Authority (PRA) or the Financial Conduct Authority (FCA). The Development Bank of Wales has three subsidiaries which are authorised and regulated by the FCA. Please note that neither the Development Bank of Wales Plc nor any of its subsidiaries are banking institutions or operate as such. This means that none of the group entities are able to accept deposits from the public. A complete legal structure chart for Development Bank of Wales Plc can be found at www.developmentbank.wales

Pack Page 23

1. Context

The purpose of this short report is to provide a high-level summary of the key points to ensure they are not lost and are easily accessed by anyone contemplating creation of a similar fund in the future. This report does not go into the detailed performance of the fund or any individual investment or reviews, however links to the key documents which cover these matters are in annex A.

The Wales Life Sciences Investment Fund ran for 10 years between 2013 and 2023. It was seen as part of an ambitious and innovative policy to enhance support to and grow the Life Sciences sector in Wales. The funds 10-year term has now ended and, apart from some low value assets which have yet to be exited, is now closed.

The fund was set up with four objectives:

- to increase accesses to equity finance for Life Sciences SMEs,
- attract Life Science businesses to Wales,
- increase rate of growth and employment for the sector in Wales and,
- increase commercialisation of Life Sciences research, development and innovation.

Overall, the fund did meet these objectives.

To date, of the £50m Welsh Government investment into the fund it has returned £21.8m. The financial loss on the fund was caused by several factors:

- The investment strategy assumed a larger fund size which resulted in a less diversified portfolio, which increased risk and limited follow-on funding.
- A major investment fund (Woodford Equity Income Fund) in life sciences in the UK, who co-invested in some WLSIF businesses, collapsed. This left those WLSIF investee companies facing greater difficulty in raising follow-on capital.
- Whilst the Covid pandemic impacted all investee businesses, it was quoted as a contributing factor for the failure of Rutherford Health.
- For businesses like ReNeuron Group PLC disappointing results of their clinical trials were the main contributing factor to the company's failure.

The Fund has been subject to many reviews throughout its life. These have included Welsh Government Internal Audit, the Wales Audit Office (now Audit Wales), external consultants Regeneris Consulting (now Hatch) as well as numerous reviews by the Development Bank. These have helped to guide and shape the fund throughout its lifecycle.

2. Core lessons

2.1. Choice of Fund Manager

The fund was designed to focus on just life science businesses either located or willing to locate to Wales. It also had an ambition to raise an additional £50m. The decision to appoint an external, specialist fund manager was considered the best option as it is a very specialist sector and a fund manager specialising in Life Sciences would have been better placed to raise the private sector investment at fund level and have better contacts with life science businesses looking to relocate to Wales.

Previous reviews highlighted several issues in the early stages of the Fund. They included communications between the fund manager, DBW and the Welsh Government as well as the level of fees the Fund Manager directly charged the investee businesses. While the charging of fees by a fund manager is standard practice in the Venture Capital market, the fund management contract did not set limits. **The Governance, including lines of communication and other issues such as prescribing charging limits needs to be considered, and built into the fund management contracts at the outset.**

2.2. Risk profile

Venture Capital is a form of investment that focuses on early-stage, innovative businesses with strong growth potential. As such this form of investment, particularly in the Life Sciences sector, also attracts a substantial element of risk.

Whilst £50m is a large sum of money, it is relatively small for a fund of this type. The initial aim was to raise a further £50m, creating a £100m fund. The fund manager cited the Wales Audit Office review of the fund, which took around two years, as a major cause of them being unable to raise the additional £50m as it would have caused concerns with potential investors. Eventually the fund manager ARIX Biosciences PLC invested £5m into the fund in 2016.

Normally the maximum investment from a fund into a single business is limited to 10%. This mitigates the impact to the fund should some of the investments fail. In this case the fund manager made 11 investments in 9 companies, with three of those investments exceeding 10% of the value of the fund. Because of this, the Regeneris review concluded the fund was 'over concentrated'.

The decision to approve the additional investments in the three companies beyond 10% were based on the assumption, and promises by the fund manager, that they would raise the additional £50m investment at fund level. If this had happened all investments would have been within the 10% threshold. **The key lesson learnt is to base all investment decisions of the value of the fund at that time and not on potential future value.**

The 9 investee businesses represented a broad portfolio, ranging from lower risk established businesses with revenue streams to very high risk (potentially very high return) pre-revenue businesses where future returns were wholly dependent on successful trials. To that extent the portfolio was considered balanced.

3. Future projects

As part of the economic policy to support the Life Sciences sector in Wales, alongside other interventions such as the Life Sciences hub, a specialised life sciences investment fund for Wales was seen as an attractive part of the Welsh offering to the sector. Compared to grant funding the investment model has the benefit that the fund should make returns.

Although the fund was 'over concentrated' in three large investments and a broader portfolio would have potentially been lower risk, one of those investments created a significant return. At point of investment, Simbec was an established businesses and in the lower risk section of the portfolio. This risk-based investment safeguarded over 100 high quality jobs in a clinical research business in Merthyr, brought its ownership back to Wales and, provided a £19.7m (2.25x return) on a £8.75m investment.

Whilst there were issues with this fund, the main reasons for the poor overall returns were external factors which impacted the portfolio, Covid-19 had a direct impact on Rutherford Health, the collapse of the biggest investor in Life Sciences in the UK had an impact on several portfolio businesses and, unfortunately the trial results were inconclusive in ReNeuron. The fund did achieve all four of its objectives and it may have taken just one more portfolio company to succeed for the fund to have returned the full investment or profit.

For that reason, provided all the lessons learnt from this fund are considered, the final lesson learnt is **not to write off any future considerations for using a specialist fund manager with a dedicated fund as part of a wider approach to supporting growth in a business sector.**

Annex A: Past reviews

Senedd Committee item page: [Items at meetings - Wales Life Science Investment Fund](#)

Committee session, 27 September 2023, submission from Welsh Government and Development Bank of Wales: [Supporting paper from Welsh Government.pdf](#)

Committee session, 27 September 2023, Review of the Wales Life Science Investment Fund: [Regeneris Report](#)

Audit Wales 2016 report “Establishment and oversight of the Wales Life Sciences Investment Fund”: [Establishment and oversight of the Wales Life Sciences Investment Fund | Audit Wales](#)

Direct to Welsh Government reviews as outlined in Annex 1 of “Closure Review of the Wales Life Sciences Investment Fund” submitted to Welsh Government on 15/04/2024.



Llywodraeth Cymru
Welsh Government

Dr Andrew Goodall
Ysgrifennydd Parhaol
Permanent Secretary

Mark Isherwood MS
Chair, Public Accounts and Public Administration Committee
Welsh Parliament
Cardiff Bay
CF99 1SN

1 April 2025

Dear Mr Isherwood

Public Accounts and Public Administration Committee – Welsh Government Annual Report and Accounts 2023-24

Following the Committee scrutiny of the Welsh Government Annual Report and Accounts 2022-23 on the 19 February 2025 I am pleased to provide responses to the further information you have requested as set out in Annex A and B to this letter.

I trust that this additional information helps the committee in any final reflections and that Committee found the evidence session we attended in respect of the 2023-24 accounts helpful.

Yours sincerely

Dr Andrew Goodall
Ysgrifennydd Parhaol/ Permanent Secretary
Llywodraeth Cymru/ Welsh Government



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Annex A

Evidence session follow up - Scrutiny of Accounts: Welsh Government 2023-24

1. In the accounts, you note that the Welsh Government is in the process of developing an exit strategy that examines the cost versus benefit of whether to continue with post-competition monitoring of its COVID-19 business grants. In the session, you agreed to provide a note elaborating on your oral response. We look forward to receiving this.

Response:

The exit strategy is now complete. ERF Post Completion Monitoring will conclude in the first quarter 2025-26. A summary of the strategy is set out below.

The Economic Resilience fund delivered by Welsh Government formed part of the overall £2.6bn provided to business through the pandemic. Over 26,000 grants were given out to businesses during this time. It was acknowledged that extensive post completion monitoring (PCM) would be required. A PCM team was established, and all grant recipients have received a request for information to ensure that the grant was required under the terms and conditions of the grant award letter.

Grants to small businesses and those in the SME category which were awarded £30,000 or less were surveyed. All other grant recipients received a full PCM request which required evidence to be supplied that the expenditure complied with the grant terms and conditions. The PCM team issued surveys in line with the requirements set out and accepted by the ERF Oversight Group for SME and <£30,000 awards. All large (>250 employee and largest individual grants) companies have also been completed.

In agreement with the ERF Oversight Group and the Additional Accounting Officer (AAO), due to diminishing returns and the passage of time (five years post ERF phase 1), the team is due to cease undertaking any further work on PCM from the end of March 2025.

Due to the number of times and effort which has already been undertaken to contact the businesses, the following action is proposed.

- Every business has been contacted at least 3 times for outstanding information. No further work will be undertaken to chase down the businesses which have not replied or have stopped interacting with Welsh Government PCM team.
- All cases have received our 'breach to conditions' formal letter that states that following all attempts to obtain the required monitoring information, an invoice



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will be issued if no response is received and the outstanding information provided.

- All outstanding cases will now be issued with a formal invoice for recovery of the grant as they are in breach of the terms and conditions.
- The PCM team will submit all business information to the Grants Centre of Excellence Due Diligence Hub so that this can be checked by other grant managers in line with Welsh Government policy.
- Invoices will be raised by the PCM team who will continue to liaise with the central debt team. They will be on the Welsh Government finance system known as SAP.
- No further Dunning process will be undertaken by the central debt team given that sufficient time has elapsed, and that all businesses have already been given many opportunities to respond aligned to Dunning.
- The ERF PCM team will complete the formally undertake close-down process of the PCM by the end of Quarter 1 2025-26.

2. As per the above point, you also agreed to address the a point made by the Chair concerning the administration of COVID business grants:

If you could also provide a note addressing whether you've carried out any work in that context regarding the business grants—the COVID business grants— regarding the differential way the discretionary local authority powers were exercised. I know, just in my area, some were very permissive, but not fraudulent; others were extremely restrictive and even denied that they had discretionary powers, and that would have been reflected in the numbers of grants, presumably, awarded. So, I don't know if you've done any work on that, but if you have, I'd be grateful if you could address that subsequently.

Response:

With thanks to the Chair who was able to provide several cases where applicants to local authority delivered schemes felt they had unfair treatment due to the application of the guidance and differing application of discretion, each of these cases have been reviewed and considered.

All examples related to the application of support to self-catering and bread and breakfast accommodation in the tourism sectors. The principal issue being the number of days let and or occupied to qualify for the support on offer where sector restrictions were applied. As part of guidance, Local Authority 151 officers were provided



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discretionary powers to ensure mitigation of any unintended consequences which would unfairly punish the applicant. Having examined the cases provided and discussed with relevant Local Authorities, we have not found evidence of unfair assessment and or award. The cases in question were well below the eligibility requirement for funding to the point where any discretion would not be appropriate.

While this is the case for the examples reviewed it is accepted that the points made by the Chair on application of “discretion” should always be underpinned by strong guidance and checks to ensure it is applied consistently across delivery, in this case the 22 local authorities. During the two years of the pandemic the tourism and visitor economy came under significant strain so ensuring consistent application and fairness needs to be a key consideration.



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Annex B

Additional Questions - Scrutiny of Accounts: Welsh Government 2023-24

Accounts preparation

- In the Accounts, the Welsh Government notes GCRE Limited has not yet been classified by ONS and private financial investment is actively sought for the long-term future of the entity. What's the current status of GCRE Limited; has it attracted private investment?

Response:

GCRE Limited were classified by ONS in September 2024 to the central government subsector with effect from 24 August 2021.

The status of the project remains unchanged. Welsh Government continues to support the company in its efforts to secure private investment whilst planning for alternative funding solutions, should private investment fail to materialise fully or in part.

Should there be any change to the structure and governance of the company as part of securing private investment, this may necessitate classification review by ONS in future.

Welsh Government 2025

- How are you improving the diversity of your workforce (for which you've set "ambitious plans and targets") and ensuring a pipeline of talent across the organisation since you've paused the new apprentice and fast streamer recruitment for 2024-25?

Response:

Our ambition to address historic under-representation within our workforce has been impacted by current workforce budget challenges, limiting the options we've been able to take in terms of recruitment schemes and sustained outreach activity.

Nonetheless, we remain committed to attracting a diverse field of candidates through enhancing the profile of the Welsh Government Civil Service as an inclusive employer and removing barriers from our external recruitment and internal progression processes – levelling the playing field and giving everyone the best opportunity to succeed.



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Our overall performance against the recruitment targets for 2024 is currently being reviewed but our Team Support external recruitment campaign offers some encouragement. As a result of tailored outreach, a streamlined application process and the support of our recruitment adjustment service, we saw a significant increase in successful outcomes for disabled candidates and Black, Asian and Minority Ethnic candidates, exceeding the 20% goal. The campaign was an exercise in co-production, with staff diversity networks providing the guidance and scrutiny needed to ensure a fair and equitable approach for all candidates.

Welsh Government 2025

- We note comments at the Board in September 2023 that many of the savings identified in 2023-24 were one-off and financial challenges lay ahead. Can you set out the scale of the financial challenge you faced in 2023-24 and the implications for 2024-25?

Response:

The scale of the financial challenge faced in 2023-24 and the actions taken to address that challenge were set out in the 'Update on 2023-24 financial position' issued in October 2024 [Update on 2023-24 financial position: summary of main changes | GOV.WALES](#) and the subsequent 2nd Supplementary Budget 2023-24 [2nd Supplementary Budget 2023 to 2024 | GOV.WALES](#).

The work was underpinned by a set of clear principles to ensure that core services were protected as far as possible and to deliver the greatest benefit to households hardest hit by the current cost of living crisis. Consideration was also given to the importance of protecting jobs.

Ministers considered where spending can be delayed or deferred, re-prioritised or where cuts could be made to free up funding to support core public services and continue to provide help to those who need it the most. To reduce the impact on services, decisions were made to reduce spending by reprioritising or deferring activity wherever possible rather than cutting or ending programmes. Demand-led budgets were reviewed across government and where spending is below anticipated levels, savings were released.

Actions taken included:

- Maximisation of the in-year and Wales reserves whilst maintaining a prudent level of contingency;
- Planning based on using consequential expected from the UK Government;



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- Requesting a switch from capital to revenue from the UK Government;
- Making a combination of revenue and capital savings in departmental budgets (MEGs).

Given the scale of the challenge, many of the reductions in spending identified in the 2023-24 in-year exercise were non-recurrent (such as deferring spending, using income, one off savings opportunities). As non-recurrent actions, there remained significant spending reduction challenges to be met in the 2024-25 Budget exercise.

Full details of 2024-25 financial plans, including changes from 2023-24 and the reasons for making changes to previously published plans, were set out in the Draft and Final Budget for 2024-25 [Welsh Government budgets | GOV.WALES](https://gov.wales/budgets).

Workforce issues

- Sick leave levels were lower in 2023-24 than the previous year, which you say is largely due to a decline in COVID-19. However, you note a “minor increase” in absence related to mental health issues and identify it as one of the key areas for focus in the coming year. How prevalent is staff absence due to mental health issues and how are you addressing it?

Response:

The current data on absence shows the level of absences due to mental health account for approximately 48% of all long-term sick absences.

The Health Safety and Wellbeing Board holds the organisation to account on the support and interventions it provides staff to assist them to overcome mental health decline. The Board recently held a deep dive into mental health over the course of two board meetings. Actions flowing from the deep dive include promoting the use of the wellbeing hour, exploring the need for mental health first aid training for all line managers and more regular analysis of trends and patterns to enable the development of further targeted interventions and support in the right places at the right time.

We continue to provide a range support packages and interventions to promote and help wellbeing and positive mental health which include, Mental Health Allies, Stress Risk Assessments, a Mental Health Line Manager Toolkit and Workplace Passports as well as an Employee Assistance Programme and Occupational Health service.



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In addition, the HR Case Advice team review long term absences monthly to ensure individuals are receiving appropriate support and that any adjustments needed to facilitate a return to work are implemented.

Welsh Government spending

- In its report, 'Maximising EU funding' published in June 2023, Audit Wales noted that WEFO and the Welsh Government had identified staff capacity as a risk. How are you balancing maintaining resources in WEFO to support programme closure and redeploying staff to other Welsh Government priorities?

Response:

WEFO has paid all final claims received from beneficiaries and submitted its own final claims to the European Commission on 13 February 2025. WEFO has maximised the drawdown of EU funding for the 2014 - 2020 Structural Funds Programmes across 5 Programmes, WEFO has facilitated investment of €4.5billion including €2.5billion EU funding and €2billion of Public and Private Investment.

The majority of WEFO staff have been redeployed to new roles throughout the Welsh Government. However, WEFO has retained enough staff resources to service its regulatory obligations and manage the programme closure including the routine audits of the final claims.

Losses and Special Payments

- How did the Welsh Government incur a loss of £2.3m relating to the Welsh Government's Optimised RetroFit Programme (ORP) and could it have been avoided?

Response:

One of the key requirements of this early stage of the ORP was the installation and operation of IESs (Intelligent Energy Systems) to transmit data from retrofitted homes to help the Welsh Government build evidence and learn lessons from the scheme to inform future residential decarbonisation policy and programmes. During 2023-24 it was identified that a number of IES previously obtained as part of the programme had become defunct, due to technological and platform changes, and needed to be upgraded to ensure continuity of IES data provided to the programme. Not all of the units were able to be upgraded and, for 2023-24, this resulted in the loss (fruitless payment) relating to their original purchase.



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The way in which the original stakeholder mechanism was set up meant limited, direct engagement with the Welsh Government. The IES installer led the programme management and delivery, with grant funding passported through a Registered Social Landlord. This appears to have created a lack of clarity in reporting and escalation. This meant that Welsh Government was unaware of the platform change issue, which led to the units becoming defunct, until after it had materialised.

A detailed and thorough lessons learnt process has been completed, in which all parties have considered and reflected upon their role and responsibilities. The Welsh Government is now in a direct contract with the IES provider, to ensure that full transparency and appropriate governance is in place while the programme of works is completed. It should also be noted that the initial IES devices represented one of the first tranches of monitoring units of this kind, so were exposed to the inherent risks associated with new technologies.

Losses and Special Payments

- What can you tell us about the fraud investigation of the three grants paid to the same individuals for the refurbishment of hotel and leisure facilities at two separate premises, the recovery of which you wrote off in 2023-24?

Response

There had been allegations arising from press reports, and an individual's blog, concerning possible fraud associated with these cases. There was no report however of any fraud against Welsh Government. It appeared to Welsh Government that the hotels had complied with the grant award apart from failing to provide an independent audit report despite repeated requests.

The matter was passed to the Welsh Government Counter Fraud Branch. The external allegations were that the grant applicants may have committed mortgage fraud. However, the alleged fraud was against a Bank who did not pursue the matter. As this was not an alleged fraud against the Welsh Government there was no further action that Welsh Government could take.

Losses and Special Payments

- Why did the Welsh Government make a special payment of £13.1m (excluding VAT) to reach contractual settlement agreements for Strategic Road Network (SRN) Projects, which arose due to inflationary pressures; what would have been the consequences of not settling?



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Response

The signed contracts for three road schemes were based on Welsh Government terms and conditions. These terms and conditions have been developed over a number of years. They include provisions that allocate risk around general inflation, with most of this risk being borne by the contractor.

Clauses dealing with other specific issues – which may also impact inflation/ prices - e.g. changes in legislation, changes in rules around site operations, force majeure, conflict etc. are more nuanced, with some of these risks being sat with the contractor, others with the Welsh Government. Events such as the conflict in Ukraine has seen contractors become laser focused on the risks they hold – they have caused contractors to push back on certain risk positions that have been longstanding.

This push back is not unique to Welsh Government, with National Highways, HS2, numerous local authorities and other bodies across the UK having to grapple with the reality of contractors now no longer being willing to take on particular risks.

Such events have also resulted in contractors looking at every possible opportunity to recover their financial position on projects. The Welsh Government schemes in this case are an example of this. Numerous contractual claims were advanced by the contractor for additional monies on the three schemes. At the same time, they also advanced a claim under the WG's WPPN 09/21.

In the interests of value for money, officials looked to settle all claims the contractor had in relation to WPPN 09/21, inflation and other matters – on all three schemes. Not settling all claims would have left Welsh Government open to the risk of unsettled claims being leveraged by the contractor at a later date, i.e. the contractor would come back seeking to recover their position, over and over. Amounts in relation to WPPN 09/21 were paid as a result of the WG's policy position and were discretionary. The contractor was deemed to be entitled to the remaining amounts under the terms of the respective contracts.

Whilst there's no guarantee the contractor would have commenced formal dispute proceedings for amounts the considered were due, it was deemed that there was a real chance of them doing so. In addition to the general risk of Welsh Government losing in such disputes, any dispute would have more than likely seen a delay to the programme. This in turn would have impacted the ability of Welsh Government to secure ERDF funding related to the schemes.



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VAT

- An HMRC VAT inspection identified the Welsh Government under recovered VAT on the A487 and A465 road schemes. Why was this not identified by officials and what assessment have you made whether the issue is more widespread?

Response:

The reviews of the A487 and A465 road schemes are not part of the HMRC VAT inspection but a standard part of the application of VAT on road construction schemes.

VAT recovery on road schemes is very complex and can change throughout the life of the project. For road schemes a VAT recovery percentage based on an apportionment calculation is applied at the outset of the scheme based on planned construction activity and costs, however the actual recovery rate percentage is confirmed later in the project delivery life cycle, and retrospectively agreed and applied with HMRC which can lead to repayments. Welsh Government worked with HMRC from 2019 on the A487 scheme, and from 2022 on the A465 scheme.

Governance and assurance

- What lessons have you learned from the Internal Audit of the Welsh Government's Programme and Project Management Framework, for which the Head of Internal Audit gave a "no assurance" opinion again in 2023-24; have you now fully implemented the priority projects and workstreams of this Programme?

Response:

The Audit report highlighted the need for PPM professionalism, governance, support and guidance to aid Welsh Government (WG) in delivering its agenda of change and the requirement for there to be more PPM practices, skills and presence being visible within and across WG.

In recognising the medium to long term nature of the work needed to improve Project Delivery, our approach to PPM has been to follow a best practice model in utilising the Project Delivery - Continuous Improvement Assessment Framework (CIAF) https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1028350/2021-10-22-version-2-Approved-Project-Delivery-Continuous-Improvement-Assessment-Framework_1.pdf to respond to the IAS recommendations and progress towards a level of Good in project delivery maturity.

To achieve Good, 141 recommendations need addressing and whilst work is progressing, it is recognised this will take time to implement and embed across Welsh



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Government. In delivering the 141 recommendations these will also address the recommendations raised by Internal Audit who are also a member of the Get-to-Green Programme board and been actively engaged in how we have looked to respond to the report.

Initial efforts focussed through the Get-to-Green Programme have been to develop the Project Delivery profession, improve assurance and compliance, and advise on implementing a Portfolio Management approach to deliver change across Welsh Government. Key progress over the last 12 months includes:

- Appointing a Chief Project Delivery Officer.
- Progressing towards a portfolio approach to identifying major change activities.
- Ensuring appropriate governance arrangements are in place – SRO appointment letters and Risk Potential Assessments are now mandatory.
- Rolling out the Government Online Skills Tool (GOST) to SROs and delivery teams – this includes a skills GAP analysis for all project roles and the ability to identify, deploy and recruit the right project resources.
- Agreed a WG wide suite of standard project delivery roles aligned to the Project Delivery Capability Framework (PDCF), which is now in use to recruit for project roles across WG.
- Currently updating all project documentation and guidance with a focus on governance, planning and risk management.
- Strengthening the assurance framework for projects – all projects must now have named SROs who have an approved GOST assessment.
- Regular reporting to the Finance and Corporate Service Sub-Committee of ExCo which re-emphasizes commitment to the Get-to-Green Programme. This reporting includes providing data on assurance, project delivery self-assessments and change activities to improve transparency and help drive the change agenda.

Progress achieved in the past 12 months has been a positive move forward, however the next step will be to have a fuller picture of the project professionals across WG, which will be the catalyst to embed the required level of cultural change.

The team has already recruited a number of additional PPM professionals into its structure and is in the process of looking to incorporate/ develop PPM expertise and capability at all grades across the team. In addition, addressing all 141 recommendations also involves understanding the organisation's capacity and capabilities, including the necessary time it would take to absorb the changes we want to make and adopt new processes/tools.



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Governance and assurance

- What essential areas of Managing Welsh Public Money have you identified for immediate update and when do you expect to publish them; are you on course to complete a comprehensive review of the entire document by the end of this calendar year, as planned?

Response:

As MWPM is a lengthy and complex document we are prioritising certain chapters for update, starting with those areas that have previously been identified by this Committee as requiring update.

Those areas include:

- Updating MWPM following the issue of our first (and only) Ministerial Direction in December 2019 when we identified a minor procedural improvement required in respect of reporting the existence of a Ministerial Direction to Finance and the relevant sub- committees.
- Updating MWPM to reflect the new Subsidy Control Regime (which superseded State Aid rules).
- Ensuring the procedures and processes for administering special payments aligns to the calling in procedures for our public bodies.
- In response to recommendation 18 which was raised in the PAPAC's report on the Scrutiny of the Accounts 2021-22 we will update MWPM to provide further clarity on what is considered a serious loss and how this is reported to the Senedd.

We will publish the updated chapters as they are completed. While we have set a provisional completion date of December 2025 for the entire project, this timeline may be adjusted based on other competing priorities.

Governance and assurance

- Have you implemented the new self-assessment approach for, and resumed the tailored review of, individual organisations; if so, can you share a rollout plan with the Committee?

Response:

The self-assessment approach hasn't been implemented yet. We have completed the initial pilot stage which involved adapting the UK model to the Welsh policy environment and testing it with a number of Welsh bodies. Officials will be shortly seeking the agreement of senior officials to publishing it for use on an extended pilot basis across all Welsh public bodies outside the NHS and local government sectors.



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This will mean that those bodies, with the exception of those which tested the model or have undergone Tailored Reviews since 2021, will complete the self-assessment by 31 March 2026 and decide with their partnership teams what further reviews are necessary.

The UK Government has halted the Tailored Review programme and, we understand, has no plans to restart it. As a result, the Welsh Government will not be restarting a programme of Tailored Reviews but is looking to offer a number of options for further, more detailed reviews of bodies. This will offer a more flexible approach to reviews based on the results of each self-assessment exercise. A further update on the roll out of the self-assessment exercise will be provided in due course.

Summary of Resource Outturn

- You say, in the notes to the Summary of Resource Outturn, a number of the Welsh Government's Arm's Length Bodies overspent in 2023-24. Aside from having to accommodate the overspending in your budgets, what are the implications for you (including the sponsor department) and the organisations themselves?

Response:

We will continue to work with arms' length bodies' leaders and sponsor teams to ensure that effective governance is in place.

Other issues

- In his July 2024 letter to the Committee, the AGW noted officials were preparing Ministerial advice about whether to sell the shareholding in TVR Automotive. Does the Welsh Government still hold an equity stake in TVR Automotive and if so, how does this represent value for money?

Response:

In August 2024, Cabinet Secretary for the Economy, Transport and North Wales approved the sale of all shares held by Welsh Government in TVR Automotive Limited at 'Fair Market Value' (FMV), as per the Shareholders Agreement.

The work of establishing the FMV is not straightforward. TVRA are still a pre-revenue-based entity with very little asset value beyond branding and there is little by way of industry comparatives and a business plan that is still to be achieved.



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The sale has yet to complete (the equity stake is still held) but negotiations are underway.

- Has the Welsh Government now leased the refurbished factory in Ebbw Vale; if so, what are the terms of the lease and will it generate the expected return?

Response:

The property remains vacant but is the subject of an active enquiry from a potential occupier. Discussions/ negotiations are progressing.

- How many vacant commercial properties is the Welsh Government holding and how does it decide when to sell them?

Response:

The vacancy level on the lettable estate currently stands at circa 12%. There are currently 17 whole buildings that are vacant and not available for letting due to reasons such as refurbishment, being under offer, or awaiting demolition.

Assets within the Economy portfolio are sold either in pursuit of Economic Development policy objectives, or when identified as being surplus to requirements for policy delivery.



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Briefing to inform Committee Inquiry into Cancer Services

Submitted to Public Accounts and
Public Administration Committee

Public Health Wales

April 2025

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1. Introduction

The purpose of this briefing paper is to inform the Public Accounts and Public Administration Committee inquiry into Cancer Services in Wales. Public Health Wales was asked to provide information on the following:

- ❖ What data is available comparing cancer mortality and survival outcomes in Wales to other UK nations and internationally – and for what is available, we would welcome a summary of comparable performance;
- ❖ What data is available on cancer stage at diagnosis to understand variation at lower super output level and below in Wales – and we would welcome a summary of what any available data shows;
- ❖ An update on the unit's work with the SAIL database to link cancer registry data to other relevant datasets to understand the impact of social and demographic factors (such as education and employment) on cancer incidence.

2. Public Health Wales

We are the National Public Health Organisation for Wales. Our purpose is working together for a healthier Wales. We help all people in Wales live longer, healthier lives. With our partners, we aim to increase healthy life expectancy, improve health and well-being, and reduce inequalities for everyone in Wales, now and for future generations.

Together, our teams work to prevent disease, protect health, provide system leadership, specialist services and public health expertise. We are the primary source of public health information, research and innovation, to help everyone in Wales live healthier lives.

By 2035, we will have achieved a healthier future for Wales. We are working towards a Wales where people live longer, healthier lives and where all people in Wales have fair and equal access to the things that lead to good health and well-being.

3. Welsh Cancer Intelligence and Surveillance Unit (WCISU)

Public Health Wales runs the Welsh Cancer Intelligence and Surveillance Unit (WCISU). WCISU collaborates and publishes with several UK-wide and international research programmes. The research programmes include both childhood and adult cancers. Annually, WCISU also publishes official statistics on cancer incidence, mortality and survival in Wales.

Cancer statistics for Wales are available through the [cancer reporting tool](#) which is regularly refreshed. Mortality data up to the end of 2024 will be published in June 2025.

4. Summary of latest mortality data

The most recent cancer mortality official statistics were published by WCISU in February 2024, covering 2002-2022. In 2022, there were 9,154 deaths from cancer, comparable to the pre-pandemic level. Cancer remains the leading cause of mortality in Wales, accounting for one quarter of all deaths in 2022 (see Annex 1) and the long-term trend of decreasing cancer mortality rate appears to have stalled since around 2015.

Lung, bowel (colorectal), prostate and female breast cancers accounted for four in ten cancer deaths in Wales in 2022, with lung cancer alone accounting for two in ten cancer deaths. The

deprivation gap between the most deprived and least deprived areas in Wales has persisted since 2002, despite slight variations over time (see Figure 1). More details by cancer type are in **Annex 2**.

Figure 1: Deprivation gap for cancer mortality between the most deprived and least deprived areas in Wales since 2002. Produced by Public Health Wales, using PHM & MYE (ONS) and WIMD (WG).

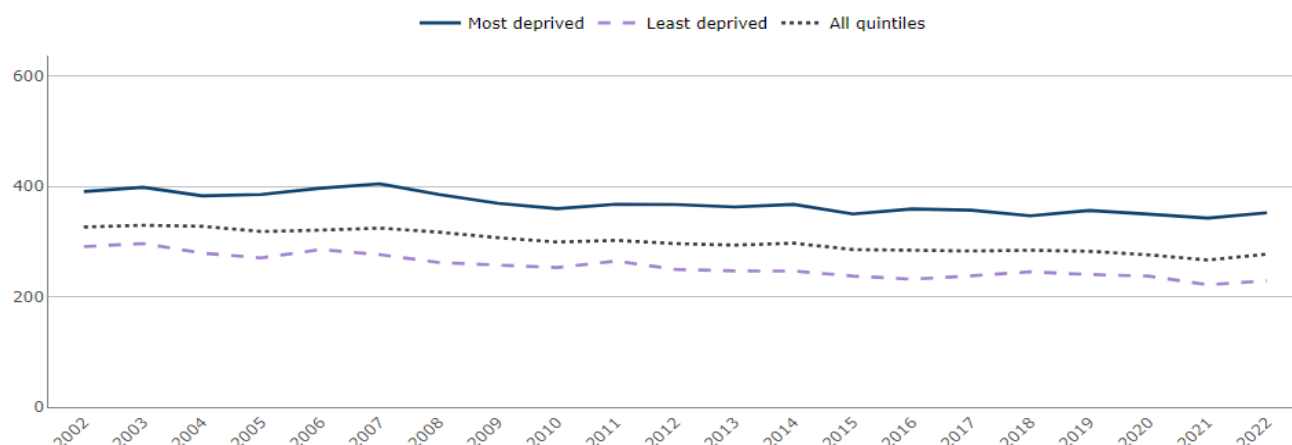


Figure 2: Cancer mortality, all cancers excluding nmsc, European age-standardised rate per 100,000 persons, all ages, by UK jurisdiction

Cancer mortality, all cancers excluding nmsc, European age-standardised rate per 100,000, persons, all ages, by UK jurisdiction

Produced by Public Health Wales, using UK cancer mortality data (NDRS, PHS, NICR) and PHM & MYE (ONS)

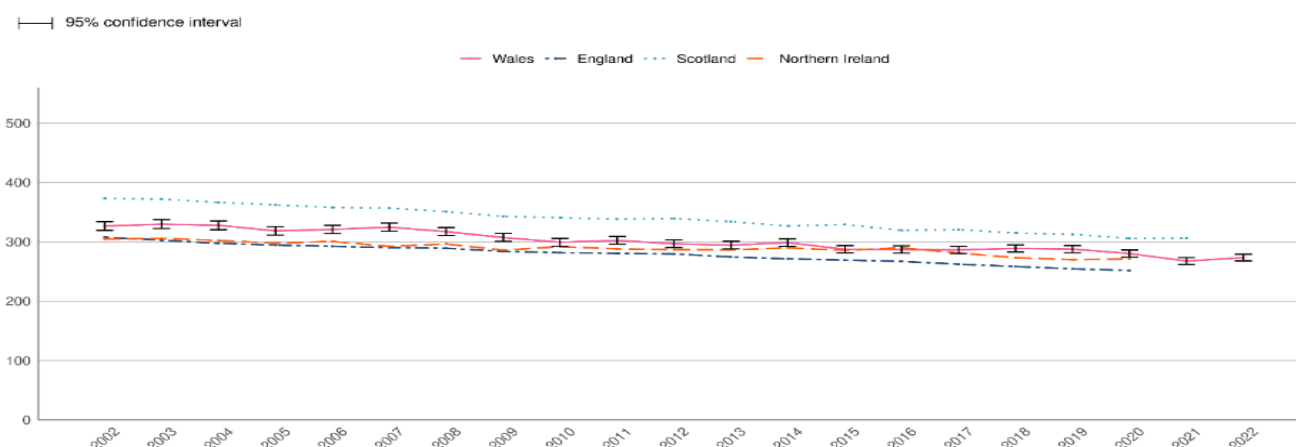


Figure 2 shows that over recent years, the highest cancer mortality rate is in Scotland, followed by Wales, Northern Ireland and then England.

5. Summary of latest cancer survival data

The latest cancer survival official statistics, published by WCISU in March 2025, show that for people in Wales diagnosed from 2017 to 2021, 63.1% survived cancer five years from diagnosis, on average (reference 1).

Long-term historic improvement in five-year net cancer survival had stagnated since the 2014-2018 diagnosis period, that is, before the Covid-19 pandemic (Annex 3). The stalling in survival improvement has also continued beyond the first year of the pandemic.

More details by cancer type are included in Annex 2.

6. Response to queries

*6.1 POINT 1. What data is available comparing **cancer mortality** and **survival outcomes** in Wales to other UK nations and internationally? – and for what is available, we would welcome a summary of comparable performance*

Cancer registries globally uniquely collect data according to the same World Health Organization (WHO) international rules, and so their data can be reliably compared. WCISU aligns with these standards.

Data from the European Cancer Information System (ECIS) dashboard (reference 8) provides cancer mortality rates in 2020 for European countries, and the whole of the UK. WCISU has additionally compared this to Wales alone.

ECIS cancer mortality in Wales, and the UK is higher than EU-27 as a whole (see Annex 4). The higher mortality rates are in eastern EU countries and Denmark, Ireland and Netherlands. Lower cancer mortality is in the rest of western, southern, northern EU, Czechia and Bulgaria.

Data from the ECIS dashboard also models cancer incidence estimates using population cancer registry data for EU-27 countries and the UK. Age-standardised cancer incidence rate estimates for 2022, for all cancer excluding NMSC, female breast, colorectal and mesothelioma, show the UK to have incidence rates that fall roughly in the middle of the EU-27 countries' rates. This suggests that Wales is close to the EU-27 average.

WCISU collaborates with the International Cancer Benchmarking Partnering (ICBP), which provides knowledge of the global picture for cancer survival. Using cancer registry data, WCISU with the ICBP researched the absolute change in one-year survival from 1995-1999 to 2010-2014 diagnosis periods for oesophageal, stomach, colon, rectum, pancreas, lung and ovary cancers (reference 3). Pre-pandemic, Wales already had relatively poor cancer outcomes compared to many other high-income countries but was improving. In general, improvement was most rapid in Denmark, Ireland and England.

The ICBP research (reference 3) also examined five-year net survival. For colorectal cancer, survival was highest in Australia, followed by Canada, Denmark, Norway, New Zealand and the UK (reference 3).

The ICBP UK analysis also examined cancer incidence, five-year net survival and mortality (reference 3) by UK jurisdiction. Wales had the highest incidence of colorectal cancer, followed by Northern Ireland, Scotland and then England. For five-year net survival, Northern Ireland had the highest rate, followed by Scotland, England, and Wales. For mortality, Scotland was highest, followed by Wales, Northern Ireland and England. Collectively this data suggests that Wales colorectal cancer mortality is high due to high incidence and comparatively lower survival.

In another international collaboration that includes WCISU, the CONCORD 3 study examined five-year age-standardised net survival for 2010-2014. Wales already had relatively poor

cancer outcomes compared to many other high-income countries (reference 4). Amongst others, CONCORD 3 researched colon cancer, lung cancer and female breast cancer. Wales had poorer survival compared to England and Scotland. Wales was in the bottom fifth of worse performing countries for these three cancers, with highest performing countries including Australia, Iceland, Switzerland, Canada and Norway.

Another international collaboration for WCISU is the Benchista project. Benchista aims to understand the variation in childhood cancer survival rates between countries, and to highlight any areas for improvement (reference 5). The work found evidence that children in the UK and Ireland with neuroblastoma, had a higher probability of diagnosis at the metastatic stage, whereas eastern and southern Europe had the lowest probabilities (reference 6).

WCISU also collaborates with the EUROCARE programme. The on-going study published data on survival and health care burden of children with retinoblastoma in Europe. Five-year survival of children aged 0-14 years, with a diagnosis of retinoblastoma from 2000 to 2013 shows Wales, Scotland, Northern Ireland, Slovenia and Norway with the highest 5-year survival (reference 7). Bulgaria, Estonia, Portugal and Latvia had the lowest 5-year survival (reference 7).

Lower survival in Wales compared to many high-income countries is likely related to (largely researched by WCISU and the ICBP programme):

- ❖ High population cancer incidence with inequalities and ageing population
- ❖ Late stage diagnosis –related to beliefs and attitudes and help seeking behaviour, access to primary care and capacity, referral patterns from primary care, capacity and access to diagnostics by primary and specialist care.
- ❖ Variation in outcomes between services and health boards in geographic areas.
- ❖ Access to treatment for each stage at diagnosis, whether late stage or not.
- ❖ Access to diagnostics in general across Wales, with inequitable access to diagnostics and treatment for older age groups (and in more deprived areas).
- ❖ Population burden of other inequalities in health and co-morbidities.
- ❖ Excess of emergency presentation diagnoses (worse outcomes, regardless of diagnosis stage).

In 2015, a UK collaboration study led by Cancer Research UK with WCISU and other UK cancer registries, researched the fraction of cancer attributable to modifiable risk factors in England, Wales, Scotland and Northern Ireland (reference 9).

The published study (reference 9) estimated that some of the new cancer cases from the pre-pandemic period could be attributable to potentially preventable risk factors (for example, smoking, weight, alcohol) by cancer type. In Wales, nearly four in ten (37.8%) of cancer cases were attributable to known risk factors. In England (37.3%) and Northern Ireland (38.0%) the figures were similar, and in Scotland it was slightly higher at 41.5%.

For the UK combined, 37.7% of cancers were attributable to known risk factors in 2015 (reference 9). Data from other countries includes 42.0% in the US in 2014 (reference 10), 40.8% in Alberta, Canada in 2012 (reference 11) and 31.9% in Australia in 2010 (reference 12).

6.2 POINT 2: What data is available on **cancer stage at diagnosis** to understand variation at lower super output level and below in Wales – and we would welcome a summary of what any available data shows.

Due to small numbers and to ensure robust estimates, analyses are produced at the health board level. A summary of analyses at the health board level for lung, colorectal, prostate and female breast cancer is provided below. At local authority level and below, the estimates are more susceptible to random variation. Numbers at lower super output area (LSOA) level are small and therefore are not produced. In future, we intend to analyse stage of diagnosis by Welsh Index of Multiple Deprivation (WIMD) deprivation quintiles to understand the impact of inequalities.

Figure 3: Lung Cancer, persons, all ages, 2019 - 2021

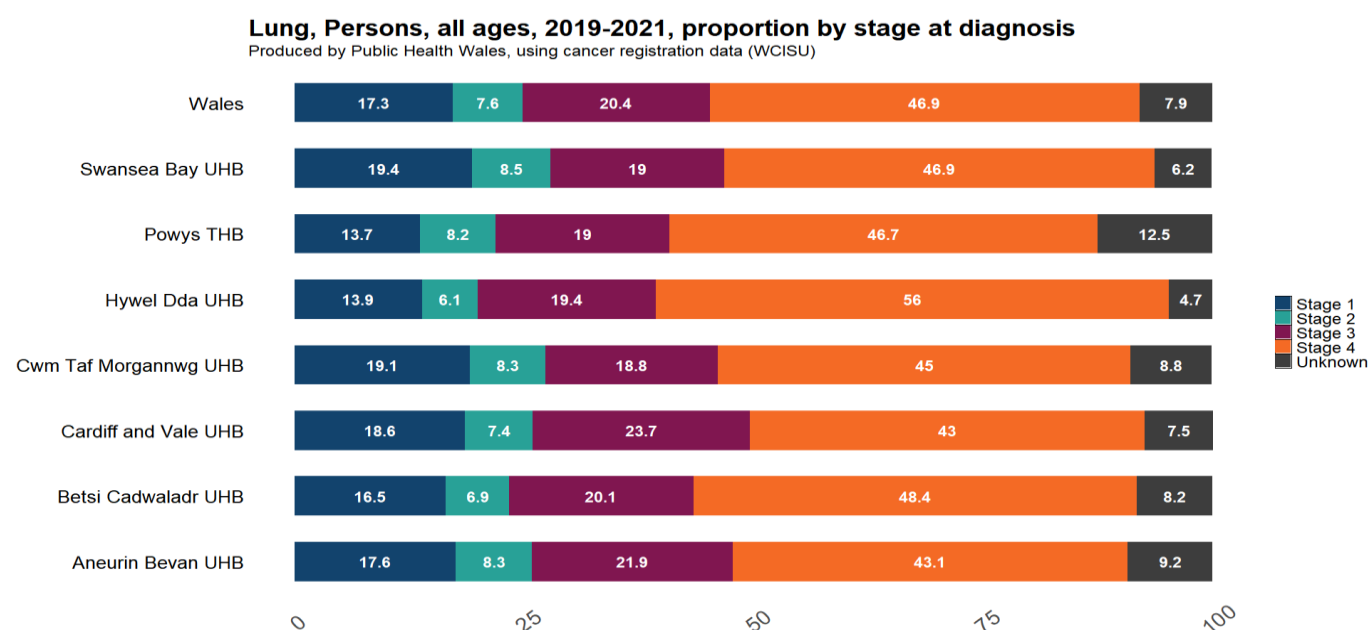


Figure 3 shows that residents in Hywel Dda University Health Board area have a significantly lower proportion of stage 1 diagnoses and a significantly higher proportion of stage 4 lung cancer diagnoses than Wales as a whole. Stage 4 diagnoses in Aneurin Bevan UHB were statistically significantly lower when compared to Wales as a whole.

Figure 4: Colorectal cancer, persons, all ages, 2019 - 2021

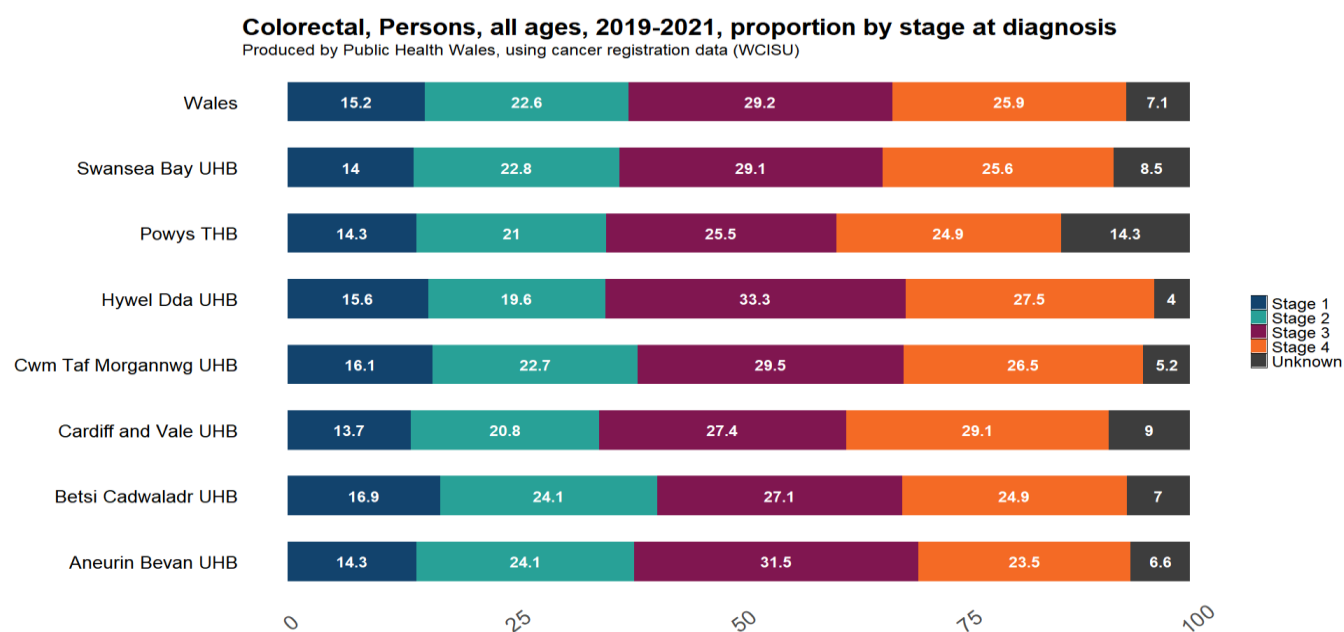


Figure 4 shows that there is less variation in stage of diagnosis across health boards for colorectal cancer, the majority of differences are not statistically significant.

Figure 5: Prostate cancer, persons, all ages, 2019 - 2021

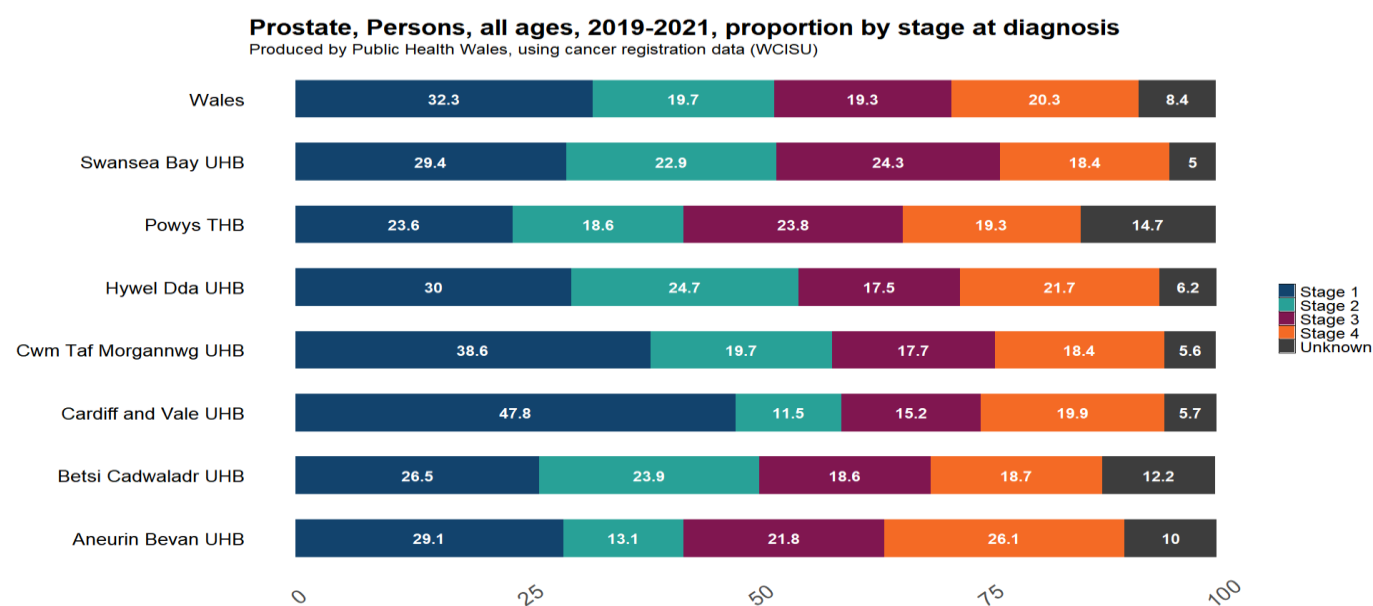


Figure 5 shows that one in four prostate cancers for residents in Aneurin Bevan University Health Board are diagnosed at stage 4, statistically significantly higher than Wales as a whole. Cardiff and Vale University Health Board residents have a statistically significantly higher proportion of stage 1 prostate cancer diagnoses and a significantly lower proportion of stage 2 diagnoses when compared to Wales. Residents in Powys Teaching Health Board area have the lowest percentage of stage 1 diagnoses, with both stage 1 and stage 2 proportions significantly lower than those in Wales as a whole.

Figure 6: Female breast cancer, persons, all ages, 2019 - 2021

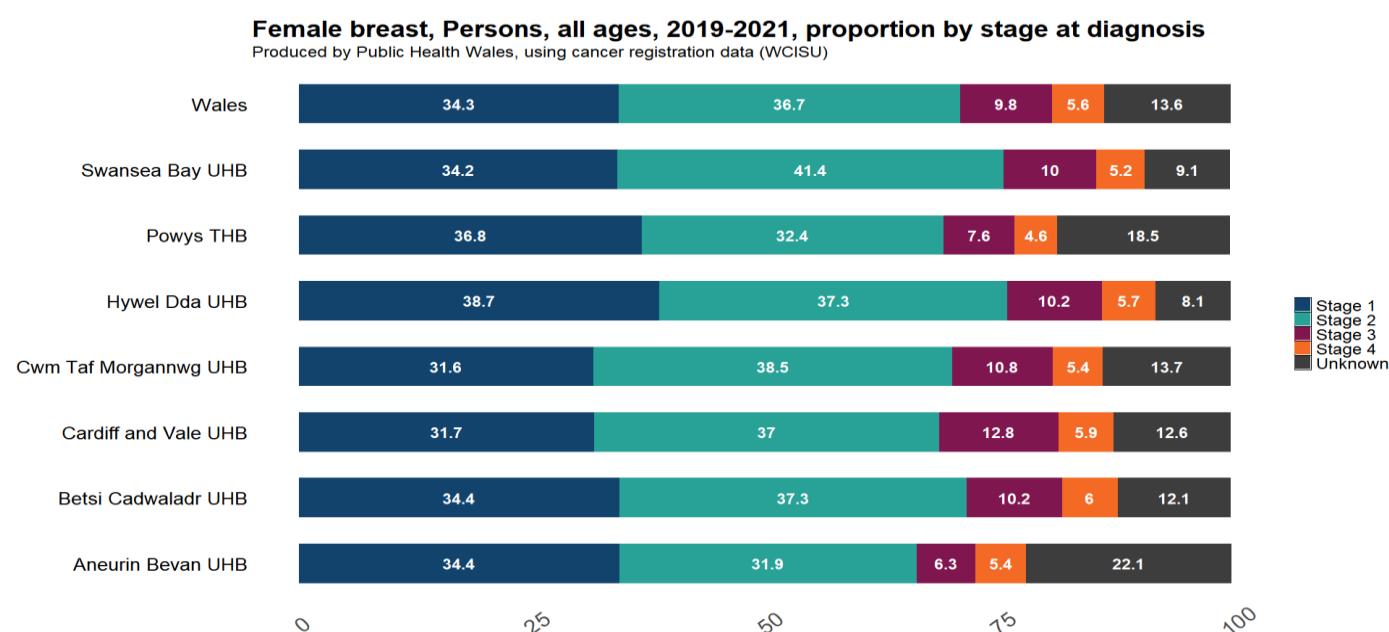


Figure 6 shows that for residents in the Aneurin Bevan University Health Board area, both stage 2 and stage 3 diagnoses are statistically significantly lower than in Wales. Cardiff and Vale University Health Board show a statistically significantly higher proportion of stage 3 diagnoses. Stage 1 diagnoses for residents in Hywel Dda University Health Board and stage 2 in Swansea Bay University Health Board are statistically significantly higher when compared to Wales as a whole.

6.3 POINT 3. An update on the unit's work with the SAIL database to link cancer registry data to other relevant datasets to understand the impact of social and demographic factors (such as education and employment) on cancer incidence.

This important analysis project that linked WCISU cancer registry data to Census 2011 data in the SAIL Databank is nearing completion. It is at the commentary and quality assurance stage. It is envisaged that findings from this Phase 1 of the work on Cancer Inequalities will be published in June 2025. We will notify the Committee as soon as the findings are published.

Phase 1 considers how cancer incidence (2011-2020) varies by ethnicity, housing tenure, overcrowding and occupation. Cancer types include all malignancies (excluding NMSC), lung, colorectal, male prostate and female breast cancers.

We are currently in the planning stages for Phase 2 of this Cancer Inequalities work in SAIL Databank. Phase 2 will expand on learning from Phase 1. It will also include linking to Census 2021 data to explore new variables and cancer diagnoses data for 2021.

6.4 Other remarks

You also asked for any other remarks we would like to make. The following gives an overview of some of the developments that are under way.

Official statistics for cancer mortality in Wales, up to 2024, are due for release in June 2025. These will be published in the Cancer Reporting Tool, with an accompanying main message

document. This represents a significant improvement in timeliness of mortality data, and we will look to publish earlier in the year next year. We are also exploring the work necessary to further improve the timeliness of our cancer incidence data.

All the international research programmes with which WCISU is collaborating are poised to complete or mostly to commence their next phases. They include ICBP-Covid19 Module, ICBP Phase 3, EURO CARE-7, CONCORD-4, and BENCHISTA-2. The next phases of these programmes will all include much more recent cancer registry data and examine in more detail factors related to international inequalities in cancer survival. The committee can be notified of any new publications.

References

- 1)**WCISU cancer survival official statistics messages [CancerSurvivalInWales 2002-2021 MainMessages.docx](#)
- 2)**WCISU cancer mortality official statistics main messages [Main messages - Mortality OS 2022 - Corrected April 2024.docx](#)
- 3)**International Cancer Benchmarking Partnership Surv Mark 2 *Lancet Oncology*, 2019 Progress in cancer survival, mortality, and incidence in seven high-income countries 1995–2014 (ICBP SURVMARK-2): a population-based study - The Lancet Oncology
- 4)**Allemani et al. Global surveillance of trends in cancer survival 2000-14 (CONCORD-3): analysis of individual records for 37 513 025 patients diagnosed with one of 18 cancers from 322 population-based registries in 71 countries. *Lancet* 31 January 2018
- 5)**Benchista website: The BENCHISTA Project | UCL Great Ormond Street Institute of Child Health - UCL – University College London
- 6)**International benchmarking of stage at diagnosis for six childhood solid tumours (the BENCHISTA project): a population-based, retrospective cohort study - PubMed
- 7)**Virgili G, Capocaccia R, Botta L, et al. Survival and Health Care Burden of Children With Retinoblastoma in Europe. *JAMA Ophthalmol.* 2024;142(11):1062–1070. doi:10.1001/jamaophthalmol.2024.4140
- 8)**ECIS dashboard: European Cancer Information System (ECIS) and Welsh Cancer Intelligence and Surveillance Unit Official Statistics
- 9)**Brown. Cruk paper The fraction of cancer attributable to modifiable risk factors in England, Wales, Scotland, Northern Ireland, and the United Kingdom in 2015 | British Journal of Cancer
- 10)**Islami F. et al. Proportion and number of cancer cases and deaths attributable to potentially modifiable risk factors in the United States. *CA Cancer J. Clin.* doi: <https://doi.org/10.3322/caac.21440> (2017)
- 11)**Grundy, A. et al. Cancer incidence attributable to lifestyle and environmental factors in Alberta in 2012: summary of results. *CMAJ Open* 5, E540–E545 (2017)
- 12)**Whiteman, D. C. et al. Cancers in Australia in 2010 attributable to modifiable factors: summary and conclusions. *Aust. NZ J. Public Health* 39, 477–484 (2015).

Annex 1: Cancer mortality in Wales

Cancer is the leading cause of death in Wales, accounting for one quarter of all deaths in 2022.

Broad Cause	Count	Age-standardised Mortality Rate
All cancers excluding NMSC	9,154	273.5
Circulatory system	8,770	264.4
Other causes	5,077	152.8
Respiratory system	4,393	132.0
Dementia & Alzheimer	3,833	110.3
Digestive system	1,960	58.8
External causes	1,584	50.7
Flu and pneumonia	1,389	42.6
Diabetes Mellitus	490	14.7
Infectious diseases	433	13.1

Source: [Main messages - Mortality OS 2022 - Corrected April 2024.docx](#) (reference 2)

Annex 2: The deprivation gap for cancer mortality and survival in Wales

The impact of deprivation varies across different cancer types with examples of cancer types provided below. Additional detailed breakdowns are available on the [cancer reporting tool](#).

Cancer mortality and deprivation:

- ❖ Of the four most common cancers, lung cancer has the widest inequalities in cancer mortality by area deprivation in Wales (Figure A).
- ❖ The gap in bowel cancer mortality rates between the most and least deprived areas in Wales rapidly decreased in 2022 (Figure B).

Figure A: Lung cancer mortality and deprivation in Wales. Produced by Public Health Wales, using PHM & MYE (ONS) and WIMD (WG).

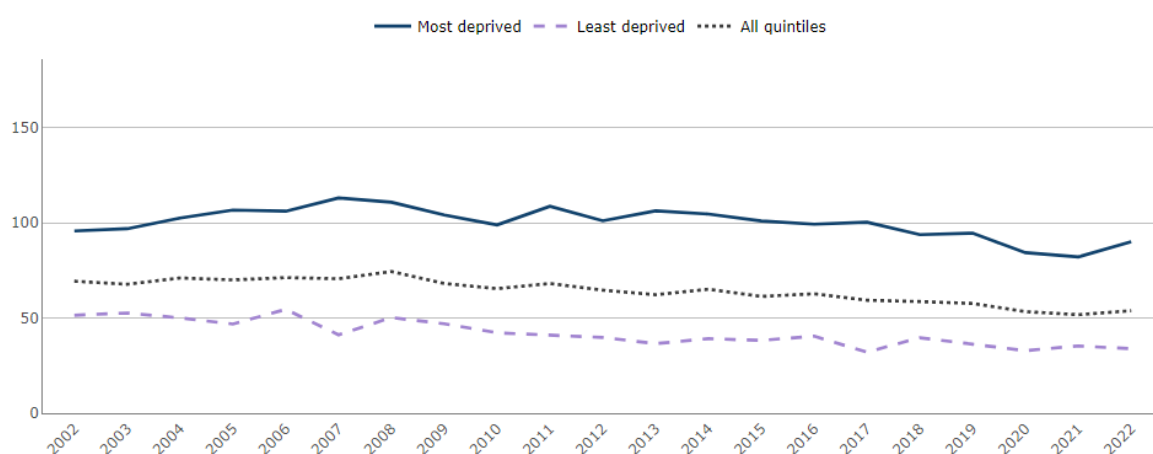
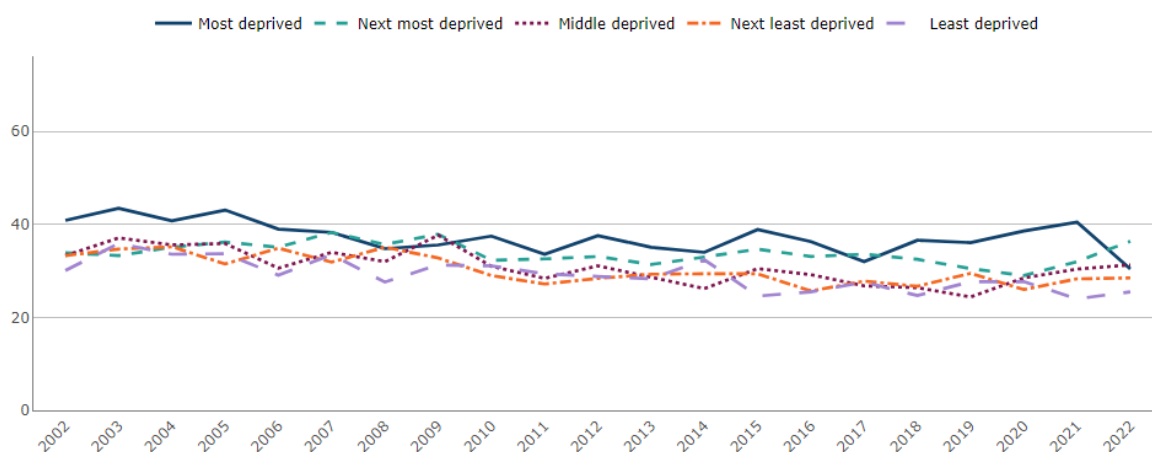


Figure B: Bowel cancer mortality and deprivation in Wales. Produced by Public Health Wales, using PHM & MYE (ONS) and WIMD (WG).



Source: Figures 5 and 6 in [Main messages - Mortality OS 2022 - Corrected April 2024.docx](#) (reference 2)

Cancer survival and deprivation:

- ❖ For people diagnosed with colorectal cancer, this inequality gap in net survival is wider than it was for the previous period (Figure C).
- ❖ For lung cancer, ten-year net survival has greatly improved in the least deprived areas of Wales, but much less so in the most deprived, widening existing deprivation inequalities (Figure D).

Figure C: Colorectal cancer net survival and deprivation in Wales

Five year unstandardised net survival (%), colorectal, persons, all ages, Wales by deprivation fifths

Produced by Public Health Wales, using cancer registration data (WCISU), PHM & MYE (ONS) and WIMD (WG)

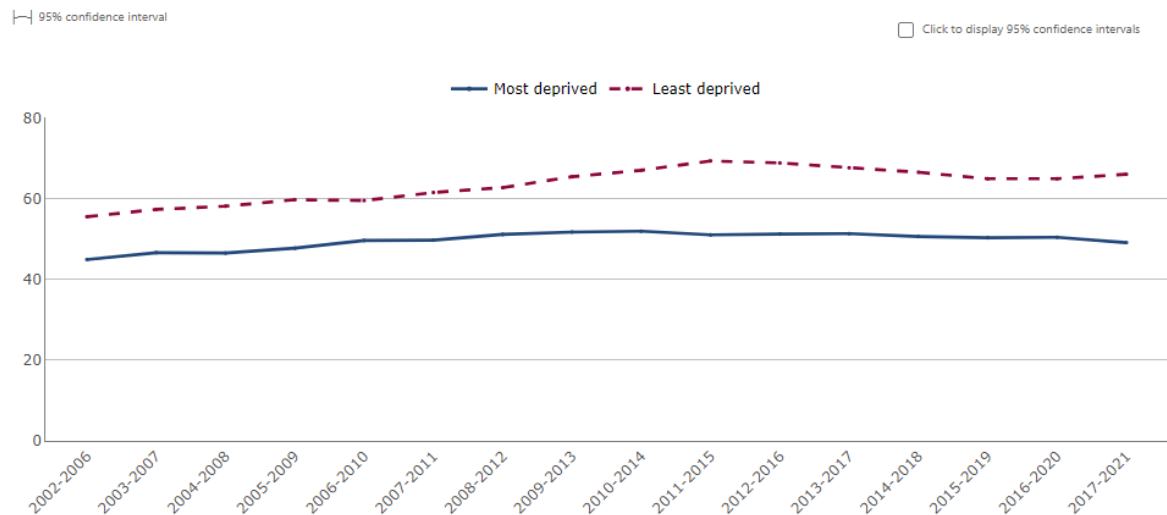
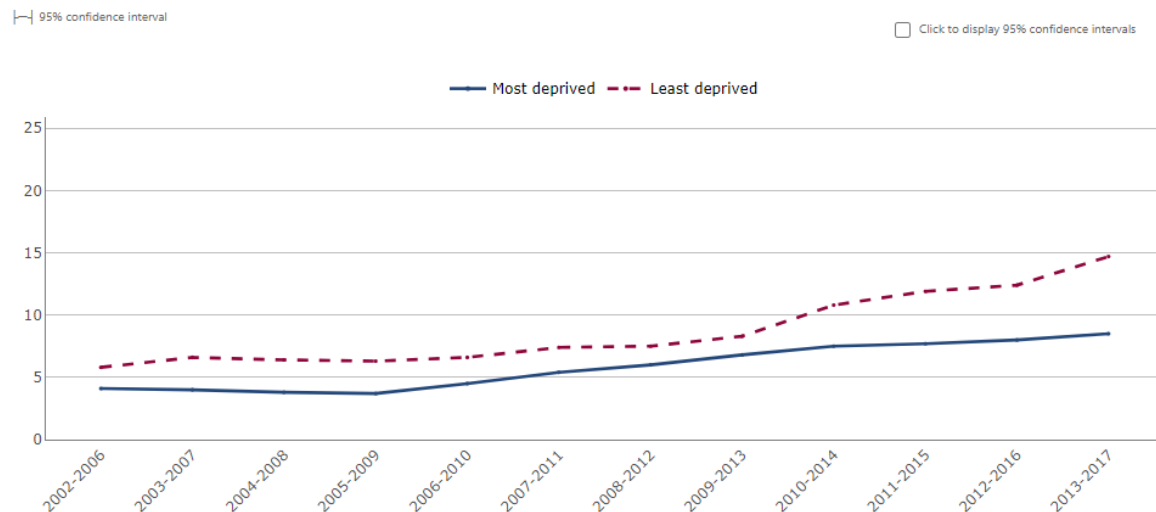


Figure D: lung cancer net survival and deprivation in Wales

Ten year unstandardised net survival (%), lung, persons, all ages, Wales by deprivation fifths

Produced by Public Health Wales, using cancer registration data (WCISU), PHM & MYE (ONS) and WIMD (WG)



Source: Chart 8 and Chart 9 in [CancerSurvivalInWales 2002-2021 MainMessages.docx](#) (Reference 1)

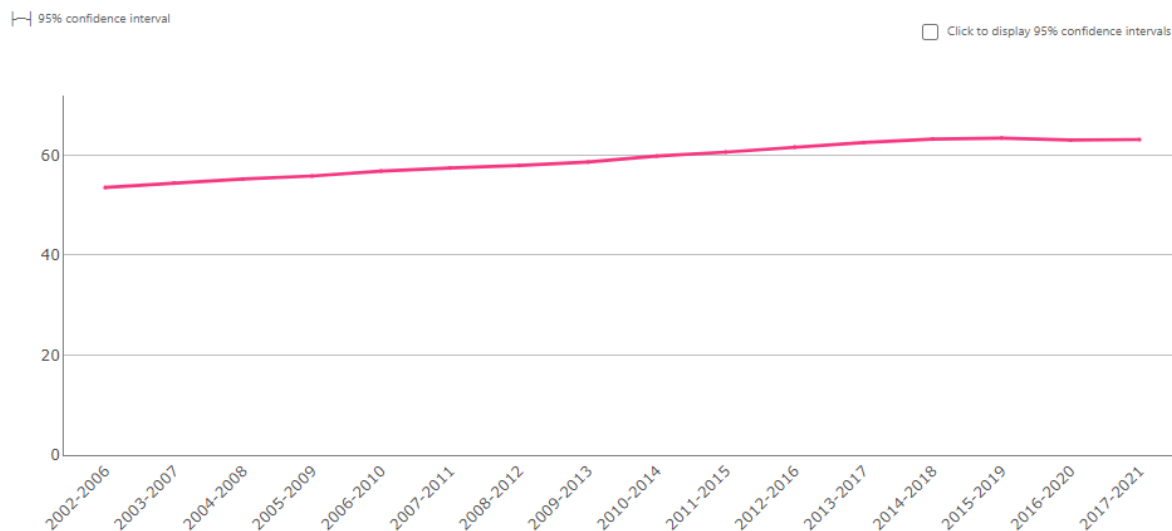
Annex 3: Five-year net cancer survival in Wales

Long-term historic improvement in five-year net cancer survival has stagnated since the 2014-2018 diagnosis period. This stalling in improvement started before the Covid-19 pandemic and has continued beyond it.

Figure E: Five year age-standardised net survival %

Five year age-standardised net survival (%), all cancers excluding nmesc, persons aged 15-99, Wales

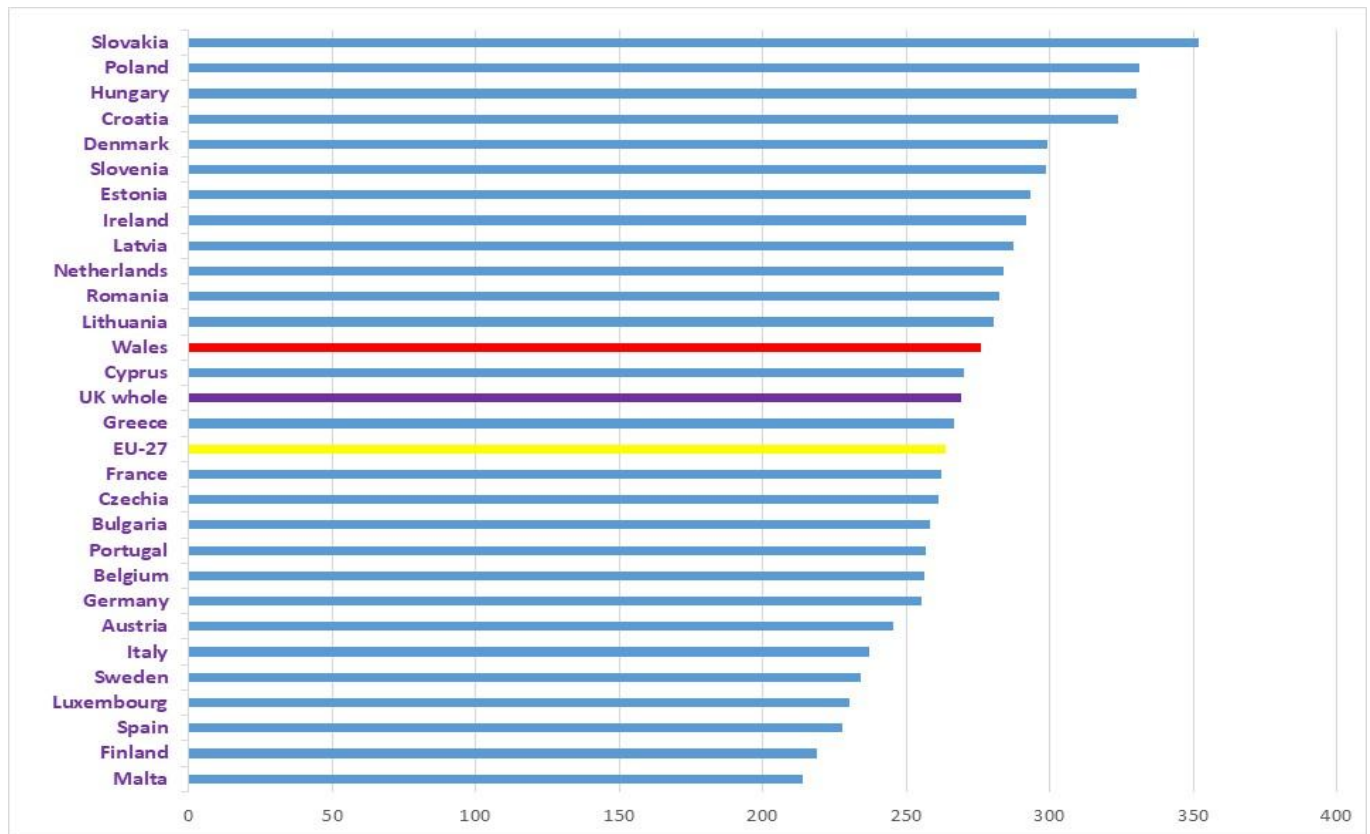
Produced by Public Health Wales, using cancer registration data (WCISU), PHM & MYE (ONS) and WIMD (WG)



Source: Chart 1 [CancerSurvivalInWales_2002-2021_MainMessages.docx](#) (reference 1)

Annex 4: Cancer mortality from the European Cancer Information System (ECIS) dashboard

Figure F: European Cancer Information System (ECIS) dashboard for mortality in EU-27 countries, UK as a whole, and Wales



Source: ECIS dashboard 2020

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