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

Meeting Venue:	For further information contact:
Committee Room 2, Senedd	**Richard Thomas**
Meeting date: 4 March 2026	Committee Clerk
Meeting time: 09.30	0300 200 6565
	SeneddCulture@senedd.wales

Hybrid

Private pre-meeting

09:15–09:30

1 Introductions, apologies and substitutions

09:30

2 ARFOR: Ministerial evidence session

09:30–10:30   (Pages 1 – 261)

Rebecca Evans MS, Cabinet Secretary for Economy, Energy and Planning

Mark Drakeford MS, Cabinet Secretary for Finance and Welsh Language

Duncan Hamer, Director of Operations, Business and Regions, Welsh Government

Ann Watkin, Head of Strategy, Operations Alignment and Planning, Welsh Government

Elin Burns, Director for Culture, Heritage, Sport and Welsh Language, Welsh Government

Iddon Edwards, Head of Economy, Housing and Welsh Language, Welsh Government

Attached Documents:

Research brief

Written evidence – Welsh Government

Written evidence – Mentera

Written evidence – Carmarthenshire County Council

**Senedd Cymru
Welsh Parliament**

Written evidence – Welsh Language Commissioner

Written evidence – Menter Môn

Written evidence – Wavehill report: Evaluations, Conclusions and
Recommendations of the ARFOR Programme – October 2021

Written evidence – ARFOR programme update – March 2024

Written evidence – ARFOR programme update – March 2025

Written evidence – Wavehill report: The ARFOR 2 Programme: Evaluation,
Monitoring and Learning – September 2025

Break

10:30–10:40

3 General ministerial scrutiny: Welsh Language

10:40–11:40   (Pages 262 – 318)

Mark Drakeford MS, Cabinet Secretary for Finance and Welsh Language

Elin Burns, Director for Culture, Heritage, Sport and Welsh Language

Jeremy Evas, Head of Project 2050

Attached Documents:

Research brief

Written evidence – Welsh Government

Written evidence – Community Housing Cymru

4 Papers to note

11:40

4.1 Wales-Ireland relations

(Pages 319 – 320)

Attached Documents:

Correspondence from Dr Hefin Gwilym: Inviting the Committee to attend a
seminar on the Basic Income for the Arts in Ireland – 23 February 2026

4.2 Public service broadcasting in Wales

(Page 321)

Attached Documents:

Correspondence from Ofcom: Sharing its final decision on Part 5 of the Media Act – 25 February 2026

4.3 A Culture Bill for Wales

Attached Documents:

Report from the Future Generations Commissioner for Wales: Culture for Future Generations. A Culture Act for Wales: Green Paper – 25 February 2026

4.4 Auditor General for Wales

Attached Documents:

Copy letter from the Auditor General for Wales to the Chair of the Finance Committee and the Chair of the Public Accounts and Public Administration Committee: Providing a perspective on the challenges and opportunities for Welsh public services – 26 February 2026

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

11:40

6 Consideration of the evidence received

11:40–12:00

7 BBC Royal Charter review: Consideration of draft response

12:00–12:10

Attached Documents:

Draft response to the UK Government – Consultation on the BBC Royal Charter Review

Draft letter to the UK Government – Public service broadcasting in Wales inquiry

Agenda Item 2

Document is Restricted

Welsh Government Evidence Paper – ARFOR Programme

18/02/2026

This paper provides a summary of the ARFOR programme and has been prepared by the Welsh Government for the Culture, Communications, Welsh Language, port and International Relations Committee, ahead of the meeting to be held on Wednesday 4th March 2026 when the Cabinet Secretary for Finance and Welsh Language and Cabinet Secretary for Economy, Energy and Planning look forward to giving evidence/discussing further.

Contents

1. Background

1. Welsh Government has provided grant funding to the local authorities in the ARFOR region of Ynys Mon, Gwynedd, Ceredigion and Carmarthenshire to deliver strategic programmes designed to support economic development and the Welsh language across the four local authority areas.   The programmes, based on proposals received from the four authorities collectively, have been managed by Cyngor Gwynedd and delivered by a range of contracted partners and by the local authorities themselves. ARFOR has sought to test a range of approaches, recognising that a strong local economy is vital to sustaining the Welsh language in the rural heartlands.

2. The initial ARFOR programme (agreed as part of the budget agreement between Welsh Government and Plaid Cymru), operated between 2019 and 2021, with a budget of £2 million of revenue funding.

3. As part of the Co-operation Agreement there was a commitment to co-produce a phase 2 of the ARFOR programme with local authorities. Building on the experience of the earlier programme, a further £11 million of funding was made available to ARFOR 2 between 2022 and 2025 to support a more strategic programme of interventions.

4. During the current financial year, a budget of £500k has been made available to the local authorities to undertake a "pause and reflect" exercise, whilst maintaining funding for the programme co-ordinator and aspects of the programme (aimed primarily at young people). This work will be key to help inform a way forward alongside mainstreaming of functions.

5. A governance structure was in place for the ARFOR Programme through the establishment of a Programme Board, comprising the Leaders of each of the 4 local authorities, to provide strategic direction and decision making. This was supported by an Officials group with representatives from each of the local authorities. Both Groups, and the Programme Co-ordinator employed by Cyngor Gwynedd with funding via the programme, have worked closely with officials from both Economy and Welsh Language teams in Welsh Government.

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2. ARFOR 1 (2019–2021)

6. Funding of £2 million was provided to ARFOR 1 to pilot innovative approaches to promoting entrepreneurship, business growth, community resilience and the Welsh language. It targeted support in Gwynedd, Anglesey, Ceredigion and Carmarthenshire and was delivered over a two-year period 2019/20 and 2020/21.

7. The funding – made available from Welsh Government via Cyngor Gwynedd to the 4 local authorities - was based on a proposal received from the local authorities which looked to facilitate new and innovative methods to supporting economic development in the region, by:

- Promoting enterprise and supporting business growth in areas with a high proportion of Welsh speakers
- Generating more and better paid jobs to retain local people in these areas and encourage those who have left to return
- Promoting the wide-ranging value of the use of Welsh and bilingualism in business creating a vibrant sense of place
- Encouraging the businesses and people who move to rural areas to value and use the Welsh language

8. In addition to piloting interventions in each of the different local authority areas, the fund was intended to support projects developed in a collaborative approach on an inter authority basis given the areas share many similar social and cultural situations.

9. The ARFOR 1 programme delivered a number of interventions across the 4 counties including:

- **Direct business grants:** Direct business grants were offered by all four local authorities, though with some variation. Grants were offered to support capital and revenue investment.

- **Llwyddo'n Lleol:** Gwynedd and Ynys Mon also offered placements for young people on the Llwyddo'n Lleol scheme run by Menter Mon. The scheme involved an 11 week mentoring programme, supporting young people as they developed their business ideas and plans. Alongside the mentoring, the young people were expected to document their experiences through social media, in turn aiming to highlight the business opportunities and possibilities for young people in the area.

- **Ffiws/Gofod Creu:** The Ffiws scheme funded the creation of temporary spaces around Gwynedd and Ynys Mon offering free access to specialist equipment, with technicians on hand to help with training and use. The spaces offered access to equipment such as 3D printers or laser cutters. The intention was to support local businesses to develop prototypes and product ideas.

- **Cymunedau Mentrus:** The Cymunedau Mentrus scheme sought to support social businesses and community enterprises develop spaces and workplaces that would in turn allow them to extend or expand their provision, support and services to the communities.

- **Bwrlwm ARFOR:** the programme's marketing initiative to promote impact and lessons and to develop case study examples.

10. ARFOR 1 was a pilot programme testing innovative, place-based interventions to promote economic resilience and through this the Welsh language. It mainly focussed on business support, mentoring of young people, support for social enterprises and projects to embed the Welsh language in a business setting.

11. Despite some difficult operating circumstances (due to Covid) the outcomes for the ARFOR 1 programme included 154 businesses supported, 238 full-time and 89 part-time jobs created, and 226 jobs safeguarded.

3. ARFOR 2 (2022 – 2025)

12. Building on the earlier ARFOR 1 programme and evaluation, £11 million was made available for ARFOR 2 between 2022 and 2025 as part of the Co-operation Agreement between Welsh Government and Plaid Cymru.   Delivered as a grant via Cyngor Gwynedd on behalf of the four local authorities, this aimed to support a strategic programme supporting economic development and the Welsh language across the ARFOR area.

13. Managed by Cyngor Gwynedd and delivered collaboratively by the authorities and contracted partners, ARFOR 2 built on the foundations laid by ARFOR 1 while testing new approaches based on a central principle: a strong local economy is essential to sustaining the Welsh language in its traditional and rural heartlands.

14. ARFOR 2 has focused on encouraging young people to stay or return to the ARFOR area, supporting local enterprises, promoting economic and social opportunities, and strengthening the use of Welsh in the workplace and wider community. The programme has supported several key elements, including:

    a. **Llwyddo'n Lleol** [Succeeding Locally] – Focused on changing perceptions of the region as a place to live and work, using marketing and direct support to help young people settle, find jobs, or start businesses.

    b. **Cymunedau Mentrus** [Enterprising Communities] - Provided grants to businesses to create jobs and promote the use of the Welsh language.

    c. **Cronfa Her** [Challenge Fund] – Funded innovative projects for a wider range of stakeholders to explore new ideas and generate learning about the relationship between the economy and language, in line with the programme's objectives.

    d. **Bwrlwm ARFOR** [The vibrancy of ARFOR] – A communications and marketing strand to promote regional identity and the use of the Welsh language and raise awareness of the programme objectives.

15. ARFOR 2 was a placed based approach and delivered collaboratively with the support of over 200 partners and stakeholders. The *'ARFOR 2 Programme Update Document' (included at the following link:* Second phase of ARFOR*)*, prepared by the local authorities provides full details of the outputs delivered as part of the programme, together with case studies and examples of the breadth of support provided to individuals, businesses and communities under this programme. It also provides an overview of the work streams and gives examples of some of the many organisations and individuals from across the ARFOR region who have benefited from the Programme.

16. Wavehill Consulting Ltd was commissioned to work alongside the delivery of the various elements of the ARFOR 2 programme to provide an independent evaluation. The evaluation concludes that the programme has delivered a significant amount of activity in a very short period. Several key performance measures were agreed as part of the contractual process, and overall, the

outcomes and outputs suggest effective performance. Of the 23 indicators which included a quantitative target, the programme met or exceeded 18 of them. However, for some aspects of the programme e.g. changing perceptions etc, it has been difficult to apply any meaningful quantitative measures.

17. The evaluation reports that ARFOR 2 has delivered short-term economic benefits, including:

- creation of 327 and safeguarding of 295 jobs
- supporting 263 new and 678 existing enterprises
- 210 businesses increased their use of Welsh
- over 200 young people received in depth support.

18. The evaluation report makes a number of broad recommendations, including:

   1. The need for a long-term intervention to make a real difference, given that the two-year delivery programme is not sufficient to address the challenges posed. It suggests a focus on:
        a. sharing good practice and providing guidance and strategic coordination.
        b. research, testing and piloting, with focus on young people
        c. marketing and communication – aimed at changing perceptions
   2. Use a transition period to plan thoroughly for longer term intervention, with continued support for 'Llwyddo'n Lleol' on a smaller scale to support marketing aspects, and to work towards mainstreaming the successful and innovative elements of the programme
   3. Applying the research's main lessons to inform next steps

4. Current Position and Next Steps

19. Building on the recommendations of the evaluation of ARFOR 2, Welsh Government has provided further funding of £500k in the form a grant to Cyngor Gwynedd on behalf of the four local authorities in this current financial year to:

- Support the ongoing role of the programme co-ordinator at Cyngor Gwynedd.
- Continue 'Llwyddo'n Lleol' activity with focus on young people, but on a reduced scale.
- Working closely with Wavehill Consulting Ltd, to undertake a pause and reflect exercise to allow the local authorities to identify:
  - o what has worked well
  - o where impact has been strongest
  - o what has been less effective
  - o where opportunities exist to take lessons learnt into mainstream activity

20. This work is ongoing, and due to be completed soon after the end of the financial year. Actions to mainstream some activities such as business support are underway and the final report will be important to help inform a way forward across the functions delivered.

Written Evidence from Mentera

ARFOR – Delivery Insights, Lessons, and Recommendations

1. Executive Summary

Our role: We contributed to the design and delivery of ARFOR interventions spanning inspiration and careers, enterprise development, challenge-led investment, and community activation across the region.

We specifically delivered the Challenge Fund (Cronfa Her) and Llwyddo'n Lleol (in partnership with Menter Môn), therefore our comments will mainly focus on our lived experience in these two strands, as well as our experience of being part of the delivery partnership.

What worked:

- The vision behind ARFOR deserves real recognition. Since its inception, clear effort has been made to ensure that each of the four counties received appropriately tailored support.
- A regional, place-based strategic approach that recognises the distinct needs of rural and urban communities – especially where economy and language intersect.
- Llwyddo'n Lleol (careers/placement and campaign) exceeded initial placement ambitions and showcased ARFOR as a place to live and work very effectively.
- The Mentro initiative (enterprise cohorts) attracted more applicants than could be supported, showing a clear demand for entrepreneurial support. With light touch finance, new Welsh-speaking businesses were created or given the confidence to grow.
- Cronfeydd Her ARFOR (Challenge Funds) enabled innovative, cross-sector solutions to regional challenges, strengthening the economy-language link, with an emphasis on partnership working.

Key challenges:
- The short-term and stop-start nature of the programme created unnecessary uncertainty for staff, delivery partners, and beneficiaries.
- The programme's complexity risked spreading objectives too widely and increased risk of duplication in delivery.

Top recommendations:

- Socio☐economic interventions require long☐term stability and a consistent policy framework. This must be central to the design of any future support. It is also important to acknowledge how much was achieved with what was a relatively modest budget.
- Give programme greater long-term certainty through longer funding commitments, allowing for more strategic planning, to protect capacity and help build momentum.
- Simplify the offer (e.g., a single Challenge Fund; clearer brand direction), with distinct objectives for commercial vs community activity.
- Retain and refine Llwyddo'n Lleol (building on the success of the Mentro initiative), and community activation (Bwrlwm ARFOR / Cymunedau Mentrus) with enhanced follow-up and measurement.
- Consider extending the programme to include other Welsh-speaking heartlands, for example north Pembrokeshire, Bro Ddyfi, Pontsenni.

2. Introduction

About the Organisation: Mentera is Wales' leading independent business development company, a not-for-profit with a track record spanning 36 years and a turnover of over £20 million.

We help small and large businesses to grow and prosper whilst supporting and encouraging people to set up new, innovative businesses. We achieve this across Wales by providing high-quality tailored services, and by utilising our staff's expertise, our physical presence across the country, as well as our partnerships and contacts in industry and government.

Four of our five offices are in the ARFOR region and many of our 160 staff live and work in these communities.

Scope of Submission: This evidence summarises delivery insights, outcomes, challenges, lessons, and recommendations from our lived experience of delivering on ARFOR, including proposals for its long-term success.

3. Overview of ARFOR Delivery

Objectives (as implemented):

- To strengthen the relationship between the economy and the Welsh language, supporting vibrant communities where people can live and work in Welsh-speaking areas.

Activities Delivered:

- **Llwyddo'n Lleol (Marketing, Inspiration & Careers):**
  A marketing campaign encouraging people to put down roots or return home to the ARFOR region by promoting local employability, enterprise and family support, and challenging the stereotype that success requires leaving the region. Supported individuals acted as ambassadors, sharing strong real□life examples.
  The campaign was underpinned by four initiatives:
  1. **Mentro Initiative (Enterprise Cohorts):** Group-based training, expert support and seed funding for new enterprises; demand exceeded capacity.
  2. **Gyrfaol Initiative (Employment Opportunities / Placements):** Funding for work placements with local employers. Against a target of 40, the initiative placed 56 individuals across 49 businesses. County officers also facilitated social activities to showcase ARFOR as an attractive place to live and work.
  3. **Profi Initiative:** Employability resources and sessions for schools and colleges, highlighting Welsh-medium local job opportunities and building employability skills, with potential for mainstreaming.
  4. **Ymgartrefu Initiative (Resettlement):** Financial support and advice to encourage families and young people to return to the region.

- **Cronfa Her (Challenge Funds):**
  A mechanism for piloting innovative responses to regional challenges through cross□boundary, cross□sector partnerships, with the aim of strengthening the link between the economy and the Welsh language. Applicants were encouraged to submit joint proposals, as collaboration and partnership working were integral to the project's design.
- **Cymunedau Mentrus:**

Business grants aimed at creating high☐quality jobs and increasing the everyday use of the Welsh language within communities.

- **Bwrlwm ARFOR:** A communications programme designed to raise awareness of the ARFOR programme, promote local businesses, and generate a sense of energy and enthusiasm ("buzz") across the ARFOR region.

4. Evidence of Impact

The recent independent evaluation of ARFOR 2 by Wavehill noted the following:

- High levels of satisfaction from participants (69% very satisfied with support received under Llwyddo'n Lleol, and 71% for Enterprising Communities).
- 68% of participants reported that the support had raised their business aspirations.
- 250–330 jobs created (although this is also caveated because of the risk of displacement elsewhere in the region).
- 78 new businesses created (60 from Llwyddo'n Lleol and 18 from Enterprising Communities).
- 48% increase in the number of businesses assessing Welsh language capability as part of recruitment process.
- 59% of programme participants reported that the programme had given them confidence they could achieve their aspirations without having to move away.

Other quantitative outcomes:

- 56 young people placed; 49 businesses engaged under the careers strand – surpassing the original target of 40 placements.

Other qualitative outcomes:

- Campaigning and event presence challenged stereotypes and raised awareness of viable local futures, helping position ARFOR as "a good place to live and work".

- Enterprise cohorts: strong participant demand, with many requesting deeper follow-up – evidence of a readiness to start/grow businesses with light-touch finance and coaching.

- Challenge Funds enabled collaborative problem-solving across multiple sectors and borders, aligning economic vitality with language outcomes.

Success Factors:

- Place-based design with regional coordination worked well.

- Flexible pilot ethos (test, learn, iterate) should be encouraged further.

- Cross-sector collaboration (Challenge Funds) creating practical solutions in sectors including food, agriculture, creative industries, hospitality, sport, education, digital tech, and communities.

5. Challenges and Barriers

Programme Design:

- Complexity across multiple strands/funds (e.g., separate funding programmes, different marketing campaigns) caused confusion; simplification recommended.

- Short delivery windows limited longitudinal follow-up and outcome measurement.

- Broad aspirations for the programme meant that limited funding was spread too thinly, risking impact of the interventions.

Delivery/Cross-cutting:

- Lack of financial continuity reduced ability for long-term approach and limited impact.

- Stop-start approach disrupted delivery and made staff retention more challenging.

- Communications: Brand awareness of ARFOR is low and further diluted by multiple sub-brands/strands of work. Need to clarify the ARFOR brand direction and re-package elements of Llwyddo'n Lleol more clearly for audiences.

External Context:

- Uncertainty over the future of the SPF, which local authorities have depended on for ARFOR transition, amplifies the need for a more

proactive and long-term approach to supporting the most rural and deprived communities.

6. Lessons Learned

What Worked Well?

- The vision behind ARFOR was innovative and deserves recognition. Clear effort was made to ensure that each local authority area received appropriately tailored support. A lot was achieved in a small amount of time and with relatively small amounts of money, through innovation and collaboration.

- Campaign plus placements approach (Llwyddo'n Lleol) is persuasive and scalable and provides a clear call to action and incentive; event presence drives visibility and aspiration.

- Cohort based enterprise with microfinance unlocks participation; there is clear appetite for post-programme 1:1 support.

- Challenge led investment is one of ARFOR's most innovative features and yet it has been difficult to quantify impact in the timescale. Future programmes should look to retain the pilot/innovate ethos to address structural challenges but include long-term and effective evaluation methods from the start.

What Should Change Next Time?

- Longer-term funding and strategic planning allowing for greater impact, certainty and better outcomes.

- Consolidate funds and differentiate objectives for commercial vs community activity.

- Build systematic follow-up (placements, enterprise cohorts, resettlement) to track long-term outcomes and cost-effectiveness.

- Mainstream "Profi" employability content into education pathways; embed early entrepreneurship exposure ("start your own business") across schools/FE/HE and into professional tracks likely to become self-employed.

Policy Implications:

- Socio☐economic interventions require long☐term stability and a consistent policy framework. This must be central to the design of

any future support. It is also important to acknowledge how much was achieved with what was a relatively modest budget.

- A regional strategic plan (six years) is needed to align language planning, rural development, and the foundational economy, with early mobilisation to achieve long-term, cross-programme impact.

7. Recommendations for Future Funding and Programme Design

Recommendation 1: Consider a longer-term strategic plan to tackle the socio-economic challenges facing Welsh-speaking heartlands.

Rationale: These are long-term and deep-rooted challenges that require longer-term focus and behaviour change based on research and evidence.

Recommendation 2: Retain and refine Llwyddo'n Lleol (campaign + placements).

Rationale: Demonstrated demand and outcomes (56 placements; 49 businesses). Expand targeting outside Wales while sustaining ARFOR wide awareness; embed structured longitudinal tracking.

Recommendation 3: Scale the Mentro Initiative with follow-on 1:1 support and microfinance.

Rationale: Oversubscribed cohorts indicate latent entrepreneurship; add modular post-programme support (business planning/marketing) and regular application windows.

Recommendation 4: Consolidate the Challenge Funds into a single fund.

Rationale: Reduces confusion, improves communication, and enables a portfolio of innovative, cross-sector pilots targeted at regionally prioritised challenges.

Recommendation 5: Distinguish commercial vs community objectives across funds.

Rationale: Position the Challenge Fund for commercial/market innovation; use Cymunedau Mentrus/Bwrlwm ARFOR to resource community and cultural activation that nurtures belonging and Welsh language use.

Recommendation 6: Maintain an innovation mindset.

Rationale: A conservative approach would run counter to ARFOR's founding principles; continue to pilot, trial, and invest during transition to prepare for scaled, strategic interventions from 2027 onwards.

Recommendation 7: Simplify programme, branding and strands.

Rationale: Clearer messaging and packaging will improve stakeholder navigation and uptake. There is a need to mitigate the risk of duplication between the marketing functions of Llwyddo'n Lleol and Bwrlwm. Llwyddo'n Lleol's core purpose was to deliver a marketing campaign, and its objectives overlapped with Bwrlwm's when promoting local opportunities and success stories. Note that the recent independent review commissioned by the Welsh Government and conducted by Wavehill states that *'Llwyddo'n Lleol is possibly the strongest element of the ARFOR programme'*.

Recommendation 8: Build early-stage entrepreneurship and employability into education.

Rationale: Career patterns are increasingly portfolio-based; introduce "start your own business" content and mainstream Profi within secondary and post-16 pathways.

Recommendation 9: Confirm and extend the transition period (≥12 months, ideally longer).

Rationale: Protects staff capacity, avoids provision gaps, and maintains momentum while designing a six-year strategy; aligns with electoral timing and delivery realities.

8. Conclusion

ARFOR has delivered momentum and innovation across career pathways, enterprise, and community activation, linking economic vitality with the Welsh language. We stand ready to provide further data and oral evidence if helpful.

With simplified structures, and a six-year strategic plan mobilised early, the next phase can consolidate gains, deepen impact, and offer strong value for money for rural and Welsh-speaking communities.

There is a need to streamline and focus ambitions and objectives, simplify the programme and embed evaluation and follow-up to fully understand long-term impact.

1. Introduction and context

This response draws on the independent evaluation of the ARFOR 2 Cymunedau Mentrus scheme in Carmarthenshire, delivered between 2022 and 2025. The scheme formed part of the wider ARFOR 2 programme, an extended pilot funded by Welsh Government to address the linked challenges of economic opportunity and Welsh language decline in Welsh-language heartland areas

Carmarthenshire County Council received an allocation of £1.125 million through the Cymunedau Mentrus workstream to deliver a grants programme supporting businesses and third sector organisations, with the dual aim of strengthening economic activity and increasing the use of Welsh in the workplace and with customers.

2. Experience of delivering the scheme

From a delivery perspective, the evaluation indicates that local authority–led delivery was effective and well regarded.

Key features of the delivery experience included:

- A clear and proportionate application and grant management process, operating to common criteria across the ARFOR authorities.

- Strong working relationships between programme managers and grant recipients.

- Effective signposting to other business support and funding, helping some projects to lever additional investment.

- Positive feedback from beneficiaries regarding responsiveness, clarity and accessibility of the scheme

Delivery benefited from being locally managed, allowing the scheme to align with Carmarthenshire's wider economic and Welsh language strategies while still operating within a national framework.

3. Evident successes and positive outcomes

Economic outputs

The evaluation confirms that Cymunedau Mentrus delivered clear and measurable outputs:

- £1.102 million total expenditure, including £931k awarded to 30 businesses and community organisations.

- £411k of match funding secured, equating to approximately 29% of total project costs.

- 71 jobs and freelance roles created or safeguarded, at a gross cost per job of around £13,100, which is broadly in line with comparable business support schemes

Grants were particularly impactful for micro and small enterprises, where the scale of funding was sufficient to influence business investment decisions rather than simply offset marginal costs.

Welsh language outcomes

All supported projects included commitments to increase Welsh-language use. The evaluation finds evidence of:

- Increased use of Welsh in internal workplace activity.

- Expansion of Welsh-language customer-facing services.

- More visible use of Welsh in branding and marketing.

- The development of Welsh-language working and collaboration spaces, particularly in creative and media environments

In several cases, engagement with ARFOR encouraged businesses to treat Welsh as a strategic asset, leading to new products, services and markets that would not otherwise have been pursued.

Sectoral strengths

The strongest impacts were observed in sectors where Welsh is intrinsic to the economic activity, most notably:

- Creative and media industries (including activity linked to the Yr Egin cluster).

- Elements of the food and agri-tech economy where language, place and provenance add commercial value.

In these contexts, ARFOR reinforced existing Welsh-language economic ecosystems rather than attempting to create demand where it did not already exist.

4. Additionality: did ARFOR achieve more than a standard business support grant?

A critical issue is whether ARFOR delivered additional impact beyond what could reasonably be expected from other business support grants operating in Carmarthenshire.

On conventional economic metrics, the evaluation suggests that ARFOR is not clearly distinguishable from other grant programmes. Outputs such as jobs created or safeguarded and businesses supported are standard measures used across a wide range of local and national schemes. In a county with a large and diverse business support landscape, it is difficult to demonstrate that ARFOR's economic

outputs alone represent outcomes that would not have occurred through other funding routes

The report explicitly recognises this challenge, noting that ARFOR 2 – and Cymunedau Mentrus in particular – was a relatively small intervention when set against the scale of wider economic development funding operating locally. As a result, it was never realistic to expect ARFOR to generate distinctive county-wide economic impacts when assessed solely through standard output measures such as jobs or employment stock

Where ARFOR *does* demonstrate clearer additionality is in its language-specific conditionality and behavioural effects. The evaluation highlights that the explicit integration of Welsh language objectives into business support is distinctive to ARFOR, compared with mainstream grant programmes

Evidence suggests that scheme requirements encouraged some beneficiaries to adopt a more proactive approach to Welsh language use than they would otherwise have done, in some cases resulting in new Welsh-language products, services and markets.

In summary, ARFOR's economic additionality is difficult to evidence using conventional metrics, but its language additionality is more credible, particularly where Welsh is central to the business model rather than peripheral.

5. Limitations and challenges

The evaluation is clear about the limits of what ARFOR achieved:

- Scale: The scheme was too small to influence wider economic performance or labour market structure.

- Migration outcomes: **There is no demonstrable impact on out-migration**, population retention or return migration, reflecting the complexity of factors influencing these decisions and the limited scale of intervention .

- Outcome definition: Concepts such as "good jobs" lacked precision, making it difficult to assess impacts on job quality, pay or career progression.

- Breadth of focus: Broad eligibility criteria led to a diverse portfolio of projects, diluting strategic focus and limiting depth of impact.

6. Areas for future development

The Carmarthenshire experience suggests several lessons for future policy design:

1. Sharper focus on language-driven economic activity
   Future programmes are likely to be most effective where Welsh is integral to the economic offer, rather than an added requirement.

2. Clearer articulation of realistic outcomes
   Small-scale business support should not be over-burdened with expectations around migration or demographic change.

3. Depth over breadth
   Concentrating resources on fewer sectors or clusters could deliver stronger and more visible impacts.

4. Retention of strong local delivery models
   The Carmarthenshire model demonstrates the value of local authority delivery aligned with local economic and language strategies.

7. Concluding remarks

Overall, the evaluation suggests that ARFOR's principal contribution in Carmarthenshire lies less in its conventional economic outputs, which are comparable to other grant schemes, and more in its role as a pilot testing how economic development and Welsh language objectives can be aligned at business level.

If ARFOR is judged primarily on jobs and business counts, its impact is difficult to separate from the wider business support landscape. Its added value is strongest where it influenced business behaviour, language use and sectoral development in areas where Welsh is a genuine economic asset. This distinction between economic additionality and language additionality is central to understanding both the achievements and the limitations of the programme.

The Carmarthenshire evaluation demonstrates that while ARFOR delivered conventional economic outputs, these are not materially different from those produced by other business support schemes, and there is no demonstrable impact on migration or population retention

Future design must therefore focus on what ARFOR can credibly influence.

ARFOR should be designed explicitly as a targeted retention programme, not a general business support grant scheme

Should future commitment be realised, we would wish for the broad objectives of the previous Arfor programmes be refocussed, prioritised and simplified into one primary objective of retaining and attracting Welsh-speaking, economically active people in Carmarthenshire.

A programme that centred on the following would be welcomed as these interventions could provide more tangible benefits to the area as well as measurable outcomes

Key delivery actions

1. **Welsh-medium retention jobs fund**

Fund only roles that:

- are Welsh-essential or Welsh as the normal working language
- pay ≥ Real Living Wage
- offer permanence or a defined progression pathway

Prioritise roles suitable for people early in their career or with families.

2. **Career pathways, not isolated jobs**

Support employers to create:

- graduate/returner roles
- structured apprenticeships or traineeships
- progression ladders within SMEs and community enterprises

3. **Enterprise entry routes**

Targeted support for:

- under-35 founders
- family businesses transferring to a new generation
- co-operative and community enterprise models in rural areas

Comisiynydd y Gymraeg
Welsh Language Commissioner

Comisiynydd y
Gymraeg
Welsh Language
Commissioner

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

SeneddCulture@senedd.wales

20 February 2026

Dear colleague,

Invitation to provide written evidence: ARFOR

Thank you for the opportunity to provide evidence to help inform the Committee's scrutiny of Welsh Government Ministers and their delivery of the ARFOR programme. Our response provides a brief overview of our main impressions of the scheme's successes to date, and is based on our involvement in the programme's Llwyddo'n Lleol, Enterprising Communities and Challenge Fund workstreams.

Llwyddo'n Lleol

It should be noted that one of my officials has acted as a non-executive member of the Llwyddo'n Lleol element of the programme's steering group. Non-executive members had no influence in terms of the decisions made on the allocation of grant funding.

Llwyddo'n Lleol is a project that seeks to inspire long-term behaviour change, but with a short-term funding stream. We believe that the project has succeeded in creating content and activities that target young people from the ARFOR region in an attempt to overturn the common perception that they must leave the areas in which they grew up in order to be successful. This message is a powerful one, and the brand has been established, so we are of the opinion that the project could continue in future if there were funding for it. We believe that long-term funding for a project of this kind would increase the likelihood of delivery against the project's main objectives, and we hope that the next Welsh Government will commit to taking this step.

The project's steering group was highly inclusive, with representatives drawn from a large number of public bodies in Wales operating on a national level and in the four ARFOR

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counties. We understand that the intention behind the inclusion of so many bodies was to help disseminate the project's message and influence, but it is possible that a smaller group would have been more successful in providing strategic direction to this element of the ARFOR programme.

One of the project's objectives was to encourage young people who had moved away from the ARFOR area to return. Of course, we support this principle and this message, but we believe that adapting the message to encourage any Welsh speakers to move to ARFOR areas would be more inclusive and may, ultimately, be more successful.

Enterprising Communities and the Challenge Fund

As part of the agreement for the receipt of funding through these elements of the ARFOR programme, it was agreed that companies would need to receive Cynnig Cymraeg accreditation, which is recognition by the Commissioner that organisations highlight the services that they are able to provide after developing a Welsh language development plan. We were pleased to have this opportunity to collaborate with the ARFOR programme and to increase the Cynnig Cymraeg's reach. This co-ordination between Enterprising Communities, the Challenge Fund and the Cynnig Cymraeg led to 25 additional organisations providing more services through the medium of Welsh. The table below summarises the schemes that have received Cynnig Cymraeg accreditation:

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Scheme	Number of organisations that received funding	The number that have received the Welsh Language Development Plan template	The number that have completed and received Cynnig Cymraeg accreditation	% that have received Cynnig Cymraeg accreditation
Enterprising Communities	65	65	18	28%
Challenge Fund	24	24	17	71%

There were inconsistencies across the counties in their methods of referring and monitoring organisations, with some counties starting the work months after others. Although not all organisations ultimately completed the Cynnig Cymraeg process, it is encouraging that every organisation has begun the process of creating a Welsh Language Development Plan. This has contributed towards ensuring that investment through Enterprising Communities and Challenge Fund grants leads to an increase in opportunities for people to use Welsh at work and when they receive services from various businesses.

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An evaluation of ARFOR 2 was announced earlier this year, and the evaluation has found that the programme is successfully achieving some of its main objectives, but that consideration should also be given to targeting certain businesses and sectors in a more strategic manner. This also aligns with our own impressions. Although there are many examples of grant funding being spent on projects that are likely to have a positive effect on the use of the Welsh language, there were other examples where the investment's likely influence on the economic opportunities of Welsh speakers and on the wider use of the language was less obvious.

We believe that the programme would have benefited from a longer strategic planning phase to understand how grant funding could lead to the greatest positive impact on increasing young people's economic opportunities in the four counties, and in so doing increasing opportunities to use the Welsh language.

Decisions on grant allocations were made at the local authority level. We believe that that decision, on the one hand, ensures that decisions are made on a more local level and at a level that is, therefore, closer to the communities that the funding was intended to support. However, on the other hand, we believe that that decision led to inconsistencies in the kinds of organisations and proposals that were successful across the ARFOR region.

If a similar programme were to be run in future, we believe that it would be beneficial if strategic direction and clear instructions were provided to local authorities in terms of consistent, more strategic decision making when allocating grants. We would, therefore, be eager to see greater expertise being developed in future in order to invest in larger scale projects that have been planned more carefully and strategically so that they have the greatest possible influence on the economy and the Welsh language's viability in ARFOR areas. It should be noted that the ARFOR 2 programme's restricted timetable and limited budget did not serve to facilitate this kind of strategic, careful and long-term planning.

Connecting ARFOR activities with mainstream economic development programmes

Despite the ARFOR programme's importance, it must also be acknowledged that the related investment is very small in the context of the Welsh Government's wider economic development budget. For example, the city and growth deals provide investment worth

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billions of pounds and provide strategic direction for economic development the length and breadth of Wales over a period of 15 years. It speaks volumes that a research report by Aberystwyth University found that the Welsh language was a marginal consideration in the development of growth deals in north Wales, mid Wales and south-west Wales. According to the report, the long-term impact of the city and growth deals will be hugely significant, bearing in mind the high levels of public and private investment involved, but it appears that these initiatives do not give serious consideration to the ARFOR programme nor to the Welsh language.

Our understanding is that the contact between ARFOR officials and those involved in the city and growth deals has been very light touch in nature, if not non-existent in some areas. This is disappointing, bearing in mind that one of ARFOR's main aspirations was to understand better the link between the Welsh language and the economy, and to trial and mainstream successful interventions. In our conversations with ARFOR officials, they report that an effort has been made to co-ordinate with the city and growth deals, but that the response has been poor.

The Commission for Welsh-speaking Communities recommends that the Welsh Government should develop an economic development strategy that addresses the needs of areas of higher density linguistic significance in particular. According to the Commission, such a strategy should promote approaches to economic development that focus on the basic needs of the relevant areas. In its response to this recommendation, the Government has committed to consider this as part of the 'pause and reflect' phase of the ARFOR II programme. We believe that officials of the city and growth deals operating in areas of higher density linguistic significance should be part of any discussions on the development of specific economic development strategies for these areas. We must ensure that the city and growth deals contribute directly to the success of these economic strategies in areas of higher density linguistic significance in particular, but that they also contribute to the Welsh language's viability across all of their regions.

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Conclusions and the future of ARFOR

The ARFOR programme succeeded in convening and formulating a comprehensive programme of work very quickly after the Welsh Government stated that it would be funded, and the programme's officials are to be praised for this. The programme evaluation outlines many examples of the programme making a difference for businesses and individuals living in the ARFOR region, and this is to be welcomed.

The ARFOR programme has started to build an evidence base for the connection between the Welsh language and the economy, but additional investment is needed and additional interventions trialled to understand how best to support and strengthen the sustainability of the Welsh-speaking heartlands. The problems facing these areas are complex, which means that successful solutions to these problems are likely to be just as complex, and will be need to evolve as society evolves. We believe that the Welsh Government should commit to long-term investment to build on ARFOR's foundations.

One criticism of ARFOR that we have regularly heard is that restricting the funding to four counties excludes other areas that have a high density of Welsh speakers but are located outside the programme's current boundaries. Our view is that it would be more inclusive to co-ordinate any future funding with efforts to establish areas of higher density linguistic significance, in accordance with the main recommendations made by the Commission for Welsh-speaking Communities.

We hope that the above comments will be of assistance to you in your inquiry, and I am happy for my officials to meet with you for further discussion.

Yours sincerely,

Efa Gruffudd Jones

Welsh Language Commissioner

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Llwyddo'n Lleol 2050

1. Project Background

Llwyddo'n Lleol 2050 has been an ARFOR funded programme, operating across Carmarthenshire, Ceredigion, Gwynedd and Anglesey.

With the migration of families and young people being recognised as one of the main reasons for the decline in the number of Welsh speakers in key areas, the aim of Llwyddo'n Lleol 2050 is to convince young people and young families who are at risk of leaving or have already left that it is possible to have a bright future, with a good job in an exciting field, within their native community.

There are four elements to the Llwyddo'n Lleol 2050 project:

1. Elfen Gyrfaol / Career Initiative

2. Elfen Mentro/ Enterprise Initiative

3. Elfen Ymgartrefu/ Relocation Initiative

4. Elfen Profi / Profi Initiative

2. Elfen Gyrfaol (Career Initiative)

The Gyrfaol (Career) initiative is a key programme that has provided meaningful professional experiences for young people in the ARFOR area, helping them develop their careers while also highlighting the potential for success in West Wales. Through this initiative, we have supported 81 young people in gaining practical experience with local businesses, promoting their development in various fields.

This initiative offered young people the opportunity to receive training, placements, apprenticeships, and even visit companies outside the ARFOR area to gain valuable insights that they could bring back to revitalise their local communities. The companies involved in the programme had the chance to apply for up to £12,000 to invest in young staff members or provide them with professional experience.

One of the main goals of the Gyrfaol initiative was to showcase the wide range of industries and career paths available in West Wales. By working with 62 businesses or organisations, ranging from engineering, marketing, theatre, football recruitment, to beekeeping, we

succeeded in demonstrating that exciting and rewarding career opportunities can be found in rural areas. This has helped challenge the common narrative that career success and professional development are not possible without moving to urban or more metropolitan areas.

In addition to promoting local employment, the Gyrfaol initiative has placed significant emphasis on the Welsh language, encouraging its use as an essential skill in career development. We have highlighted the importance of bilingualism in the workplace, which has become a key asset for personal and professional development in the region.

Another key element of the initiative was promoting the work-life balance available in the ARFOR region. We had the opportunity to organise trips and social gatherings for those involved in the Gyrfaol initative, so they could connect, share experiences, and celebrate the positive impact this programme has had on their lives. By creating a strong community and highlighting the advantages of the lifestyle associated with living and working in rural Wales, we have underscored the possibility of building a successful career while maintaining a fulfilling personal life.

In summary, the purpose of the initiative was to encourage young people to pursue successful and rewarding careers in their local communities, invest in their professional development, and raise awareness of the opportunities available in rural Wales. It has contributed not only to the economic development of the area but also to preserving and promoting the Welsh language as an essential skill in the modern workplace.

Impact of the Gyrfaol Initiative

The Gyrfaol initiative has had a significant impact on both the local economy and the young people involved, while also playing a pivotal role in promoting the Welsh language. One of the key outcomes of the programme is the creation of new job opportunities, with 14 young people securing new roles that were specifically created due to the funding provided by the Gyrfaol initiative. Additionally, a further 30 participants will continue in roles within businesses where the initiative allowed them to grow and develop their skills, either through work experience, training, or direct employment.

Gwenyn Gruffydd, Camarthenshire

The Gyrfaol initative allowed Andy Stead to receive a beekeeping apprenticeship. Through this opportunity, Andy has secured a full-time job and has been able to take advantage of apprenticeship courses and is now able to implement the skills and knowledge learnt into the business.

Pelly, Anglesey

Pelly is a relatively new football recruiting company based in Gaerwen. They were eager to employ a new member to the team through Llwyddo'n Lleol's support. Through the gyrfaol initiative they were able to offer Luke Jordan a role as project officer. Since being at the company for a year, Luke has now secured a permanent full-time role as a Sales Officer. This new position will allow him to visit and recruit new clients for the business.

(Left: Andy preparing bee boxes, Right: Luke visiting potential clients whilst on a scouting course in France)

Economically, the Gyrfaol initiative has not only helped retain young talent within the region but also contributed to the growth and sustainability of local businesses by enhancing their workforce. The opportunity to gain professional experience has proven to be a valuable asset for both businesses and young people, helping to foster a skilled, adaptable, and committed workforce that can meet the challenges of a changing economic landscape.

Each individual involved in the initiative gained invaluable experience, which has enabled them to advance their careers. Whether through direct employment or by developing further within their existing roles, the participants have gained the skills, confidence, and connections necessary to thrive professionally. Furthermore, all positions created or developed through the initiative required the ability to speak Welsh, ensuring that language skills were not only valued but essential for success.

The emphasis on the Welsh language has had a profound effect on those involved, particularly for those who were initially less confident in using it. The Gyrfaol initiative provided a supportive environment where individuals could practice their Welsh language skills, see the practical value of bilingualism in the workplace, and, ultimately, build their confidence in using the language. This focus on Welsh has helped to reinforce its importance as an essential skill in the local economy and workplace, while also contributing to the broader cultural goal of ensuring the continued use and promotion of Welsh in the region.

In summary, the Gyrfaol initiative has delivered positive economic outcomes, fostering local employment opportunities, and has empowered young people to develop both professionally and personally. By prioritising the Welsh language, the initiative has also reinforced the value of bilingualism, helping to build confidence in young people and ensuring that Welsh remains a key asset in the local workforce.

Insights Gained

The Gyrfaol initiative, provided valuable insights into the demand for youth career development support in rural areas, as well as the effectiveness of partnering with a wide range of local businesses and organisations. Several key lessons have emerged from the initiative, which will guide future efforts in empowering young people and promoting local development.

1. **Strong Demand for Career Development Support**
   One of the most important lessons learned from the Gyrfaol initiative was the high level of interest and demand for this type of support. Despite being a new element within Llwyddo'n Lleol, the initiative proved to be highly popular among both young people and businesses. This demonstrated a clear need for targeted programmes that provide professional development opportunities within rural communities. Businesses recognised the value of investing in the career growth of young people, viewing it as an excellent opportunity to foster local talent and create long-term workforce sustainability.

2. **Diversity of Experiences and the Challenge of Capturing Stories**
   Working with such a broad range of businesses across different sectors was one of the most rewarding aspects of the initiative. The variety of industries involved, from engineering and marketing to the arts and sports, provided participants with a wealth of professional experiences. Additionally, capturing these stories through social media helped raise awareness of the opportunities available. However, one challenge that emerged from working with so many businesses and individuals was the difficulty in fully capturing and conveying each story on social media. While efforts were made to highlight as many experiences as possible, the volume of content and the diversity of the stories meant that some narratives did not receive the attention they deserved. In future initiatives, focusing on fewer businesses or individuals could allow for more in-depth storytelling and better social media engagement.

3. **Flexibility in Support, but a Need for Focused Engagement**
   The flexibility of the initiative, allowing businesses to tailor the type and length of support for young people, was an essential factor in its success. This adaptability enabled businesses and participants to gain the most from the initiative. However, it also highlighted that the varied nature of support—from short-term placements to longer-term apprenticeships—meant that some young people might not have received the depth of experience necessary to fully benefit. Moving forward, it may be more effective to focus on fewer participants but for longer durations, ensuring a more thorough and meaningful engagement. This would allow for better storytelling, more focused outcomes, and a stronger economic impact in the community.

4. **The Value of Local Business Engagement**
   The extensive collaboration with over 60 local businesses reinforced the importance of community-based partnerships in providing professional opportunities for young people. This wide network of businesses not only helped create a range of experiences but also emphasised the potential of local economies to sustain and

develop young talent. Future initiatives could benefit from further strengthening these relationships by working more intensively with a select group of businesses that are committed to offering ongoing opportunities for young people, possibly extending financial support to cover placements or apprenticeships for a longer period—up to a year—providing a more substantial and lasting impact.

5. **Promoting Bilingualism and Cultural Heritage in the Workplace**
   A key takeaway from the initiative was the importance of bilingualism in the workplace. The Gyrfaol programme successfully integrated the Welsh language into professional experiences, underscoring its relevance as a valuable skill in the modern workplace. This not only contributed to preserving and promoting the Welsh language but also positioned bilingualism as a competitive advantage in local career development. Future projects should continue to emphasize the role of bilingualism in enriching the workplace and supporting personal and professional growth.

6. **Creating a Balanced and Supportive Community**
   The initiative's focus on maintaining a healthy work-life balance, through social events and networking opportunities, proved to be a significant benefit. Participants were able to connect, share experiences, and celebrate their successes together, which helped foster a strong sense of community. This sense of belonging and mutual support was invaluable in motivating young people and reinforcing the idea that career development can be achieved while maintaining a fulfilling personal life in a rural area. Future programmes should continue to nurture this sense of community, as it plays a crucial role in encouraging sustained engagement and well-being.

The Gyrfaol initiative has offered numerous insights into the demand for professional development opportunities for young people in rural areas, the importance of flexibility in support, and the value of local business partnerships. By focusing on fewer, more targeted opportunities for extended placements and offering greater financial support for longer periods, future initiatives could have an even greater impact on career outcomes for young people in rural communities. These lessons, combined with the continued promotion of bilingualism and work-life balance, will help shape the future of youth development programmes in rural Wales, ensuring that young people can build successful careers while contributing to the local economy and cultural heritage.

3. Elfen Mentro (Enterprise Initiative)

The Mentro initative was designed to support individuals with similar interests in developing business ideas or responding to challenges in their communities. By delivering a series of tailored training programmes, the element created unique opportunities for collaboration, skill development, and turning ideas into practical solutions. The element was structured to engage participants in both broad county efforts and more local community projects, fostering a diverse yet cohesive approach to personal and community development.

The aim of the Mentro initiative was twofold: to provide the resources and support needed for participants to develop viable business ideas and help address local challenges. Participants were encouraged to identify opportunities within their communities, and the initiative provided tools—such as mentoring, financial support, and sessions with experts—to enable them to create practical solutions to problems. Whether participants focused on business development or addressing local social issues, the initiative was designed to build capacity, encourage creative thinking, and foster leadership among participants.

The programme was divided into two main components:

- **Programmes delivered by the Lafan Consultancy Group:** These programmes were held across the four counties, with participants attending weekly sessions with experts over a period of 8 to 10 weeks. These weekly sessions provided participants the chance to hear from guest speakers and experts in various fields such as marketing and financial management, as well as take part in workshops or activities to develop various skills. As part of the scheme, financial support was offered to participants to develop their business ideas, providing an inclusive environment for innovation. By bringing people together from different regions, these programmes created unique opportunities for networking, sharing knowledge, and collaborating across county borders.

- **Programmes delivered by Project Officers:** These programmes focused on local community needs and were specifically designed to address issues such as creating community events or helping young people learn about different career paths. Although these programmes were more localised, they still aligned with the broader goals of the Mentro initiative: fostering empowerment, developing new skills, and addressing key community challenges. By focusing on local issues, project officers were able to create targeted, meaningful impacts within rural communities.

Impact of the Mentro Initiative

The Mentro initiative has had a positive impact on participants and their wider communities. Young people who participated in the programmes organised by Lafan had a unique opportunity to develop their business ideas with financial and expert support, as well as the chance to build a broad network of contacts within their local areas. This led to the development of new businesses that addressed specific local needs and contributed to economic growth in their regions.

To measure the impact of the programmes organised by Lafan, participants were asked to complete a brief questionnaire before and after participating in the training programmes. By comparing the responses from participants before and after their involvement in the project, changes in attitudes and opinions could be measured. The research results showed that participants had strengthened their understanding of the opportunities available in the ARFOR region, as well as experiencing significant improvements in confidence.

Prior to taking part in the Mentro scheme, 76.9% of participants in Ceredigion and Carmarthenshire strongly agreed that the Welsh language offered opportunities for them, and by the end of their involvement, this percentage had increased to 84.6%. This suggests that the Mentro initiative succeeded in raising participants' awareness of the opportunities Welsh offers for entrepreneurship and employment.

When measuring participants' confidence, there was a 38.4% increase in the number of participants (from Ceredigion and Carmarthenshire) who strongly agreed that they felt confident about their future. A similar increase in confidence was also seen in participants in Gwynedd and Anglesey, and while initial responses indicated some uncertainty about their futures, by the end of the programme, 60% of participants felt confident about their next steps.

For those involved in the community-focused initiatives delivered by project officers, the project provided a platform to address local concerns and create practical solutions. Whether organising events, fostering career exploration, or tackling community challenges, beneficiaries were able to make measurable impacts in their local environments. The focus

on young people and local issues also contributed to inspiring a sense of agency, encouraging future leaders to play an active role in shaping their communities.

One of the local Mentro initiatives was providing local rygbi clubs support to organise Welsh language community events. These proved to be very popular as well as economically beneficial to the clubs. Through the support of Llwyddo'n Lleol, Clwb Rygbi Aberaeron organised a charity 'Strictly Come Dancing' evening. The evening raised £13,500, with half the proceeds going to Aren Cymru charity and the other towards the club which will allow them to organise similar events in the future. One of the event organisers said;

 'Llwyddo'n Lleol's support has been extremely valuable to the club so far and has proven the need and value of organizing events that create a local buzz.'

Overall, Mentro successfully empowered individuals to act on their ideas, whether related to entrepreneurial ventures or social change, creating lasting effects that continue to be felt in communities across all the participating counties.

(Business start-up cohort)

Insights Gained

The Mentro Initative provided valuable insights into the needs and support required by young people seeking business assistance and developing social events.

1. **Business Support Programmes:** Business support programmes were very popular, clearly demonstrating the demand for this type of assistance. Young people were eager to engage with available resources to help develop their business ideas, confirming the need for accessible business mentoring and grant funding.

2. **Themed Programmes:** While themed programmes focusing on specific career paths were offered, they were not as popular as the more general business support programmes. This suggests that a broader and more flexible approach may be more appealing and successful for young people who may be exploring multiple career options or seeking a more open structure.

3. **A Mix of Online and In-Person Sessions:** The mix of online and in-person sessions worked well. This format made it easier for participants to attend sessions while still providing opportunities for networking and making connections. The flexibility of

online sessions, combined with the personal connection from face-to-face meetings, was key to maintaining engagement and fostering meaningful connections.

4. **Financial Support:** Offering financial support, such as the £1000 grant, appeared to be a strong tool. This funding helped young people take the first steps in launching their business ventures, providing the resources they needed to get started.

5. **Local Community Interest:** Through the programs in the counties, there was a clear interest in organizing gigs and events. Many young people recognized the need to create local events for their age group, creating opportunities to engage with the community and provide entertainment. This highlighted the potential for creating youth-driven events to address gaps in the local event scene.

4. Elfen Ymgartrefu (Relocation Initiative)

The Ymgartrefu initiative was launched with the aim of supporting families considering a move back to the ARFOR region by providing them with valuable information, financial aid, and access to a network of individuals who share the desire to return home. Initially, the scheme was designed to facilitate residential weekends, bringing together families who were considering relocating to ARFOR. These weekends were intended to allow participants to discuss their concerns, receive guidance, and gain insights that would help them make informed decisions about returning.

However, this initial model of engagement proved to be less successful than anticipated, with limited interest and participation. In response to this, we adapted our approach and launched a new scheme that offered a £5,000 incentive to families as an encouragement to relocate to the ARFOR region. This small-scale pilot project was designed to provide financial support to a select number of families, allowing them the opportunity to return in exchange for sharing their experiences and journey through our social media platforms. By showcasing their stories, the aim was to highlight both the benefits and challenges of returning to the region, with the hope of inspiring others to follow suit.

The revised initiative generated an overwhelmingly positive response. We received over 50 applications, and to date, more than 200 individuals have enquired about support to return to ARFOR. Unfortunately, due to limited funding, we were only able to support eight families through this scheme. While this was a significant step forward, the high level of interest demonstrated the need for continued support and resources to assist others in their return journey.

In response to the growing demand, we developed a comprehensive resource booklet that provides essential information and links to address the key concerns raised by those interested in relocating. Topics covered include housing, employment opportunities, healthcare, childcare, education, and community activities, with a particular emphasis on Welsh language events and services. This resource is being distributed to everyone who has shown interest in the Ymgartrefu initiative, as well as to local councils and relevant organizations such as Mudiad Meithrin, Young Farmers, and M-Sparc, ensuring that individuals have access to the support they need to successfully return to the ARFOR region.

While the pilot phase of the Ymgartrefu initiative was not without its challenges, the feedback received and the high level of interest from prospective returnees highlight the importance of continuing to develop and expand support for families looking to move back to the area. Through the financial aid, information sharing, and the creation of a support network, the

initiative is helping to lay the groundwork for a more sustainable and inclusive approach to population growth and retention in the ARFOR region.

Impact of the Ymgartrefu Initiative

As part of the Ymgartrefu £5k financial support initiative, we have assisted 8 families or individuals in relocating to the ARFOR region. Below is an overview of how the project has impacted each of them:

1. **Manon Williams, Gwynedd** – Since returning to Gwynedd, Manon has secured a role at 'Glasu', a local company in Pen Llŷn that makes and sells ice cream. This new position allows her to apply the skills and experiences she developed while living outside the ARFOR region, assisting with the production process. Outside of work, Manon has a strong interest in art and hopes to develop this passion into a small business on the side, all while continuing to help on the family farm. Returning to Gwynedd has also enabled her to continue volunteering with the local coastguard team.

2. **Catherine and Matt, Gwynedd** – After relocating from Derby to Gwynedd in February, Matt started a new job with Siemens Healthineers near Llanberis. Catherine has also been successful in finding work as a Science Coordinator at the UK Ecology and Hydrology Centre. The couple is currently renting a home in Y Felinheli but hopes to stay in the area and start a family. Both enjoy outdoor activities, and Catherine has shared their experience of returning to the region in this clip on the S4C News website: Catherine and Matt

3. **Annest and Saman, Gwynedd** – After nearly twelve years working as an English teacher in Thailand, Annest returned to Gwynedd this year, bringing her husband Saman and their young son, Arwyn John, with her. Thanks to the Llwyddo'n Lleol 2050 financial support, Annest has been able to enroll in a PGCE course at Bangor University to qualify as a science teacher, starting in September. Meanwhile, Saman plans to develop a business idea. Annest said: "The ARFOR Ymgartrefu Element – Llwyddo'n Lleol 2050 has been incredibly valuable by providing guidance as we moved from abroad back to Wales and offering financial stability during such an expensive transition. Their continued support for our plans has been encouraging, and knowing they will continue to assist us once we arrive has given us great peace of mind."

4. **Lea and Simon, Ceredigion** – Lea, Simon, and their children returned to Ceredigion in December 2024. Since then, the family has enjoyed exploring their new home in the Tal-y-bont area. Two of their children have started at the local school, taking part in the Christmas pantomime and the School Eisteddfod. Lea is a talented artist, while Simon has continued his job with Network Rail.

5. **Helen and Guto, Ceredigion** – After several months of repairing their new home, Helen and Guto were able to move to the Talgarreg area in Ceredigion at the end of March. Before relocating, they were concerned that leaving Cardiff would mean leaving successful careers as television producers with ITV Cymru. However, both

have been able to continue in their roles, combining their careers in an exciting field with the enjoyment of living back home in the ARFOR area.

6. **Glyn and Sophie, Sir Gar** – After leaving Carmarthenshire in 2019 in search of work opportunities, Dr. Glyn and Dr. Sophie Morris, along with their young family, returned to Carmarthenshire at the start of this year. Sophie is learning Welsh alongside their young children, Rosie and Osian, while both continue to run a consultancy and evaluation business supporting research students with their work. Glyn said:

"We were on the fence about moving back until my father sent me a message about the ARFOR Llwyddo'n Lleol grant. I can't describe how much this little supportive boost encouraged us to take the leap of faith and return home."

7. **Eleri and Edward, Sir Gar** – After living in Cardiff and Neath Port Talbot, Eleri and Edward Powell returned to their home in Carmarthenshire in February this year with their young son, Elis. Since then, their family of three has grown to a family of four, with the arrival of their second child, Efa, in March.

8. **Gwyn and Jeno, Sir Gar** – In January, Gwyn began his new role as a humanities teacher at Bro Myrddin School in Carmarthen. The young couple has purchased a house in Carmarthen, and since their return, both have enjoyed following the local football club's ups and downs, as well as attending Welsh-language music gigs in the area. They are both thrilled to be back home in the ARFOR region and look forward to walking the coastal path and "getting a lovely garden!" Gwyn said:

"One of our biggest concerns was whether there would be jobs available. Thanks to the financial support from ARFOR and having time to prepare, this worry has been alleviated, and we are excited to work in the Carmarthen area."

(The eight cases Llwyddo'n Lleol supported to return home)

Insights Gained

1. **Media Attention and Public Discussion:** The press release for the financial support offer generated significant media coverage, sparking wider discussions about the opportunities and challenges of living in the ARFOR region. This feedback, particularly around the challenges faced by young people, will be valuable for shaping future initiatives.
2. **Clarification of the Offer:** While the marketing efforts successfully attracted attention, the offer should be presented more clearly next time to emphasise that the financial support is limited and that there were conditions and requirements that needed to be met. Additionally, clearer communication about the commitment to contribute to the digital campaign will help manage expectations.
3. **Application Process and Criteria:** The guidelines should include specific criteria for scoring applications so applicants understand the limited nature of the support and the requirement for digital engagement. The application process also needs formalising to avoid delays and ensure timely decision-making.
4. **Building a Database of Interested Individuals:** The initiative successfully built a database of individuals and families interested in returning to ARFOR. With ongoing enquiries, it's clear that there is strong demand for this type of support.
5. **Effective Content Sharing:** Offering financial support in exchange for digital content has been an effective way of sharing positive stories. Although the quality of content varied, the overall standard was high, and it successfully conveyed an honest, positive picture of returning to the region.
6. **Opportunities for Community Engagement:** With more time, organising events to bring together those who have benefited from the initiative could further strengthen the sense of community and provide additional support.

5. Elfen Profi / Profi Initiative

The Profi Initiative was designed with the goal of shaping mindsets and equipping young people with the necessary skills and confidence to make informed decisions about their futures. By offering practical support, the initiative helps students in schools become more aware of their individual strengths and abilities, empowering them to confidently pursue opportunities, both in education and the workforce. Central to the initiative is the encouragement for young people to recognize the value of their Welsh language skills and how these can significantly enhance their employability in the evolving job market.

Developed by Menter Gorllewin Sir Gar, the Profi Initiative initially achieved success within Carmarthenshire by directly engaging students and helping them prepare for the challenges ahead. Building on this success, the project aimed to expand across the ARFOR region, reaching a wider audience of young learners and offering similar resources and guidance.

In collaboration with Llwyddo'n Lleol, Menter Gorllewin Sir Gar worked to create a dynamic Profi website, a central hub for resources that include podcasts and videos. These media not only highlight local businesses and employers but also share valuable insights into the career opportunities available throughout the ARFOR region. One of the key messages conveyed through the website is the importance of Welsh language proficiency in the modern workforce. The initiative showcases how having Welsh skills can provide a competitive edge and open doors to a broader range of professional opportunities, especially in Wales.

Through this collaborative effort, the Profi Initiative continues to empower young people, encouraging them to embrace their cultural heritage and be confident in leveraging their Welsh language skills in the world of work.

(Llwyddo'n Lleol attending school careers fair)

Impact of the Profi Initiative

The Profi initiative has made a significant impact across the ARFOR region, providing valuable career guidance and support to 11,451 young people in Carmarthenshire, Ceredigion, Gwynedd, and Anglesey. Originally established in Carmarthenshire, Profi continued to prove popular within the county, consistently engaging with local schools and students. In Ceredigion, the programme expanded, with notable success in schools such as Ysgol Aberaeron, Bro Teifi, and Penweddig. These schools embraced the initiative, and Profi's popularity grew steadily as a result.

However, the initiative saw more limited success in Gwynedd and Anglesey. In Gwynedd, Ysgol Brynrefail and Ysgol Tryfan found the resources and career sessions useful, requesting additional sessions for their students. Despite these positive responses, efforts to engage other schools in the county proved challenging, with limited uptake across the region. Similarly, in Anglesey, while sessions were successfully organized at Ysgol Bodedern and project officers participated in mock interview days at Ysgol Syr Tom Jones and Ysgol David Hughes (in collaboration with Gyrfa Cymru), wider engagement across the island remained more difficult to achieve.

Feedback from the schools that did benefit from the Profi initiative has been overwhelmingly positive, with many educators praising the value of the resources provided. However, measuring the direct impact of the sessions on students remains challenging. Without the opportunity to conduct multiple sessions and assess the long-term effects on career skills and knowledge of local career paths, it is difficult to fully gauge the programme's influence on students. Despite this, the positive feedback and engagement from participating schools highlight the potential of the Profi initiative to support young people in making informed decisions about their futures.

Insights Gained

1. Access to Schools and Competing Priorities

One of the main challenges encountered with the Profi initiative was gaining access to schools, particularly in Gwynedd and Anglesey. Schools are already under significant pressure, and many organisations are competing for opportunities to engage with students. This made it difficult to introduce a new resource like Profi and secure consistent buy-in from schools.

2. Clarifying Profi's Unique Value and Building Stronger Relationships with Local Partners

There was some confusion about what Profi offers compared to existing resources available through Gyrfa Cymru. In Gwynedd and Anglesey, schools already have strong relationships with Gyrfa Cymru, which likely made them less open to exploring new resources. Moving forward, it may be more effective for the local Mentrau Iaith to play a larger role in delivering Profi. As Profi was created by Menter Iaith Gorllewin Sir Gar, it aligns well with the goals of the Mentrau Iaith, and many already have established relationships with schools, which could facilitate the programme's expansion.

3. Collaboration with Local Education Authorities and Raising Programme Visibility

For continued expansion, it would be valuable to collaborate more closely with local education authorities. By working with councils to raise awareness of the benefits of Profi, we can ensure that schools understand what the programme offers and see its value. This partnership could help make Profi sessions a priority within schools and encourage their integration into the curriculum.

4. Navigating Existing Partnerships and Complementary Resources

Finally, addressing the confusion surrounding the relationship between Profi and Gyrfa Cymru is crucial. By emphasising how both programmes can complement each other, rather than compete, we can help schools see the added value of Profi alongside the services already provided by Gyrfa Cymru.

6. Marketing and Communication

The Llwyddo'n Lleol social media campaign has been a cornerstone of our efforts to challenge the prevailing stereotype that young people and families must leave rural areas to build successful careers and lives. The campaign's primary objective has been to showcase positive stories and real-life examples of individuals, families, and businesses who have chosen to stay or return to rural areas and have found success, both professionally and socially.

Through this initiative, we aimed to highlight the potential for a fulfilling life in rural communities, proving that it is not necessary to relocate to urban centres for career advancement or a vibrant social life. Each element of the project, including the Profi initiative and other related activities, fed directly into this campaign, with stories shared through social media to reach a wider audience and inspire others to consider the possibilities available in their local areas.

The campaign has not only helped raise awareness but also fostered a sense of pride and empowerment within the local communities. By sharing these success stories, we have sought to provide inspiration and demonstrate that rural areas can offer lucrative career opportunities, strong community ties, and a high quality of life.

- Website
- Instagram
- Facebook

- [LinkedIn](#)
- [Youtube](#)

Impact of Marketing and Communications Campaign

The branding and marketing of the Llwyddo'n Lleol campaign has received positive feedback from both partners and the public. Many have praised the campaign's social media content, which has been highly visible, engaging, and appealing to a wide audience. This feedback demonstrates that the campaign has resonated with people and successfully captured their attention.

A key testament to the impact of the social media campaign is the project's successful establishment in Ceredigion and Carmarthenshire. Both of these counties were new to the Llwyddo'n Lleol initiative, yet over the last 18 months, we have been able to substantially increase our reach and grow the number of followers in these areas. This expansion can be attributed not only to the campaign's visibility but also to word-of-mouth recommendations facilitated by connections made by project officers and the increased support the project has provided to local individuals and communities.

Various marketing tools have contributed to the campaign's wide reach, including social media, the project website, TV ads, TV/radio interviews, events and press releases. These efforts have ensured that Llwyddo'n Lleol's messages about the benefits and opportunities available in West Wales have reached a broad and diverse audience.

Many individuals who have participated in the Gyrfaol, Mentro, and Ymgartrefu initiatives have shared that they first learned about these opportunities through social media. This highlights the impact the campaign has had in encouraging people to consider how they could succeed in West Wales. While it is challenging to fully measure the long-term impact of social media and marketing campaigns, the high level of interaction with the content suggests that the campaign provided people with valuable insights into the opportunities available in the region.

Insights Gained

1. Central Role of Marketing and Communications
Marketing and communications were vital to Llwyddo'n Lleol's success in promoting West Wales as an attractive place to live and work. By addressing why people leave and the challenges preventing young people from staying, we sparked important conversations. Sharing positive stories helped challenge stereotypes and highlighted opportunities for success in rural areas.

2. Importance of Strong Branding and Participant Stories
 Given the large scale of the project across four counties, a strong, consistent brand and sharing participant stories were crucial for engagement. These personal stories made the campaign more relatable, increased visibility, and successfully humanised the initiative, making it more appealing to the target audience.

3. Balancing Marketing with Project Delivery
 One key takeaway was the challenge of balancing marketing efforts with project delivery. While our strategy was diverse, focusing on fewer initiatives with more targeted, meaningful content could have led to clearer messaging and better audience engagement. Less can often be more when it comes to marketing.

4. Managing Messaging Across Multiple Campaigns

The marketing team also created additional campaigns, such as two Christmas, the Cymrix show, alongside a book aimed at secondary school pupils which included works by local authors. While these campaigns were innovative, the sheer volume sometimes diluted the core message. A more focused approach could have strengthened the overall impact of the campaign.

5. Avoiding Overextension

Ultimately, trying to cover too many initiatives at once risked confusing the messaging. Moving forward, we've learned that focusing on fewer, more cohesive campaigns could ensure clearer communication and more effective engagement with our audience.

7. Conclusion

The Llwyddo'n Lleol 2050 initiative has demonstrated significant progress in fostering economic resilience and sustainable opportunities for young people in the region. By addressing key challenges such as employment accessibility, skill development, and community engagement, the programme has played a pivotal role in equipping individuals with the necessary resources to thrive.

Through strategic partnerships, targeted interventions, and innovative support mechanisms, Llwyddo'n Lleol 2050 has successfully contributed to retaining local talent and enhancing the socio-economic landscape. Moving forward, continued investment and collaboration will be essential to ensuring long-term success and scalability. By building on the programme's achievements and refining its approach based on ongoing evaluations, Llwyddo'n Lleol 2050 can continue to empower future generations and drive meaningful, sustainable change within the region.

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Evaluation, Conclusions and Recommendations of the Arfor Programme

October 2021

ARFOR
Creu Gwaith - Cefnogi'r Iaith

Cyngor Sir CEREDIGION County Council

CYNGOR GWYNEDD COUNCIL

Cyngor Sir Gâr Carmarthenshire County Council

CYNGOR SIR YNYS MÔN ISLE OF ANGLESEY COUNTY COUNCIL

Ariennir gan **Lywodraeth Cymru**
Funded by **Welsh Government**

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Contents

1 Introduction

1.1 Background

The 20th century witnessed a steady decline in the percentage of Welsh speakers in Wales. During the second half of the century, efforts were made by individuals, civil society and, more recently, the governments of the UK and Wales to try to prevent the decrease and ensure the sustainability of the language. Legislation was introduced and the Welsh language was afforded official status, whilst education came to the fore as one of the main tools with which to revive the language, ensuring sizeable cohorts of young people were equipped, through the Welsh language, with the skills to live and work.

However, despite these successes, the threat to the sustainability of the Welsh language continues, particularly within specific areas of Wales. Most notably, the geographical areas, which are home to large percentages of speakers, i.e. the 'heartlands', are still considered areas of concern. Recent falls in speakers recorded within the 2011 census has only reinforced the widespread belief that Welsh, as a language of everyday, work and community life, is under threat.

The counties of Gwynedd, Anglesey, Ceredigion, and Carmarthenshire are often referred to as the heartlands, although several counties or areas within other counties share similar characteristics such as the Conwy Valley, North Pembrokeshire, and areas of Clwyd and Powys. There is a general consensus that these heartlands share similar social, economic and cultural characteristics, including:

1. A large percentage of Welsh speakers
2. In-migration of older people, out-migration of young people
3. Rural, with a dependence on agriculture, food and tourism
4. Market towns and university towns
5. A large percentage of public sector jobs
6. The lowest wages in Britain, and among the lowest wages in Europe.

Whilst acknowledged as areas where Welsh has historically been the main language of community and work life, there is a further consensus that economic processes have been a factor in and a reason for the decline of the language in the area. Moreover, there has been an interest and, more recently, political will to develop economic interventions that can support the language and enable it to thrive in these areas. The four local authorities also share and support a desire to work in partnership to establish an economic development and language planning framework to respond to the challenge.

1.1.1 What is Arfor

Following budgetary discussions between Plaid Cymru and the Labour-led Welsh Government, a budget of £2 million was earmarked for the Arfor programme during the period of 2019–2021. The proposal for the Arfor Innovation Fund outlined the following broad criteria for specific schemes that could be funded:

    a. Projects that increase the use of Welsh within the workplace
    b. Projects that focused on creating favourable conditions.
    c. Projects that increase the number of Welsh speakers in the business community.

Specifically, the funding was made available by Welsh Government to the four local authorities to facilitate new and innovative methods to support economic development in the region by:

- Promoting enterprise and supporting business growth in areas with a high proportion of Welsh speakers.
- Generating more and better paid jobs to retain local people in these areas and encourage those who have left to return.
- Promoting the wide-ranging value of the use of Welsh and bilingualism in business creating a vibrant sense of place.
- Encouraging the businesses and people who move to rural areas to value and use the Welsh language.

Whilst these were the overarching aims of the programme, the focus of this evaluation will be on the individual schemes, and the manner in which they contributed to these aims. Moreover, the evaluation consciously explores the extent to which the programme has achieved its own stated aim, namely, to create 'more and better jobs'. Doing so enables the evaluation to explore the programme's logic and theory of change, discussed in detail below.

The money was to be used by the four Local Authorities (LAs) in West Wales to work in partnership to **trial** and **evaluate economic interventions** in the area.

A portion of the money was also set aside to develop a strategic plan. However, the conclusion was reached that it was not possible to recommend a range of specific actions, which were certain of having a positive impact on the Welsh language. An Interim Report was developed instead, outlining the results of the research and preparatory work for a more detailed strategy. It made recommendations for further action by the four local authorities to reach the point at which it would be possible to identify economic interventions that are likely to have a positive impact on the Welsh language.

A key characteristic of the programme is that it aims to develop **economic interventions** and **not linguistic interventions**. This is an important distinction. As noted below and reflecting the findings of the Revitalise team from Aberystwyth University and wider research, often when discussing and developing interventions regarding the relationship between the economy and the language, the focus is on the use of the language by or within businesses. However, this money has been earmarked for all types of economic development which are

required to create better and more job opportunities, which, in turn, will contribute to ensuring the prosperity of the Welsh language. Arfor is an economic programme, developing economic interventions that will consequently have a positive or beneficial impact upon the Welsh language.

Logic and Theory of Change

The haste with which an operational programme had to be developed limited the extent to which the management team were able to develop a comprehensive strategy and theory of change. There was no time either to trial ideas or develop many bespoke schemes. The programme had to draw upon existing ideas or relatively straightforward mechanisms for supporting businesses. The four local authorities brought a series of ideas forward to be funded by the programme. There was some overlap, particularly in relation to the provision of funding to businesses, and some divergence in the scheme (details below).

The programme's logic and the driving logic behind the development of schemes can be summed up by its strap line, **'creating more and better jobs'**. This logic was clear in scoping interviews with management staff and reflected a wider perception and understanding of the impact of economic interventions on the Welsh language.

Essentially, the "problem" within rural Welsh speaking communities was that people, particularly young people, were migrating out of the area, and with them jeopardising the sustainability and viability of the Welsh language within communities. There is an accompanying belief that these people are leaving to find better employment elsewhere. Consequently, and logically, the creation of more and better jobs will enable more people to remain in the area.

This logic was critically examined in the Arfor Evaluation Interim Report. The report concluded that, while there was evidence to support the notion that young people were leaving the area, their motivations were far more complex. Young people are likely leaving the area for a range of reasons, including a desire to seek out excitement, to move to more culturally vibrant areas, or simply to join friends or other large numbers of young people. Moreover, the wider academic literature suggests that issues other than a lack of jobs are pushing them away from the area. These include a lack of education and training opportunities, a lack of entertainment and cultural opportunities, poor transport infrastructure and wider services tendency for rural communities to be more socially conservative.

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Nonetheless, Arfor, in its current iteration sought to 'create more and better jobs' with the expectation that this would be beneficial for the Welsh language, particularly in keeping young people in the area. Staff however, were, as detailed below, aware of wider considerations and tended to appreciate that the "problem" was more complex than the programme's logic had established.

Management

Arfor began the process of developing its schemes during the summer-autumn of 2019 and began receiving applications later that year. 2020 was identified as the key year of delivery, however it was significantly impacted by the Coronavirus pandemic, which is discussed in detail in relation to the specific schemes.

Structurally, Arfor is comprised of a Board, whose membership is made up of elected Members from the four local authorities (notably the Leaders of all four Authorities chose to undertake this role) and representation from Welsh Government (from both economic development and the Welsh language teams) and the Welsh Local Government Association (WLGA). The Board is responsible for strategic oversight of the programme. Operational management and delivery is the responsibility of an Officers Group drawn from officers from the four local authorities, officers from the economic development and Welsh language perspectives within Welsh Government and the WLGA. One local authority (Gwynedd) took responsibility for administering the entire programme and co-ordinating the work of all four local authorities.

Delivery

Activity was primarily delivered directly by the Local Authorities utilising existing resources. In every area there was a close alignment with the activities of the LEADER Programme[1] locally along with area's broader business support / economic development activities and local language initiatives via the area's Mentrau Iaith.

In Gwynedd and Anglesey, the delivery of some Arfor activities was outsourced to Menter Môn. Menter Môn is a not-for-profit company that runs a number of initiatives with the aim of providing solutions to challenges facing rural Wales. Notably, Menter Môn is the administrative body for the LEADER Local Action Groups in both counties (Arloesi Gwynedd Wledig and Arloesi Môn) and the local language initiative in Anglesey, Menter Iaith Môn. Menter Môn had developed the Llwyddo'n Lleol concept, which was funded through the Arfor programme and operated across Gwynedd and Anglesey. Menter Môn staff delivered that programme, and its staff were interviewed in that capacity for this report. Menter Môn also managed one grant fund on behalf of the Isle of Anglesey County Council.

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[1] Funded through the Rural Development Programme for Wales, LEADER is designed to support local people, businesses and communities to become involved in delivering sustainable, yet innovative solutions to address some of the economic, social and environmental challenges facing rural areas.

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In view of the constrained timescale for development and delivery and the relatively modest budget a consensus was reached in summer 2019, that each Local Authority would develop their own schemes as the primary means of delivery. A key characteristic of all Arfor schemes is the scale. **These are small scale interventions with relatively small pots of funding**. The aim was to trial a range of schemes, not bring about lasting or significant impact upon the economy and language of the area. Moreover, few of the interventions sought to address the structural weaknesses of the area's economy. These points are stressed due to the perception amongst some stakeholders, particularly at the Evaluation Interim Report stage, that the programme constituted at least the initial stages of a significant structural investment in the area, akin to Growth Deals. **These are small scale trials with small cohorts of beneficiaries**. The aim is to **test interventions and learn lessons**. The following schemes were established:

Direct business support / funding: Direct business grants were offered by all four Local Authorities, though with some variation. Grants were offered to support capital and revenue investment. Gwynedd offered a 'Cymorth i Fentro' support package to help businesses look at what they wanted to develop over the next five years and identify barriers. Business Wales and Enterprise Hub Business Advisors worked with applicants to identify their requirements and what support was available, with Cymorth i Fentro as a last resort to address any unmet needs. Ynys Môn offer two types of grants, a Language Grant and a Business Grant.

Ynys Môn's Business Grant, more substantial in value than the Language Grant, was offered to support businesses' development and expansion plans. Though initially separate, it became relatively common for business to be encouraged to initially apply for a Language Grant, before moving on to a Business Grant. Both grants required, as part of the application and approval process, a review of the language profile of the business.

The Ynys Môn Language Grant focused specifically on improving Welsh language capacity, services and products of businesses. A key condition of the language grant was that recipients would be required to engage with the Helo Blod service and at least begin a more strategic approach to developing language capacity and services (see Policy Context section below).

Ceredigion also offered two grants, Grant Mentro and Grant Twf. The former was aimed at new businesses entry support with the challenges and costs of setting up and beginning trading. The latter was aimed at established businesses looking to develop. The application process required businesses to outline their plans to develop their Welsh language services, products and provision, and identify steps that they would be taking. Successful applicants were also encouraged to engage with the Helo Blod service.

Carmarthenshire, meanwhile, offered direct grants to any businesses provided they were related either to the creative industries or the food and drink sectors. Both these sectors are key sectors for Carmarthenshire and its economic development strategy.

The application process for these grants were relatively similar, comprising of an application form that outlined their plans to develop the business, plans to develop their provision of the Welsh language services and products as well as details in relation to expenditure. Each application was scored and approved by a panel comprising of council officials and wider stakeholders. Each authority had a separate panel. The key characteristic of all grants was the uncommonly high scoring awarded to the application's engagement with the language and its development within and by the business.

Llwyddo'n Lleol: Gwynedd and Ynys Môn also offered placements for young people via the Llwyddo'n Lleol scheme run by Menter Môn. The scheme involved an 11-week mentoring programme, supporting young people as they developed their business ideas and plans. Alongside the mentoring, the young people were expected to document their experiences through social media, in turn aiming to highlight the business opportunities and possibilities for young people in the area.

Ffiws/Gofod Creu: The Ffiws scheme funded the creation of temporary maker spaces around Gwynedd and Ynys Môn offering free access to specialist equipment, with technicians on hand to help with training and use. The spaces offered access to equipment such as 3D printers and laser cutters. The intention was to support local businesses to develop prototypes and product ideas as well as gain experience in the use of innovative equipment.

Cymunedau Mentrus: The Cymunedau Mentrus scheme in Gwynedd sought to support social businesses and community enterprises develop their communities through community ownership and foundational economy principles, looking at how to make their communities more resilient by developing an idea/challenge to develop new skills and jobs, thus supporting the Welsh Language.

Bwrlwm ARFOR: Initially, all four Counties were keen to collaborate to further develop the concept of 'welcome packs' that had been created before the programme. These packs were aimed at signposting Welsh language services and support for people who were new into the area. However, with the pandemic perceived as a likely barrier to engaging with individuals in such a manner, the management and delivery team decided to explore means of promoting businesses who used the Welsh Language as an integral part of their operations. The aim was to showcase the benefits this had for the business, their staff and their communities. Bwrlwm ARFOR was created as a platform for case studies; podcasts; videos; workshops on using the Welsh Language in Business www.bwrlwmarfor.cymru.

1.1.2 Findings of the Evaluation Interim Report

The Interim Report was developed during 2020-2021. It concluded that a comprehensive and detailed strategy for the utilisation of economic interventions to benefit the Welsh language was not possible, due to the lack of data and supporting evidence to identify and recommend specific activities.

The report noted that despite a consensus among academics, the Welsh Government and civil society organisations that economic processes and interventions provide a means of ensuring the sustainability of the Welsh language, there was very little discussion and data regarding specific economic processes and their actual impact, positive or detrimental, upon the Welsh language. Recent research on behalf of the Welsh Government supported this claim (Thomas, Duggan, Glover and Glyn, 2020), echoing the findings of Dr Huw Lewis and the Revitalise team from Aberystwyth University.

Although there is evidence supporting the hypothesis at the heart of the programme, namely that migration out of the area has a significant and detrimental impact upon the language, the report concluded that there was a lack of evidence entirely supporting the suggestion that creating more and better jobs would resolve that issue.

The report suggested that deeper, structural economic issues, such as the economy being skewed towards sectors which have a lower base value and weaker prospects for growth, lower than average wages and relative inaccessibility of housing for young people, are key drivers in pushing young people out of the area.

Moreover, the wider literature relating to rural migration, as explored in the Interim Report, suggests that issues such as quality of life, access to services and education, the conservative and patriarchal culture of rural areas as well as a desire to expand horizons and access recreational opportunities were further, and important factors to consider in relation to the outward migration of young people.

The solutions and purely economic interventions that are required therefore, are likely to entail focusing on developing diversity and supporting sectors that are likely to see greater value and higher wages. However, there was no data available to recommend which sectors or ways of working are likely to have a positive impact on the language as well as on the economy. Consequently, efforts to attract people, specifically Welsh speakers, and enable people to move into or back to the area maybe better and perhaps more effective ways of compensating for the outward migration of young people in the meantime.

The report concluded by making four recommendations that aimed to support the process of understanding the link between economic process and the language. Moreover, the recommendations aimed to identify means by which economic interventions that were beneficial to the language could be identified and mainstreamed.

The recommendations were as follows:

1. Firstly, to aim to support and continue with Arfor's current work of trialling and, of key importance, evaluating and learning from interventions in the economy and to support businesses.

2. Secondly, the report proposed that a research group be established (including members from further afield than linguistic experts or those who have been associated with this subject for some years), to develop and promote an understanding of the link between the economy and the language. The group's role should be to evaluate the trialling and piloting of interventions, review wider evidence and research, and recommend effective interventions to be mainstreamed and promoted within and by the four counties.

3. Thirdly, and with a long-term in mind, the report recommended that the work be linked with a formal body, which can mainstream and promote successful interventions within the local authorities in the Arfor area as well as externally. In short, the four local authorities should consider continuing to work together formally beyond the lifespan of the programme and should agree to mainstream and promote successful interventions amongst themselves and beyond.

4. In addition, since the impact of COVID-19 was likely to prevent projects and spending, which had been planned for Arfor's current programme, the report recommended that the money be used to develop an understanding of the reasons as to why young people leave or return to the Arfor area, or to evaluate the aims of relevant projects, which are implemented outside of the Arfor programme, such as the linguistic impact of developments like Yr Egin, or to examine the recent anecdotal increase in the number of people returning to the Caernarfon area.

This report focusses primarily upon the evaluation of the activities undertaken by the Arfor programme. However, it also seeks to consider and relate the findings to the wider context explored in the Interim Report. Moreover, it aims to critically evaluate the relevance of the recommendations following at the latter stages of the Arfor programme.

1.2 Context

1.2.1 Policy Context

The role of the Welsh language in economic development — and economic development's impact on the language — has been a topic of discussion for years. In 2014, an independent Task and Finish Group published a report emphasising the need for further evidence and research in relation to the link between the economy and the language.

The Welsh Government's current Welsh language strategy, 'Cymraeg 2050', notes the importance and impact of the economic context upon the Welsh language. It presents the view that the strongholds of the Welsh language are dependent on jobs in the public sector, or on jobs associated with specific 'rural' industries such as agriculture, tourism or the food industries. It also acknowledges the negative impact of economic factors upon the language and its sustainability in these areas. In this regard, it echoes previous strategies such as 'A living language: a language for living - Welsh Language Strategy 2012 – 2017'. Importantly, however, the strategy, echoing the government's 'Prosperity for All: the National Strategy', acknowledges the need for economic and social change and to develop the economy in a manner that can sustain the language:

> 'We cannot expect Welsh-speaking communities to remain static while the nature of society is changing. As such, the Welsh Government fully recognises the importance of developing a thriving, sustainable economy in rural areas, including in the areas described previously.' (Cymraeg 2050, p.62)

The Welsh Government's 'Prosperity for All' strategy outlined its plans to develop the economy of Wales in the future. A criticism of the strategy, however, is that it is a regional approach that fails to identify the 'heartlands' of the Welsh language as requiring specific or alternative economic consideration. Essentially, the four rural counties, wherein the Welsh language is strong and prominent, are included in economic regions in which, as a whole, English is predominant and where the emphasis appears to concern urban centres. The concern, therefore, is that economic-language planning is likely to be side-lined or downgraded in a regional context of this nature.

More broadly, there was a perception amongst stakeholders interviewed, for both the interim and final evaluation reports, that government policy had historically approached (rural) economic development and language policy as distinct policy fields, with the latter rarely integrated into the former. Where language and economic policy meet, it is primarily focussed on highlighting or maximising the value or impact of the language within or upon businesses, rather than on recognising the economy and economic processes as tools with which to influence the language and its use.[2] Indeed, this was a key finding of the Interim Report, echoing key studies by wider research bodies and academics. Therefore, whilst a strategic desire to support the language through economic intervention exists, Arfor can be seen as the first to explicitly seek to use purely economic interventions to support the language.

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[2] Currently there are two key sources of support for businesses and the economy that relate to the Welsh language. These are Business Wales' Helo Blod service, and the Welsh Language Commissioner's business support team.

In this sense, therefore, Arfor comprises a fundamentally different approach to rural development, where language revitalisation is integrated and a key aim alongside sharing prosperity. Moreover, the approach and ideal of placing language revitalisation and sustainability as an explicit goal of rural and economic development lends itself to the wider rural agenda.

The Welsh Language Commissioner's Hybu team and Business Wales' Helo Blod

Two key sources of support for businesses looking to develop their capacity and use of the Welsh language were derived from the Welsh Government's Business Wales service and the Welsh language Commissioner's *Hybu* business support team. Business Wales' Helo Blod service is designed to offer fast and accessible translation and proofing services to businesses and charities. The service also offers advice in relation to the use of the Welsh language within the business or charity. The Welsh Language Commissioner's *Hybu* business support team seek to promote the use of Welsh within businesses and support individual businesses in their efforts to develop their capacity and services. The service offers a range of support including advice and guidance, as well as profiling and supporting the design of language development plans for individual businesses.

These can be seen to represent the language>economy approach to supporting the Welsh language, i.e. efforts to promote the use and take up of Welsh language services and products by businesses or promoting the value of the Welsh language to individuals within the labour market or businesses more generally. These do not represent the economy>language approach which relates to economic or business interventions that have an impact upon the Welsh language.

Each local authority had an existing relationship with these sources of support. The established and effective relationship with the Helo Blod service in particular was deemed a key factor in their involvement within the design of the funding provided to businesses as part of the Arfor programme.

1.2.2 Practical context

The programme was significantly impacted by the coronavirus pandemic in a number of ways. Firstly, the overall aim of creating jobs was, albeit informally, modified to also include the safeguarding of jobs. Secondly, individual projects and grant holders amended, postponed or, on rare occasions, abandoned plans that were proposed in applications. Thirdly, and in relation to the evaluation, fieldwork was restricted to online and remote data capture.

Consequently, all interviews and workshops conducted for this evaluation were conducted over MS Teams or telephone. The evaluation team was unable to conduct any in person visits to observe sites, businesses or ongoing activities as originally intended. The evaluation consequently draws exclusively upon the contributions of participants and management staff and the monitoring and evaluation data captured by the management team.

1.3 The Evaluation

1.3.1 Aims and Key Research Questions

The Arfor programme, despite a particularly wide initial remit, essentially evolved into a pilot or demonstrator fund. The programme sought to support a number of relatively small individual schemes whose impact upon the economy, and consequently the language, is theorised, but not proven or evidenced. Through the external and internal evaluation processes, it is hoped that the programme will reveal key lessons in relation to the types of interventions that have a positive impact upon the economy as well as the language. It is hoped also that the programme will lead to valuable insights in relation to how certain economic processes benefit the language.

This report represents an outcome and a process evaluation of the Arfor programme. The evaluation details the findings in relation to both components in Chapter 2 and 3. The conclusions seek to concisely summarise the findings of the report by addressing two key and three sub- research questions. The key and sub- research questions are:

1. What impact has Arfor had upon businesses? Would this impact have been secured without the support from the programme?

2. Based on the learning from this programme, how can economic interventions contribute to the sustainability of the Welsh language in the Arfor area?

Whilst the evaluation seeks to answer these key research questions, there was particular interest from management and stakeholders in the wider implications and lessons of the programme. This report contains, therefore, a more extensive discussions section (Chapter 4) than would be expected, which explores any insight gained into key concepts surrounding economy>language interventions and language policy more generally. This section also seeks to consider and relate the findings to the wider context explored in the Interim Report.

1.3.2 Methodology and data

As a pilot programme that explores the feasibility of economic interventions as a means of supporting the language, the evaluation has adopted an inductive and exploratory approach, i.e. no specific targets were set against which the success of individual schemes were to be measured. Rather, detailed qualitative research was undertaken to explore the impact of the various schemes upon the businesses and beneficiaries before drawing general conclusions. The only target as such was the expectation that, to be considered successful to any extent, a scheme needed to have had a positive impact upon the economy and the language. However, this was objectively measured by exploring businesses and jobs created, and revenue generated. The evaluation sought to learn lessons and explore the processes by which economic interventions can support the language.

As a pilot programme that sought to support several schemes, across a wide area and with limited investment, it was unlikely that the impact of the programme will be evidenced in national or even local economic and language data. The programme's **impact was unlikely to be identifiable within economic and language metrics**.

It was also **unlikely that any significant quantitative data will be available to evidence the programme's impact**. This was primarily due to the impact of the coronavirus pandemic, slowing and postponing delivery, as well as the nature of the interventions, i.e. long-term changes to businesses and the development of new services. In short, data would not be available until after the evaluation period. Moreover, with each individual business grant application being unique and bespoke, comparisons between the recipients and schemes are **limited to qualitative, comparative observations and analysis** rather than statistical investigation. Objective, quantitative data was available, but would only evidence some of the impact that is forecasted, such as businesses and jobs created, or revenue generated.

It is nonetheless recommended in this report's conclusions, that the Arfor management and the LAs involved **continue to monitor the impact upon and development of the programme's beneficiaries into the future**.

Whilst the evaluation does draw on the limited quantitative data available, the reliance is primarily upon qualitative data generated from a number of interviews with beneficiaries (businesses and individuals who have benefitted from the schemes), management staff and stakeholders. The aim of these interviews was to generate insight inductively. The evaluation has sought to explore the experiences and impact upon a sample of beneficiaries from each scheme, and to present the findings alongside the views of management staff and stakeholders.

The research team undertook the following activities between December 2020 and March 2021 to collect data for the evaluation:

- 12 Semi-structured interviews with delivery and management staff
- 43 Semi-structured interviews with stakeholders at the interim stage and 12 at the final report stage
- Review of application and delivery documentation
- Review of monitoring and performance data
- Semi-structured interview with 42 business owners/managers in receipt of grant support
- Exploration of 5 Ffiws case studies alongside management and delivery interviews (x2)
- Interviews with 4 Llwyddo'n Lleol beneficiaries
- Interviews with 2 Ffiws staff members
- Interviews with 3 Cymunedau Mentrus beneficiaries
- A workshop with stakeholders and staff.

2 Discussion of individual programmes and findings

2.1 Programme Outputs and Outcomes

Table 2.1: Scheme Output and Outcome Data

Local Authority	Grant	New Businesses (younger than 12 months)	Existing Businesses	Total	Jobs safeguarded Full Time	Jobs safeguarded Part Time	New jobs within 12 months Full Time	New jobs within 12 months Part Time	New jobs within 2 years Full Time	New jobs within 2 years Part Time	Work Placement	Increased Turnover	Increased use of Welsh	Expenditure
Ynys Mon	Business	4	9	13	13	16	36	12	52	15	2	10	9	
	Language	9	25	34								21	24	£401,464.00
Gwynedd	Ffiws													£74,227.27
	Cymunedau Mentrus	not recorded	not recorded	3										£81,000.00
Gwynedd & Ynys Mon	Llwyddo'n Lleol	22		22										£100,000.00
Gwynedd	Cymorth i Fentro	not recorded	not recorded	17					58	7				£173,757.20
Ceredigion	Mentro mewn Buses	not recorded	not recorded	14	42				60					£211,616.58
	Tyfu yw'r Nod	not recorded	not recorded	17										£240,995.16
Carmarthenshire	Sector Grant	20	24	44			11	11	21	44				£466,250.00
Bwrlwm Arfor	Promotion & Marketing													
Total		55	58	164	208	16	47	23	191	66	2	31	33	£1,749,310.21

Source: Project Monitoring data[3]

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[3] 10 Businesses received both Language Grant and Business Grant and the total unique businesses is 154

Table 2.1 above presents the combined monitoring data from the four Local Authorities. However, as detailed below, the job figures are very likely linked to projections and estimates. This is partly due to the expectation that the grant would have a long-term impact upon the businesses, and partly due to the impact of the coronavirus pandemic, which has halted delivery and is perceived to have delayed impact.

2.2 Direct Business Support/Funding:

A significant portion of the programme consisted of various direct business support / funding schemes. These included the Language and Business grants in Ynys Môn; the Cymorth i Fentro grant in Gwynedd; the sectoral grants in Carmarthenshire; and the Twf and Mentro grants in Ceredigion.

Although there were differences between the schemes, they were generally very similar. All entailed direct, revenue and capital grants to businesses. Businesses were all required to outline their plans to develop both the business and use of the Welsh language within the business. Selection panels approved applications in all instances, though with additional, senior official approval in some Local Authorities. The findings in relation to the delivery and impact of the grants were also similar. Consequently, for brevity and to avoid the repetition of similar findings, this section will discuss the direct grants to businesses in general terms unless specific differences merit particular attention.

Design and aims

All businesses interviewed were clearly in agreement with the programme's rationale and felt that there was a need to both create jobs and support the Welsh language in the area. Although many of the businesses interviewed use the Welsh language within their business, most also saw an opportunity to increase or expand that provision.

Ynys Môn
The small Language Grants were designed to support businesses to develop their Welsh language services and products. Businesses were required to outline specific interventions that would be funded by the grant as well as their longer-term plans in relation to the Welsh language services and products. The grant (of up to £5,000 in 2019/20 and up to £2,000 in 2020/21) was designed to pay 80% of the costs of any visual support needs such as;

- Point of sale signage for shops.
- Support to ensure that the Welsh is heard, such as paying for Welsh language social entertainment.
- Marketing materials in Welsh such as providing support and covering the cost of producing films to promote the business digitally.
- Or supporting businesses to develop their use of the Welsh language by covering the cost of Welsh language lessons.

After a successful application and panel interview, businesses would be required to engage with Helo Blod, the Welsh translation and advice service provided by Business Wales.

The generally much larger Business Grants of up to 50% or £30,000 were more straightforward, offering capital grants to support businesses with any developments and costs if justified within the application form. Businesses were also required to outline language development plans for the future, and to engage with the Helo Blod service.

Gwynedd

Gwynedd operated the Cymorth i Fentro scheme, effectively supporting businesses through a support package. Working with Business Wales and the Enterprise Hub, the aim was to identify how a business could develop over five years and removing any barriers for growth. The programme was aimed at businesses involved in production (virtual or physical), but there was flexibility. In practice, however, only small and micro businesses expressed any interest in the support. However, the funding was designed to operate alongside wider support schemes.

Through relatively coordinated promotion, staff and indeed businesses reported having moved from one support scheme to the next. Some, for example, would start by engaging with Ffiws, then apply for Cymorth i Fentro to further develop business ideas. Businesses in receipt of support were required to engage with the Helo Blod service provided by Business Wales.

Ceredigion

Ceredigion offered two direct grants to businesses. The first, Grant Mentro, was aimed specifically at start-ups whilst the second, Grant Twf, was open to any businesses in the county. The grants were designed following a consultation forum with businesses in the area. A few core principles were established that define the grants and delineate their role from wider support offered to businesses.

Firstly, the management staff desired a flexible grant that was accessible to small and micro businesses that would not normally have the capacity or meet eligibility criteria for wider support. The grant would meet revenue and up to £10,000 of the capital costs outlined in the applications, but outside of which there were no restrictions to the grant's use. The variety of businesses that engaged with the grant was later attributed to this flexibility. Staff did not want to limit the grant to particular sectors and noted that they had **not received any applications from some key sectors in the area**, suggesting that this demonstrated there were other sources of support for such businesses.

> 'We need to create new businesses. But I wouldn't want to restrict what sectors we support too much. Grants are often available for the food and drinks sector, or tourism. But we didn't receive one application from the tourism sector really.' [Author's Translation] (Management Interview, 2021)

The **flexibility also extended into the application process itself**. The management adopted a discursive approach to the development of applications, refraining from outright refusal if the staff considered the application to have potential, even if the scoring was not thought to meet the threshold. Staff would work with businesses to develop the applications further, often noting in interviews that the businesses were often inexperienced in preparing grant-applications.

Moreover, the panel, who would review applications, were also given leeway to recommend resubmission and offer constructive feedback. Staff noted that the process led to **applications that were ultimately far more aligned with the aims of the programme than the initial submissions**.

Secondly, the application required the business to show substantive engagement and intention to develop the Welsh language capacity or services of the business. Up to 25% of the application scoring was awarded to Language planning and development within the grant. This, both management and businesses noted, **anchored language development within the wider development of the business**.

Management staff also noted that they received little push-back from businesses and that the grant effectively operated as a form of **leverage to push businesses further in their language development journey**.

> 'The thing with a grant is that you have something to offer like a hook. You can have that engagement and start mentoring. They get more value out if it as well because we can start sharing more information with them.' [Author's Translation] (Management Interview, 2021)

Carmarthenshire

Carmarthenshire County Council sought to focus expenditure upon two key economic sectors. These sectors were the food and drinks and creative industry sectors, both key sectors identified in the authority's economic and strategic planning. The process involved four separate calls for applications, for officers to review the applications before passing them to the Local Action Group (LAG) for approval. Alongside the receipt of grant funding for capital investments, the business was expected to engage with the Helo Blod service provided by Business Wales.

The decision to focus upon two key sectors elicited criticism from some stakeholders and management staff. However, it was also identified as a key strength of the grant within Carmarthenshire. Stakeholders questioned the value of a relatively small grant targeted at two sectors that were in receipt of considerable support from other sources. These stakeholders questioned what additional impact this grant could have provided on top of that which was available already.

However, management staff suggested that there were numerous benefits to focusing upon these two sectors. Firstly, the grant offered a means by which the Local Authority could **further support their strategic economic priorities**. Gaps could be filled, and staff noted that they **worked closely with wider schemes** such as the Cywain programme in **identifying businesses who could further benefit and develop with support from the Arfor grant**.

Secondly, **smaller businesses** that would otherwise be ineligible or would find it difficult to compete for broader grants, support or funding, **could access the Arfor grant for very bespoke and specific reasons**. This linked to a broader strength of the grant, namely that **the grant could be particularly flexible and could fund very specific but key technological or capital developments** that would consequently **enable the businesses to overcome barriers or open up new markets and sources of revenue for the businesses involved**.

Finally, management staff were keen to stress that because of the focus upon the Welsh language, **this grant was distinctive and added value to the whole package of support targeted at the authority's key sectors**. Staff noted that in placing the language as a key consideration within Arfor grant applications, an explicit and unique focus was placed on developing Welsh language capacity alongside other aspects of the business. The grant, staff suggested, forced businesses and their owners to think differently and to give genuine consideration to the language. Linking with the Helo Blod sessions, it was felt, helped develop the thinking around how to include and capitalise upon the Welsh language within the business.

2.2.1 Application Processes

Application processes across all grants were viewed generally favourably by both management staff and businesses. Application processes were commonly seen to be straightforward and, though very occasionally overly bureaucratic, they were well supported by attentive staff. Businesses also reported receiving clear and quick communication from the council and effective feedback on their applications.

Management staff, particularly in **Ceredigion,** suggested that there were further benefits to this model noting that, in administering the grants themselves, the council staff developed a deeper understanding of businesses in the area. This, staff noted, was of particular value when designing and delivering further direct business grants and will be of continued value to staff working within economic development.

> 'One of the side effects I think from our side as a Council, and I wouldn't have foreseen this, but because we've worked with businesses in the area through Afor… what we learned through Arfor was a big help for us when we were delivering the pandemic support. Between that grant and Arfor, there aren't many businesses in Ceredigion that we don't know about now. We have a better picture of the type of businesses we have in Ceredigion.' [Author's Translation] (Management Interview, 2021)

An exception to the Local Authority managed process would be **Ynys Môn.** The application 'front line' process for both **Ynys Môn** grants were effectively outsourced to Menter Môn, with the Council role being budget management and issuing offer letters and payments. In year 2 the language grant was fully delegated to Menter Môn. Alongside the positive comments from businesses and applicants, management personnel also noted that this approach led to a **more streamlined process** and **brought particular benefits**.

Menter Môn were seen to be able to turn applications around quickly. Moreover, Menter Môn staff, with links to the wider support infrastructure for the Welsh language, were able to draw upon their experiences to **provide additional advice and more informed comments on the applications**. Staff were also able to highlight additional sources of support, not least from the Menter Iaith.

> 'The process with Ynys Môn council wasn't too easy, there were a lot of hoops and such, and the Council were keen that recommendations from the selection panel would have to go to a senior officer. We like to turn grant applications around quicker, so that's where the language grant came in.' [Author's Translation] (Management Interview, 2021)

Businesses seem to have found out about the grant through different ways, often the Local Authority and its social media platforms or website, but also through word of mouth from friends, colleagues or other businesses. It was felt, particularly in **Carmarthenshire,** that the coronavirus pandemic had impacted take up of the grant and the number of applications received, however more applications were received during the final six months of the programme.

> 'When things settled in September there was money for another call [for applications], but the uptake wasn't as big as we thought it would be. For one, there was a lot of support from Welsh Government. Secondly, businesses had more of a survival than a growth mentality. Three, there are a lot of cases [of COVID-19] in some areas. Four, there were staff costs associated to a lot of these grants so they couldn't commit. Since we've reopened the grant more recently, there's a lot of interest and the focus of the businesses has moved back to those growth ambitions, and there are a lot of start-ups.' [Author's Translation] (Management Interview, 2021)

2.2.2 Delivery

Management personnel saw that the grants could fulfil a very particular role. Staff in **Ynys Môn** for example, spoke of encouraging businesses to apply for the Language Grant before moving onto the Business Grant. This would effectively force the business to engage with the Helo Blod service and secure some Welsh language outputs or outcomes. Management staff for all grants suggested that the Business Grant did not always secure such outputs or outcomes, and that businesses saw the language requirements as a somewhat peripheral criteria and component. The Language Grant, however, was viewed by management as a means of securing Welsh language outcomes. This was due to the fact that significant scoring was awarded to the development of the business' Welsh language capacity within the application process.

> 'In terms of what we change, the one that is most obvious is, like any grant scheme, you have businesses that would do whatever [is needed] in order to receive the funding. What we did was to introduce a process of applying for a language grant to start, then going on to the business fund, so that there is a link with Helo Blod. Some went straight to a business grant, as long as someone

Reach and type of beneficiary

Ynys Môn

In total, 37 businesses received one or both grants. Data shows that of 34 businesses that received the Language Grant, 13 of which also received the Business Grant. Three businesses only received the Business Grant.

A variety of businesses received funding through the grant, ranging from pizza restaurants to physiotherapists, milkshake companies and wedding services companies. All businesses interviewed suggested that the grant was easy to access, and information was easy to come by. Fears of the application process were generally positive although a few suggested that there were either delays between the application and approval, while a few also commented on the positive support received from staff.

As expected, the Language Grants were designed to support the development of Welsh language services and Its use within the business. The businesses interviewed reported a range of skill sets and capabilities in relation to the Welsh language. Some businesses, for example, consisted of staff who were fluent Welsh speakers, and others consisted of staff who are limited in their Welsh language skills and capabilities or lacking confidence to use it.

Gwynedd

The Cymorth i Fentro grant was effectively the smallest, supporting 17 businesses in total. These businesses were largely small and micro businesses across a range of sectors including bakeries, butchers, printers, distilleries, timber works and honey producers. Around a third of the companies in receipt of funding were involved in the food and drink sector, making it the most represented.

Ceredigion

31 businesses received a grant in Ceredigion, 17 'Grant Mentro' and 14 'Grant Twf'. Management staff noted that the **majority of the 'Grant Mentro'** were awarded to businesses whose owners were **under 35**. This was not by design but, management staff felt, was due to the demand from younger businesspeople seeking support for start-ups. **Access to capital and a lack of credit rating were significant barriers that younger people faced in raising funds to invest in businesses**.

'There was one young man, 17 years old, who wanted to go on his own as a welder. He'd done the training, but it was hard. We actually gave him an up-front payment. You see, it's hard for anyone that age, without a credit history, to get a loan from a bank. We've been able to be more flexible to support businesses to develop. It's kept these people in their local area and working to benefit the community and local economy. In a way, that's what Arfor is; yes it's to do with the language and business, but more broadly it's about keeping people local, especially younger people.' [Author's Translation] (Management Interview, 2021)

A range of businesses were supported, though all were small or micro businesses. Some were businesses that were notable as a Welsh language business. When questioned as to the logic of supporting these businesses, management staff noted that the selection panel saw these companies as **leaders or beacons in the community that demonstrated there was value to the Welsh language in business**, and that these merited support and promotion.

> 'They were all small businesses. But in terms of a business like [business name redacted], the Welsh comes naturally. They operate through the Welsh language. Many of these businesses do that… so we wanted to help sustain those businesses in the area, through that investment in innovative development. We also wanted to recognise that there was a value to being a Welsh company as well. This has promoted them and given them a platform to show that they are recognised and that there's value to the language in business,' [Author's Translation] (Business Interview, 2021)

Carmarthenshire

In total, 24 established and 20 new businesses were supported (new businesses being defined as those that had been operational for 12 months or less). Two businesses received two grants. Of these, 30 of the businesses were from the food and drink sector, 9 from the creative industry sector and 5 were classified as 'other', with a looser connection either to one or both sectors. The grant is projected to have spent £449,286.66 in supporting these businesses. However, management staff noted that due to the coronavirus pandemic it had proved difficult to spend the money due to delays and businesses closing during lockdown. Businesses were on average awarded £10,211.06. Two businesses received a £50,000 grant for the development of spaces, and when these outliers are omitted, the average grant received by businesses is £8,316.35.

The food and drinks businesses consisted of producers, wholesalers and customer facing businesses such as cafes and restaurants. Seven of the businesses were related to the dairy industry, producing milk, ice cream or yoghurt. A range of other food and drink businesses were also in receipt of grant funding such as bakeries, animal food producers, tea wholesalers and home cooking businesses. Businesses within the creative industry sector consisted of clothing manufacturers or printers, craft producers and a digital and podcast producer. These were all micro or small businesses, aiming to expand services and create jobs as a result.

The grant was used to fund capital investments in a wide variety of ways. For example, Dairy businesses, particularly milk producers, investing in milk vending machines designed to enable the business to sell directly to the public. Some of the creative businesses invested in printing equipment, digital hardware and software, or the development of workspaces.

Alternatives and counterfactual

The businesses across all direct grants suggested that, as small and micro businesses, they were **not in a position to fund the kinds of developments to their businesses without the Arfor grant**. This seems to suggest that the scale and size of the grants have enabled businesses that would not normally have the means to invest in and develop the Welsh language services and products.

'As a very small business I wouldn't have been able to afford to pay for a translator to make all of my marketing, website and instructions bilingual. I don't think it would have been possible to get a loan to do this.' (Business Interview, 2020)

As discussed below, the Grant Mentro in Ceredigion attracted applications from young people exclusively. Many noted either in interviews or to management staff, that sourcing investment for their start-ups or nascent businesses was particularly challenging given their lack of experience and awareness of sources but also a lack of credit history that limited their ability to access sources. **Arfor consequently presented an accessible means of sourcing investment for their businesses**.

The support also appears to have **stimulated substantive engagement with the Welsh language, unlikely to have happened otherwise**. The Language Grant in Ynys Môn, for example, has supported businesses in their development of bilingual or Welsh language services and products. It was thought very unlikely that these businesses would have developed these services and products without the funding. Implicit and sometimes explicit in the responses of businesses was the suggestion that investment in Welsh language services or products was not likely to be a priority for any business.

More widely, management staff and businesses echoed each other's suggestions that businesses either would not have come across the support available to develop Welsh language services and capacity or would not have engaged as substantively as they had through this Grant. As discussed below, the requirement and score weighting within the application process also encouraged a **substantive engagement with the development of the Welsh language and wider support services**.

External Factors

The coronavirus pandemic had a significant impact upon the grant in several ways. Firstly, the applications and interest in the grant, particularly in some Local Authorities, have fluctuated due, in the view of management personnel, to the shutting down of businesses or the switch from a 'growth' to a 'survival' mentality during the pandemic.

Secondly, the pandemic impacted upon businesses and their ability to fulfil the conditions of the grant. While the purchase of equipment was possible, though often delayed due to wider supplier and business closures during the lockdown, the operations of the businesses themselves were often reduced in scale or even shutdown completely during the lockdown. Management staff noted that these delays frequently lead to businesses amending their delivery plans with a knock-on delay in approving and transferring funds and the spending of the grant money. Management personnel noted however, that levels of interest in the grants, particularly in Gwynedd and Mon, remained high throughout the pandemic, even if their capacity to fulfil the conditions of the grant was limited.

Importantly however, as a result of the coronavirus pandemic, few of the businesses interviewed felt particularly confident in relation to the outcomes of the impact of the grant. Most suggested that the outcomes noted in monitoring forms were indicative, and further validation or corroboration would be needed in the future.

No business suggested that the outcomes would not be achieved, only that it would take longer to do so due to the delays caused. However, individuals interviewed did not feel that it was possible to evidence the impact of the new services or products upon turnover of all the business more generally. **While the grant has clearly led to the development of services and products through the Welsh language, the impact of doing so and proof of concept is still to be evidenced.**

> 'No new posts have been created as the wedding season was disrupted by Covid. Most of the seasonal staff we take on are local and tend to be Welsh speaking.' (Business Interview, 2020)

However, management staff were also of the view that the programme had benefited from a wider set of external circumstances and factors that influenced trends in social and business life. Staff noted, for example, that there was **a growing interest in the notion of buying local,** and the grant represented a means by which businesses could look to capitalise on this trend. Moreover, the emphasis on the Welsh language, local produce or the sourcing of key components or ingredients locally had helped highlight the local character of those businesses and staff consequently felt that they were in a good position to capitalise upon a growing desire to buy local produce.

2.2.3 Impact on the business

Key Findings
- Helped safeguard 208 full time or FTE jobs and 16 part time jobs.
- Helped businesses create 238 FTE and 89 part time jobs.
- The pandemic and related delays have restricted the ability to gauge the impact of the grant revenue streams. Validation and corroboration of the outcomes would still be needed for the impact to be assessed objectively.
- Grant used to develop new products and innovate within the business.
- Businesses are optimistic in relation to the impact that the developments funded by the grant would have upon their businesses.
- Anticipated impact included more efficient delivery of services or more clients, customers and turnover.
- Businesses felt that there were few if any alternatives.
- Grant Mentro (Ceredigion) was entirely taken up by young people.

Management staff consider that the impact of grants upon businesses and their turnover would be best evidenced in the future. Indeed, staff noted that two years would have been very tight to evidence any impact under any circumstances, but particularly given the delays caused by coronavirus pandemic. However, they were confident that new products and services had been created as a result of the grant.

It should be noted that the figures quoted below include figures for full-time, part-time and full time equivalent (FTE) jobs. This is because of different monitoring/reporting processes used by different Local Authorities.

In total, the direct grants to businesses are claimed to have supported 95 businesses (85 unique businesses), **helped safeguard 208 full time or FTE jobs and 16 part time jobs**. They have also, monitoring data claims, **helped businesses create 238 FTE and 89 part time jobs**. With a total expenditure (at the time of writing) of £1,494,082.94, this amounts to a ratio of **one FTE job safeguarded for every £6,917.05 and one FTE job created every £5,288.79 spent**.

These figures must be treated with caution however, as the data provided relates only to the anticipated outcomes that have not been corroborated.

Table 2.2: Impact of the Direct Grants to Businesses

Local Authority	Grant	Business Supported			Jobs safeguarded		New jobs within 12 months		New jobs within 2 years		Additional Impact			Expenditure
		New Businesses (younger than 12 months)	Existing Businesses	Total	Full Time	Part Time	Full Time	Part Time	Full Time	Part Time	Work Placement	Increased Turnover	Increased use of Welsh	
Ynys Mon	Business	4	9	13	13	16	36	12	52	15	2	10	9	£401,464.00
	Language	9	25	34								21	24	
Gwynedd	Cymorth i Fentro	not recorded	not recorded	17					58	7				£173,757.20
Ceredigion	Mentro mewn Busnes	not recorded	not recorded	14	42				60					£211,616.58
	Tyfu yw'r Nod	not recorded	not recorded	17										£240,995.16
Carmarthenshire	Sector Grant	20	24	44	153		11	11	21	44				£466,250.00
Total		33	58	95	208	16	47	23	191	66	2	31	33	£1,494,082.94

Source: Programme Monitoring Data

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Ynys Môn

The monitoring data collected by **Ynys Môn** suggests that out of 37 businesses who received one or both grants, **23 have expanded the business** while **nine were new businesses**. **31** of the businesses reported that **turnover had increased**, **24** had reported that **new products or services were created** and **33** noted that the **use of the Welsh language had increased** as a result of the grant. Two of the businesses reported that **new qualifications/accreditation were achieved** by the business (or staff members).

The monitoring data also suggests that **88 new full time and 27 new part time jobs** will be created within or sooner than two years while **13 full time and 16 part time jobs were also safeguarded** as a result of the grant. This is a ratio of **creating one FTE per £ 1,873.88 spent**.

Two work placements were also created. However, all of these jobs had been created or preserved by businesses who also received the Business Grant. None of the businesses who received only the Language Grant reported having created or preserved any jobs. It is likely, therefore, that all of these jobs were created as a result of the Business Grant and not the Language Grant.

Monitoring data also suggests that the grants have stimulated a total of **£285,189** in investment from the companies themselves, £262,851 of which came in relation to the business grants. This investment was made by the companies to support or complement the developments being funded through the grants. More broadly, the investment suggests that businesses valued the investment enough to commit their own resources to support the developments. **On average, each business grant encouraged £12,516.71 of private investment,** however amounts varied significantly between grants.[4] Businesses invested as much as £45,497 and as little as £1,674.

Ynys Môn Language Grant

Interviews also suggested the Language Grant had not led to the creation of any new jobs, although any increased turnover could sustain and possibly lead to the creation of new jobs. The products or services that were created through the Language Grant were all related to external and formal communication with customers. The grant supported the creation of all the new translation of existing online booking services, menus and websites. As a result, customers can engage with businesses, their services and products through the medium of Welsh. Most of the businesses however consisted of staff who were fluent in Welsh, and had reported that their dealings with customers, albeit on an informal level, was already through the medium of Welsh.

Gwynedd

The Cymorth i Fentro Grant in Gwynedd supported **17 businesses**, creating **58 new full time** and **seven part-time jobs**. This is a ratio of **one FTE created per £2,825.32 spent**. Management staff stressed however that these figures were in anticipation or speculative and that, mirroring responses in interviews, these numbers had not been reached to date. Continued monitoring of the businesses supported is key to validating this impact.

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[4] A standard deviation of £12,660.32 illustrates the differences between amounts.

As with most businesses, the pandemic has impacted delivery and the extent to which the impact can be measured. However, interviewees were **optimistic in relation to the impact that the developments funded by the grant would have upon their businesses**. Those interviewed were able to give details of their plans and the development steps in the short and medium-term.

> 'We've not seen results yet because the visitor centre has not been able to open because of Covid restrictions. When it opens it should attract more footfall and increase sales. We will employ two bilingual tour guides. The bilingual digital information screens should also increase footfall to other local businesses as they will also promote them to visitors.' (Business Interview, 2021)

Some were able to be more specific and confident in relation to the impact however, particularly those who had adjusted their delivery and focussed on remote or on-line services or products. However, **validation and corroboration of the outcomes would still be needed for the impact to be assessed objectively**. Management staff felt that the wider package of grants and the incorporation of support through Business Wales added additional value to the approach. Businesses benefitting from the grant were in a position to draw on business advice and were made aware of further support that was available.

Ceredigion

The two grants supported **31 businesses in total**, **17** benefitting from the 'Grant Mentro' and **14** from the 'Grant Tyfu'. In total, the two grants **created 60 FTE jobs** and helped **safeguard 42 FTE jobs.**

Businesses frequently noted that the benefits of the Grants would be delayed due to the impact of the coronavirus pandemic. All were nonetheless confident that the support provided would ultimately lead either to **more efficient delivery** of services or **more clients, customers and turnover**.

> 'This has allowed me to purchase a CNC machine which allows me to produce more in a shorter amount of time, and more accurate. Able to halve [the time taken] and do another task at the same time.' (Business Interview, 2021)

Management staff were insistent that the **support offered to the 17 start-ups** through the 'Grant Mentro' was **particularly impactful**. Business interviews echoed this view. This was thought at least in part due to the younger age of the business owners and the challenges they faced in accessing finance or qualifying for loans.

> 'Those new businesses that have started, it's allowed those 17 businesses to exist. It's enabled those businesses to start up in a very difficult period. Many of each grant have said that they would've really struggled without Arfor, and that's saying a lot around here. The 17 new businesses though, I doubt they would've started at all. They would definitely have struggled.' [Author's Translation] (Management Interview, 2021)

> 'I mean, it's allowed me to set up the business and have a job. I've also been able to offer newer services and to do larger jobs because I have the right machinery.' (Management Interview, 2021)

Carmarthenshire

Monitoring data collected by management staff suggested that **153 jobs had been safeguarded**, although 92 of these were related to two businesses. Delineating the Arfor grant from wider coronavirus support is challenging however, and it is unlikely that the grant was the sole or even main means of safeguarding these jobs. Furlough and the wider business support are likely to have played a more instrumental role in safeguarding the jobs and businesses, although the Arfor support should not be discounted.

In total, 11 new jobs will have been created by the end of March 2021, and eleven part time jobs would have been created by the same period. A further 21 jobs will have been created within a year of the programme ending and alongside a further 44 part-time jobs. In all, therefore, the grant is expected to have **safeguarded 153 jobs** and will, within 12 months, have supported the creation of **32 full time jobs and 55 part time jobs**. A ratio of **1 FTE created per £7,836 spent**.[5]

The businesses interviewed noted that any jobs that were intended or would be created as a result of the grant would, they hoped, go to local residents. Only monitoring data collected at a later date will evidence this. The language profile of new recruits will inform the impact in relation to the wider aims of the programme. In some instances, the business owners themselves had been able to commit full time to the business.

> 'This has created a full-time job for me. I've always lived in this area and I speak Welsh already.' [Authors Translation] (Business Interview, 2021)

The new businesses, i.e. those that were in the process of being established or had been in existence for less than 12 months, **suggested that the support proved to be a key factor in a successful establishment**. These business owners frequently noted that capital was difficult to source, and either that there was **no alternative to the grant**, or that a bank loan would have consisted of a more drawn out and bureaucratic process as well as being too risky or costly a financial commitment for the company. The grant was therefore not only a source of funding that would have been difficult to source elsewhere, but also enabled the business to move quickly in developing, setting up and beginning to trade.

> 'We couldn't get the money otherwise. Not without Arfor. There was no other suitable finance around. This helped us expand the business much quicker.' (Business Interview, 2021)

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[5] This assumes that the Part Time jobs equate to 0.5 FTE

All businesses interviewed reported that the grant had a significant impact upon their business. As well as helping the businesses to be established, the existing businesses reported having expanded their operation and were expecting increased revenue as a result of the developments. However, the coronavirus pandemic had **restricted the ability to gauge the impact of the grant upon their revenue streams** and that objective; quantitative data to evidence the impact was not available at this stage. Other factors delayed or limited the extent to which the impact could be evidenced. Some businesses for example, were still awaiting safety certificates, or were only in the process of beginning to trade.

> 'We've not sold yet because we're still waiting for Food Hygiene status. We've started pre-orders on the website. But salami and so on takes at least four months to dry out before you can start selling them.' [Author's translation] (Business Interview, 2021)

General findings

All businesses interviewed noted that their **marketing communication materials with clients and customers were already bilingual** and that, due to the skills and abilities of this staff, were already able to and tended to engage informally with customers through the medium of Welsh.

In some instances, but most notably **Carmarthenshire,** staff were of the view that people were more interested in moving to the area or staying in the area to start their businesses because the grant was available, possibly due to the wider package of support available to particular types of businesses.

Management staff also felt that the businesses supported by the grant were notable and prominent within their local villages and communities in many instances. Although difficult to evidence, management felt that these businesses were **helping to build resilience within the communities** as well as, over time, providing examples of where local people can succeed without having to leave the area. These were subjective views expressed by the management, and merit further investigation if and when possible.

> 'There were these two brothers with a farming background who wanted to stay in the area. They wanted to give something back to the area, so they started a yoghurt business. This sort of thing came through in many applications and it might be something in terms of COVID and people wanting to come home as it were… The milk vending machines as well, people are trying something that's a little bit different. That local thing is coming through in the applications, this idea of buying local. Another example would be a couple, non-Welsh speakers, who have been growing wheat that is indigenous to the area and using that to make and sell bread. They see the heritage and the history and things like that. It goes beyond the language, it's about the community really wanting something and wanting to create a Welsh produce for Welsh people. It's about a sense of place.' [Author's Translation] (Management Interview, 2021)

More broadly, management staff felt that it would have been advantageous to have been able to match the funding with LEADER funding. This may have enabled more sophisticated or joined up applications to be developed involving both capital and revenue spend for innovative developments, particularly if more time had been available to develop ideas.

2.2.4 Impact on the Welsh Language

Key Findings
- Direct Grants have embedded language provision and development within businesses.
- This is done through the application process and scoring emphasis upon Welsh language capacity and service development.
- Belief that this has ensured more substantive engagement with the agenda, as well as with wider government support services such as Helo Blod.

With the exception of the Language Grant, the language outputs were more difficult to gauge. Only some monitored the businesses in this regard. In **Ynys Môn**, **33 of the 37** recipients of either or both funds noted that their business' **use of Welsh had increased** whilst **24** noted that they had **developed more Welsh or bilingual signage**. **All of the Language Grant** recipients noted **increases in the business' use of Welsh** whilst 9 out of 13 of the Business Grant recorded doing so.

The interviews provided additional data, though representing only a sample of the businesses supported by the grants. Around **64%** of the businesses noted that the Grant **had not had a significant impact** upon the use of Welsh within the business internally or informally. However, they operated primarily through the Welsh language prior to receiving the support or were sole traders to whom the internal and informal use of the Welsh language was not relevant. Around **24%** of the businesses interviewed did note that, internally and informally, **the use of Welsh had increased** due, in part at least, to the support received. Most commonly, **this resulted from the recruitment of Welsh speakers**. It suggests that increasing the number of Welsh speakers within small and micro businesses may have an impact on the wider workforce, at least on a casual or informal level.

> 'It has grown a little bit, as we have two Welsh speakers and a Welsh learner now and we have sort of short, informal conversations in Welsh.' (Business Interview, 2021)

A small minority of businesses (2) noted that they had developed their booking software to account for both languages, necessitating Welsh language skills from the staff in turn. These, though rare, could be seen as examples of **internal but formal processes** that had been developed as a result of the grant, and particularly in the view of the businesses, as a result of their engagement with the Helo Blod service (see below).

Around **22%** of the businesses noted that they had **started or increased the degree to which they engaged with clients bilingually or in Welsh**. The majority of these tended to be businesses in **Ceredigion**, although it is unclear why this would be the case. This, interviewees frequently suggested, was due to an increase in the Welsh content of their marketing or social media output.

Consequently, clients and customers were choosing to engage with the business in Welsh. **46%** of the responses suggested that they **already engaged with clients or customers bilingually**. The rest felt that they did not have the capacity to do so or were not sure. There is evidence to suggest, therefore, that increasing the amount of visible Welsh encourages engagement in Welsh, and consequently for businesses to respond in Welsh, if capacity exists.

> 'We are getting an increasing number of requests, communications and phone calls from customers in Welsh because of the increased Welsh content on social media and the website.' (Business Interview, 2021)

> 'We are being contacted by customers via social media in Welsh a lot more and we are also having more phone enquiries from customers in Welsh.' (Business Interview, 2021)

> 'More conversations in Welsh as customers realise that we have Welsh speaking staff.' (Business Interview, 2021)

Around **36%** of the businesses interviewed noted that their formal dealings with clients and customers were **bilingual before the Grant**. However, around **26%** of the responses noted that **more formal aspects of the business' dealings with clients and customers** was, as a result of the support, **through the medium of Welsh**. The rest of the responses suggested that their formal processes such as invoicing and ordering were not available bilingually, or that they could not provide detail during the interview. It again suggests that there may be a link between increasing the visibility of Welsh and businesses adapting and meeting the demand to engage in Welsh.

> 'The majority of our website and social media is bilingual now, and I hope to have everything bilingual by the summer of 2021. The e-mail and order forms are now bilingual as well.' [Author's translation] (Business Interview, 2021)

Businesses were also asked to reflect on the visibility of the Welsh language within and by their businesses. Around **31%** suggested that all their marketing and social media or other **visible aspects of the business were already bilingual** or through the medium of Welsh. However, **66%** of responses noted that they had **increased their visible Welsh language content and output as a result of the grant**. Some have developed their existing output whilst others have started from nothing. The scale could be small in some instances, such as changing names, whilst other companies have committed to bilingual social media presences and marketing.

> 'The Website, social media and adverts were already at least partly bilingual before Arfor but because of Arfor we have increased the amount of Welsh in all of our communications.' (Business Interview, 2021)

> 'Bilingual labelling and I've started preparing digital marketing and posting social media posts that are bilingual.' [Author's Translation] (Business Interview, 2021)

More broadly, management staff in particular suggested that **the Grants had generated more substantive engagement with the Welsh language** as a topic for development within the business. These comments were echoed by the businesses themselves when interviewed, who noted the value of engaging with these services and that they would not have considered accessing these services were they not required to do so by the grant. The grant application process **required businesses to outline their plans** for the development of Welsh language services. Often, such as in the case of **Ceredigion's** two grants, the applications scoring gave substantial weighting to this aspect (around 25% of all marks were available for their plans in relation to the Welsh language). Moreover, the grants required (and in **Ceredigion's** case also monitored) engagement with the Helo Blod service as part of the conditions. For many businesses, this began **the process of engaging substantively with the issue**.

Ynys Môn Language Grant

The Language Grant differed in some respects as it only concerned itself with developing the language services and capacity of the businesses. The grant has enabled some businesses to **circumvent some of the barriers to wider support services,** specifically in relation to funding Welsh language lessons for staff. While this support is available from other sources, smaller businesses in particular face barriers to accessing Welsh language lessons. Management staff for example, in drawing attention to the strength of this grant, noted that to be eligible for Business Wales support for Welsh lessons, groups of seven or more staff members were needed. Moreover, these staff members are required to be at the same ability level, and the classroom-based courses provided necessitated time away from the business and, therefore, was a cost to the business. The language grant, however, **enabled businesses to access more bespoke or relevant Welsh language lessons** which, at least in part due to the coronavirus pandemic, were undertaken online and at more convenient times for the staff members.

> 'Certainly there are examples where people have used the language grant to take Welsh language lessons. So informally, and internally, the fund has had an impact on capacity. There was a [redacted] company, they made an application for her and her staff to attend a formal Welsh language learning programme, but they weren't eligible because you need seven staff members on the same language level. I think it's only a Local Authority that would have seven staff members on like that, on exactly the same level. Also, you can't take Welsh lessons if you have to close the door to the shop. So the courses are now virtual and more accessible.' [Author's Translation] (Management Interview, 2021).

Some Grants however, notably **Ceredigion's** two grants, prohibited its use for Welsh language lessons. This, staff suggested, was due to a concern that doing so would duplicate the wider support available within the county.

> 'We were clear that this wouldn't be used for Welsh lessons. There's plenty of that available in the county, and for free. I feel strongly about that. How would you monitor it anyway?' [Author's Translation] (Business Interview, 2021)

2.2.5 Further and Common Findings

Across all business grants, businesses, management staff and stakeholders drew common conclusions that were not exclusive to any one specific grant. From the outset for example, management staff recognised that **there was a demand for financial support for businesses to develop**. **Small** and **micro businesses** were thought to be in particular need due to the challenges or cost of securing alternative sources of finance and investment such as bank loans. The flexibility of the grant was a further aspect thought to be of particular appeal to smaller and micro businesses. This perception was only supported by anecdotal evidence, but nonetheless offers a possible explanation to the attractiveness of the direct business grants. It also suggests, as a few stakeholders and businesses had explicitly noted, that access to capital and **sources of support for micro businesses looking to develop are limited**.

> 'No, I don't know of any sources of funding for local businesses, or money to promote Welsh language or its use. It was a shock for me to see the difficult conditions that some businesses have been facing. As I understand it, any government funding for businesses in 2020 or 2021, such as Business Wales has gone towards supporting businesses through the pandemic.' [Author's Translation] (Stakeholder Interview, 2021)

Of the businesses interviewed, many noted that th**ey would not have progressed with their development plans were it not for the grants** received.

Two of the local authorities found that the **coronavirus pandemic had impacted the extent to which businesses were looking to develop**. Stakeholders and management personnel were of the view that these businesses had **become overly concerned with survival rather than development**. However, management staff reported a **renewed interest** in the business grants and a desire from owners to develop their businesses as lockdown measures were eased **in the latter half of 2020**.

> In terms of things that I'd change, the really obvious thing would be that, as with any grant scheme, you have businesses who will do anything just to get the money. What we did was introduced a process that you had to go for a language grant and then move on to the business grant, so that link is there with Helo Blod. Some went straight to the business grant because they promised to do something with the language, but the danger there is that it doesn't work as well, and they don't produce anything in terms of the language.' [Author's Translation] (Management Interview, 2021)

Direct Business Grants - Conclusions

In conclusion, the grants appear to have had an impact on almost all recipients. The data suggests, although only projected figures were available, that in total 282.5 FTE jobs have been safeguarded whilst 238 full time and 89 part time jobs will be created as a result of the support. Overall, this equates to **one FTE job safeguarded for every £6,917.05 and one FTE job created every £5,288.79 spent**. However, these figures are estimates, and further monitoring is required to validate the impact of the grant.

Data nonetheless suggests that the Grants have supported many businesses to **develop new products and services** that have or are predicted to **increase turnover in the future**. Moreover, the Grants have led to a substantive effort to develop and increase the Welsh language provision and capacity of the businesses. Businesses and management staff felt that these developments would not have been possible without the grant, as the wider sources of funding for the specific and bespoke developments that businesses were hoping to make were too difficult to access.

The business impact is straightforward. The investment has enabled the businesses to **employ more people**, to **expand services**, **develop new products** or **more efficient ways of working** and trading. For **start-ups**, the impact is thought to have been **instrumental in enabling**, **particularly younger business owners**, **to access funding and investment**.

Meanwhile, the application process has **embedded language provision and development within businesses**, specifically the requirement to present and score well on a commitment to the Welsh language and its development within and by the business. By embedding language development within business planning, the grants have ensured **more substantive engagement with the agenda**, as well as **with wider government support services** such as Helo Blod.

It was widely felt that the **coronavirus pandemic had impacted** the businesses in delivering their plans and, more reportedly, had **restricted the ability to evidence** any particular impact that had resulted from the grant and the associated service or product developments. It was felt by both management and businesses, that the impact could **only be evidenced in the longer term**. Businesses were nonetheless **optimistic about the impact of the new products and services upon their turnover**.

Management staff, meanwhile, had noted wider benefits to the community, suggesting that the businesses themselves were living **examples and case studies of local residents succeeding without having to leave the area**. Key **businesses had been recognised** alongside the **value of the Welsh language in business**. This was thought to have a wider impact on the perceptions of individuals considering careers in the area or moving away. Staff also felt that the programme supported businesses, particularly small businesses, in ways that other grants could not. In turn, this support may assist these businesses in tapping into a desire to buy local, where the language and local character of the business was a key strength.

2.3 Llwyddo'n Lleol

Background and design

Llwyddo'n Lleol Was a bespoke programme developed and managed by Menter Môn[6] to support and mentor young people as they developed their businesses. Young people on the scheme would attend weekly workshops and receive group support from specialist business advisors. The programme was designed to last 11 weeks, during which the young people were also tasked with documenting their experiences over social media in a series of challenges. Beneficiaries also received a £1,000 bursary. There is no specification as to where this money should be spent, and some beneficiaries reported using the bursary to supplement their income while others invested in equipment for the business.

The programme had been in development for some years, with management staff both within the local authorities and at Menter Môn noting that there been a desire to trial the approach for some time. Arfor offered an ideal opportunity to trial the scheme.

> 'I think Llwyddo'n Lleol has been around for some time as an idea. There's always some talk that it would be great to try and use this to convince or attract young people to stay here. There have been a couple of similar ideas in the past. But what changed also was that we felt, with COVID, there was a need to change things. Certainly the programme [Arfor] has given us a chance to trial Llwyddo'n Lleol.' [Author's Translation] (Management Interview, 2021)

> 'I'm not sure we would have been able to run this scheme this year without the Arfor money. It wasn't in the pipeline. Arfor gave us the initiative and it was only the Arfor money that ran this until we started using a little bit of LEADER funding. Without Arfor, we wouldn't have been able to be so flexible and it's important to emphasise that flexibility [as a strength].' [Author's Translation] (Management Interview, 2021)

There were two core aims to this programme. Firstly, the direct support to a group of young people who were in the process of establishing their businesses within the Gwynedd or Ynys Môn area. The programme was designed to equip young people with hard and soft skills to establish their businesses. Secondly, by requiring the young people to document their experiences and share their stories with their peers through social media, the programme sought to highlight alternatives to the perceived discourse, common in Welsh rural areas, that young people had to leave a Local Authority in order to succeed in business.

> 'A lot of young people don't think there's anything cool about this area, and the cities and the more populated areas attract a lot more young people. We were hoping to change that a bit and show that the language and working in this area can offer a lot more to young people. Because maybe these young people have ideas that are life changing for themselves and their communities.' [Author's Translation] (Management Interview, 2021)

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[6] An explanatory note on Menter Môn's role as both delivery and management partner is included in the introduction section here.

Previous iterations of this scheme envisaged young people being placed within businesses, to be mentored and trained on the job. However, due to the coronavirus pandemic, the decision was taken to approach the cohort as one group, and to support them as they developed their business plans. This **was thought to have worked well, and in hindsight, was a better design than that which was originally envisaged**.

The scheme was also designed to complement the Ffiws scheme run in the same locality, with those enrolled on Llwyddo'n Lleol encouraged to make use of the Ffiws equipment and technicians to develop prototypes and test products. Beneficiaries were also eligible, and many did receive support from the Arloesi Gwynedd Wledig's 'Amser i Fentro' pilot scheme.[7] This scheme was designed to support the individuals after the Llwyddo'n Lleol scheme. Amser i Fentro provided financial support to allow individuals to take time out of their work or education to further develop their businesses.

Delivery

Two rounds of Llwyddo'n Lleol were delivered, the first in 2020 to **14 beneficiaries**, and the second in 2021 to **eight beneficiaries**. In both instances, the scheme was delivered through the medium of Welsh. Welsh speaking business advisors were invited to hold weekly workshops with the beneficiaries. **The criteria for the second cohort was narrowed to seek to attract University students who had remained home due to lockdown regulations**.

As the scheme sought to showcase young people starting businesses in the area as well as providing direct support to individuals, the application and selection process involved consideration of the individuals' ability or potential to be a spokesperson or role model. Management staff spoke of the need to get to know the applicants as well as considering their formal applications.

The beneficiaries who were interviewed all suggested that the application process was straightforward. Most from the first cohort became aware of the programme through social media and posts by the scheme manager. While some raised concerns in relation to regular payment schedules, most were generally satisfied with the management of the scheme.

Impact

All beneficiaries completed the scheme. Early indication shows that out of the 22 young people who participated, 14 have either started their businesses or are about to start and seven others were still developing their plans and ideas. The beneficiaries themselves noted that the cohort was still in touch regularly through WhatsApp groups, **sharing ideas, good practice and promoting each other's businesses**.

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[7] 'Amser i Fentro' already existed, supported through the Arolesi Gwynedd Wledig programme. Llwyddo'n Lleol wasn't designed to complement or align with 'Amser i Fentro', but in hindsight, management personnel came to appreciate the alignment and the value of a range of grants that could combine to support businesses. The ability to support the follow-on, and importantly, to give time for Llwyddo'n Lleol applicants to invest in developing and effectively launching their business idea (developed through Llwyddo'n Lleol), was an effective model that may, in the view of management staff, have ensured that more businesses were ultimately started.

All beneficiaries interviewed felt that they had **developed their business management skills and knowledge**. The beneficiaries noted that the scheme had provided them with access to experts in a range of fields, from marketing and branding to financial management, customer relations and legal aspects.

The beneficiaries interviewed were also particularly positive in relation to their experiences and the impact that the scheme had upon themselves personally, and their businesses. On a personal level, beneficiaries frequently spoke of **developing their soft skills**, particularly their **confidence** in relation to **online and social media-based marketing**. While increasing skills and knowledge would be expected to lead to an increase in confidence, the beneficiaries noted that the **weekly challenges did more to develop their confidence and willingness to engage with clients over social media**.

> 'I've been really lucky to gain so much confidence through the scheme… I would never have put videos of myself up on social [promoting my business] were it not for this. A lot of clients have heard about me through the videos.' [Author's Translation] (Beneficiary Interview, 2021)

> 'Skills definitely. Communication and presentation skills, I don't think I'd have been able to give presentations without this. But also doing the accounts and the paperwork, double practical side of things. Confidence as well. I don't treat this as a hobby anymore it's a business now. I'm rebranding and I'm putting more focus on the design. I've got the confidence to do that now.' [Author's Translation] (Beneficiary Interview, 2021)

The beneficiaries interviewed also felt that the scheme had a particularly **positive impact on their businesses**. All noted that through the challenges, they had been through the process of **developing their businesses, products and services** but also had communicated with **new clients and increased the awareness of their businesses**. Beneficiaries also noted that the skills and knowledge that they had develop through the weekly sessions also served them well during the initial and foundational stages of establishing their businesses.

Beneficiaries drew particular attention to the **growth in clients**, **diversification of their services and products**, **better marketing and branding** and consequently **increased turnover** that had resulted from the changes implemented.

> 'I've expanded the business and the turnover. After relying on craft fairs and making £40 here but paying £10 for the stall, now I'm making about £300 month because of all the new services that I'm offering and the marketing.' [Author's Translation] (Beneficiary Interview, 2021)

The beneficiaries interviewed were all first language Welsh speakers and noted that **they had always intended to remain and live in the area**. One noted that she had to travel outside of the area for her job, but that the progress she was making with her own business had enabled her to leave the job and find a part time job closer to home to be able to focus more on her own business.

The beneficiaries reported having a **wide audience to the blog posts and social media posts** documenting their progress, **particularly from their peers and other young people**. Beneficiaries felt that although they had always intended to remain in the area, other young people were taking note of the possibilities that the programme was exhibiting, i.e. that **it was possible to remain in the area and start a business**.

> 'As part of this but also through the Cymorth i Fentro [scheme], we were asked to try and inspire young people and convince them it was possible to start a business, so I've been giving a food presentations in youth clubs, virtually of course. Virtual chats really, and two… It's just opened their eyes to the to the opportunities out there… And the response was really good in the youth clubs… There was a good response as well to the fact that I was running this business through the Welsh language. I think they were surprised that I could run the business in Welsh and didn't have to do everything through English first but could still reach people and make it work.' [Author's Translation] (Management Interview, 2021)

Everyone interviewed noted that the **support had been instrumental in the development of their businesses**. All felt they would **not have made such progress**, and certainly not as quickly **without the skills and knowledge that they did acquire through the scheme**, but also through the challenges and the work that they were required to do.

The scheme appears to have **added value to and benefited from other schemes** that were being funded as part of the Arfor programme. For example, management staff noted that beneficiaries were able to make use of the Ffiws workspaces and equipment to develop prototypes and product ideas. Beneficiaries also noted that they had been encouraged to and had successfully applied for support through Arloesi Gwynedd Wledig's LEADER scheme, 'Amser i Fentro'. This scheme effectively paid for the individuals to spend a further one day per week working on the development of their businesses and had enabled beneficiaries to continue developing their businesses without the risk of leaving their employment and losing their main source of income.

> 'I've also had support from Amser i Fentro [sic]. So I've had more time and I effectively get paid to work on the business for one day a week. That's just increased my capacity but also my confidence to go along with this as well as the financial support of course. It keeps the momentum going, the momentum that you get from Llwyddo'n Lleol continue because of this.' [Author's Translation] (Beneficiary Interview, 2021)

As with other schemes within the Arfor programme, businesses and beneficiaries would be directed to wider support services available, in turn helping to promote and encourage engagement with the wider support offered by the Welsh Government. Beneficiaries noted having been directed to and encouraged to engage with the Helo Blod service for example. The young people suggested **they would not have done so otherwise** and that they were now making regular use of the service. One noted that she was not particularly confident in her Welsh language writing skills, but that the service had given her the confidence to offer all her paperwork through the medium of Welsh to her clients.

> 'Maybe they'd have done that [produce materials bilingually] anyway, but through Llwyddo'n Lleol, they have to get that support from Helo Blod. We educate them about the value of the language and including it in their business. Some have been in two minds about a bilingual website, but after the support they realised the value of it, and they do it.' [Author's Translation] (Management Interview, 2021)

Conclusions

The Llwyddo'n Lleol scheme is relatively unique in that it not only seeks to support individuals to develop and established their businesses, but also aims to use those individuals as role models, promoting the idea that young people can stay, live and start their own businesses within the Arfor area. The scheme seeks to address one of the core challenges of the area, namely the young people migrating to other parts of the UK.

The data available on the programme and its impact is limited and largely subjective in its nature. Nonetheless, both management staff and beneficiaries suggest that it is having the impact that it was designed to have. Firstly, the **individuals and businesses being supported** all report having **benefited greatly from the scheme**. Individuals are **developing the skills, knowledge and the confidence** that enable them to develop and establish their businesses locally. The businesses themselves exhibit more objective signs of success such as an **expanding client base** and **increased turnover** since the support.

Although less conclusive, and likely only observable in the longer term, beneficiaries and management staff feel that by documenting their journeys, the cohorts have **raised the profile of young people starting and running their own businesses** among their peers and young people generally. The promotional work undertaken through the Bwrlwm ARFOR scheme would later complement these efforts by showcasing case studies. Beneficiaries suggested that they were having an impact upon young people although there is no data that enables an examination of this impact.

Nonetheless, the scheme has helped create and present an alternative discourse to that which suggests that young people must leave the area in order to find work. The 22 individuals who have benefited from this scheme have presented their own stories of staying in the local area and successfully establishing a business either as a full-time job or as a means of supplementing their income.

Integration with wider schemes have also added value to Llwyddo'n Lleol. The Ffiws, Llwyddo'n Lleol and Amser i Fentro schemes combine to give young people and business start-ups a considerable advantage during the period of establishment. The other two schemes enable beneficiaries of this scheme to access specialist equipment, develop prototypes and ideas and also to maintain a degree of momentum as they establish and develop their business without the risk of losing their established income stream.

2.4 Ffiws/Gofod Creu

Gofod Creu was a scheme funded through the Arfor programme by Gwynedd Council. The concept mirrors international examples, where collaborative workspaces are established for making, learning and exploring using specialist equipment. The scheme offered opportunities for businesses to explore the use of specialist equipment, ultimately to support and encourage growth and innovation. Two spaces in Gwynedd, branded as 'Ffiws', were developed through a partnership between Menter Môn and MSparc. Though not a core aim, this also presented an opportunity for council staff to make alternative use of high street premises.

The first space was located on Porthmadog's High Street, offering access and support to use a 3D printer, laser cutter, heat press, mug press, vinyl cutter and other specialist equipment. The technicians offered support to any individuals to use the equipment to develop products and prototypes, as well as offering workshops and training sessions. A second space was planned for Nefyn Business Park, but due to the coronavirus pandemic, was not progressed.

No monitoring data is available for the spaces and their use, though management staff are aware of at least 9 businesses that have started following their engagement with the spaces.[8] Staff noted in interviews that the interest was initially high, both in using the equipment and in the workshops and training offered. The spaces were frequently used by the general public, local businesses and start-ups, including Llwyddo'n Lleol participants. There are also instances of individuals who have successfully sought funding from the Cymorth i Fentro scheme to further develop their products and business following an initial engagement with Ffiws.

> '[Name redacted] came to Ffiws to learn more about the CNC machine and to find out if it was possible to use it to make a beehive. After a chat with [name redacted] the technician… he was confident a CNC machine would help his business by allowing him to make more beehives in less time. He is now in the process of looking to buy a CNC machine for the business… has made an application to Arfor's Support for Enterprise fund and has been successful in the first round. He has also been successful in securing a business unit in Harlech where the production work will happen. He said Ffiws helped him light the spark and was very grateful to Ffiws for giving him the opportunity to try the high-tech equipment available there.' (Ffiws Case Study, 2021)

Ffiws plays a supporting role, **adding value to wider business support services** as well as serving the community. It was effectively integrated with wider Arfor schemes, and the space will be funded for an additional year through the LEADER scheme. Staff also noted the importance of being able to access specialist equipment and expertise locally, if people are to establish businesses, work and live locally.

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[8] There is no direct, causal link that can be evidenced. But the spaces are being used by individuals who later go on to start businesses.

'Ffiws doesn't solve any challenge, but it helps businesses who come to us with ideas for a product that needs developing. It helped those who were with Llwyddo'n Lleol, and because of that we're looking at creating creative spaces for artists. It's about the local economy and a cyclical economy, if we want people to live and to work within 20 minutes [of their home], well Llwyddo'n Lleol has proved that that's possible especially when there are things like Ffiws to support them.' [Author's Translation] (Management Interview, 2021)

2.5 Cymunedau Mentrus

The Cymunedau Mentrus scheme sought to support pilot programmes led by the local community that support and develop the foundational economy alongside local supply chains, local employment and increasing the amount of money brought into and retained within communities. Applicants were to demonstrate commitment and benefit to the local community. The scheme was designed to work with three projects, and social businesses were identified as a means by which the aims could be achieved, but also due to the management staff's wider strategic interest in expanding their engagement with such organisations. Alongside supporting the three projects and communities, it was hoped that the work would generate insight into how to create employment locally.

Ultimately, the scheme engaged with three social enterprises, all located in Gwynedd. Menter y Plu is a social enterprise started by buying and operating a pub in Llanystumdwy. Pum Plwy Penllyn operates in the Bala area, letting and renting meeting rooms and offices. Partneriaeth Ogwen, meanwhile, provides clerking services for the local Community Councils; develop community, economic and environmental regeneration projects; manage properties and develop community asset transfer projects; and support projects that create a healthy, vibrant and sustainable community.

Originally, development officers were expected to be employed directly through the grant. These officers would then expand the reach and activity of the organisation. In all three instances however, **due to the impact of the pandemic, plans were reviewed and changed.** Ultimately, the organisations sought to develop either their digital or physical infrastructure. As a result of these changes, two of the social enterprises undertook physical improvements to their assets while a third used the grant funding to improve and develop a website and to employ a project development and marketing officer.

Application and design

Employees of the three enterprises were interviewed. These suggested that personal contact and relationships with management and delivery staff helped them to source information about the grant and through the application process itself. A few noted that the application process was challenging, mainly due to the amount of information that had to be provided and the tight time scales involved.

Delivery

The coronavirus pandemic has impacted all three enterprises and the extent to which they can evidence any impact to date. The two enterprises that undertook physical improvements were aware that the office accommodation that had been developed and renovated with the grant funding would not be operational or be able to draw revenue until lockdown and social distancing measures had been relaxed.

Once the grants were approved, however, management staff noted that the enterprises themselves were experienced and skilled enough to manage the projects themselves. The enterprises were familiar with the requirements of public funding, and the need to monitor activity and demonstrate impact, and were able to report back to the management staff effectively.

> 'As for Cymunedau Mentrus, it's themselves. That's probably because of the type of communities they are and the enterprises that they are. The impact of Cymunedau Mentrus has been wider within the community. The results have been fantastic but again maybe that's because of who we've been working with.' [Author's Translation] (Management Interview, 2021)

Impact

The two enterprises that developed their stock and buildings nonetheless **felt confident** that the developments **would lead to both to an increase in revenue and ultimately to the creation of new jobs**. The third enterprise, which had developed an online presence and shop, **could already identify and quantify new sources of income** and were confident that they had, as a result of the grant, **expanded their customer base**.

> 'We've just got new services that have been created and we've increased from 6 to 13 businesses using the centre [and using the new offices].' [Author's Translation] (Cymunedau Mentrus Interview, 2021)

Management staff noted that the organisations also helped in delivering support to communities during the pandemic. This, management staff felt, was a reflection of their organisations' ethos and commitment to their communities. Indeed, both management and the enterprise staff felt that the social enterprises were very suitable candidates to receive support from the programme. These interviewees suggested that social enterprises were likely to be embedded in their local economies and communities and offer more direct benefit to the local residents with profits kept and spent locally. These individuals also felt that the social enterprises were a means of multiplying and magnifying the investment of the programme, and that through the employment of one development officer for example, the social enterprises could expand the level of support.

The developments have not led directly to an increase in the use of the Welsh language within the business or in its communication with clients other than marketing materials and the website. The enterprises all noted however, that they operated entirely through the medium of Welsh before the grant.

Its language impact has been through the employment that has been generated as a result of the improvements alongside the wider services available in Welsh. Local tradespeople were also employed to make physical improvements and any jobs created are advertised among local residents, with the ability to speak Welsh highly desirable or essential.

The LA continues to work closely with the three social enterprises in question. These social enterprises have 'spin-off' businesses, more as a result of the grant, that employ local residents and ensure that the money spent on these products and services is kept and spent locally. The experiences and knowledge of the enterprise staff will support the local authorities' wider efforts to generate an understanding of the foundational economy and its impact and value to local communities.

Conclusions

The direct impact of the scheme is somewhat limited and difficult to evidence at this stage. The businesses themselves were **confident of a positive impact upon their** businesses, leading to **more clients and customers**, **diversification of services and products**, and a **higher turnover**. This would lead to the businesses being able to **employ more people locally, with an emphasis on Welsh language skills**. Only further monitoring and evaluation can corroborate and validate these anticipated impacts.

However, more broadly, the scheme has revealed, and indeed expanded the capacity of **several key organisations within the communities in question, which are aligned with identical goals to the Arfor programme; to create employment that has a beneficial impact upon the Welsh language**. Specifically, they seek to ensure that businesses recycle and keep money within local communities whilst offering employment opportunities for Welsh speakers. **This suggests that a wider pool of social capital exists within the communities that can assist in the pursuit of Arfor's broader aims.**

2.6 Bwrlwm Arfor

Initially, all four counties were keen to see how each county could further develop the welcome packs that had been created some time ago, guiding people who were new into the area on where to go for Welsh services. It was decided to look at a new idea of promoting businesses who used the Welsh Language as an integral part of their business and show the benefits this had for them, their staff and their communities. Bwrlwm ARFOR was created as a platform for case studies; podcasts; videos; workshops on using the Welsh Language in Business www.bwrlwmarfor.cymru. Examples of Bwrlwm Arfor's content are included in the Executive Summary.

3 Process Evaluation

3.1 Project rationale

There was **widespread agreement with the rationale** of the programme, and that creating more, and better jobs was a means by which economic intervention could support the language. Indeed, the majority of the schemes developed and delivered as part of Arfor were aimed at supporting small and micro businesses to create more jobs. Management, stakeholders and businesses personnel interviewed agreed that the direct business grants in particular were a means of directly supporting businesses and of indirectly creating opportunities for Welsh speakers to work and live in the area.

However, a few, particularly management staff and stakeholders, noted that the focus upon creating jobs could only, and probably **should only be a component of a wider approach**. This wider approach should include improving the range of determinants of the **quality of life** of living within rural areas, as well as **addressing the negative narrative concerning living and working locall**y. Management staff noted that the process of developing and delivering the programme had informed their understanding and perceptions in this regard.

Management staff and stakeholders noted that this had been **a successful pilot**, that many key lessons had been learned, and that some of the successes could and should be rolled out or mainstreamed across for local authorities. Many also noted that the **rationale of piloting and trialling new approaches**, funding innovation and encouraging businesses to come forward with new ideas, **was still valid**. There was a widespread belief that there was **still a justification to continue with an Arfor-like programme into the future,** i.e. the problem at the heart of the programme still existed and those same solutions had been identified, although all four local authorities were still a long way from resolving their challenges in relation to the economy in the Welsh language.

Management staff and stakeholders suggested that the programme had **succeeded in identifying ways to both create jobs and to support the Welsh language,** but the programme was also thought to have succeeded in trailing and developing **proof of concept** for less direct but arguably **more effective ways of combating the negative narrative around living, working** and not leaving the area. Management staff and stakeholders drew particular attention to the Llwyddo'n Lleol programme and the way in which it had encouraged young people to lead and own a campaign **stressing the benefits of staying in the area** and **starting businesses locally**.[9] This in turn, almost organically it was felt, **had a positive impact on both the resilience of the local community and the Welsh language**.

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[9] Other ideas were proposed at the design stage that were not delivered. These ideas suggest that the programme management and design staff were looking to develop more innovative approaches that did indeed seek to address the problem in a more nuanced fashion. One of these ideas included the Academi Byw a Bod, which would have employed 20 students over a period of 10 weeks, although those 50 working days could be spread over a longer time period, i.e. 2 days per week for 25 weeks. The programme would have targeted young people between 15 and 29 years old who also fell into a group that, on average, were more likely to leave the area. The students would be tasked with raising the profile of employment opportunities in the area, particularly for Welsh speakers among their peers. This programme bears some resemblance to the Llwyddo'n Lleol scheme but was explicitly focused on the promotion of job opportunities.

Promoting the idea of or supporting former residents to return to the area was not an explicit objective for any of the schemes. However, management staff noted that such efforts would be in keeping with the rationale of the programme and a form of economic intervention that would almost certainly have a positive impact upon the Welsh language. Though none of the schemes sought to encourage people to return to the Arfor area, management, stakeholders and delivery partners where **already developing ideas and schemes that would do so**.

> 'To be honest, I'm not sure that anybody's come back because that was never how we pitched it. If we'd said, 'come back to Gwynedd, we'll give you a grant', it wouldn't have worked. There's a lot more that somebody goes through before they up sticks and come back. But Msparc's campaign, 'dowch yn ôl' [come back] is interesting. If we had some form of Arfor 2, we'd make much more of that campaign, and we look more at the agenda I'm trying to create projects around that. That's very interesting, and we should have made more of that.' [Author's Translation] (Management Interview, 2021)

Some stakeholders held a different understanding of Arfor's rationale, however. These stakeholders suggested that Arfor should essentially develop into an economic region in time, with development being managed by a body that sat across all four local authorities. These stakeholders also felt that Arfor should be looking at developing transport and digital infrastructure or intervention within local labour markets and developing the economic cohesion of the region. **This is not such a programme**. This programme was designed to be **small in its scale**, targeting relatively **small amounts of money** at **specific businesses**. This is a **pilot programme** that explores **what can work at an individual, business level** and, if possible, what could be mainstreamed across all four local authorities.

Better Jobs?

Stakeholders and management staff have developed the thinking around the nature of the problem facing the four local authorities as well as the most suitable solutions and approaches. A central question is whether the creation of more and better jobs is suitable as the sole objective. Although management staff and stakeholders frequently agreed that the creation of more jobs was a suitable target and aim, **scepticism is expressed** in relation to **whether this should be the only objective**, but also in relation to **what a "better" job was** and how it could be measured.

The programme had stimulated critical investigation of the concept of a "good job" in relation to the aims of the programme, the economic prosperity, and the linguistic vitality of the area. These discussions could help further refine the specific aims, the explicit targets and the impact of any future efforts that seek to develop both the economy and linguistic vitality.

> 'Creating more and better jobs is hard to define. "Better" for the individual could simply mean that they can stay within their square mile to live and work. Maybe it's about higher wages. A better job by now, since COVID, might mean that you have a better quality of life. So, in terms of better jobs, I'm not sure I'd use that as an objective again. Some businesses have developed or have had extensions that will help things. But the other thing is the "feel good" factor in these schemes, it's so important on the High Street that we shout out bilingually. Things like that were a quick win for the programme, pretty up signs work, and it creates a warm feeling within a town. Maybe it doesn't create jobs, but it certainly contributes to the place.' [Author's Translation] (Management Interview, 2021)

Younger People

Interestingly, the data generated by this evaluation does not offer much insight into what type of job would constitute a "better" job, which would consequently convince young people to remain in the area. The young people who have been employed as a result of or in relation to some of the schemes have found jobs in a range of sectors involving a variety of responsibilities. However, the popularity of start-up grants with younger people may suggest that **a lack of access to finance is a barrier to younger people starting businesses in the area**.

As noted, the Llwyddo'n Lleol scheme has sought also to engage with the narrative concerning young people and the need to leave the area to find suitable employment. However, only limited data and information is available at this stage in relation to its impact. The data that is available does suggest that those who participated directly in the scheme had all remained in the area, and 21 of the 22 were continuing to develop their businesses either as a primary source of employment or as a means of supplementing their income. **In this direct sense, the programme has been successful**. However, it is more difficult to gauge the impact that the wider blocking and social media activities of these individuals had upon their peers. It would be ambitious to expect a significant impact upon outmigration data for both local authorities (Ynys Môn and Gwynedd). Nonetheless, management staff who aim to continue to monitor the impact of these schemes may wish to draw upon the future of these individuals that took part in the scheme in relation to the impact upon their peers.

Overlap with or adding value to other support

Most of the direct grants to businesses encouraged or even necessitated engagement with wider services such as Business Wales's Helo Blod service. Stakeholders and management staff in interviews and the workshop discussed the extent to which this constituted a duplication of the work of wider support services. Some stakeholders and staff suggested, for example, that the grants promoted service and recruited businesses, in turn **duplicating some of the work that they felt the Helo Blod service should be doing**. Others noted, however, that the more general support and advice provided to businesses as they develop their applications and delivered what was being funded **overlapped to some extent with the work of the Welsh language commissioner's** business support team, Hybu. This was particularly relevant to those businesses that went through the process being managed by Menter Mon, who could draw on their wider experience and network to support businesses in this regard.

To some extent, this suggests that **the programme could have been better integrated with the wider support services at the design stage**. However, this view should be tempered by the fact that the design stage was particularly short, and the lack of integration may likely be a consequence of the haste in which the programme was rolled out. Indeed, some management staff also noted that, in hindsight, the wider Welsh language support services for businesses would have benefited from being involved in the programme.

> 'If we were to restart, I would have brought the Welsh Language Commissioner in to help with the Welsh language side of it [the direct grants to businesses]. That's not what it's all about, it's about a lot more than that. But it is also about trying to raise awareness of what the Welsh language can offer to businesses. But as with everything, you never have enough time to plan and these projects aren't on a shelf ready to go so you have to go with what you have don't you.' [Author's Translation] (Management Interview, 2021)
>
> 'Maybe we could have done more of that. Promote Welsh lessons to businesses as part of the package. If we'd been able to sort some form of partnership with the Welsh language commissioner, it would have happened more naturally I think.' [Author's Translation] (Management Interview, 2021)

However, some stakeholders and management staff argued that the Business Grants had, in fact, **added value to the Helo Blod and the Welsh Language Commissioners business support service**. These contributors suggested that, firstly, the programme had ensured more, and more substantive engagement with these services. These comments were echoed by the businesses themselves when interviewed, who noted the value of engaging with these services and that they would not have considered accessing these services were they not required to do so by the grant. In **requiring businesses to outline their plans** for the development of Welsh language services as part of the grant application, for example, for many businesses this began **the process of engaging substantively with the issue**.

Management staff were also of the view that, because of the nature of the relationship with the businesses and the constant dialogue that was had, the **businesses saw the development of bilingual and Welsh language services more as a process rather than a one-off event**. Management staff felt that they could explain and convey the benefits of small-scale interventions and changes and also link them to the wider journey that a business could undertake. This, management staff felt, was different to the very specific and limited engagement with the Helo Blod service, for example. Ultimately, these management personnel and stakeholders felt that there was some **learning and good practise that could and should be shared with wider support services**.

3.2 Design

Gwynedd and Ynys Môn took a different approach to Ceredigion and Carmarthenshire. The latter focussed entirely upon the delivery of direct grants to businesses, whilst the northern counties sought to trial a wider range of schemes. Menter Môn are also effectively subcontracted to deliver some schemes such as Llwyddo'n Lleol and the administration of Language and Business Grants. The short period available to design programmes to operate across the four LAs, the differing economic priorities of the four authorities, the disruption caused by the pandemic and the desire to trial a range of schemes were frequently identified as the reasons for this variety in schemes. Management personnel noted that this had been a strength of the programme's design, but also expressed **regret that there had not been an opportunity to develop a scheme that operated throughout the area**.

Nonetheless, the Llwyddo'n Lleol scheme was recognised as a success and both Ceredigion and Carmarthenshire have consequently sought to identify means of financing its rollout within their areas in the future; a notable instance of **a successful pilot being rolled out on a wider and larger scale**.

> 'The only thing, despite running grant funds ourselves, I would've liked to have seen was more work across the four counties. But because of a lack of time, and the four counties focused on running their own schemes, and the pandemic has restricted so much. If we were to go on to something new [i.e. further work in this are], I'd like to do something together. But in Carmarthenshire, and in Ceredigion here, we're looking to run Llwyddo'n Lleol [through other funding streams.'] [Author's Translation] (Management Interview, 2021)

The Llwyddo'n Lleol and Ffiws programmes existed at least as ideas before Arfor, though Menter Môn had experienced difficulties in sourcing funding for them. Consequently, Arfor provided **a platform any means by which existing ideas could be developed and trialled**. In this regard, the **relationship between the northern local authorities and Menter Mon was key**, and enabled Ynys Môn and Gwynedd to draw on wider expertise and thinking in the realm of economic and language support in a way the southern counties did not. Management staff felt that this had enabled the programme to offer more variety and a greater range of support in the North as well as trialling innovative ideas that could potentially do more than simply support individual businesses.

3.3 Delivery

Marketing and promotion

The programme management noted that there were no efforts to publicise Arfor as a single or homogenous programme. This was in part due to the variety of grants and programmes available across the four local authorities. This made the promotion of a consistent message particularly difficult and any efforts to draw attention to what may have been available in some local authorities may only have served to cause confusion in others. Moreover, management staff noted that the Arfor brand was still being developed while applications were being received for the grants. It was only near the end of the programme period that management staff felt they had a consistent brand with which to promote and market the programme. Staff noted that if a follow-up programme was approved and funded, **that brand was now established and somewhat recognised**.

The individual local authorities did seek to publicise the grants and support available, and staff felt that efforts were sufficient. Due to the coronavirus pandemic and the need to avoid conflicting messages or confusing the key public health messaging coming from the Local Authority, efforts at marketing and promoting the support were somewhat limited. Nonetheless, staff noted that the number of applications received was satisfactory as were the quality of those applications.

> 'It's an interesting one because I don't think we ever made the decision to go out and promote Arfor. Every Local Authority tried to raise awareness of their own individual projects because Arfor means different things to different people. If you promote it, it's hard to control people's expectations. If you promote it as a whole I mean, so the right thing was to promote it by Local Authority.' [Author's Translation] (Management Interview, 2021)

A few local authorities, most notably Carmarthenshire and Ceredigion, felt that the number of applications dwindled during 2020 and as the lockdown took effect. **Staff felt that businesses were closing, and that owners or directors were focusing on survival rather than development and innovation**. However, as restrictions started to be lifted near the autumn of 2020, more applications were forthcoming, including those concerning plans to develop businesses and new services and products. Staff working with the Ynys Môn or Gwynedd schemes were unexpectedly surprised at the number of businesses who were looking for support to develop. These management staff felt that promotion and marketing was never really a problem for the programme; there was a clear appetite.

Applications and beneficiaries

Some stakeholders and management staff suggested that the programme had attracted businesses that were primarily Welsh speaking, and businesses that were already committed to developing their Welsh language or bilingual services and products, regardless of support. The exceptions tended to be businesses that had an active interest in developing their Welsh language capacity and services.

These would commonly go on to argue that **Arfor should ideally be targeting businesses and individuals that have not developed their Welsh language services**, or who are not as advanced in their thinking in relation to the language development business.

Management staff expressed some regret that the programme **had not succeeded in engaging businesses that had not previously considered developing the Welsh language services and products**. Several staff members noted, however, that engaging these would have necessitated an extensive engagement plan. Moreover, a few noted that promoting the benefits of the Welsh language to businesses was **not the aim of the programme**.

> 'About 90% of the businesses that we've supported are Welsh language businesses anyway. There are a few who are not Welsh language, but even they see the benefits [of developing which language services and products]. Should we have targeted non-Welsh language businesses so that we could have more influence? We supported [business name redacted], and there's a big discussion about the status of the company. But maybe its businesses like that that you need to target if you're going to have an influence.' [Author's Translation] (Management Interview, 2021)

Staff also noted that there was a logic to supporting such businesses. These were the businesses that had been proactive in developing their Welsh language services and products, in many cases over several years. Management staff felt that there was a logic to supporting and rewarding these businesses and **recognising them as leaders or beacons in the field**. Staff also felt that the support would give recognition and **value to the use of the language in business**.

Importantly, the impact that this scheme has had upon businesses and individuals must be understood in this context. **This programme has primarily sought to benefit businesses that can be considered "allies" to the broader goal of expanding the use of the Welsh language within business**. It has not sought to evangelise in relation to the benefits of using the Welsh language. It has only sought to reward those that do or wish to develop their capacity and offer.

Furthermore, and a possible explanation for the nature of the applicants and beneficiaries, it was common for businesses to note that they had learned of the programme through personal contacts and word of mouth and social media. The management staff were themselves advocates for the programme, sharing as widely as possible on social media.

Looking to the future, and any extension of the programme therefore, careful consideration should be made of the marketing and branding of Arfor. There is a risk that as a grant aimed ultimately at benefiting the Welsh language is seen as being irrelevant to businesses with limited or no Welsh language services or product. Seeking to promote the benefits of using the Welsh language within business, however, risks overlapping with the role of the Welsh Language Commissioner's responsibilities.

Improved social capital

Social capital refers to the networks and relationships between people and organisations within society and communities. These ties and relationships are what enable societies to function and achieve common goals. Though not explicitly explored through research tools, and therefore remains a tentative finding at this point, there was some suggestion that the Arfor programme has enhanced social capital around the Welsh language.

The businesses interviewed all expressed support for the general rationale of the programme whilst the Cymunedau Mentrus scheme has expanded the capacity and reach of social businesses that pursue similar aims. Stakeholders suggested that wider support existed within the area to help pursue the core objectives of economic development that was supportive of the language. Stakeholders also identified other potential delivery partners, beyond local or national government, which had not been engaged during the lifetime of Arfor.

Arfor appears to have acted as a hub, around which a coalition of 'allies' have or could have been drawn (and enticed through direct funding). This suggests that there may be a network of organisations and individuals interested in pursuing the common purpose of developing economic interventions that benefit the language, and a programme such as Arfor can lead and progress this through its work. Menter Môn's involvement both as a delivery and management partner exemplifies the type of wider support and involvement that can be stimulated and fostered through the Arfor model. Indeed, their involvement has enabled the latter company to pilot and develop their own innovative solutions to the challenges facing rural Wales and the Welsh language, and to add value and knowledge to their wider work.

The implications of this largely concern the future and any potential expansion or extension of the programme. If Arfor is to be continued in some form, then its role as a hub, but also the potential allies and delivery partners, should be a consideration in its evolving design and delivery model.

3.4 Management

Model of delivery

From the perspective of the businesses, a key benefit of delivering the programme through the local authorities appears to have been the **efficient application process**. This is particularly relevant to the direct grants to businesses. This was widely believed to be due to the experience of council staff members in administering grants. By and large, processes exist and staff, when administering grants, are aware of the necessary steps to ensure accountability. Moreover, given the tight time limits and the need to turn grants around quickly, this would seem to be a particular strength of the model.

However, management staff in all four local authorities noted that the **administrative burden was considerably heavier than anticipated** or planned for, particularly in relation to the direct grants to businesses. Staff frequently noted that management and delivery personnel were required to work longer than originally planned, and that much more could have been achieved with more members of staff.

The decision to effectively outsource the management of some grants to Menter Môn was, at least in part, an attempt to alleviate the administrative burden, although Menter Môn were also considered to have a particular knowledge and skill set that would enable them to administer the grants more effectively as well as link to wider sources of support.

> 'There needs to be more staff resource. Arfor is a lot of work. It takes more time to monitor every Local Authority and individual projects [than originally anticipated]. A lot of time has gone in on the project management and administration. I don't know if that's because of the model of delivery, I mean, by doing it through four local authorities you learn a lot more. If you only had one organisation responsible for it, I don't think the learning would have been as good.' [Author's Translation] (Management Interview, 2021)

A few stakeholders suggested that an alternative delivery model could have alleviated some of this administrative burden. Local authorities were sometimes considered to be bureaucratic and process heavy, although this was not a view shared by all stakeholders nor the majority of the businesses interviewed. Nonetheless, some did feel that an independent or a separate body would have been able to administer the whole programme more effectively than four individual local authorities.

Some stakeholders were also disappointed that **opportunities to reach out to key institutions outside the local authorities, and to approach them as delivery partners, were not taken**. Some stakeholders suggested that Yr Egin could have played a more central role either in promoting the grants for businesses, or as a delivery partner. These suggested that there was a potential benefit of coordinating support for the creative industry through or with Yr Egin, whilst the Food Centre Wales at Horeb could play a similar role in supporting or delivering support to businesses and start-ups in the food and drinks sector.

Staff frequently noted that the **lack time for the design and development of schemes** during the earlier stages of the programme limited the extent to which new and innovative partnerships or schemes could be developed. However, staff in all four Local Authorities noted that **the universities within the area have a potential to support the delivery of Arfor programmes** and, if an extension or continuation is considered, then these institutions should be considered as delivery partners.

Timeline

The design of a strategic plan was outsourced in the summer of 2019; however, decisions had already been made in relation to the type of support and the schemes that would be offered. Indeed, the call for applications to some of the direct grants to businesses were opened in the summer of 2019, as the external contractor was engaged to develop the strategic plan. As a result of which, the strategic plan was never likely to inform the delivery of the programme, and consequently sought to focus upon the wider strategic picture and examining the evidence linking the economy and the Welsh language (see 'What is Arfor' in Chapter 1).

Most staff members suggested that a longer design and development period would have enabled more innovative schemes to have been included in the programme. **The short timeline was widely thought to have been a weakness of the programme**, though outside the control of its Board or the management.

3.5 Pandemic and other external impact

It is clear that the **coronavirus pandemic has had a significant impact on the programme**, it's delivery and **any attempts to evidence its impact**. The pandemic has led to widespread business closures due to lockdown measures, has severely limited the extent to which businesses can engage with customers and the community and, in many stakeholders and management personnel's view, has impacted the mentality of businesses and business owners. Businesses and business owners are widely thought to have been **focused primarily on survival during the pandemic**, rather than focusing on business development. Some businesses have also amended their delivery in response to the pandemic and what was originally planned by some beneficiaries, was not necessarily what will be delivered.

Businesses and management personnel noted that the **impact** of the programme and the activities, products or services developed through the grant **will only be seen in the years to come**. This **increases the importance of continuing to monitor the businesses that have received grants,** the impact of the new products and services have had upon their turnover, the extent to which they have created new jobs and the impact upon the Welsh language. As well as the impact on specific businesses, the proof of concept for some schemes remains to be comprehensively evidenced.

Although the coronavirus pandemic posed many challenges and problems for both businesses and the programme management, many also identified opportunities. Particular attention was drawn to the fact that businesses, business owners and new businesses had been presented with an opportunity to consider, refine and develop their plans for the businesses. Arfor, in turn, presented the means by which those plans could be taken forward.

> 'I've been surprised at how many businesses want to develop and how many new businesses there are out there. I think this has been really positive [for Arfor]. Its allowed people to think and put time into developing ideas. Maybe that time to think is a real benefit and opportunity.' [Author's Translation] (Management Interview, 2021)

Broader issues have impacted the programme to some extent. Businesses and management staff noted that supplier delays were encountered as a result of Brexit.

3.6 Impact

The specific impact related to each of the schemes has been discussed in the relevant sections above. However, there was widespread agreement among businesses, stakeholders and management staff that the impact of the programme would not be felt in earnest for some years. Both the pandemic and the nature of the programme - funding the initial steps in a chain that it is hoped would lead to the creation of jobs - meant that the true impact was not measurable at this stage.

> 'Reporting on the impact has to come down the line. It's at least a year away, a year and a half. One of the things that I wanted to see most was jobs being created, then because of covid, safeguarding jobs, and that happened.' [Author's Translation] (Management Interview, 2021)

3.7 Partnership working

The **partnership working, sharing of good practice** and wider if informal familiarisation between the staff of the four local authorities was frequently hailed as **an important aspect of the programme**. Management staff frequently noted that the relationships and processes that had been begun for the purposes of delivering this programme would **likely continue into the future**. Moreover, some of the schemes that had been trialled and in operation in one or two of the local authorities have been identified as being suitable for wider roll out among the other local authorities.

Staff suggested that **key lessons have been learned** in relation to the management of grants, but also the wider understanding of the state, challenges and opportunities facing smaller micro businesses within the region, and the type of support that would enable those businesses to develop further and create more jobs.

The process of working with and indeed outsourcing of the delivery of the programme to partners suggests also that there is both **an appetite and capacity for the Arfor agenda to be developed and delivered by a range of actors**, not just government and local authorities. The two northern authorities have developed a very strong working relationship with Menter Môn, who are consequently developing their engagement with the southern counties by developing a Llwyddo'n Lleol for Ceredigion and Carmarthenshire.

This relationship is perceived to have been beneficial to both partners; Menter Môn have received the **financial backing needed to trial schemes that had been in development** for some years. The northern local authorities, meanwhile, have ensured that the programme has been delivered by a **partner with experience and expertise both in business development and developing the Welsh language in business**. Menter Môn are also able to support the Arfor schemes further by linking to their wider business and language support programmes.

These programmes have in turn **drawn funding and financial support from other sources** such as the LEADER programme and have enabled the **continuation of some of the schemes beyond the lifespan of Arfor**. Ffiws for example, will continue to have a presence in places like Porthmadog with technicians funded through the LEADER programme for at least another year.

> 'The positive thing with Menter Môn is that it's created a platform for us to move these forward and develop things further. That link through LEADER is more flexible, and although Welsh government were clear that Arfor couldn't support LEADER programmes, it has enabled us to continue funding some things. That relationship is really strong, and it continues. We could do more with other partners like Yr Egin or the food centre at Horeb, and I'd expect [any future iteration or continuation of Arfor] to do that because they are a good example of how to pursue the themes of Arfor and there are others; there are the universities, there is the Galeri in Caernarfon, there is the Llandrillo-Menai Group. We need to get the message out there and push that entrepreneurship agenda because there's a base this year to develop something across all four authorities.' [Author's Translation] (Management Interview, 2021)

Moreover, work with Menter Mon and M-SParc has demonstrated the appetite but also the range of ideas and capacity that exists among wider partners. The Arfor Programme has **begun the work of coordinating a coalition of organisations and partners committed to economic development that is of benefit to the Welsh language**. This, arguably, potentially represents a more **lasting and impactful legacy of the programme** if these organisations and partners continue their work in the field and / or are supported into the future.

Other partners and organisations that work with businesses to help develop bilingual products and services are also thought to have benefited, largely through exposure to new ways of working and engaging with businesses. Management staff feel that Arfor has worked in ways that are more effective than some Welsh Government support services, **revealing good practise and key lessons for these wider services**. As discussed previously, placing the development of Welsh language services and capacity at the heart of grant approval criteria has led to a **more substantive engagement with the support programmes** and a **fuller realisation of the potential of the Welsh language within business**. The funding available through the direct business grants encourage businesses to engage substantively with services such as Helo Blod, whereas normally their officer will be tasked with engaging business individually and convincing them to engage without a material incentive.

> 'It added value to things like Helo Blod. They've had so much buy-in. Helo Blod pay for an officer to go around businesses introducing the language and their services, which is fine. But through Arfor there's money available and it encourages businesses to go after that money, and through that they engage properly with Helo Blod. everybody who took part in the programme had to register with Business Wales.' [Author's Translation] (Management Interview, 2021)

3.8 Legacy and sustainability

The Arfor programme has sought to **trial business support schemes on a relatively small scale**. These pilots will not bring about significant change across the Arfor area but have identified key lessons and learning to inform future efforts to develop economic and business interventions that do not neglect, and indeed contribute to the viability of the Welsh language.

Arfor generates a direct impact most clearly through the projects that are developed and implemented. The theory is that **the economic and language impact of these projects would not be known if they had not been trialled/tested with Arfor support**, and **that logic is clear**. Llwyddo'n Lleol, Ffiws and even the direct grants were unlikely to have found funding through any other source and no data would have existed to demonstrate their capacity to support job creation, businesses and the local economy, as well as increasing the use of Welsh within the workplace, creating favourable conditions for further development of language capacity and services, as well as potentially increasing the numbers of Welsh speakers in the business community.

That impact is, however, unlikely to be significant beyond the individual business or community supported given the scale of the programme and type of projects supported. For the projects to have a significant impact **the learning must be shared**, and **schemes must be mainstreamed**.

Mainstreaming is only possible however if (a) there is an awareness amongst 'mainstream' policy and funders of the projects and their impact and (b) that mainstream funding is available to follow on from Arfor. These are the barriers/enablers of Arfor. A key task for Arfor and its staff in the post-Arfor period, or during any continuation or extension of the programme, will be to **promote good practice amongst and beyond the four participating LAs**. Moreover, for the impact to be felt beyond the very local or small scale, the key **successes of the programme must be mainstreamed** and **funding identified for their continuation**. In this regard, **the funding-dependent nature of the support may constitute a key weakness in the design**; without continued funding, the impact of the programme remains limited.

'Learning' is also identified as a critical outcome generated by the focus within Arfor on trialling and innovation as a priority. However, learning outcomes can only be achieved if there is an ongoing loop back to activities, and ideas can be refined and developed, drawing upon that learning. Specifically, the learning has to be captured and then shared. This 'loop' is an important aspect of the pilot or demonstrator funds.

4 Discussion and Lessons

4.1 Discussion of the outcomes

The Arfor programme has been a means by which four Local Authorities have trialled a number of business support schemes that also aim to have a beneficial impact upon the language. The rationale, that creating more, and better jobs can enable Welsh speakers to remain working and living in the Arfor area and contribute to the sustainability of the language in its "heartlands", is one that was shared by the majority of staff, stakeholders and beneficiaries. Ultimately, the programme has demonstrated and generated evidence of this happening on an individual level. Data explored in this report suggests that each individual scheme has been of benefit to businesses and expanded the provision, visibility and/or the capacity to use the Welsh language in business. These schemes, in a variety of ways, have also created jobs and enabled Welsh speakers to secure employment within the area, providing proof of concept. This section explores the learning from the whole programme, including the process of developing the interim report and the ongoing discussions with and amongst the management and delivery team throughout the programme's lifetime. The section discusses the findings in relation to the wider aims of Government strategy and efforts to develop economic interventions that are beneficial or supportive of the language.

4.2 The Impact

What impact has Arfor had upon businesses?

The impact of the direct grants to businesses upon businesses is relatively straightforward. The monitoring data projects that 154 businesses have been supported, 226 FTE jobs safeguarded, and 238 full time and 89 part time jobs have been created in part or entirely due to the support received. On average, the programme has safeguarded **1 FTE job for every £6,917.05 and 1 FTE has been created for every £5,288.79 spent**. These outcomes are largely related to the direct grants for businesses. However, the monitoring data only offers projected or planned for outcomes and subjective estimates. Further monitoring is required to validate the actual outcomes of the programme. This report has recommended that the management staff maintain their contact with these beneficiaries and continue to monitor the impact of the schemes.

Interviews with the businesses, however, suggest that the support has been of particular value. For established businesses, th**e support has enabled the development of services and products or new ways of working**. Importantly, and in relation to a key sub-question of the evaluation, these businesses consistently noted that such developments **would have been particularly difficult to secure without the Arfor grant**. The data suggests that small and micro businesses in the Arfor area experience **challenges in accessing finance and investment in order to fund key developments**. Businesses and management staff were generally confident that, in time, **these developments would ensure higher turnover and enable the recruitment of additional staff members**.

Data suggests that **new businesses**, often targeted by specific schemes such as the 'Grant Mentro' in Ceredigion or the Llwyddo'n Lleol programme in the two northern counties, have also **benefited greatly from the direct support**. Between the two schemes specifically targeting star-ups, the support has led to the **creation of 37 new businesses** during a trying economic climate.

The flexible support through the direct grants is considered instrumental in **enabling**, **particularly younger business owners**, **to access funding and investment**. Indeed, the data suggests that **younger business owners face additional challenges in accessing finance and investment for their businesses due to a lack of credit history or capital**. These **grants consequently fill a particular void** and, arguably, a market failure.

Moreover, the data suggests that some schemes are having a **wider impact on the communities**, the **young people** and even the **narratives around the economy** and starting businesses in the area. However, **these should be considered preliminary findings** and it should be noted that the **data and evidence is largely subjective**. Qualitative interviews with stakeholders, management staff and beneficiaries are inherently from those individuals' perspectives. A bias towards emphasising the successes is possible.

This is certainly not to invalidate the findings, only to draw attention to the possibility of **optimism bias** and the **preliminary nature of these findings**. This magnifies the importance of revisiting this programme, the individuals and businesses supported in the years to come to explore and collect more objective data in relation to the impact this programme has had.

Based on the learning from this programme, how can economic interventions contribute to the sustainability of the Welsh language in the Arfor area?

The Arfor programme has supported schemes that have contributed to the sustainability of the language in three different ways. Firstly, the direct grants to businesses attach a positive linkage to their funding conditions, i.e. in order for an application to be successful, the business must demonstrate and engage substantively with the development of language capacity and services. Grants are effectively structured to **embed language provision and development within businesses.**

This is done primarily through a relatively simple mechanism, by requiring applicants to present plans and score well in their submissions in relation to the Welsh language and its development within and by the business. By embedding language development within business planning, the grants have ensured **more substantive engagement with the agenda**, as well as **with wider government support services** such as Helo Blod. Ultimately, this leads to more, and more accessible Welsh language services and products, as well as the language becoming more visible amongst businesses. **This does not necessarily increase the numbers of Welsh speakers in an area**, but it does support communities and individuals to live their lives through the medium of Welsh. Moreover, the jobs created could, theoretically, be taken by local Welsh speaking residents or those who otherwise would have left the area.

Management staff, meanwhile, noted that the businesses themselves were living **examples and case studies of local residents succeeding without having to leave the area**. Key **businesses that championed the language had been recognised** alongside the **value of the language in business**. This was hoped, though not supported with data to date, to have a wider impact on the perceptions of the role of language in business.

The direct grants, therefore, whilst not directly increasing the number of Welsh speakers, did increase its use by businesses and provided a means by which the language can be used in the communities. The grants also offered employment to enable Welsh speakers to live in the area.

Secondly, **Llwyddo'n Lleol**, alongside supporting nascent businesses run by young people, sought to establish a positive discourse around young people remaining in the area and starting businesses. The young people supported have both **developed and in some cases established full time businesses** and have documented their journeys and **publicised the possibilities and options for young people wishing to remain in the area**. These stories directly challenge the notion that young people must leave the area to secure suitable employment. Only in time will it be possible to determine the impact of these stories upon their peers. Moreover, a key question remains; **will young people who are inspired by the stories require their own support programme, necessitating continued expenditure and investment in programmes such as Llwyddo'n Lleol?** The scheme, nonetheless, represents an economic intervention with valid economic outcomes, which also supports the sustainability of the language by challenging a damaging discourse that encourages out-migration.

Finally, the **Cymunedau Mentrus** scheme sought to support and expand the work of key "allies" in pursuit of similar aims. Specifically, the development plans of three social businesses that seek to create employment for local people, through the medium of Welsh, were supported. This approach differs from the other schemes in that the impact is entirely secondary and draws upon the capacity and role and impact of the businesses within communities. This approach, it could be argued, seeks to capitalise on the social capital that exists within the communities of Arfor, and involves those communities in the pursuit of strategic goals.

Has Arfor succeeded?

More generally, the data suggests that it is possible to support business development and innovation alongside supporting the development of Welsh language capacity. The latter does not limit the former from creating and supporting jobs linked to innovation within companies across a range of sectors. Moreover, the former does not limit the latter, and businesses can be supported and encouraged to develop their Welsh language capacity alongside wider business development, and that language development can be mainstreamed and embedded within business development.

This report does not explore alternative or hypothetical economic interventions that are beneficial to the language. Rather, it limits itself to the data available from the activities undertaken and impact evidenced. It can conclude, however, that **the model has succeeded in its aims of supporting economic development alongside language development**. This has been achieved largely by mainstreaming and embedding language development within wider business development.

Importantly, it suggests that **there is value** to trialling, evaluating and learning from interventions in the economy to support businesses. Given that a wide range of alternative interventions may be possible, there is **justification to continue** with the work of trialling and evaluating. The **interim report's first recommendation remains relevant**, though dependent on identifying and securing resources to fund and support the work.

4.3 The Delivery process and model

4.3.1 Rationale and design

Programme rationale, design and addressing the core challenges of the area

As noted in the introduction and the interim report, the interventions were built on the premise and logic that creating more and better jobs would encourage and support people to remain in the area. In turn, this would counter the outward migration, particularly of young people, and enable Welsh speaking communities to remain viable.

Create more jobs -> More opportunities for local and young people to work and live locally -> More Welsh speakers to sustain communities.

A programme of this scale was unlikely to achieve a degree of change that would have any significant impact upon outward migration in general within the area. As a pilot or demonstrator programme, the hope was that the schemes would **reveal what works and what lessons can be learned**.

Several of the schemes within the programme were designed primarily to support businesses, with the hope and intention that by growing and expanding, those businesses could then employ more people. The direct grants to businesses, the only schemes running in two of the local authorities, were the clearest examples of this. Logically, this added an additional step to the theory of change, and an assumption that businesses would create jobs, and that those jobs would be available to young people in the area. Innovation and a desire to grow emerges as a key criteria for the businesses supported within the logic, though failed innovation may also represent a degree of risk, i.e. if the innovation fails and the business does not grow, the grant will not support the desired outcomes.

Arfor supports businesses -> Businesses innovate and grow -> Businesses recruit and create jobs -> More opportunities for local and young people to work and live locally -> More Welsh speakers to sustain communities.

Creating jobs was an aspect that would score highly in applications and there is data to show that the programme has enabled businesses to both innovate and recruit. Logically, **there are more opportunities for local and young people to work and live locally due to Arfor**. In this regard, Arfor has succeeded in revealing ways in which the more opportunities can be created for local and young people to work and live locally.

Creating "the right jobs"

Whilst there are job opportunities for local and young people, there were, nonetheless, no efforts to ensure that the jobs would be offered to local/young people and Welsh speakers, nor those who would otherwise have left the area. In this sense, **more could be done to understand the relationship between creating jobs and the 'right' people taking the posts, or in understanding which were "the right jobs" to attract young, local and Welsh speaking people to live and work in the area.**

Indeed, the labour market data for the area suggests that employment has kept pace with the rest of Wales over the past 20 years. Lack of employment does not appear to be an issue that adversely impacts the area, and outward migration of young people has continued as employment has risen. Statistical analysis undertaken for the Interim Report suggested that there was either no relationship, or if there was, a negative linkage between job creation and the language i.e. when the economy grows and jobs are created, the numbers of Welsh speakers decline.[10] **Simply creating job opportunities may not, alone, be enough. It may even be counterproductive.**

The likely challenge therefore is related **not to the number of jobs**, but to the **type of jobs available to young people**. The challenge is also likely **related to wider issues concerning the quality of life and ambitions of young people**.[11]

Whilst the programme has succeeded in creating more jobs, its success in creating "better" jobs is less clear, possibly due to the uncertainty in relation to what a "better job" is.

The programme had stimulated **critical investigation of the concept of a "better job" in relation to the aims of the programme**, the economic prosperity and the linguistic vitality of the area. These discussions could help further refine the specific aims, the explicit targets and the impact of any future efforts that seek to develop both the economy and linguistic vitality. **The notion of a "better job", in relation to its wider social and language impact, should be considered within the wider context of who takes the job**.

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[10] See also hiips://www.arsyllfa.cymru/is -there-a-statistical-relationship-between-economic-development-and-the-welsh-language/

[11] See also
hiips://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/902943/Moving_out_to_move_on_report.pdf

LESSON 1: The management staff and stakeholders have developed their thinking in relation to a key Arfor concept, namely the notion of a "better job" within the area, post-pandemic. The staff and stakeholders should aim to continue to develop their understanding of what constitutes a "better job"; this will inform any future efforts to develop job creation programmes or economic interventions that have a beneficial impact upon the language. A "good job" should also concern the social and language impact of the job being created.

Part of a wider approach

Indeed, staff were increasingly viewing the intervention as only a part of the possible response. Whilst the focus upon creating jobs was welcome, it could only, and probably **should only be a component of a wider approach** to tackling outmigration and the threat to the sustainability of the language as one of community and working life. This wider approach should involve improving the range of determinants of the **quality of life** of living within rural areas, as well as **addressing the negative narrative concerning living and working local**ly. In regard to the latter, schemes such as Llwyddo'n Lleol sought to create and publicise an alternative narrative that stresses the opportunities for young people to start businesses if they stayed in the area, although there is a risk that its success would be contingent upon continued support and funding opportunities for the programme to continue. The Cymunedau Mentrus scheme, meanwhile, sought to address the former, by creating work opportunities in more remote rural communities, focussing on generating economic, social and language benefits to those communities as well as recycling expenditure locally.

These findings appear to have confirmed the view expressed in the interim report, that economic intervention should only form a component of a wider approach.

> 'In the long run, economic interventions must be considered in the wider context. Although the aim of Arfor is to develop economic interventions, which have a positive linguistic impact, they will ideally support, and be supported by, a range of wider social policies which enable non-Welsh speakers to acquire the language and facilitate its use. Moreover, improving and developing the appeal and quality of life in these rural areas will be further key components of any approach that tackles the issue of out-migration.'

LESSON 2: Strategically, expectations of what impact a job creation programme can have upon migration (in and out) and consequently the language should be limited. Ideally, economy>language approaches should be a part of a wider strategy to tackle the underlying and structural factors threatening the sustainability of the language.

Young People

There were no specific attempts to encourage the recruitment of young people through the direct grants however, and where they had been employed, it was coincidental. This is not to devalue the impact of the schemes and the jobs created; indeed, the jobs have offered employment and therefore the means of remaining and living in the area to many people.

However, given that the programme implicitly sought to counter outmigration, particularly of young people, it would have been **more in keeping with the logic of the programme to seek to encourage businesses to create jobs or possibly apprentice positions specifically targeted at young people**.

However, there was some agreement that the logic of the programme would and should not comprise the only approach to addressing outmigration and the challenges to the sustainability of the Welsh language and its speakers in rural areas.

More generally, it would have been beneficial and informative had the management collected data in relation to the age of the individuals being employed by the businesses. This data can still be collected if, as management have indicated, the monitoring of these businesses is to continue into the future. A further examination may then be undertaken, of the type of jobs that appeal to young people, and what a "good job" is.

LESSON 3: It is recommended that the age profile of individuals benefiting where jobs are created is captured in future monitoring data. This would enable the management to gain insight into the types of interventions and jobs that encourage young people to remain in the area.

However, one **key finding** relates to the success of the Arfor schemes that have appealed to young people. The Grant Mentro in Ceredigion is thought to have been taken up entirely by people under 35 years old, and most were younger still. The data in relation to the grant suggests that young people face additional challenges in the area when seeking finance or investment in start-ups. A lack of credit history or capital is a significant challenge to purchasing equipment for instance. The Grant Mentro, however, provided the finance and enabled these young people to overcome their challenges. Consequently, 17 new businesses have been established within a difficult economic context. **The experience of this grant suggests that young people would be more likely to remain in the area, and start businesses, if finance and business investment were more accessible**. The Llwyddo'n Lleol programme has also demonstrated that, with support and guidance, there is a demand amongst young people to start businesses and remain in the area.

Economy>Language interventions

The relationship between the economy and the Welsh language is not well understood within Wales. This issue was examined in detail in the Interim Report but has also been discussed within the wider literature as well as the Revitalise programme at Aberystwyth University. One of the latter's key conclusions was to draw a distinction between economy>language, i.e. economic intervention that has an impact on the language, and language>economy i.e. the role of the language within business and the economy. The majority of economic related language programming and interventions conform to the latter and seek to promote the value of Welsh to businesses and individuals within the labour market.

This programme has sought to explore economy>language approaches, and to develop business or economic interventions that can have an impact upon the language. The programme has succeeded in this regard and has demonstrated how business support can also be sensitive to and supportive of language sustainability.

The direct grants to businesses have embedded language planning and development within wider business plans. This was achieved through the prominence awarded to the criteria within the application process. Moreover, by encouraging or in some instances insisting upon engagement with wider support services such as Helo Blod, the grants have also ensured that businesses access best practice and good support as they develop their language capacity and services. This could be understood as **a process of attaching a positive linkage to the grant funding**.[12] In other words, it represents an economic intervention that also contains a language>economy component, effected and effectively enforced by the particular design and criteria of the direct business grants and economic intervention.

As a consequence of the more substantive engagement with the language, the grants have stimulated and led businesses to increase their Welsh language activity/visibility. In turn, this generates demand, and businesses seek to meet the demand for more use of the Welsh language.

In detail; by encouraging informal and internal developments, **particularly within businesses that have recruited Welsh speakers**, **the grant has supported the development of business' capacity to engage, at least informally, with clients and customers**. By engaging informally through social media, signage or informal conversations and communication with clients and customers, business believe that the **demand for products and services has increased**. This echoes the wider research on the value of Welsh within business as a means of generating demand and widening the appeal. Alongside, and to meet the increased demand, however, **businesses have also looked to develop formal processes of engaging with clients in Welsh, such as bilingual ordering and invoicing**. The grant has consequently stimulated relatively rapid development and incorporation of Welsh into both the formal and informal workings of the business. In turn, there are more possibilities and indeed suggestions that more people take advantage of the opportunities to use Welsh language within the communities of the Arfor area. This does not directly impact the overall sustainability of the language in terms of numbers of speakers, but it does help create conditions for language use within communities.

Llwyddo'n Lleol, meanwhile, has sought to provide direct business support to start-ups and young people. This is an economic intervention. However, by incorporating a marketing and PR campaign into the programme – specifically by requiring beneficiaries to document their experiences of starting a business in the area – the programme has developed a narrative around employment and work that contrasts with an established discourse. The story being promoted through the beneficiaries is that young people can start successful businesses in the area, and that it is an engaging and exciting process. This contrasts with the established economic narrative, namely that young people must leave the area to secure adequate employment.

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[12] A "positive linkage" is a term borrowed from the democracy assistance literature. It refers to efforts by states to attach conditions to international aid, enticing recipient countries to make changes in order to receive the aid.

If the established narrative is a barrier to young people living and working in the area, then **the Llwyddo'n Lleol programme has identified a possible means by which this narrative can be countered**. Moreover, the **positive narrative promoted by the programme is explicitly an economic one but can potentially have a positive impact upon the language**. An economy>language intervention.

The Language Grant, however, provided direct support to businesses to engage solely in developing their language capacity and services. Alone, this grant represents only a language>economy intervention and could overlap with the role and support offered by a range of wider actors and support services. However, its use as effectively the initial step for businesses, before accessing the Business Grant, served to **ensure substantive engagement with the language within the business.**

Duplication and overlap or added value?

Concerns were raised in relation to the risks of **duplicating some of the work that support services such as Helo Blod should be offering.** However, management staff were of the view that rather than duplicating the support, the programmes had added value to such services. Staff argued that businesses often saw such support services in a tokenistic manner and rarely engaged with the support in a substantive manner to transform their own businesses. By embedding language development into the business plans and signposting businesses to the Helo Blod support service, the grants encouraged a more substantive engagement with the process. Moreover, the approach, in the view of staff and businesses, has developed the notion that **developing language services and capacity is a process rather than a one-off activity**, and that the Helo Blod service would in future be a trusted source of support. However, staff did note that they felt that the **schemes could have been better integrated with wider support services at the design stage.** Moreover, staff felt that **key lessons had been learned in engaging businesses with the process of developing language capacity and services.**

LESSON 4: The management staff should seek to engage with Business Wales's Helo Blod and the Welsh language Commissioner's business support services with the aim of sharing their experiences and good practise developed while delivering this programme.

Social Capital

Arfor appears to have acted as a hub, around which a **coalition of "allies"** have or could have been drawn and enticed through direct funding. This suggests that **there may be a network of organisations and individuals interested in pursuing the common purpose of developing economic interventions that benefit the Welsh language**, and a programme such as Arfor can lead and progress this through its work. If Arfor is to be continued in some form, then its role as a hub, but also the potential allies and delivery partners, should be a consideration in its evolving design and delivery model.

LESSON 5: If an extension or continuation is considered, the role of social capital and the added value of a wider coalition of delivery partners and allies should be considered when developing the design and delivery model. The design should look to capitalise and maximise the impact that the social capital may achieve.

4.3.2 Delivery

Promotion and take-up

Management noted that there had been no efforts to publicise Arfor as a single or homogenous programme. Each LA promoted their own programmes locally, largely through council social media, and through word of mouth or the social media of the officers. However, over the lifetime of the programme, staff suggest that the **brand had been established and somewhat recognised**. More broadly, this offers **a platform that enables the LAs to build upon the impact and reputation of the current programme**.

Staff were mixed in their views in relation to the take-up of the grants. The two northern LAs reported a consistent and satisfactory level of interest in the grants available. Businesses were generally happy to engage with the Language Grant as a precursor to applying for the Business Grant in Ynys Môn. However, Ceredigion and Carmarthenshire staff reported interest waning during the lockdown period. This was largely attributed to a **shift in focus for businesses, toward survival and safeguarding jobs**. Staff noted however, that by September 2020, around **six months after the initial lockdown, interest had picked up and businesses were again looking at development and diversification**, with the grants appealing.

The initial and rapid resurgence of interest in grants to support development and diversification suggests that there is relatively strong demand in the area amongst small and micro businesses. **A successor programme should be expected to attract a similar level of interest**.

The wider programmes, particularly Llwyddo'n Lleol and Cymunedau Mentrus were popular, with the criteria for the former even narrowed for the second call in order to focus the support on university students staying home due to lockdown restrictions.

A possible drawback of the approach, but a factor that also attributed to the tight timescales for designing and delivering the programme and schemes, was the relative failure to engage businesses that had not previously considered developing the Welsh Language services and products. This was also, to some extent, by design. However, some stakeholders suggested that an alternative and **possibly more impactful approach would have been to target businesses that had not sought to develop their language capacity and services**.

Management and delivery model

Businesses, stakeholders and management were of the view that **the programme and individual schemes had been well managed and effectively delivered**. The application processes were rarely criticised by businesses, and **little evidence supported the views of some stakeholders that LAs were cumbersome or slow to deliver**. However, staff across the LAs reported that the administrative burden of the schemes, particularly the direct grants to businesses, was an issue.

> **LESSON 6:** More resource was required to manage and deliver the programme than had been anticipated. If extended or continued, the programme should account for the administrative burden of administering the grants.

Whilst effective in delivering the planned outputs, the model was nonetheless criticised for not engaging with or approaching **institutions outside the LAs as delivery partners**. **The universities within the area were frequently noted as potentially valuable collaborators,** whilst others noted that key institutions and organisations such as Yr Egin and The Food Centre Wales could have supported and enhanced the support being offered. Ultimately, stakeholders felt that the coalition of "allies" and the pool of social capital and possible delivery partners from which programmes such as Arfor could, in theory, draw upon, is much wider. Once more, **a lack of time to deliver the support schemes limited these possibilities**.

LESSON 7: If an extension or continuation is considered, including institutions that are hubs within sectors such as Yr Egin of the Food Centre Wales as well as numerous Universities in the area should be considered as delivery partners.

As has been noted in relation to several aspects of the design and delivery, many of the weaknesses of the programme have been attributed to the short timeline. This short timeline **was widely thought to have been a weakness of the programme.**

LESSON 8: If an extension or continued, the management and funders should consider allowing more time to design and develop schemes. This should enable staff to approach key stakeholders and possible delivery partners to add value to the support as well as draw a wider network of actors into the field of developing economic interventions that benefit the language.

External Impact

The **coronavirus pandemic has had a significant impact on the programme**. The pandemic has clearly impacted its **delivery** and **any attempts to evidence its impact**. As a result of which, caution must be taken in two regards. Firstly, the **findings of this evaluation must be considered somewhat preliminary**. Further evaluation and monitoring is required to corroborate the findings outlined above. Secondly, the unique circumstances brought about by the pandemic are unlikely to be repeated and it is difficult to gauge their precise impact upon the programme and its delivery. The pandemic is considered to have dampened businesses desire to develop and innovate. However, it may also have spurred businesses looking to safeguard their continued existence, to seek any support available, and consequently encouraged applications for business grants. The recruitment of the young people for the Llwyddo'n Lleol programme, particularly the second round, meanwhile, was tailored to attract those having to remain home from university or delay their studies. **These opportunities would not have been available without the pandemic**.

More broadly, **the impact** of the programme and the activities, products or services developed through the grant **will only be seen in the years to come as businesses recruit and seek to raise their revenue**. This **increases the importance of continuing to monitor the businesses that have received grants.**

LESSON 9: The programme management and the four local authorities should seek to remain in contact with the businesses and beneficiaries of the programme. The management should aim to continue to monitor the impact that the support has had into the next few years.

The Arfor programme was a pilot or demonstrator fund, seeking to test ideas on a limited level, evaluate their impact and suitability in order to learn lessons. Its direct **impact is unlikely to be significant beyond the individual business or community supported** given the scale of the programme and type of projects supported. For the projects to have a significant impact, **the learning must be shared**, and **schemes must be mainstreamed**.

The Arfor structure, involving cooperation between the staff of the four Las, **represents a means by which the learning and good practice can be shared internally**. Indeed, the rollout of the Llwyddo'n Lleol scheme in Ceredigion and Carmarthenshire suggests as much. As a body of four rural LAs with data and experience to support their claims, the four LAs are also well positioned to engage externally with other LAs, umbrella bodies for LAs, Welsh Government and City or Region Growth Deals with the learning and knowledge generated through this programme. This was recommended in the Interim Report, and this Final Report has presented data that supports the validity of those recommendations.

LESSON 10: In looking to share good practice and learning, and to promote the mainstreaming of successful activities, the four LAs should continue to cooperate into the future, regardless of whether a formal Arfor programme exists. The Arfor structure presents opportunities to maintain cooperation; for sharing good practice and learning internally; identifying opportunities for mainstreaming; identifying funding opportunities for further trialling; and for promoting learning and knowledge externally to influence wider economic governance structures.

4.3.3   Interim Report Recommendations

The recommendations from the interim report are discussed in Section 1.1.2.

As noted in a previously, **the Arfor programme has demonstrated the value in trialling and evaluating interventions**. This is particularly valuable in a context where a lack of available evidence and research limits the extent to which specific interventions can be proposed with confidence in their impact. This work should continue if more and better or more effective interventions are to be identified and evaluated for their potential.

The second recommendation proposed that a research group be established, ideally made up of individuals from further afield than language policy specialists. **The value of evaluating and evidencing** if and importantly how economic interventions can be supportive of language development and sustainability **has been demonstrated by the interventions trialled through the Arfor programme**. However, the scope for further evaluation and research remains wide. There is still a role for a group not only to evaluate any future interventions and their impact on the language, but also to revisit existing interventions and economic developments. Moreover, **the need to draw on wider evidence and research remains relevant** if effective interventions are to be identified and mainstreamed within and even beyond the four counties as part of wider efforts to support the sustainability of the Welsh language.

The interim report also recommended that a formal body be established in order to continue to promote successful interventions within the local authorities in the Arfor area as well as externally. This body should also seek to identify means and resources that would enable the work of trialling and evaluating interventions to continue. **This recommendation remains relevant**, and if the legacy and impact of the Arfor programme is to be secured, then **a suitable organisation or body should continue the work of promoting the successes and relevance of the interventions trialled within the Arfor programme**. The process of evaluation within this report may offer some insight in relation to the organisation or body that would be suitable.

Finally, the interim report recommended that, with the impact of the pandemic likely to prevent spending, that the programme should consider funding additional research into the relationship between the economy and the Welsh language. Specifically, it was recommended that the programme explored the reasons as to why young people leave or return to the area. Ultimately, the pandemic did not prevent spending and delivery, consequently there was no need to divert the budget into alternative activities. However, out-migration and in-migration, particularly of young people, remains an area burdened by preconceptions and limited evidence. Further research into this area, possibly led by a research group (see recommendation 2), would likely be of considerable benefit to future efforts.

5 Conclusions

The Arfor programme has successfully trialled small scale business support schemes, and demonstrated that they have the potential, if structured to do so, to increase the use of Welsh within the workplace, to create favourable conditions for further development of capacity and services, as well as increase the numbers of Welsh speakers in the business community. The impact, and specifically the monitoring data, should, however, be reviewed in the future to validate and corroborate the findings of this report, but there was no data to suggest that the schemes have failed to achieve these impacts to some or a greater extent.

The programme has had the most visible and direct impact through direct business grants to small and micro firms in the area. These businesses frequently noted how difficult it was to access alternative sources of finance, investment and capital. In this sense, the grants have proved particularly valuable for these businesses, and have enabled expansion and diversification. In turn, these businesses have created 238 FTE and 89 part time jobs and safeguarded 226 FTE jobs, increased revenue, and in being local firms, are more likely to recycle the revenue locally.

By embedding the development of language services and capacity within businesses, largely through positive linkages and by necessitating engagement with the Helo Blod service, the programme has identified ways to support the Welsh language. Schemes such as Llwyddo'n Lleol, meanwhile, have demonstrated a means by which a narrative around starting businesses and living within the area can be created and promoted.

The programme, in spite of the delays and difficulties caused by the COVID-19 pandemic has, therefore, been a successful in supporting pilot schemes to promote economic development and generate a benefit to the Welsh language. It has succeeded in identifying ways in which economic interventions can support the sustainability of the Welsh language in rural areas. The immediate challenge of ensuring that the learning and good practice is shared, learned and adopted, remains for the participating LAs.

The Arfor programme has also offered insight into the types of interventions that will support the strategic aims of the Welsh Government in relation to the Welsh language. Creating jobs can offer a means by which people may remain and work in the area, though much work and research is needed to determine what types of jobs encourage Welsh speakers to live in the area rather than non-Welsh speaking in-migrants. This is important as failing to do that risks engaging in counterproductive interventions that adversely impacts the language. Further and more refined evaluation of the impact may offer insight into these issues.

The process of delivering the programme has spurred a critical examination of the problems and possible solutions that the Arfor area faces in relation to the economy and the Welsh language. In this sense, the programme can also be considered a success. Staff and stakeholders have developed their understanding and supporting data surrounding ways in which economic development can support the language. Moreover, the Arfor model has proved itself to be a successful means of piloting a range of schemes and, at times, involving wider delivery partners and capitalising on the social capital that exists in the area.

Ultimately, however, the Arfor programme was a pilot or demonstrator fund. Given its scale, therefore, the **direct impact is unlikely to be significant beyond the individual business or community supported**. For the programme to have a significant impact and a constructive legacy, **the learning must be shared**, and **schemes must be mainstreamed. The Arfor structure**, involving cooperation between the staff of the four LAs, nonetheless **represents an effective means by which these two tasks can be accomplished. The LAs should therefore seek opportunities to continue to cooperate, to share good practice internally and promote it externally, to mainstream effective schemes, and to identify opportunities to fund further pilots.**

5.1 Summary of Lessons

LESSON 1: The management staff and stakeholders have developed their thinking in relation to a key Arfor concept, namely the notion of a "better job" within the area, post-pandemic. The staff and stakeholders should aim to continue to develop their understanding of what constitutes a "better job", this will inform any future efforts to develop job creation programmes or economic interventions that have a beneficial impact upon the language. A "good job" should also concern the social and language impact of the job being created.

LESSON 2: Strategically, expectations of what impact a job creation programme can have upon migration (in and out), and consequently the language should be limited. Ideally, economy>language approaches should be a part of a wider strategy to tackle the underlying and structural factors threatening the sustainability of the language.

LESSON 3: It is recommended that the age profile of individuals benefiting where jobs are created is captured in future monitoring data. This would enable the management to gain insight into the types of interventions and jobs that encourage young people to remain in the area

LESSON 4: The management staff should seek to engage with Business Wales's Helo Blod and the Welsh Language Commissioner's business support services with the aim of sharing their experiences and good practise developed while delivering this programme.

LESSON 5: If an extension or continuation is considered, the role of social capital and the added value of a wider coalition of delivery partners and allies should be considered when developing the design and delivery model. The design should look to capitalise and maximise the impact that the social capital may achieve.

LESSON 6: More resource was required to manage and deliver the programme than had been anticipated. If extended or continued, the programme should account for the administrative burden of administering the grants.

LESSON 7: If an extension or continuation is considered, including institutions that are hubs within sectors such as Yr Egin or the Food Centre Wales as well as the numerous Universities in the area should be considered as potential delivery partners.

LESSON 8: If an extension or continued, the management and funders should consider allowing more time to design and develop schemes. This should enable staff to approach key stakeholders and possible delivery partners to add value to the support as well as draw a wider network of actors into the field of developing economic interventions that benefit the language.

LESSON 9: The programme management and the four Local Authorities should seek to remain in contact with the businesses and beneficiaries of the programme. The management should aim to continue to monitor the impact that the support has had into the next few years.

LESSON 10: In looking to share good practice and learning, and to promote the mainstreaming of successful activities, the four LAs should continue to cooperate into the future regardless of whether a formal Arfor programme exists. The Arfor structure presents opportunities to maintain cooperation; for sharing good practice and learning internally; identifying opportunities for mainstreaming; identifying funding opportunities for further trialling; and for promoting learning and knowledge externally to influence wider economic governance structures.

Appendix: Referenced Sources

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ARFOR

CREU GWAITH – CEFNOGI'R IAITH

ARFOR 2 PROGRAMME UPDATE
UP TO MARCH 2024

CYNGOR GWYNEDD COUNCIL

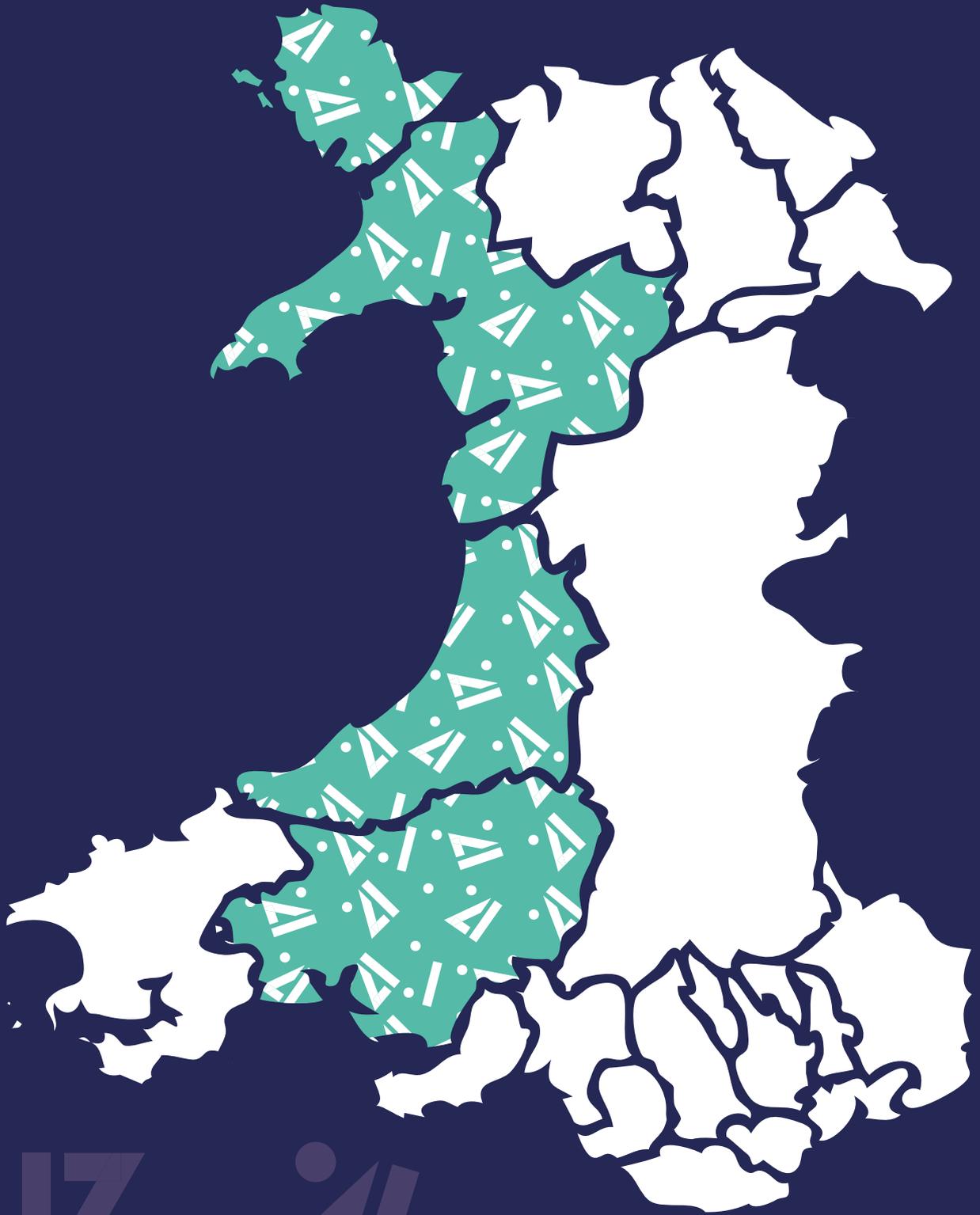CYNGOR SIR YNYS MÔN ISLE OF ANGLESEY COUNTY COUNCIL

Cyngor Sir Gâr Carmarthenshire

Cyngor Sir CEREDIGION County Council

Ariennir gan Lywodraeth Cymru
Funded by Welsh Government

ARFOR ACTION REGION

INTRODUCTION

Since 2019 the ARFOR project has been working in favour of the Welsh language in its strongholds to ensure that prosperity and economic investment support and empower communities where there's a high percentage of Welsh speakers.

ARFOR 1 was established in 2019 following the budget agreement between the Welsh Government and Plaid Cymru. The first phase of the project saw an investment of £2 million provided to Carmarthenshire, Ceredigion, Gwynedd and Anglesey Councils. The aim of the programme was to start looking at economic interventions in the Welsh language strongholds by funding innovative projects that promoted prosperity in these areas.

Financial support was provided to support businesses and organisations, mentoring support was given to young people through Llwyddo'n Lleol 2050, financial support was given to businesses to be able to buy new equipment and groups were supported to establish social enterprises with the aim of protecting their key local resources. 154 businesses received support through the programme, 238 full-time jobs and 89 part-time jobs were created with a further 226 jobs being protected within the region as a result of the programme in the period leading up to March 2021.

Following the success of the first part of the project, and as part of the Collaboration Agreement between the Welsh Government and Plaid Cymru, it was announced in October 2022 that the ARFOR Programme would receive a further investment of £11 million until the end of March 2025. The establishment of ARFOR 2 represented a significant expansion of the original project, with the aim of continuing the learning and innovation work at the heart of the first phase. At the core of the work are four strategic objectives:

1. **Create opportunities for young people and families under 35 years of age to stay or return to their native communities,** supporting them to succeed in their local areas by following new initiatives and developing careers for them to secure a livelihood that matches their ambitions.

2. **Create enterprising communities within the ARFOR region by supporting business and community initiatives that seek to preserve and increase local wealth** by motivating them to take advantage of the resources, identity and unique characteristics of their local areas in order to do this.

3. **Increase the benefit obtained from the project's activity by ensuring constant and continuous collaboration.** At the core of this lie the principles of learning by doing and sharing good practice within communities, expanding and spreading these practices to other areas while also ensuring that any interventions are tailored for local conditions.

4. **Strengthen the identity of communities with a high density of Welsh speakers in terms of percentage by supporting and promoting the use and visibility of the Welsh language in these areas.** An essential element of this is emphasizing local pride, a sense of place and local loyalty in individual communities while also helping to show the characteristics, conditions and factors that are common to the whole region.

This report looks specifically at the second phase of the project, namely ARFOR 2, providing a summary of the work that has been achieved to date, the projects currently underway before the end of the current funding period in March 2025.

A wide variety of activity results from ARFOR's work, with exciting and innovative projects of all kinds receiving support through the scheme. The report will give you a flavour of the projects that were funded and what is being achieved through the programme. It clearly shows the positive change that is taking place at grassroots level across ARFOR regions and the strong foundation that has been built for interventions that combine economic and linguistic considerations in the future.

If you would like further details about any aspect of ARFOR's work or if you would like to discuss anything further, please contact **gwybodaeth@rhaglenarfor.cymru**

OVERVIEW OF WORK STREAMS

The ARFOR programme is divided into 5 workstreams that are delivered by contracted individual providers. Each stream focuses on a different element of realising ARFOR's strategic objectives and represents individually focused work programmes on specific interventions to achieve this. In this section we will look at each stream in turn, outlining the objectives, approaches and outcomes of the work to date for each element of the project.

1 **LLWYDDO'N LLEOL:** Working to raise awareness of the opportunities that exist in the ARFOR area and help develop the skills of young people there.

2 **CYMUNEDAU MENTRUS:** Fund for County Councils to be able to invest directly to ensure economic growth and that capital stays and circulates within the local economy.

3 **CRONFA HER:** A grant programme that allows organisations, businesses and groups of individuals to come together to solve some of the challenges they face locally.

4 **BWRLWM:** ARFOR activity promotion stream. Working to inform the public about what is being achieved as part of the programme and explore some of its core ideas.

5 **MONITORING, EVALUATING AND LEARNING:** Providing reviews of the programme as a whole in the form of reports, working to develop the academic and public policy bases of the scheme.

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ARFOR OUTCOMES – UP TO MARCH 2024

LLWYDDO'N LLEOL 2050

9581 Young people received information

1951 Young people received support
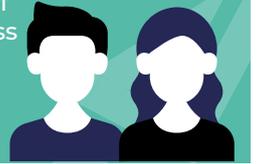
887 Young families received information

8 Young families received support

154 Positive messages disseminated

63 Examples of local success identified

CYMUNEDAU MENTRUS

19 New initiatives received support

64 Existing initiatives received support

£2,430,033 Of investment secured

113 New products / services secured

17 Social Enterprises supported. Participants in social enterprises

CRONFA HER ARFOR

77 Number of regional and local ARFOR schemes

£5,339,172 Value of regional and local ARFOR schemes

29 Workshops. Regional and local ARFOR events

17 Case studies to date. ARFOR learning cases and sharing of experiences

30 Number of local ARFOR schemes

Identifying regional and local challenges

BWRLWM ARFOR

73 Businesses / organisations increased their use of Welsh

3 Number of individuals who improved their Welsh language skills

100 Heritage / culture / local produce / Sense of Place schemes supported

269 Number of messages promoting Welsh language / identity

Mentrau Iaith Cymru successful in their Cronfa Her bid. Mentrau Iaith (Language Initiatives) also part of WRU bid.

Strengthened relationship and collaboration with Language Initiatives

26 Cynnig Cymraeg rewarded

CYMRAEG

MONITORING, EVALUATING AND LEARNING

Continuous Monitoring and Evaluation of the ARFOR Programme

4 Learning networks created during the ARFOR period

7 Engagement Forums created

Evidence created for learning about the connection between Economy and Language

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STREAM 1: LLWYDDO'N LLEOL

Llwyddo'n Lleol 2050 is a marketing and promotional campaign that works to raise awareness of the opportunities that exist in the ARFOR area and provide advice and support to those who want to stay or return there. The project is being delivered by Menter Môn in partnership with Mentera with a proposed budget of £3,000,000 over the project delivery period.

The project is divided into four divisions, the **Career Element**, the **Enterprise Element**, the **Settling Element** and the **Testing Element**.

→ The **Career Element** aims to promote the career and social opportunities that exist in the ARFOR area. This work takes the form of specialist workshops, breakout sessions, mentoring work and providing advice and job fairs highlighting local opportunities. The project has also been providing support to local businesses to offer employment to local young people.

→ The **Enterprise Element** is designed to encourage young people to venture within their native communities by providing funding and advice to individuals who want, are considering or have already started a business locally. Successful

applicants take part in programmes involving advice and training from business experts focusing on key skills such as marketing, financing, financial literacy as well as attracting and serving customers. The scheme also offers grants of £1,000 to participants to develop their business idea.

→ The **Settling Element** explores ways to encourage young families living beyond the ARFOR area to return to their areas, providing them with information, advice and support to do so. This happens in the form of residential weekends where families get the opportunity to visit and spend time in specific areas to experience a taste of life in the ARFOR area.

→ The **Testing Element** works to improve young people's skills to prepare them for the world of work. This work takes the form of face-to-face sessions in schools to help learners identify their skills, provide support on how to search and apply for jobs, as well as advice on how to draft a CV emphasising the opportunities for young people to access local jobs.

CASE STUDIES

CAREER ELEMENT: DANIEL THOMAS – M-SPARC

Daniel Thomas from Ceredigion received support through the Career Element of ARFOR's Llwyddo'n Lleol stream. Following a period working in London after attending university, Daniel now works for M-Sparc in Anglesey as a Decarbonisation Advisor. The scheme has allowed Daniel to receive training for his work as well as helping him with the cost of living as he moved to Anglesey. The opportunity to work through the medium of Welsh was important to Daniel, and he is now able to do so in an innovative field supporting small businesses in Wales to decarbonise.

Daniel's example clearly demonstrates how the ARFOR scheme is able to attract talent back to Wales to live and work, and the importance of the existence of such a network that can facilitate it.

ENTERPRISE ELEMENT: ALAW EVANS

Alaw applied to be part of ARFOR's Llwyddo'n Lleol 2050 Stream Enterprise Element in 2023 to develop a business idea to offer baby massage sessions for parents and guardians. She had noticed that there was no such provision within an hour's journey from her home in Porthmadog, and was keen to try and develop a business that would fill this gap. After a successful application, Alaw received 10 weeks of training on business development which included mentoring and skills development sessions and an opportunity to share her experiences with the other individuals on the course.

Alaw has now set up her own company 'Babis Del' and started running sessions for parents and their children in the Porthmadog area.

" Discussing her time on the course, Alaw said:

My experience of the Enterprise programme has given me a boost and confidence to start my own business. As well as equipping me with skills and knowledge, it has also been a process of personal growth for me as I pursued a business idea that I had for years.

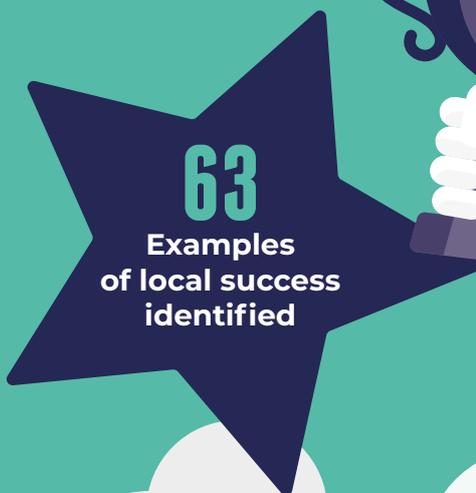# LLWYDDO'N LLEOL 2050 – UP TO MARCH 2024

1951
Young people received support

63
Examples of local success identified

8
Young families received support
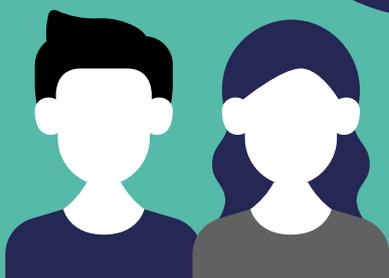
887
Young families received information

9581
Young people received information

154
Positive messages disseminated

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STREAM 2: CYMUNEDAU MENTRUS

Cymunedau Mentrus is a programme administered by ARFOR area County Councils.

The workstream budget is £4,500,000 divided into £1,125,000 for each County Council individually. Cymunedau Mentrus aims to retain and increase economic activity and wealth in the ARFOR region area by targeting commercial, social, cooperative and community enterprises. The fund has a particular interest in supporting projects that:

→ Promote **new enterprises that innovate** in a way that aligns with the local resources, landscape and environment.

→ Create and **expand job opportunities in new and contemporary industries** such as media, digital and professional services and new and innovative technologies.

→ Ensure capital **stays within the ARFOR region** by supporting applications that are aware of factors such as securing local supply chains and the economic value of energy conservation, for example.

Through this work stream the individual County Councils are able to provide financial support to organisations that have successfully applied for specific projects. The organisations can receive support through funding that contributes to revenue and capital costs and financial support that pays up to 70% of the costs of each individual project. The size of these projects varies from case to case and organisations can receive support between £5,000 and £75,000.

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CASE STUDIES

DELINEATE

Delineate is a market research agency pioneering digital data access and analysis and trading globally. Delineate received support through ARFOR's Cymunedau Mentrus stream which is administered by Ceredigion Council and recently launched their new headquarters in Llandysul, the first technology company of its kind to establish a presence in Ceredigion. The office will be home to 50 employees who will carry out a wide variety of jobs and different types of expertise. A 'Wales first' recruitment policy is essential to Delineate's strategy, with all vacancies being advertised in Wales.

One of the main aims of this is to bring more Welsh speakers into the company. Currently around 60% of the team are Welsh speakers and opportunities are offered to individuals who do not speak Welsh to learn the language. A high percentage of the team is bilingual or multilingual due to the nature of the business, which requires a number of languages to be used with clients across the world.

Discussing the support, Delineate CEO James Turner said:

Support from initiatives such as ARFOR has been key to our growth. These initiatives have provided essential funding and resources that have enabled us to transform empty spaces into valuable commercial properties and establish our operations in Ceredigion. This support has enabled us to build a solid infrastructure and attract local talent, laying a strong foundation for our continued expansion.

DECUS RESEARCH LTD

Decus Research Limited was established in 2003 and provides comprehensive laboratory testing services and scientific consulting support. Based in Capel Hendre, Carmarthenshire, it's a good example of how ARFOR's support has not only supported the growth of the business, but also given an opportunity to a local young person studying outside of Wales to undertake work experience in a scientific location. Decus received financial support to develop the business by creating a water testing

laboratory. After a local water testing business relocated to England, a gap was identified to develop another branch of the business in order to support the local food, drink and agriculture sector. 10 new jobs will be created to support the new element of the business.

Steve Whitehouse from Decus Research commented:

The support provided by the ARFOR programme has been central to the growth of our business. As a service-based business in Carmarthenshire, ARFOR has allowed Decus Research Ltd to develop a new branch of the business, which provides local services for the agriculture and food and drink sectors which are such important sectors in the county. We have received support from various streams of the ARFOR programme which have focused on increasing the use of the Welsh language in our business.

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DYLUNIO GRINGO

Gringo Design company from Penygroes received financial support through Cyngor Gwynedd's Cymunedau Mentrus stream. The company specializes in product branding and packaging and advertising for the food and drink sector, providing the service to a number of local companies. As a result of the investment, Justin Davies, the company's chief executive has been able to allocate money to upgrade necessary computer equipment to his current work portfolio and it has also enabled him to invest in equipment to expand the services he provides to customers.

GRINGO

"Discussing the impact ARFOR has had on his business, Justin said:

I have wanted to expand my service of creating murals for businesses and community projects for a while, and this grant will help with buying the necessary digital equipment for this work. I paint murals inside and outside, murals that celebrate the Welsh way of life. It's a slightly different approach to the company's usual work and something that I enjoy.

CYMUNEDAU MENTRUS – UP TO MARCH 2024

64 Existing initiatives received support

17 Social Enterprises supported. Participants in social enterprises

113 New products / services secured

19 New initiatives received support

£2,430,033 Of investment secured

STREAM 3: CRONFA HER

The Cronfa Her offers businesses and organisations the opportunity to apply for financial grants in order to solve specific challenges they face in their local communities and provide innovative new ways of working in the ARFOR area which is in line with the programme's strategic objectives. The project is delivered by Mentera in partnership with Menter Môn with a proposed budget of £2,600,000 over the project delivery period.

The work stream is divided into two parts:

→ The Small Challenge Fund offers funding of up to £30,000 to trial new ideas for an organisation or business. The aim of this Fund is to fund ideas that could be implemented quickly in order to test whether they are effective or not, with the potential for them to be developed further through an application to the Big Challenge Fund.

→ The Big Challenge Fund is a flexible fund where organisations or businesses can make a joint individual application to develop and implement schemes that respond to the strategic objectives of the ARFOR programme within one local authority, across several authorities or over the entire ARFOR area.

The specific purpose of both Challenge Funds is to assist groups of individuals, business, community and social enterprises and other organisations that want to find innovative solutions to the challenges that communities face at grassroots level by funding individual projects. The aim is to encourage partnership and collaboration at grassroots level as a means of not only strengthening the position of the Welsh language but also the economic context in which its speakers live from day to day. At the core of the work is the belief that it's important to help the residents of these areas to tackle the problems they face and empower their ability to solve problems using their local knowledge by giving them the opportunity to put their ideas into practice.

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CASE STUDIES

CARMARTHENSHIRE AND CEREDIGION CONNECTOR HUB, GLOBALWELSH

Following investment from Cronfa Her ARFOR, this joint venture between GlobalWelsh and creative projects agency Sgema aims to stimulate growth and economic regeneration across the Carmarthenshire and Ceredigion region by connecting local businesses and an international network of thousands of expatriate Welsh members who have skills, knowledge and networks to share. The Yr Egin centre is at the core of the project and acts as a hub for these businesses to foster the connections necessary to stimulate investment and growth in the area, showing the importance of dedicated Welsh-language spaces to develop business and trade.

GLOBAL WELSH

" Speaking about their involvement, Carys Ifan, Director of Yr Egin, said:

As we are a hub for creativity and digital innovation, Yr Egin is excited to be part of the Connector Hub project. This partnership opens up a world of opportunities for businesses in Carmarthenshire and Ceredigion, offering them a unique platform to connect with a global community that is passionate about Wales and its economic prospects.

WELSH SPEAKERS RECRUITMENT RESEARCH PROJECT, BANGOR UNIVERSITY

Cronfa Her has also enabled Bangor University to launch a research project that looks at why recruiting Welsh speakers can prove so challenging for employers, despite demand for jobs locally. Over 12 months, academics from the university will look at the challenges facing organisations when recruiting as well as try to find out what guides the migration decisions of young people between the ages of 18 and 35 when moving away from and into ARFOR areas.

Project leaders will conduct interviews with employers in ARFOR areas in order to collect data that will form the basis of their research work. The team will then produce a practical package to support employers based in ARFOR when recruiting.

PRIFYSGOL BANGOR UNIVERSITY

" Dr Cynog Prys, project lead, commented:

The aim of the project is to create a long-term legacy that will enable young adults who speak Welsh to stay or return to Wales by matching them with work opportunities. We are looking forward to working with all the partners to produce high quality work that will have an impact at grassroots level by contributing to the successful economic development of the area, and thereby supporting Welsh speaking communities within these areas.

ADRA'S TENDRA PROJECT

Following a successful application to the Challenge Fund, Adra has now launched their Tendra project in order to support small construction businesses in completing tender applications for construction projects for social housing agencies. The project provides advice and training to those within the construction industry who face barriers in completing the necessary paperwork for applications to supply contracts. The aim is to build confidence and understanding of the process by individuals within the industry so that they can apply for work, whether for small local projects or larger ones through platforms such as Sell2Wales.

Tendra shows how the ARFOR project can facilitate and support established businesses to make the most of the opportunities available to them, ensuring that capital stays within the local economy, promoting local supply chains and securing work within the region.

Adra

Tendra
Adeiladu'r Dyfodol, Un Tendr ar y Tro
Building the Future, One Tender at a Time

CRONFA HER ARFOR – UP TO MARCH 2024

17
Case studies to date. ARFOR learning studies and sharing of experiences

29
workshops. Regional and local ARFOR events

Regional and local challenges identified

30
Number of local ARFOR schemes

£5,339,172
Value of regional and local ARFOR schemes

77
Number of regional and local ARFOR schemes

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STREAM 4:
BWRLWM ARFOR

The aim of Bwrlwm ARFOR is to promote the Welsh language locally and strengthen the work that is carried out in the name of ARFOR by raising awareness in the form of a public marketing campaign. This stream supports the wider work of the project by leading a communication programme which seeks to increase the use of the Welsh language, encourage a sense of local pride among stakeholders as well as improve awareness of the unique socio-linguistic conditions of the ARFOR area and the economic factors that influences the linguistic situation there. The project is delivered by Cwmni Lafan with a budget of £300,000 over the project delivery period.

There are several elements to Bwrlwm ARFOR. The core of the work is to produce content published on the **Bwrlwm ARFOR** website which outlines good practice and case studies from ARFOR projects as well as informing stakeholders about work that is underway as part of the project. As part of this work and to attract more diverse voices to discuss the economy and the language in public, the **ARFOR Reporters** scheme gives young people the opportunity to develop their writing and communication skills by reporting on some of the project's burning issues and writing about them.

Bwrlwm Forum is a regular virtual meeting that allows stakeholders and those interested in the ARFOR project to come together for an hour to discuss the economy and the language.

Bocs ARFOR is a project that goes out to communities in the ARFOR area to hold and film conversations about the language and the economy in order to hear ideas and create a buzz about the programme.

The **Future Leaders** project represents a special partnership with the ARFOR area Young Farmers Clubs which sees YFC members sharing their experiences of why they have stayed in their local areas or returned after a period away as well as what living and working in the countryside has to offer young people.

The project has also organized events such as the **World's Most Welsh-Language Awards** which celebrated the contributions of individuals and businesses to the Welsh language in Welsh social and commercial life.

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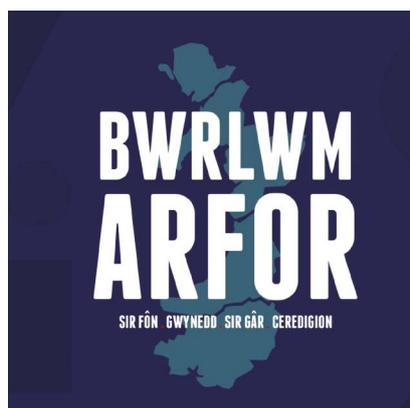
CASE STUDIES

WORLD'S MOST WELSH-LANGUAGE AWARDS

One of the elements of Bwrlwm ARFOR's work is the World's Most Welsh-Language Awards which aim to celebrate the language in the world of work in ARFOR areas. Since the wider programme looks specifically at links between economy and language, an obvious step was to hold an awards ceremony celebrating the businesses and individuals who work through the medium of Welsh. Businesses, organisations and individuals could nominate themselves or others for one of seven awards namely, Most Welsh Brand (Sglods Llanon), Most Welsh Social Media (Pawen Lawen Dog Park), Most Welsh Staff (Caffi Maes Caernarfon), Most Welsh Space (Garth Newydd), Most Welsh Business (Caffi Maes Caernarfon), Most Welsh Individual (Geraint Edwards, Pedair Cainc)

and the Most Welsh Product (Blocks by Ffion Wyn Evans from Enfys o Emosiynau). The nominations were announced, and a public vote was opened to decide the winners. On 17 July an awards ceremony was held in Aberystwyth to celebrate the winners' success.

BWRLWM FORUM

The Forum is an opportunity for individuals who are interested in ARFOR projects and the future of Welsh-speaking communities to take part in a conversation to discuss their experiences, what's happening at grassroots level in their communities and hear some of the latest developments from others who are part of the project. It can be a good opportunity to network and learn more about the variety of projects that are supported by the ARFOR project and those organisations, businesses and individuals who live and work in our Welsh-speaking communities and for the benefit of their future. The Forum is held virtually over Zoom, and everyone is welcome.

They have been very successful so far, attracting people to learn and understand more about ARFOR and offering individuals a valuable opportunity to share their ideas in a welcoming and positive context.

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BWRLWM ARFOR – UP TO MARCH 2024

CYMRAEG

269
Number of messages promoting Welsh language/identity

Mentrau Iaith Cymru successful in Cronfa Her bid. Mentrau Iaith (Language Initiatives) also part of WRU bid.

Strengthened relationship and collaboration with Language Initiatives

100
Heritage/ culture/ local produce/ Sense of Place schemes supported

26
Cynnig Cymraeg rewarded

73
Businesses/organisations increased their use of the Welsh language
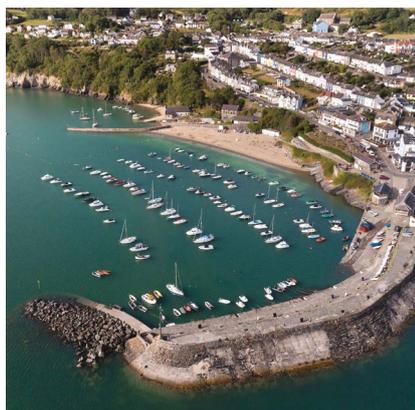
STREAM 5:
MONITORING, EVALUATING AND LEARNING

The objective of the ARFOR programme's Monitoring, Evaluating and Learning stream is to carry out research that looks at the ARFOR programme in order to record the successes of the scheme together with learning what could be improved and developed during the life of the project and in the future. The project is being delivered by research company Wavehill with a budget of £300,000 over the duration of the project. They were also responsible for the evaluation work on the ARFOR 1 project.

Wavehill has created an evaluation and monitoring framework for the project which informs their work in assessing the programme. They have provided an initial report on the work which has been shared with the ARFOR Officers Group as part of the aim to learn and adapt as the project progresses. A final report will be provided at the end of the current phase of the project.

Aberystwyth University and the Sgema company Arsyllfa: Rural Observatory are also joint partners on this stream and have helped hold various discussion sessions, articles, guest blogs and further research to match the objectives of this part of the project. The Arsyllfa: Rural Observatory website, which is run by Sgema, provides a constant stream of stories about the ARFOR project, as well as offering a view of the wider context in the form of news stories that discuss ARFOR areas and communities.

CASE STUDIES

ARSYLLFA: RURAL OBSERVATORY WEBSITE

The Arsyllfa: Rural Observatory website, which is run by Sgema, is an example of the work undertaken by the Monitoring, Evaluating and Learning stream to improve stakeholders understanding of some of the ideas at the heart of the ARFOR programme by sharing news about the project and presenting contributions from leading academics in the field of language planning. Over the past year the Arsyllfa: Rural Observatory has grown into an essential platform to motivate public discussion about ARFOR's core objectives, the nature of the relationship between economic development and the language, the impact of migration on communities and what policy makers need to consider when developing interventions.

ABERYSTWYTH UNIVERSITY RESEARCH WORKSHOPS

As part of their work with Wavehill, academics from the Centre for Welsh Politics and Society, Aberystwyth University have held a series of workshops exploring some of the themes that arise when looking at the links between economic development and the Welsh language. In November 2023 two workshops were held discussing the impact of migration and emigration, with the first of these looking at the specific conditions of north-west Wales and the second inviting contributions from academics across Europe to explain comparative contexts across the continent. These meetings have been a valuable opportunity for those who formulate policy and implement the ARFOR scheme at grassroots level to come together and hear from experts about the latest evidence regarding the links that exist between the economy and the language.
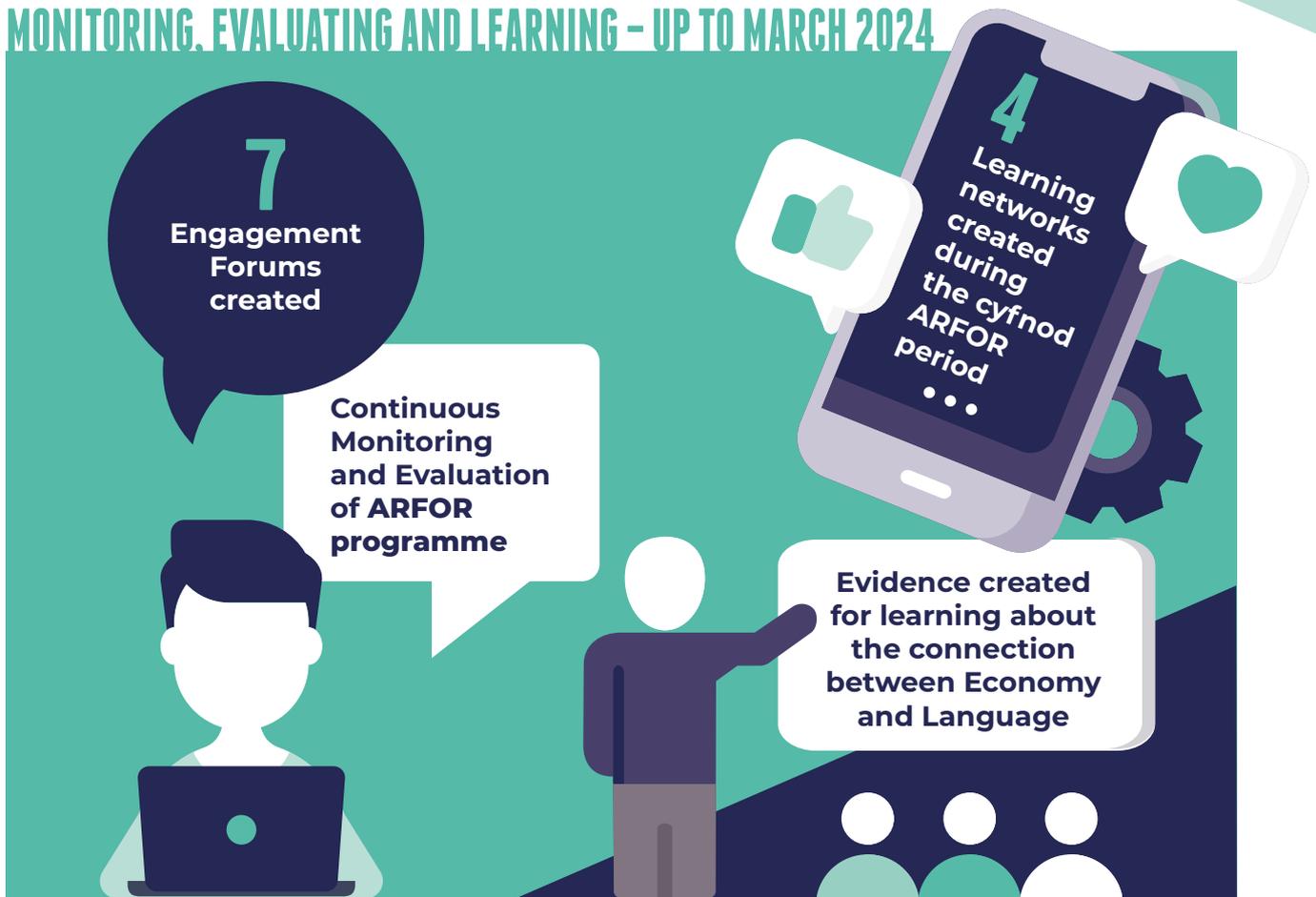
By hearing about what different regions and countries have in common and comparing the impact of migration and specific policy interventions strengthen our understanding of the best way to implement the different work streams and how ARFOR could be developed in the future.

Dr Huw Lewis from Aberystwyth University commented:

Our aim in collaborating with Wavehill on this project is to identify relevant lessons that arise from contemporary research - e.g. in the case of the nature of rural emigration and wider discussions about the nature of the relationship between the economy and the language - and delivering those findings back to the officials responsible for coordinating the ARFOR programme.

7
Engagement Forums created

Continuous Monitoring and Evaluation of ARFOR programme

4
Learning networks created during the cyfnod ARFOR period

Evidence created for learning about the connection between Economy and Language

CONCLUSION

A lot of effort and hard work has been undertaken to ensure that the ARFOR programme realizes its objectives. Collaboration between organisations and suppliers has been at the core of the project, and we can now confidently say that a strong network has been formed to realize this innovative project.

ARFOR 2 has developed the initial work of ARFOR 1 and continued the important process of raising awareness amongst the public about the opportunities available to them within their local areas and what ARFOR streams have to offer them going forward. There is now a solid foundation in place to ensure success if the momentum can be maintained and the necessary investment needed in these areas continued.

The ARFOR programme continues to develop and aims to embrace the special circumstances, which are:

→ Strengthening Welsh language communities' identity in an inclusive way

→ Creating and developing Welsh Language Spaces

→ Sharing good practice in the second homes challenge and the local housing challenge

There is a lot of work to be done between now and the end of this phase of the project in March 2025 but over the coming months we are likely to hit the key targets set across the work streams. The popularity and personal investment of those who have been involved in the work streams is testimony to the fact that the programme has a real impact at grassroots level. If we can continue this good work into 2025 and beyond, developing the project based on what we have learned, we are confident that we will see a real change in how we understand, interpret and act regarding the economy and the language in the Welsh strongholds.

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ARFOR

CREU GWAITH – CEFNOGI'R IAITH

ARFOR 2 PROGRAMME UPDATE
UP TO MARCH 2025

ARFOR ACTION AREA
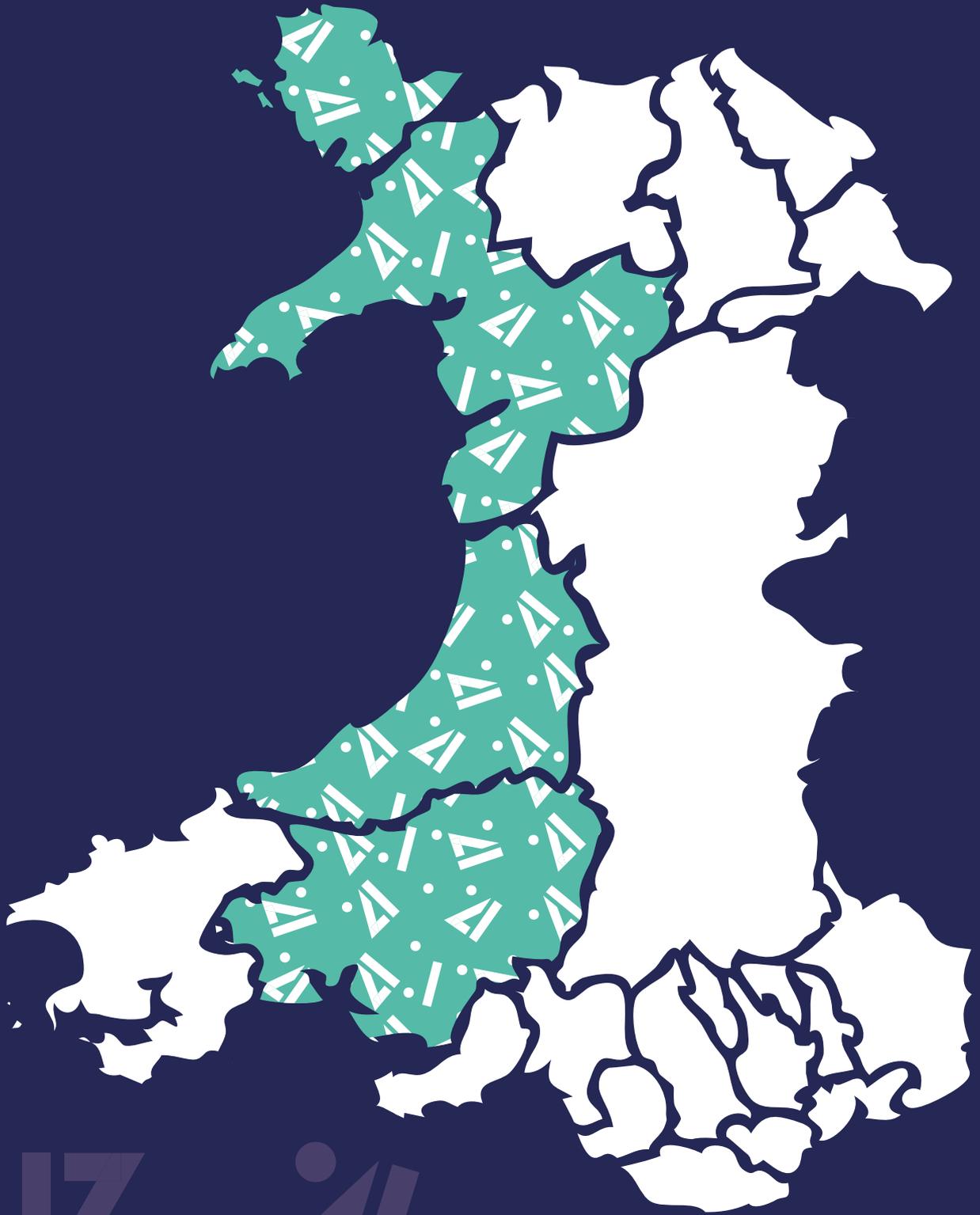
INTRODUCTION

Since 2022 ARFOR 2 has been operating across Sir Gâr, Ceredigion, Gwynedd and Ynys Môn to develop the local economy and increase the visibility and use of the Welsh language in those communities where a high percentage of the population are Welsh speakers. Through a wide variety of programmes and work streams, ARFOR has ensured innovative and far-reaching interventions in favour of the language and the local economy in these areas, which have had a positive impact on a large number of local communities, businesses and individuals.

The core aim of the ARFOR Programme was defined as "Supporting communities that are strongholds of the Welsh language to flourish through economic interventions that will also contribute to increasing opportunities to see and use the Welsh language on a daily basis". We can confidently say that all interventions of the Programme have contributed towards ensuring that this goal has been reached, and that there is real appreciation at grassroots level for the opportunities that the Programme has provided.

A key part of this work, and one of the most important outcomes when considering the long-term impact of the project, is ARFOR's success in facilitating and creating new partnerships and networks. Stakeholders across the region now know each other, are aware of the work being done in other areas and are more willing and able to work together on projects of all kinds. All this desire to work in favour of the Welsh language and the economies of Welsh-speaking communities cuts across geographical boundaries and individual areas of work, and we have been very fortunate to be able to bring the Public Sector, the Private Sector and the Third Sector together in this regard. We are absolutely convinced that this work needs to continue in the future, and that we need to build and develop on the solid foundations of creative collaboration laid by ARFOR 2.

We have also seen collaboration between local schemes supported by ARFOR and national programmes including Regional Skills Partnerships, Skills Wales and the Welsh Language Commissioner.

This has ensured not only that value is added to the ARFOR Programme, but that ARFOR's work attracts wider attention and recognition with more opportunities for collaboration created as a result.

At the core of the whole Programme are the strategic objectives, which have guided and directed every step of the process. At the core of the work are four strategic objectives:

1. **Create opportunities for young people and families under 35 years of age to stay or return to their native communities**, supporting them to succeed in their local areas by following new initiatives and developing careers for them to secure a livelihood that matches their ambitions.

2. **Create enterprising communities within the ARFOR region by supporting business and community initiatives that seek to preserve and increase local wealth** by motivating them to take advantage of the resources, identity and unique characteristics of their local areas in order to do this.

3. **Increase the benefit obtained from the project's activity by ensuring constant and continuous collaboration.** At the core of this lie the principles of learning by doing and sharing good practice within communities, expanding and spreading these practices to other areas while also ensuring that any interventions are tailored for local conditions.

4. **Strengthen the identity of communities with a high density of Welsh speakers in terms of percentage by supporting and promoting the use and visibility of the Welsh language in these areas.** An essential element of this is emphasizing local pride, a sense of place and local loyalty in individual communities while also helping to show the characteristics, conditions and factors that are common to the whole region.

The purpose of this report is to announce the results of the Programme up to the end of March 2025, providing an overview of the work streams and giving examples of some of the many organizations and individuals from across the region who have benefited from the Programme and who have seen a real change in their communities, businesses and lives as a result.

WHAT HAS ARFOR MEANT TO GWYNEDD, MÔN, CEREDIGION AND SIR GÂR?

GWYNEDD

" Councillor Nia Jeffreys, Cyngor Gwynedd Leader:

The ARFOR Programme has highlighted the value of the Welsh language in economic development matters and has strengthened the language as a business and community language in Gwynedd. It is a valuable agenda in areas with a high density of Welsh speakers such as Gwynedd, especially when striving to create a million Welsh speakers nationally by 2050. We need good employment in Gwynedd, as well as business development opportunities, and an economic development agenda that puts the Welsh language first - and the ARFOR Programme has successfully responded to these needs. I would like to acknowledge how innovative the Programme was in intertwining issues of linguistic planning and economic development, as well as its key role in supporting our young people to stay in Gwynedd or return here to live and work.

YNYS MÔN

" Councillor Gary Pritchard, Leader of the Council
and Economic Development Portfolio Holder:

The success of the ARFOR Programme is evident here on Ynys Môn, contributing to the Council's objectives to develop the economy and support the Welsh language. The Programme has enabled a number of businesses - old and new, small and medium-sized to develop, as well as create new job opportunities for local people. It was wonderful to see a number of local businesses drawing attention to the Welsh language within their organisations, new services being introduced, and activities to support a local future for our young people.

CEREDIGION

"

Councillor Bryan Davies, Ceredigion Council Leader:

In Ceredigion ARFOR has enabled us to break new ground, by offering opportunities for our young people to venture into the world of business and realise that you don't have to leave the area to succeed. It has also enabled existing businesses to develop and contribute towards the economic growth of Ceredigion.

Cyngor Sir
CEREDIGION
County Council

SIR GÂR

"

Councillor Darren Price, Sir Gâr Council Leader:

The ARFOR Programme's investment in our young people and the Welsh language has meant that Sir Gâr itself benefits. In the current economic climate, taking advantage of every possible opportunity to improve our local economy, for the benefit of future generations, is extremely valuable.

It was wonderful to see Sir Gâr businesses devoting themselves to increasing the use of the Welsh language in the business world and their desire to invest in order to grow economically.

We have welcomed the ARFOR Programme investment from the Welsh Government. It has been a pleasure to work closely with other local authorities in west Wales throughout the Programme. We look forward to further investment to support Sir Gâr's young people and businesses.

Cyngor **Sir Gâr**
Carmarthenshire
County Council

OVERVIEW OF WORK STREAMS

ARFOR 2 was divided into 5 work streams which were supplied by individual contracted providers. Each stream focused on a different element of realizing ARFOR's strategic objectives and represented work programmes with an individual focus on specific interventions to achieve this. In the next sections we will look at each of the streams in turn, outlining the objectives, thelir methods of operation and the outcome of the work for each element of the project.

1 **LLWYDDO'N LLEOL:** Working to raise awareness of the opportunities that exist in the ARFOR area and help develop the skills of young people there.

2 **CYMUNEDAU MENTRUS:** Fund for County Councils to be able to invest directly to ensure economic growth and that capital stays and circulates within the local economy.

3 **CRONFA HER:** A grant programme that allows organisations, businesses and groups of individuals to come together to solve some of the challenges they face locally.

4 **BWRLWM:** ARFOR activity promotion stream. Working to inform the public about what is being achieved as part of the programme and explore some of its core ideas.

5 **MONITORING, EVALUATING AND LEARNING:** Providing reviews of the programme as a whole in the form of reports, working to develop the academic and public policy bases of the scheme.

ARFOR OUTCOMES – UP TO MARCH 2025

LLWYDDO'N LLEOL 2050

35,596 Young people received information

9,207 Young people received support

16,687 Young families received information

1,175 Young families received support

929 Positive messages disseminated

599 Examples of local success identified

48 jobs have been created

33 jobs protected

CYMUNEDAU MENTRUS

26 New initiatives received support

110 Existing initiatives received support

£2,464,724 Of investment secured

95 New products / services secured

205 jobs have been created

168 jobs have been protected

CRONFA HER ARFOR

30 Number of regional and local ARFOR schemes

£2,137,091 Value of regional and local ARFOR schemes

27 Regional and local ARFOR events

17 Case studies to date. ARFOR learning cases and sharing of experiences

Identifying regional and local challenges

52 Participants in social enterprises receives support

227 Number of partners

74 jobs have been created

94 jobs have been protected

BWRLWM ARFOR

73 Businesses / organisations increased their use of Welsh

141 Number of individuals who improved their Welsh language skills

100 Heritage / culture / local produce / Sense of Place schemes supported

269 Number of messages promoting Welsh language / identity

Mentrau Iaith Cymru successful in their Cronfa Her bid. Mentrau Iaith (Language Initiatives) also part of WRU bid. Strengthened relationship and collaboration with Language Initiatives

39 Cynnig Cymraeg awarded

CYMRAEG

MONITORING, EVALUATING AND LEARNING

Continuous Monitoring and Evaluation of the ARFOR Programme

4 Learning networks created during the ARFOR period

7 Engagement Forums created

Evidence created for learning about the connection between Economy and Language.

Holding a conference that brought together a large number of stakeholders.

Submit a final report of the project

STREAM 1: LLWYDDO'N LLEOL

Llwyddo'n Lleol 2050 was a marketing and promotional campaign that worked to raise awareness of the opportunities that exist in the ARFOR area and offer advice and support to those who want to stay or return to the region. The project was delivered by Menter Môn in partnership with Mentera with a proposed budget of £3,000,000 over the lifetime of the Programme.

The main objective of Llwyddo'n Lleol was to convince and persuade young people and families who lived in the region, together with those who had left, of the exciting career opportunities available to them by staying locally or when returning from other areas. The core of this aim was to start a positive conversation with young people in order to encourage them to take risks and develop successful careers and consider establishing their own businesses in the ARFOR areas. Llwyddo'n Lleol has been an essential part of the ARFOR 2 Programme and has been vitally important in establishing the ARFOR brand and broadcasting messages about the objectives of the Programme among key audiences as well as promoting the opportunities available across the region.

The project was divided into four divisions, the **Career Element**, the **Enterprise Element**, the **Settling Element** and the **Testing Element**.

→ The **Career Element** aimed to promote the career and social opportunities that exist in the ARFOR area. This work was delivered through specialist workshops, breakout sessions, mentoring work and providing advice and job fairs highlighting local opportunities. The project also supported local businesses to offer employment to local young people.

→ The **Enterprise Element** was designed to encourage young people to venture within their native communities by providing funding and advice to individuals who want, are considering or have already started a business locally. Successful applicants took part in programmes involving advice and training from business experts focusing on key skills such as marketing, financing, financial literacy as well as attracting and serving customers. The scheme also offered grants of £1,000 to participants to develop their business idea.

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We believe that this work as essential in addressing the challenge of the emigration of young people from ARFOR areas and the ongoing impact this has on communities, the Welsh language, the workforce and the economy in these areas. Steps need to be taken to fight the narrative that there are no opportunities for young people in these areas, and the work of Llwyddo'n Lleol is testimony to the fact that interventions can be designed in a positive way in order to do that.

The campaign specifically addressed the following elements:

→ The types of jobs available in the ARFOR region.

→ How employers have a presence in ARFOR and the opportunities they offer.

→ The necessary skills needed in order to get a job and develop a career.

→ How entrepreneurship and setting up a business can be an option for anyone.

It is essential that the work in this area continues, as we now have a strong brand and a broad understanding of what the scheme is offering to young people in the area. We need to mainstream the working methods and ensure that young people across ARFOR not only feel pride in their locality but see it as a place where they could live in the future without having to mitigate their ambition.

→ The **Settling Element** explored ways of encouraging young families living beyond the ARFOR region to return to their local areas, providing them with information, advice and support to do so. This was delivered in the form of residential weekends where families had the opportunity to visit and spend time in specific areas to experience a taste of life in the ARFOR area.

→ The **Testing Element** worked to improve young people's skills to prepare them for the world of work. This work was delivered through face-to-face sessions in schools to help learners identify their skills, provide support on how to search and apply for jobs, as well as advice on how to draft a CV emphasising the opportunities for young people to access local jobs.

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CASE STUDIES

KIERAN THOMAS, DELI ALBERT REES

Since being employed by Deli Albert Rees through the support of Llwyddo'n Lleol, Kieran Thomas from Llanddarog has experienced success as a new butcher. Kieran won a gold medal in the Apprentice Butcher of the Year competition in Newport and is going from strength to strength building skills for the future. His apprenticeship was sponsored by Llwyddo'n Lleol, which enabled Kieran to change careers and gain skills that have proved beneficial to him personally and to the wider business.

"

Matthew Rees said:

The help we got from Llwyddo'n Lleol has enabled us to do this. Without this help we might not have be able to do it for a while. We want to push the business, we want to grow, and this will help us do that.

MENTER GORLLEWIN SIR GÂR'S PROFI SCHEME

Menter Gorllewin Sir Gâr's Profi Scheme aims to improve young people's world of work skills, inspiring them to take risks and confidently apply for local opportunities in order to enable thriving bilingual communities. The scheme offers support and advice to young people to develop individual strengths and skills and take advantage of opportunities such as work experience, volunteering and part-time work in order to improve their employability and develop as people. The **www.profi.cymru** website offers a wide variety of resources and digital content to help young people grow their awareness of what they have to offer within the world of work.

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SETTLING SUPPORT

As part of the Settling Element, 7 families were offered the opportunity to receive financial support to return to ARFOR. The scheme provided financial and practical support to people who wanted to return to their communities in Ynys Môn, Gwynedd, Ceredigion and Sir Gâr. Up to £5,000 was available to assist these families with transport costs, securing accommodation and childcare. This programme proved extremely popular with the demand for the grant very high. The 7 families have since returned to their areas and are in the process of starting their new lives in ARFOR.

Among the successful families were Annest and Saman, who met in Thailand after Annest moved there in 2013. They now have a son and were eager to return to Gwynedd so that he could be brought up in Wales and benefit from the wealth of the Welsh language and its culture.

> Annest said:
>
> **This support has made the decision so much easier. We are excited to be coming home and so grateful to Llwyddo'n Lleol for making it possible.**
>
> **It means a lot to be able to give back to the community that shaped me. I want Arwyn to have the same opportunities as I had growing up, to speak Welsh every day and be part of a strong, supportive community.**

Discussing the project and the importance of the Settling element, Aled Pritchard, Llwyddo'n Lleol Project Officer, said:

We know that so many young people want to return, but there are practical barriers holding them back. The Settling element helps to remove those barriers, proving that moving home is not just a dream but a viable supported reality. Seeing these seven families take the step to return home is incredible.

SETTLING TOOLKIT

As a result of the popularity of the settling grant and as part of the wider work of the Settling Element, a Settling Toolkit was prepared to help those who are considering moving or returning to ARFOR areas to learn about the region and what is available there. The decision to move anywhere is a step that can seem challenging at times, and it is natural for questions about work, housing, public services and social life to arise. Finding the information that is relevant to you can be a seemingly overwhelming task. The purpose of the document was therefore to assist individuals and families to take the next steps towards moving back to ARFOR areas by providing information, advice and guidance. The toolkit was divided into 5 sections: housing, jobs and work opportunities, education and childcare, health and care and social events and the Welsh language. To read the document in its entirety contact **gwybodaeth@rhaglenarfor.cymru**.

9,207
Young people received support

599
Examples of local success identified

1,175
Young families received support

16,687
Young families received information

33
jobs protected

48
jobs have been created

35,596
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Positive messages disseminated
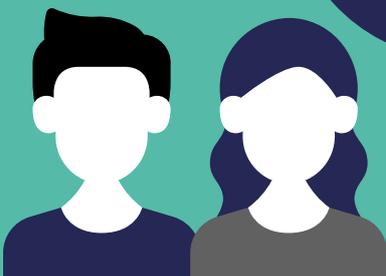
STREAM 2: CYMUNEDAU MENTRUS

Cymunedau Mentrus was a programme administered by ARFOR areas county councils.

The core purpose of the fund was to respond to the regional challenges found across ARFOR areas, with the hope that successful plans will respond to these and seek innovative solutions in the areas of work, the local economy, and the Welsh language. These challenges were defined as follows:

Work

→ The belief that work available within the ARFOR region does not offer sufficient income to enable people to live the life they want and to realize their aspirations in terms of pay and work/life balance.

→ The belief that a lack of diversity and job opportunities is an obstacle for individuals and young families to be able to stay in the communities where they grew up, and that this also prevents some from returning.

→ The skills gap that exists between the workforce and the needs of local employers.

The Local Economy

→ The need for communities and individuals to take advantage of the opportunities offered by the economic, social, environmental, cultural and linguistic qualities of the region.

→ The need to add value to local products and services in order to strengthen the economic foundations of communities.

→ The need to take more advantage of the principles of a basic and circular economy ensuring that more money circulates in the region's economy.

→ The need to prevent the risk of losing key resources and services in communities by stimulating a positive, resilient and active attitude that is alert to these problems.

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The Welsh Language

→ The need for commercial and social enterprises to make a greater contribution to increasing the use of the Welsh language locally, as a means not only of promoting the unique language and culture of the ARFOR area and creating a unique sense of place, but also as a means of adding value to goods and services offered.

→ The need to create new Welsh language spaces and develop those that already exist.

→ The need to increase the number of jobs that have bilingual skills at their core.

→ The need to increase the use of Welsh within businesses and organizations, normalizing its use as the working language of the world of work.

The Cymunedau Mentrus fund had a budget of £4,500,000 divided into £1,125,000 for each county council individually. The county councils could provide financial support to organizations that successfully applied for specific projects.

Organizations were able to receive support through funding that contributed to revenue and capital costs and financial support that paid up to 70% of the costs of each individual project. The size of these projects varied from case to case and organizations could receive support of between £5,000 and £75,000. This funding allowed these organizations to employ Welsh-speaking staff, invest in creating a new product or service, provide training for the new jobs, to cover costs that could help create Welsh-speaking spaces such as the rent and purchase of equipment on a small scale. Cymunedau Mentrus had a wide impact on a large number of businesses, allowing the councils to be able to assist businesses in a strategic way that helped stimulate growth in the area and secure jobs.

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CASE STUDIES

CEREDIGION - HALEN A PUPUR

Halen a Pupur is a café in Tregaron run by two young mothers and has been in business for just over a year. The project is a testament to the opportunities that the ARFOR Programme offered to individuals who want to venture into the world of business and do so in their own communities where the Welsh language is a natural part of social and commercial life. The business has gone from strength to strength, with the £15,000 grant received through Cymunedau Mentrus allowing them to invest and grow their business and secure 5 jobs for local people. The café has become a popular destination for young and old residents and is now a natural Welsh-speaking space that has helped regenerate the town.

HALEN A PUPUR
COFFI + BWYD

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SIR GÂR - GOFAL GOLWG

Sara Tidey received support from ARFOR to start an optometry practice in Llandovery. Insight / Gofal Golwg is a fully bilingual business that has already created employment opportunities for two people in the area and has brought an empty building back into use.

"

Sara said:

The opportunity to gain support from ARFOR has turned Gofal Golwg into a reality. Having grown up in the area, and now raising children here, I was eager to start a business that served the community. Through support from ARFOR and other business grant opportunities provided by Carmarthenshire County Council, the business is now operational and proving successful.

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GWYNEDD - CHWAREL

Chwarel Cyf, an independent television production company based in Cricieth, managed to secure an ARFOR Cymunedau Mentrus grant worth £40,155.11. With a growing portfolio of awards and successful productions, including BAFTA, RTS, *Great House Giveaway* and the Welsh version of *Gogglebox* on S4C, Chwarel has seen rapid growth in recent years.

With the support of an ARFOR grant, Chwarel created two new roles as part of the company's ongoing development. These jobs have offered valuable learning and career opportunities to Welsh speakers in the area, strengthening the company's commitment to promoting and using the Welsh language in the creative industry.

The funding has enabled Chwarel to expand their capacity and develop new and exciting formats. It has also allowed them to continue to provide high quality content while nurturing the next generation of Welsh-speaking talent within the television production sector.

chwarel
independent film & radio
ffilm a radio annibynnol

"

Sioned Wyn Morus, owner of Chwarel, said:

Receiving this grant means that the company has been able to survive after COVID and has enabled us to go from strength to strength and build on winning a British BAFTA for our production of *Great House Giveaway*.
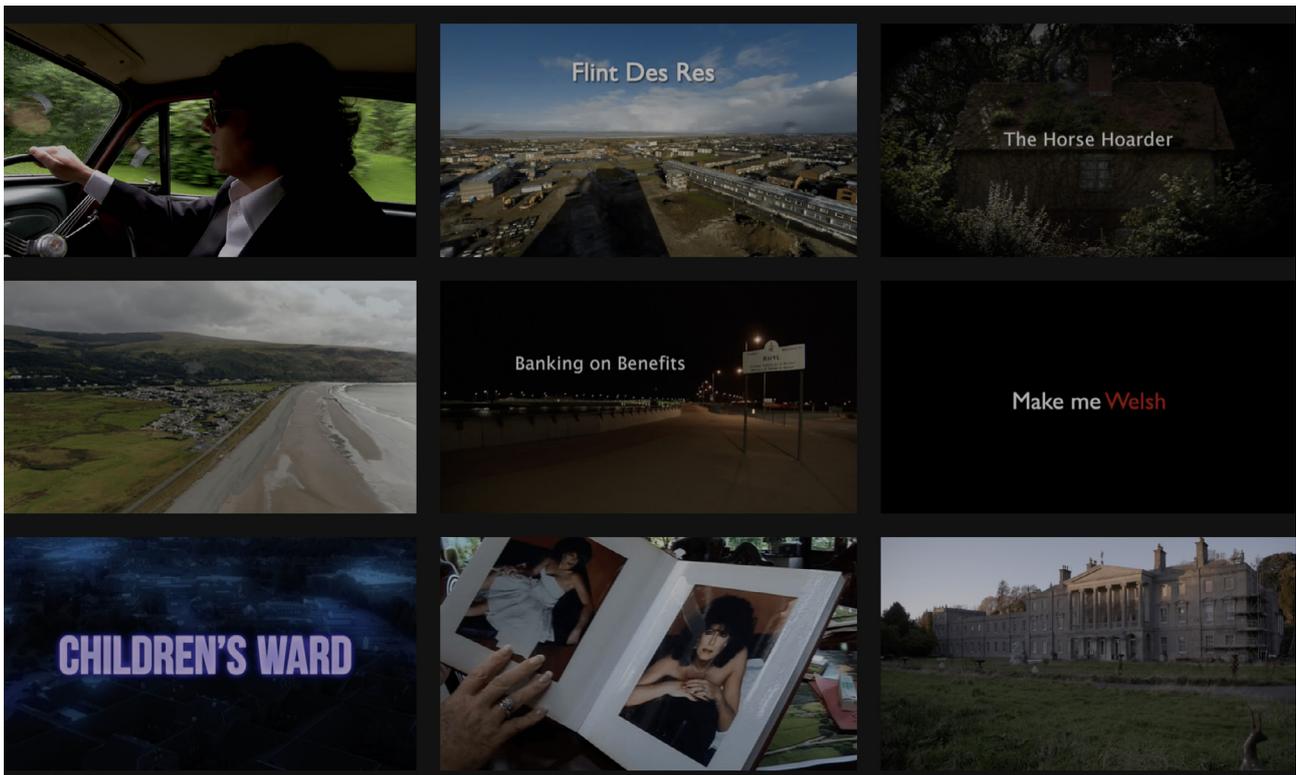
YNYS MÔN - CWMNI CADARN (CADARN CONSULTING ENGINEERS)

Cadarn is an independent engineering consultancy based in Llangefni, which uses a local workforce to develop structural and infrastructure expertise to serve the wider construction industry.

With the help of ARFOR, the company managed to invest in new design and engineering equipment in order to offer new and innovative services. As a result of this investment, the company continues to create new technical jobs in the area and has supported training for existing staff to operate the equipment and offer new services. They also run an apprenticeship programme with colleges and universities to develop a local workforce. They offer a fully bilingual service, providing projects to clients in Welsh and English as 80% of the company's workforce are fluent Welsh speakers.
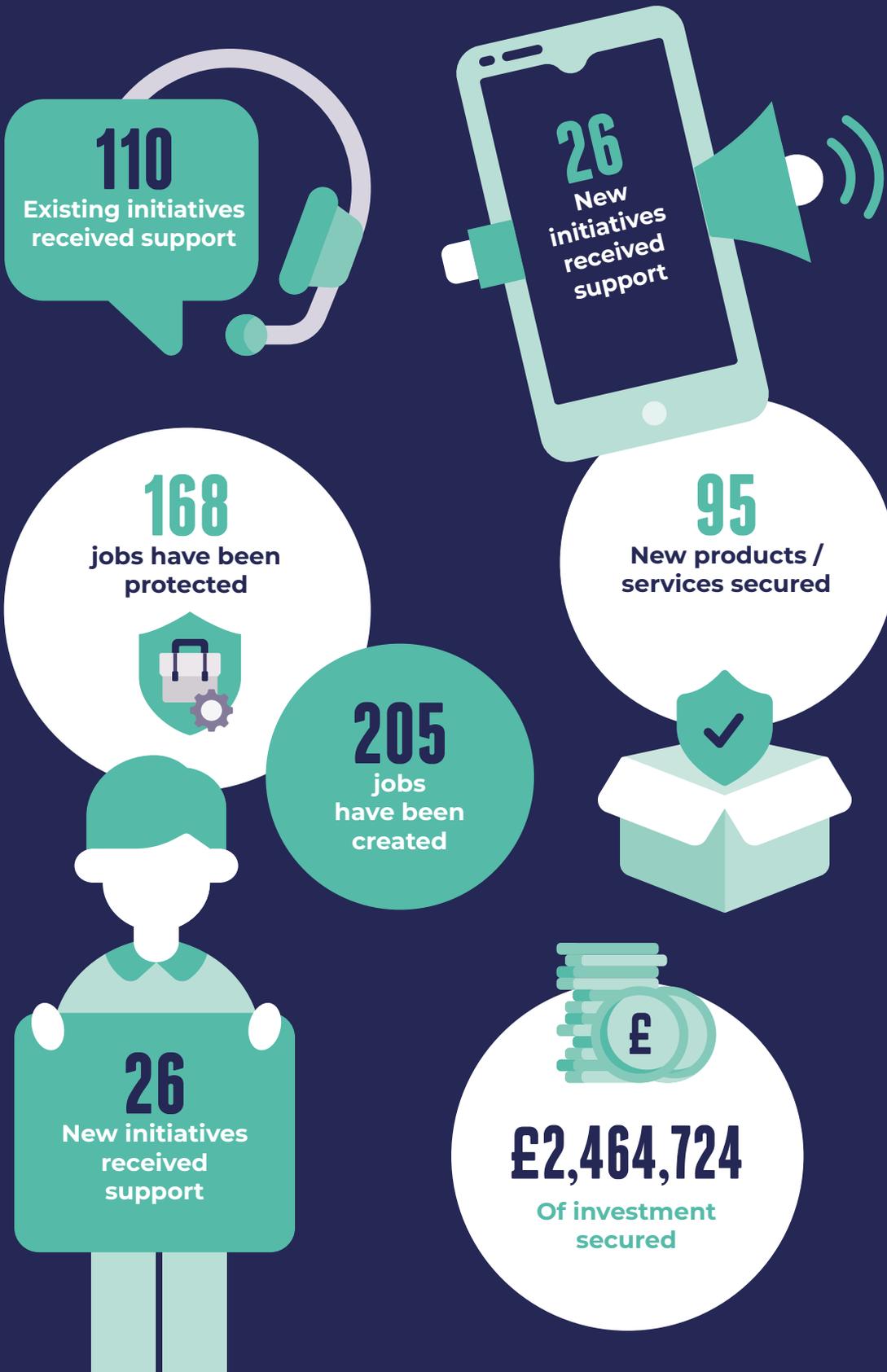
" Ifan Rowlands, Managing Director of Cadarn, said:
The grant has been invaluable to us as we are now able to offer a unique service to our clients, and continue to employ and train local, bilingual engineers.

CYMUNEDAU MENTRUS – UP TO MARCH 2025

110
Existing initiatives received support

26
New initiatives received support

168
jobs have been protected

95
New products / services secured

205
jobs have been created

26
New initiatives received support

£2,464,724
Of investment secured

STREAM 3: CRONFA HER

Cronfa Her offered businesses and organizations the opportunity to apply for financial grants in order to solve specific challenges they were facing in their local communities and provide innovative new ways of working in the ARFOR area that aligned with the strategic objectives of the Programme. The project was delivered by Mentera in partnership with Menter Môn with a proposed budget of £2,600,000 over the programme's delivery period.

The purpose of Cronfa Her was to respond to local and regional challenges by helping to develop and finance innovative projects that had inter-institutional collaboration at their core. These challenges included:

→ The lack of knowledge and understanding of the relationship between the economy and the Welsh language.

→ The need to continue to learn and innovate within the field to develop the work further.

→ The importance of offering the opportunity to a wide range of stakeholders to contribute to the work.

→ Acknowledgment that the Welsh Government and Local Authorities do not have all the answers.

The image below gives an idea of the wider types of challenges that have been responded to through Cronfa Her projects:
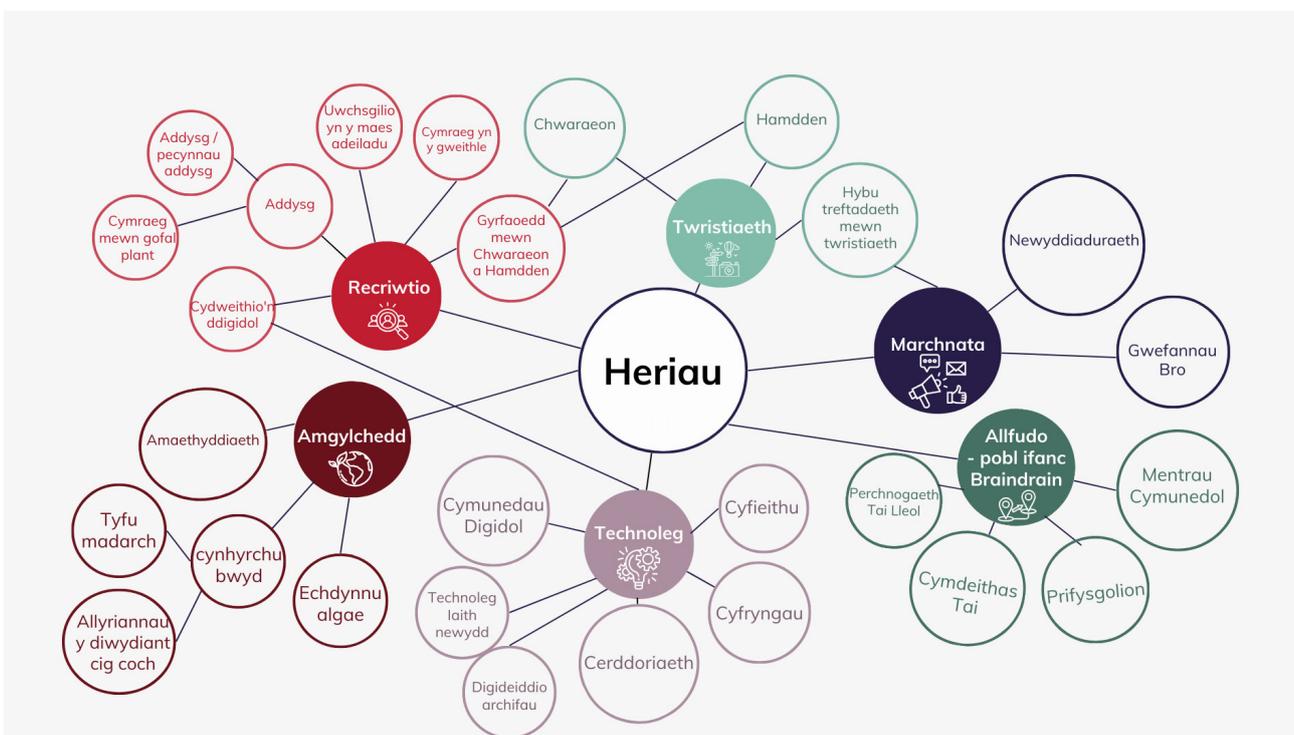
Cronfa Her's ambition was to explore solutions to these challenges that could demonstrate and strengthen the relationship between language and economy. Each scheme was required to try and prove the following points:

→ Using the language boosts the economy.

→ Using the language gives employers and staff new employment opportunities.

→ Using the language can help create a brand and draw for businesses.

→ Using the language can spark a sense of pride, including a sense of belonging to a community and having the opportunity to talk to other people who speak the same language.

The Cronfa Her work stream was divided into two parts, the Cronfa Her Fach and Cronfa Her Fawr, in order to meet different requirements.

→ **Cronfa Her Fach** offered funding of up to £30,000 to trial new ideas for an organization or business. This fund's intention was to finance ideas that could be implemented quickly in order to test whether they were effective or not, with the ability for them to be developed further through an application to the Cronfa Her Fawr.

→ **Cronfa Her Fawr** was a flexible fund where organizations or businesses could make a joint individual application to develop and implement plans that responded to the strategic objectives of the ARFOR Programme within one local authority, across several counties or across the entire ARFOR region.

By requiring project applicants to collaborate beyond their individual institutions the aim was to encourage partnership and collaboration as a means not only of strengthening the position of the Welsh language but also the economic context in which its speakers live by fostering new working relationships. At the core of the work was the belief that it is important to help the residents of these areas to tackle the problems they face and empower them to solve problems using their local knowledge by giving them the opportunity to put their ideas into practice.

As a result of this work, the 30 funded projects have produced a toolkit outlining what was delivered and how to go about creating similar projects. Each toolkit provides a useful and interesting insight into what was learned about the links between economy and language, and the challenges and innovative solutions that each of the projects identified and proposed.

CASE STUDIES

MENTRAU IAITH CYMRU: SPORT AND LEISURE ENTERPRISE PROJECT

The intention of this project was to encourage entrepreneurship among Welsh speakers in the fields of leisure and sport. By providing an opportunity for young people to qualify as coaches in their chosen leisure areas, the aim was to enable them to gain casual work in their local communities while also encouraging and enabling sports and leisure clubs to hold sessions through the medium of Welsh.

The project enjoyed a presence across all of ARFOR's counties and collaboration was achieved with the sports departments of the councils together with local clubs in order to motivate individuals to participate and to facilitate training in various recreational sports. As part of the project, two individuals were employed to lead the work.

One of these officers was located in Ynys Môn and Gwynedd and the other in Ceredigion and Sir Gâr, with 3 officers who worked for the Mentrau Iaith already in place to assist them with the work. Links were created with young people through the secondary schools, local colleges and

through sports clubs in order to attract interest in securing training to qualify as accredited coaches. There was collaboration between the officials and Sport Wales and the individual sports management bodies, together with bodies that provide sports training. Without this intervention it would not have been possible to hold these sessions through the medium of Welsh, as there was not sufficient demand for Welsh-language sessions before the establishment of the programme.

This project shows how Cronfa Her enabled different organizations to work together in order to encourage entrepreneurship among the young people of ARFOR and allow them to follow training in their own language. This ensured not only the ability to look for possible job opportunities in the future but also helped to gain confidence and start to change the culture in some clubs where although Welsh may be the main language of the sessions, technical training through the medium of Welsh was seen as less important.

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CANOLFAN BEDWYR, BANGOR UNIVERSITY: ARFER

The aim of this project was to develop an app that incorporated some of ARFer's principles and methodology in order to create a framework to support changing language practices within workplaces. The aim of the ARFer method is to support staff in workplaces where English is currently the default language, to use more Welsh.

The initial evidence of the methodology and the results seen before the development of the app were very promising. When ARFer methods were used and the frameworks outlined were followed, the use of Welsh among work teams doubled. 88.4% of users who trialled ARFer's language use tasks said that their use of Welsh had increased as a result.

As a result of the ARFOR Cronfa Her grant, the team was able to develop an app that implemented this research in an accessible way that was available to a wide audience. The app is now available free of charge on various platforms and is proving an effective way for businesses and organizations to increase their use of the Welsh language and to make the process fun.

TETRIM TEAS: GROWING LANGUAGE, GROWING MUSHROOMS, GROWING PARTNERSHIPS

This project's objective was to give disadvantaged communities in west and north Wales the opportunity to work together and benefit by growing mushrooms for use in tea products. Tetrim Teas collaborated with Madarch Cymru to create various mushroom growing sites in Sir Gâr, Ceredigion and Gwynedd. As part of the project Cynan Jones from Madarch Cymru provided training for local people to be able to grow and harvest mushrooms themselves and now the project employs 6 people who share 3 jobs across the 3 sites. All the employees either speak or are learning Welsh and Welsh is the main language of the enterprise.

Along with the provision of jobs, many wider community movements have been established as a result of the project, including community composting units to support and facilitate community vegetable growing projects, specialist training for

workers to improve skills and the provision of fresh mushrooms for these communities to eat. The project has also succeeded in securing further significant funding to further grow and expand the project.

The project shows the potential of Cronfa Her to create work in innovative areas and new sectors, helping businesses and communities to work together to ensure that well-paid opportunities for work through the medium of Welsh are available to local people.

TETRIM TEAS
CYMRU

CRONFA HER ARFOR – UP TO MARCH 2025

17
Case studies to date.
ARFOR learning cases and sharing of experiences

227
Number of partners

Identifying regional and local challenges

74
jobs have been created

94
jobs have been protected

27
Regional and local ARFOR events

30
Number of regional and local ARFOR schemes

£2,137,091
Value of regional and local ARFOR schemes

52
Participants in social enterprises receives support

STREAM 4:
BWRLWM ARFOR

Bwrlwm ARFOR's objective was to encourage the use of the Welsh language locally, to promote ARFOR's wider work, and to strengthen that work by raising awareness of the Programme in the form of a multi-media public marketing campaign. The project was delivered by the Lafan company with a budget of £300,000 over the duration of the programme.

Bwrlwm ARFOR was an essential part of the project and led a communication programme that not only increased awareness among the public and partners but also helped connect stakeholders from different streams of the ARFOR Programme. This has resulted in a new network of people who have a keen interest in the Welsh language and economic prosperity who have come to know each other and work together across the active period of the Programme and into the future.

Bwrlwm ARFOR was also key in encouraging a sense of pride in their locality among stakeholders as well as improving awareness of the unique socio-linguistic conditions of the ARFOR area and the economic factors that influence its linguistic situation.

Bwrlwm ARFOR's work was multi-faceted and cross platform, with the need to engage strategically with a variety of audiences in different ways with messages specially tailored for specific purposes.

The core of the work was to produce content to be published through the **Bwrlwm ARFOR** website which outlines good practice and case studies from ARFOR projects as well as informing stakeholders about the work taking place as part of the project. As part of this work Bwrlwm ARFOR also set up and implemented the following projects:

→ **C'mon Cymraeg:** a series of podcasts that invited various voices to consider the impact of the Welsh language on the prosperity of businesses in ARFOR communities.

→ **ARFOR Reporters Scheme:** an opportunity for young people to develop their writing and communication skills by reporting and writing about some of the project's important issues and attracting more diverse voices to explore the economy and the Welsh language in the public domain.

→ **Bwrlwm Forum:** a regular virtual meeting that allowed stakeholders and those interested in the ARFOR project to come together for an hour to discuss the economy and the Welsh language.

→ **ARFOR Box:** a project that reached out to communities in the ARFOR area to hold and film conversations about the Welsh language and the economy in order to hear ideas and create a buzz about the programme.

→ **The Future Leaders project:** a special partnership with the ARFOR area Young Farmers Clubs which saw YFC members sharing their experiences of why they have stayed in their local areas or returned after a period away as well as what living and working in the countryside has to offer young people.

→ **The Most Welsh in the World Awards:** an event celebrating the contributions of individuals and businesses to the Welsh language in Welsh social and commercial life.

→ **Cymraeg Spaces:** special attention was paid to Welsh Language Spaces as a means of raising awareness of their value to local businesses and creating a sense of pride for the presence of the Welsh language locally.

To learn more about **Bwrlwm ARFOR's** various projects visit **www.bwrlwmarfor.cymru**

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CASE STUDIES

'ARFOR 2024' SUMMIT

The ARFOR 2024 Summit was held at Parc y Scarlets in Llanelli in November 2024. The event was an opportunity for ARFOR stakeholders and those who had been working on the Programme to come together to discuss and celebrate the work achievements of the Programme.

The event was hosted by producer and presenter Angharad Mair, and a number of guest speakers also discussed different aspects of the presence of the Welsh language in their businesses. The highlights of the day included contributions from the ARFOR project leaders outlining the progress of the Programme, group activities to discuss different ideas about the Welsh language in the workplace and informal networking sessions for people to get to know each other and discuss further.

There was also an opportunity to listen and ask questions to business leaders who had directly benefited from the work of the different streams. The Trade Fair held as part of the day was also a valuable opportunity for those attending to meet, discuss and buy from traders from across ARFOR areas and hear their individual stories.

"

A spokesman for Lafan, the organizers of the event, said:

Our aim with the 'ARFOR 24' Summit was to attract all business sectors (private, social) as well as the public sector to an event that would bring a wide range of stakeholders from across the ARFOR region together to agree on a statement of commitment to make "more and better use of the Welsh language" in order to make a stand, and create a buzz around the subject. This resulted in a packed programme of guest speakers, group activities and informal networking opportunities.

With plenty of space at the location, there was an opportunity to hold a 'Trade Fair'. This provided an opportunity for ARFOR businesses to showcase their businesses (our target was 25-30 businesses), create new connections, develop relationships across the ARFOR area and celebrate the wide range of businesses that benefit economically from the Welsh language - all under one roof.

It was also an opportunity to support businesses that have not managed to receive financial support through either Cymunedau Mentrus, Cronfa Her or Llwyddo'n Lleol, in order to expand the network of businesses that know each other and work together in the ARFOR area. The eligible businesses were able to take advantage of a free of charge exhibition stand, refreshments as well as networking opportunities. By holding the Trade Fair on the same day as the Summit, conference delegates could visit the Trade Fair, and for businesses that were exhibiting could sit in on the conference, learn and be further inspired.

A small working group was held from other work streams of the ARFOR programme, together with Menter Iaith Cymru and a member of the Welsh Language Commissioner's team, in order to ensure collaboration and to add value to the event.

It was agreed that first refusal for the 25-30 business slots at the Trade Fair would be offered to the businesses that had already benefited from ARFOR's support, through Cymunedau Mentrus, Cronfa Her or Llwyddo'n Lleol. The work streams nominated 10 businesses each from the streams, and then Lafan contacted them to offer them the opportunity to exhibit. The feedback from the businesses was very positive, with many of them enjoying high sales on the day.

The conference was well attended by a variety of people from various sectors.

FUTURE LEADERS

Future Leaders was a joint partnership between Bwrlwm ARFOR and the Young Farmers Clubs, with the aim of showcasing the opportunities available to individuals who were considering returning to ARFOR areas by telling the stories of those who had already taken the step to move back. Through video interviews examples were shown of how individuals have returned and found success in their careers by finding work or setting up businesses to serve local needs, using existing networks and established connections to assist them in the process.

These short films were an effective means of broadcasting some of the main messages of Bwrlwm ARFOR, focusing on a positive message that emphasized the benefits of living in ARFOR areas and addressing some of the preconceptions and myths that exist. The video shows that these areas are lively places, where young people can venture into business and find success, they enjoy social lives and strong communities where a happy and meaningful life can be created.

> In one of the films Cadi Mars Jones who has returned to Meirionnydd having completed a degree in Cardiff, tells her story and emphasizes the opportunities available to young people:
>
> **I think everyone from this generation says, 'We have to go away to get work, go to the big cities then come back home,' but I don't think that's true. I think it's what you do, and if you want a good career in a rural area, it's possible and the opportunities available are endless.**

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141
Number of individuals who improved their Welsh language skills

269
Number of messages promoting Welsh language /identity

CYMRAEG

Mentrau Iaith Cymru successful in their Cronfa Her bid. Mentrau Iaith (Language Initiatives) also part of WRU bid.

Strengthened relationship and collaboration with Language Initiatives

100
Heritage/ culture/ local produce/ Sense of Place schemes supported

39
Cynnig Cymraeg awarded

73
Businesses/organisations increasedtheir use of Welsh

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STREAM 5:
MONITORING, EVALUATING AND LEARNING

The objective of the ARFOR Programme Monitoring, Evaluating and Learning stream was to carry out research looking at the ARFOR Programme in order to record the successes of the scheme together with learning what could be improved and developed during the lifetime of the project and in the future. The project was delivered by research company Wavehill in partnership with Sgema and Aberystwyth University with a budget of £300,000 over the project period. Wavehill was also responsible for the evaluation work on the ARFOR 1 project.

Wavehill has been extremely active in monitoring and evaluating the ARFOR Programme as a whole since 2022. They have prepared a rigorous final evaluation of the project which assesses all work streams in turn, taking care to gather the necessary information and carry out interviews with stakeholders, Programme participants, those who received support through the programme and programme organizers and administrators at all levels.

Aberystwyth University's work was a new aspect of the Programme which helped those who shaped and participated in the project to learn more about the links between economy and language in the form of research papers, reports, workshops, lectures and seminars. They were also instrumental in looking at examples from beyond Wales, drawing on the experiences of language planners from across Europe and beyond in order to strengthen the Programme and share lessons.

Sgema were also joint partners on this stream and helped deliver various discussion sessions, articles, guest blogs and further research to complement the objectives of this part of the project. Their Observatory website provided a steady stream of stories about the ARFOR project, as well as offering a view of the wider context in the form of blogs and stories discussing ARFOR areas and communities and highlighting some of the key factors at the heart of the project.

As part of this work, a group visited the Basque Country to learn about the work happening within its education system, the business world and the local authorities in order to strengthen Basque as a language and make it an integral and natural part of the world of work through innovative interventions.

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CASE STUDIES

STRENGTHENING UNDERSTANDING AND LOOKING TOWARDS THE FUTURE CONFERENCE

An ARFOR conference: Strengthening Understanding and Looking Towards The Future was held at Canolfan Medrus, Aberystwyth University. The conference offered attendees the opportunity to take part in various sessions, presentations and talks. Along with discussion sessions and presentations on specific topics, a preview of some of the main points of Wavehill's final evaluation of the ARFOR Programme was provided. The conference also offered an opportunity for stakeholders and those who have been part of the ARFOR Programme to come together to discuss the project and their impressions of it towards the end of the project.

Good feedback was given to the event as well as a positive response to the different sessions. The clear enthusiasm and passion that could be heard in the contributions of individuals during the discussion sessions was impressive, showing once again that the future of the Welsh language is a subject that inspires profound thought.

We succeeded in creating and environment for meaningful and engaging discussions which enabled attendees to share their valuable experiences and insights regarding the Programme, and the wider challenges that north and west Wales face. There seems to be a real appetite to tackle ideas that discuss the economy in these areas in the context of the Welsh language and how to use investment plans for the benefit of Welsh-speaking communities.

The discussion was enriched by the wide range of individuals who attended, with experts from a wide variety of fields present and ready to share their experiences and ideas in order to solve some of the main challenges that ARFOR areas face.

" Speaking on behalf of Wavehill, Lowri Cunnington-Wynn, the event co-ordinator, said:

The conference was a huge success - a great opportunity to bring people together to discuss the challenges and opportunities facing our communities, our economy and the Welsh language. We are very grateful to everyone who contributed to make the day so successful. It is clear that collaboration is key and that continuing some of these conversations is extremely important.

Discussing the evaluation report due to be published later in 2025 Ioan Teifi from Wavehill said:

The ARFOR 2 evaluation has a critical role in helping to inform how the main objectives of the Programme should be supported going forward. When considering the challenge of losing young Welsh speakers from these areas, the evaluation offers an opportunity to assess what lessons we can take from the introduction of the Programme and how these challenges should be tackled moving forward.

ARFOR'S VISIT TO THE BASQUE COUNTRY, DR. ELIN ROYLES

"The enthusiastic crew on the ARFOR trip to the Basque Country, led by Elin Haf Gruffydd Jones, were a combination of members of the ARFOR Board, a group of ARFOR officers, officers of bodies implementing the Programme and staff from universities involved in the Programme. It was an opportunity to understand more about the activity of local public organizations and universities in the Basque Country supporting the Basque language.

Hearing from the Mayor of Hernani, a town in the province of Gipuzkoa, 9 kilometres from Donostia, was an impressive experience. In a town of just over twenty thousand people, there are approximately 240 industrial companies working in various sectors, including international companies and part of the Mondragon cooperative group. The Mayor explained that the town has an annual budget of €40 million as a result of good taxable income from the industries in the area. While there was no specific responsibility for economic development from this level of government, their intention as a council was to have linguistic influence through their internal action, use procurement powers, in projects and in their relationship with large companies.

A key element in trying to have linguistic influence was to operate internally in the Basque language. They considered themselves as one of the largest councils using Basque as an internal language. While the decision to operate internally through Basque in 2011 had been relatively controversial, it had now been accepted and rooted. Therefore, Basque is the language of meetings, and they had internal procedures regarding the use of Basque. If information needed to be provided in Spanish, it would be translated at the end. Simultaneous translation from Basque to Spanish was also used in some external meetings, but not often. Each job had a language profile council and understanding of Basque was higher among the staff than the language profile.

The council also set language conditions and clauses in their procurement contracts to provide services, for example cleaning, waste management, or social care. Their linguistic expectations were the same as if the council itself provided the service. For example, the language profile of staff was expected to match the council's expectations if they were to provide the service. A procurement agreement also includes an assessment of linguistic needs for specific positions. The cost of providing language training was included and recognised, and the town council monitored its implementation. It would be a company's responsibility and internal process to assess the language skills of their staff as part of assessing compliance with expectations. If the body did not realize the expectations of language clauses, it would have to draw up a language plan outlining how to achieve it. As it was 14 years since the measures were introduced, companies understood and were used to the expectations.

An impressive initiative was the council's agreement with a co-operative to provide care at home for the elderly in Hernani. The council contributed to the establishment of the initiative run by women who had migrated to Spain. As their Basque linguistic skills are limited and the council wants them to develop their Basque skills, as part of the agreement the council pays 15% of the employees' working hours to learn Basque in language learning centres. This is an initiative that meets the need to provide social care, the workers develop oral skills in Basque and promote social integration by bringing two communities together. There was no formal assessment of the 3-year-old programme but the impression of the council staff was that the employees take part in other events in the town and that the scheme enables them to support their children in the Basque education system, and that the initiative dispels myths about learning challenges and value of the Basque language.

The council also worked with small and medium-sized companies within their area to increase their use of the Basque language internally, visually and with clients. Their expectation was that anyone representing a company that would meet the council could speak Basque. The council did not have the power to force companies to put up Basque signs, but they could encourage them to do so. If a company failed to provide a version in Basque, the town hall would assist them. A recent development was the passing of local legislation creating an expectation on cafes or restaurants that wanted to use public land (e.g. terrace or pavement) to provide the menu in Basque.

Also, the council used language clauses as part of the planning permission procedure. In order to try to influence supermarkets such as Lidl to make Basque visible, they drew up separate agreements. It was not possible to impose a language requirement on them according to the law, but language clauses were discussed with a company from the start and the council developed a Memorandum of Understanding. While this had no solid legal basis, it was considered

a way of encouraging making the Basque language visible and trying to ensure that large companies coming into the area are aware of the importance of the Basque language and the expectations on them.

This provides a wealth of examples of positive linguistic action by public bodies.

In the case of Mondragon University, the potential of internships to develop student connections with workplaces, including to use the Basque language, was underlined. It is a good example of integration between workplaces and universities that can support the provision of career paths to professional skills and local Welsh jobs.

In the town of Hernani, the significance of using a combination of local powers to promote a minority language was evident. Every element has value: from operating internally in Basque, high linguistic expectations in procurement agreement processes, including linguistic considerations when establishing cooperative enterprises to fill gaps in service provision, and using planning and influence powers to promote the language when dealing with companies.

7

Engagement Forums created

4

Learning networks created during the ARFOR period

Continuous Monitoring and Evaluation of the ARFOR Programme

Evidence created for learning about the connection between Economy and Language.

Holding a conference that brought together a large number of stakeholders.

Submit a final report of the project

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CONCLUSIONS

The legacy of the ARFOR Programme continues to develop further, and the efforts to continue the objectives of the project are subject to wider activity through local authority and stakeholder work. Despite this there is still a need for a dedicated work programme that directly addresses some of the main challenges that motivated the establishment of ARFOR in the first place. Some of the main areas that require further attention are:

→ The need to change the narrative 'there's nothing here for me' and to offer different narratives about what ARFOR areas have to offer young people.

→ A sustainable and long-term solution for the challenges that the migration of young people from the areas where they grew up and not returning raises, and the significant demographic change that comes as a result.

→ A campaign to further share what has been learned and developed as part of the ARFOR Programme, taking advantage of the opportunities that already exist and the established networks that have been formed as a result.

We have learned a lot while making and developing the Programme, and the team at ARFOR is convinced that there is a real need to share those lessons and build on them so that future interventions can develop, and expand the work delivered as part of ARFOR and ensure a prosperous future for the economies of local communities and the Welsh language in these communities.

Successes

The work carried out as part of the Monitoring, Evaluating and Learning stream and in particular Wavehill's final review of the Programme has highlighted some of ARFOR's main achievements. These include:

→ Success in delivering a substantial, multifaceted and innovative programme that broke new ground in a very short period of time.

→ Positive economic impact on the areas that received support.

→ Increase in the use of Welsh in the world of work, with businesses reporting that they are more likely to use Welsh as an internal and external working language when communicating with the public, customers and other businesses.

→ Success in influencing migration patterns following successful interventions.

→ High satisfaction expressed by those who were involved in the Programme in some way.

Challenges

The monitoring process also discovered challenges faced during the implementation process, and any further interventions will need to consider these if work is to continue in this area. Among the challenges identified were:

→ The effect of the short operational period of the Programme on its efficiency.

→ Ambiguity in terms of the main objectives of the Programme and the outputs.

→ Lack of a clear definition of the 'local challenges' in the ARFOR area.

→ Lack of a robust monitoring structure.

Lessons and Future Direction

When considering the lessons learned in the implementation of ARFOR and what is needed to ensure the long-term legacy of the Programme, three things need to be ensured.

→ First of all, a long-term commitment to interventions that have an extended period and that have a wide distribution, in order to measure the impact and effectiveness of measures such as those developed in ARFOR 2.

→ Secondly, a need to mainstream those elements of the Programme that have been successful, ensuring that what made them into effective programmes is preserved and developed.

Thirdly the Programme's strengths should focus on informing and enabling innovative solutions and answers to complex problems. It is not possible for any such programme to answer all challenges directly and therefore we have to prioritize and focus on the areas where a real difference can be made.

A great deal of effort and hard work has been done to ensure that the ARFOR Programme realizes its objectives. Collaboration between organizations and suppliers has been at the core of the project, and we can now confidently say that a strong network has been formed across the region to realize this innovative project.

ARFOR 2 has built on the initial work of ARFOR 1 and has continued the important process of raising awareness among the public about the opportunities available to them within their local areas and what ARFOR streams have to offer them when looking towards the future. There is now a solid foundation in place to ensure success if we can maintain the momentum and continue the necessary investment required in these areas.

There is still a lot of work to be done, but the popularity and personal investment of those who have been involved in the streams' work is testament to the fact that the Programme has had a real impact at grassroots level. If we can continue this good work developing what was discovered during the lifetime of the project based on the most successful elements, we are confident that we will see a real change now in how we understand, interpret and act regarding the economy and the language in the strongholds of the Welsh language.

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The ARFOR 2 programme: Evaluation, Monitoring and Learning
Final Report

wavehill.com

Wavehill: social and economic research

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Executive Summary

ARFOR 2 was a programme designed to provide innovative ways of supporting the economy in the strongholds of the Welsh language (Gwynedd, Anglesey, Ceredigion and Carmarthenshire). The aim was to help communities flourish through economic interventions.

£11 million was approved to deliver a second phase to the Programme (ARFOR 2), running for two years until the end of March 2025, following delivering 'ARFOR 1' between 2019 and the end of the 2020/21 financial year. The programme had five work-streams:

1. **Llwyddo'n Lleol** – a campaign to encourage putting down roots / returning home through employability, enterprise, business and family support.
2. **Enterprising Communities** – business grants to create good jobs and increase the use of the Welsh language.
3. **Challenge Fund** – funding innovative projects for a wider range of stakeholders in line with the programme's objectives.
4. **Bwrlwm ARFOR** – a communication and marketing programme to increase awareness of the programme, sense of Place etc.
5. **Monitoring, Evaluation and Learning** – to understand the effectiveness of the programme and learn more about wider research.

Assessment of the programme's delivery and design

The evaluation of the ARFOR 2 programme shows that a wide range of activities were delivered by a team of highly committed officers and contractors with evident enthusiasm for their work. Overall, the programme has been largely successful in delivering what was planned, as demonstrated by the outputs achieved and outlined below.

Outputs

Overall, the outcomes and outputs indicate an effective performance. Of the 23 indicators which included a quantitative target, the programme met or exceeded 18 of them (often exceeding to a large extent).

We note that **Enterprising Communities** has achieved its principal aim by providing financial support to 111 businesses across the four counties. It allocated approximately £4 million, with this investment then generating £2.5 million additional investment through match funding from businesses. Thirty projects were funded through the **Challenge Fund** worth approximately £2.1 million following a competitive application process which included 90 applications through four application windows.

Thousands of young people and families received information and support, primarily through activities of the various **Llwyddo'n Lleol** initiatives. While this was mainly a light engagement, approximately 200 individuals received intensive support to establish a business, find a job, or access financial support to settle down in the region.

The primary purpose of the Llwyddo'n Lleol work-stream was to influence perceptions of the area as a place to live through an effective marketing campaign. The programme has delivered a comprehensive marketing campaign through Llwyddo'n Lleol, including over 500 social media messages (mainly positive messages and success stories) together with television and radio campaigns, press releases, podcasts, and advertisements in public spaces.

The marketing model used by Llwyddo'n Lleol appears to be novel and effective, using supported individuals as campaign ambassadors to provide vivid, powerful examples of the opportunities in the region. This marketing campaign was considered by members of the delivery team and some external stakeholders to be among the programme's main successes.

Finally, numerous outputs from **Bwrlwm ARFOR** have also been reported including 715 messages to promote the Welsh language or the region's identity, establishing a forum for the region's businesses, and delivering several other activities.

Overall participant satisfaction

There was a very high level of satisfaction among all types of participants regarding the support received. For individuals, 69% gave the highest satisfaction rating in response to the participant survey, reporting that they were very satisfied with the support and this was consistent across two of Llwyddo'n Lleol's main initiatives (Mentro and Gyrfaol).

Similar levels of satisfaction were expressed among businesses that had received financial support, with 71% choosing the highest rating and saying they were very satisfied with the support.

Enterprising Communities

Three prominent themes were identified in Enterprising Communities beneficiaries' responses:

- Firstly, the programme's ethos was highlighted, namely the focus on investing in the Welsh language and investing in local people and how that fits in with their values.
- Secondly, the flexibility and openness of the grants scheme was referred to as a major strength.
- Thirdly, and linked to the previous point, the accessibility of the scheme (e.g. straightforward processes) was highlighted as a major strength, as well as effective support from programme officers. This made the programme much easier to access for small and new businesses compared with other programmes.

Despite the high satisfaction, some challenges were identified. The main challenge was time constraints, which affected businesses' ability to deliver projects on schedule, e.g. identifying suitable individuals to recruit, source the most appropriate items, or complete construction work within tight timescales. This challenge was sometime exacerbated by delays in approving projects.

Challenge Fund

There was also a high level of satisfaction among Challenge Fund grant recipients. Overall, organisations reported that their Challenge Fund projects were delivered as intended, although several highlighted challenges in undertaking effective monitoring, evaluation and research.

Based on our analysis of the final project reports, we note considerable variation in the quality of research, evaluation and learning produced. Given that the primary purpose of the Challenge Fund was to generate learning, these weaknesses across a significant number of projects are significant.

The core weakness of the Challenge Fund, beyond shortcomings in research and evaluation, was the failure to clearly define the real challenges facing communities in the ARFOR areas that the project aimed to address. As a result, many projects and their outputs were overly dependent on ready-made assumptions about the nature of the relationship between the economy and the Welsh language, rather than questioning and testing those assumptions and strengthening our understanding of this relationship.

Despite this, a number of funded projects should be commended for establishing interesting and innovative schemes that addressed some of the core issues facing Welsh-speaking communities. The relevance of other projects to the programme's objectives was less clear.

Bwrlwm ARFOR

It is important to note that Bwrlwm was a relatively small part of the programme's activity, and only a few participants received intensive support through this initiative. Nevertheless, it appears that the work-stream has offered a good range of projects, with the awards night for 'most Welsh' businesses in particular being highlighted as a success. Several businesses identified benefits from the additional publicity received following the event. The Bwrlwm Forum was another successful element, generating strong engagement with businesses.

Challenges

A recurring theme in consultations with officers and stakeholders was that ARFOR's structure and design seemed somewhat 'fragmented', and its remit overly broad, with ambitions to achieve too much. Spreading resources too thinly risked limiting what could be delivered strategically, and this approach arguably led to duplication and confusion across work-streams, particularly in relation to the various communication campaigns.

It became clear that there was some ambiguity among officers regarding ARFOR's exact role and purpose. While the nature of the challenge was well understood (namely the loss of young Welsh speakers due to a lack of economic opportunities), there was far less clarity about the programme's specific role in addressing such a significant issue. ARFOR would likely have benefited from establishing a clearer and more limited remit. This should be an important lesson for any similar programme in the future.

The short delivery period was a major challenge for the programme and likely contributed significantly to the ambiguity noted above, as there was little time for thorough planning. In regard to implementation, the short delivery period was repeatedly cited, with general consensus that the tight schedule constrained what could realistically be achieved.

Structure and design

Several positive aspects of the programme's structure and design were identified. The delivery team generally felt that ARFOR was well managed. At the regional level, stakeholders noted that information was easy to access and that support was readily available when required. Regular meetings and effective processes for sharing information were also highlighted as particular strengths.

The use of contractors proved effective, with the programme benefiting from their expertise and networks. Participants and stakeholders also praised the officers within these organisations, describing them as active, dedicated, and enthusiastic. There was a relatively young team of officers within the contractor organisations and the local authority teams. Several stakeholders felt this added to the programme's spirit and appeal, emphasising that it was a programme delivered by young people, for young people facing similar challenges.

While the programme was effectively managed at an operational level, there was a lack of resources to collaborate effectively with strategic stakeholders, consolidate efforts where appropriate, and ensure that the programme's resources were prioritised in the most appropriate way.

Assessment of impact

Impact on creating jobs and business growth

The business grants provided led to growth for the vast majority of businesses. Indeed, 83% of grant recipients reported an increase in their turnover since receiving support and, overall, it was noted that the support had made a significant contribution towards this increase. A £3.9m increase in business turnover is estimated as a result of the grants.

The primary aim of the support was to create more economic opportunities, and the scheme appears to have achieved this to some extent, with 73% of grant recipients reporting job creation as a direct result. Overall, there is strong evidence showing that the support has led to the creation of hundreds of new jobs, with estimates ranging from around 250 to 330 or possibly more. However, the additionality of the support can be questioned. A significant risk of displacement is likely, given that a high percentage of beneficiaries' competitors were also located within the region. This creates the risk that the growth experienced by beneficiaries may have had an adverse effect on other businesses in the region, thereby limiting the net economic impact of the programme.

Beyond the hard data, ARFOR officers believed that the support had a more far-reaching impact on some businesses by increasing their growth ambitions. This was supported by evidence from our survey, where 68% of respondents reported that the support had raised their aspirations for business growth. Additionally, there was a noticeable increase in their willingness to invest larger amounts to achieve these ambitions.

Entrepreneurship

Of the individuals who had received help through the Llwyddo'n Lleol Mentro Initiative, 46% had already started their own businesses, while an additional 17% were about to do so. On this basis, we can estimate that almost 60 young people have either already started their own businesses or are about to do so after receiving support from the initiative. The main effect of the support from Mentro was to accelerate this process of starting a business.

New businesses were also established following the support of Enterprising Communities. Based on the evidence from our consultation, we estimate that the scheme has led to 18 new businesses. Combined, it can be estimated that ARFOR led to 78 new businesses.

Impact on business use of the Welsh language

When applying for Enterprising Communities financial support, businesses were required to demonstrate how the investment would have a positive effect on the Welsh language. Some evidence of an increase in the use of Welsh by businesses can be seen in our consultation. Although it is fair to say that most were Welsh-speaking businesses before receiving support, a number of them increased their use of the Welsh language in specific contexts, such as in their processes and formal communication. There was a 48% increase in the number of businesses assessing candidates' Welsh-language skills as part of their recruitment process and a 26% increase in the number who believed it was 'very important' to assess candidates' skills in the language as part of recruitment.

Further evidence of this progress was provided by research conducted by our partner, Etic Lab, who applied their digital research model to assess the linguistic practices of ARFOR beneficiaries and compare them with similar businesses in the region. The findings indicated that businesses supported by ARFOR were 22% more likely to achieve a high Welsh-language score compared to those that had not received ARFOR support.

Impact on migration patterns

A detailed exploration of the programme's impact on participants' motivations and migration decisions was part of our consultation. While the programme had supported young people who were already inclined to remain in the area, many expressed concerns about the availability of suitable jobs—and the potential need to relocate for better opportunities. However, ARFOR's intervention appears to have shifted this dynamic, with 72% indicating that the programme influenced their decision to stay in the region. The main reasons cited were that the programme raised awareness of local career opportunities and gave participants confidence that support was available to them. As a result, 59% reported that the programme had given them confidence they could achieve their aspirations without needing to move away.

While these results are encouraging, it is important to recognise that the impact described relates to individuals who received direct and intensive support, a relatively small group of around 200 people. As such, these outcomes are unlikely to have a significant effect on the programme's overarching objective. Nevertheless, the evidence does demonstrate the impact of these interventions in terms of changing young people's perceptions. The key measure of impact, however, lies in understanding how the programme has changed the perceptions of young people more broadly beyond the immediate participants. Unfortunately, there is currently no evidence available to assess that wider influence.

Learning outcomes

The Challenge Fund was ARFOR's main mechanism to pilot new initiatives and, by doing so, generate learning. When considering the Challenge Fund as a whole, its overall impact on the economy and the Welsh language remains unclear. It is difficult to determine the extent to which the Fund has meaningfully contributed to improving the linguistic landscape or enhancing the economic viability of ARFOR areas. Moving forward, more comprehensive data collection and in-depth analysis will be necessary to assess the impact of these investments on the economy and the Welsh language in the region and to ensure that resources are allocated effectively.

It is worth noting that the projects which included a strong element of research tend to outperform the others, primarily because they created a knowledge base to inform future interventions, and because their influence and potential to extend beyond the life of the project will be significant. The projects demonstrating greatest strength in this regard, and which should be considered for mainstreaming or further development, are as follows:

1) **University of Wales Trinity Saint David project:** Workplace Language, Workforce Language: Exploring the use of the Welsh language in workplaces and by the workforce in ARFOR counties

2) **Cwmni IAITH:** Developing linguistic assertiveness in the field of childcare

3) **Cwmni Bro Aelhaearn:** Antur Aelhaearn housing and language project

4) **Bangor University** projects

5) **Golwg:** Extending local websites across ARFOR

Several papers and short reports were produced following research carried out by Aberystwyth University as part of the evaluation and learning commission in order to examine the connection between economy and language (as well as other relevant issues). A large number of recommendations were made as part of these papers, and they provide useful learning to inform the linguistic planning, policies, and interventions that will follow the ARFOR 2 programme.

Conclusions and the programme's next steps

Although the evidence indicates that ARFOR 2 interventions produced short-term positive economic outcomes and influenced beneficiaries' migration patterns at an individual level, a programme of this scale cannot directly address the broader structural economic weaknesses that drive rural depopulation. Given this, a programme like ARFOR is likely to have a more significant long-term impact by adopting a more strategic role – one that focuses on influencing, facilitating, and enabling – rather than attempting to directly resolve the region's deep-rooted structural economic challenges. Such an approach would also help to minimise the risk of duplicating existing activities or interventions.

Broad recommendations

We suggest three broad recommendations which offer a way forward for further investment and policy development in this area. Each broad recommendation includes a series of more detailed suggestions.

Recommendation 1: Establish a long-term intervention

A challenge as large and complex as the one discussed in this report requires a long-term, stable intervention in order to make a real difference. Indeed, that was also the conclusion of the Commission for Welsh-speaking Communities when considering the future of ARFOR:

> 'The Commission recognises [ARFOR 2]'s valuable contribution and is keen to see continuity of work in this vital area. The Commission therefore considers that ARFOR itself, or a similar body, or indeed another body..., should be established on a permanent basis.' (Report by the Commission for Welsh-speaking Communities)

Our recommendation is that a future long-term programme should possibly be smaller with a team of core officers responsible for three main functions:

- **Sharing good practice and providing guidance and strategic coordination**. This would serve to ensure that the efforts in ARFOR to solve youth depopulation and the adverse effect on the Welsh language remain on the political agenda. In addition, the programme would have a key role in coordinating the relevant activity of bodies, programmes and projects, in order to promote effective collaboration and ensure that opportunities are fully exploited by uniting efforts where appropriate.
- **Research, testing and piloting**. The programme could also be responsible for investing in emerging priorities and themes regarding young people and depopulation. This may include research projects or relevant pilot projects e.g. funding the project 'Keeping in Touch with Young People' which is currently the subject of a feasibility study through the Challenge Fund.

- **Marketing and communication**. The body or programme should be responsible for marketing and communication campaigns aimed at changing young people's perception of the region as a place to live and work. This could be a continuation of the Llwyddo'n Lleol campaign and/or other communication platforms of the programme.

Recommendation 2: Use a transition period to plan thoroughly for the long-term intervention

It is our understanding that there may be a possibility of funding for a 'transition period' to avoid a sudden end to programme activities and established procedures, which could otherwise require re-establishing later. The priority during any transition period should be to define a clear purpose and remit for future work, plan for a long-term solution, and sustain, expand, or mainstream ARFOR 2 activities where appropriate. Based on our evaluation of the programme, we recommend that the following elements should be included:

- **Planning for the next phase / long term solution**. The primary aim of the transition period should be to invest in activities that support preparations for long-term solutions. One example is the opportunity to commission experts in behaviour change to explore the most effective types of messages in changing young people's perceptions of the region as an attractive place to live. Insights from this work could help shape future communication and marketing campaigns. It is also important to acknowledge the current 'data gap' – specifically, the limited evidence on the programme's impact to date in changing perceptions among young people beyond direct beneficiaries. Further research to assess the impact at that level would therefore be highly valuable.
- **Continue to deliver the 'Llwyddo'n Lleol' campaign on a smaller scale.** Our consultation identified that this work-stream has already created enough 'content' to maintain the marketing campaign in the future. We therefore recommend that resources should be allocated to uphold this campaign and that there is no need, for the time being, to invest further in direct support for businesses and individuals through the Llwyddo'n Lleol elements (i.e. the focus should be on the marketing campaign itself only).
- **Work to mainstream the successful and innovative elements of the programme.** In addition to the recommendation to continue the Llwyddo'n Lleol campaign, there is an opportunity to invest further in other innovative and successful aspects of the programme. For example, consideration should be given to mainstreaming or further developing some of the most effective projects funded through the Challenge Fund (as referred to above under the 'Learning outcomes' heading). Similarly, attention should also be given to mainstreaming some of the most successful activities and sub-projects of the other work-streams, such as Bwrlwm ARFOR's 'The World's Most Welsh-language Awards' event.

Recommendation 3: Applying the research's main lessons to inform the next steps

Finally, several recommendations were made through evaluation and learning commission's wider research which can help inform linguistic planning, policies, and interventions succeeding the ARFOR 2 programme. Appropriate attention should therefore be given to these findings when planning ahead.

To conclude

Overall, the ARFOR 2 programme has largely delivered on its intended plan and achieved a great deal within a short timeframe. The tight schedule, however, posed challenges—most notably the limited time available for thorough planning, which may have contributed to some ambiguity about the programme's precise role and purpose, resulting in an overly broad remit. Nevertheless, the programme has generated valuable insights and learning that leave an important legacy for policymakers and has made a significant contribution by sustaining discussion and developing ideas for possible solutions to address the core challenges.

ARFOR 2 has again highlighted the scale of the challenge it sought to address, while underlining that it is not realistic to expect transformational change within such a short timescale. Instead, the challenge requires an intensive, long-term, carefully planned response. The findings from this evaluation should therefore be used to inform the development of such long-term solutions.

1. Introduction

Wavehill was commissioned by Cyngor Gwynedd, on behalf of the four local authorities in the region of ARFOR (i.e. Gwynedd, Anglesey, Ceredigion and Carmarthenshire), to provide three services:

1. To create a framework to monitor the work-streams in the four counties.
2. To evaluate ARFOR's impact, its processes and the individual work-streams.
3. To conduct research to learn more about the connection between the Economy and Language and disseminate this learning more widely.

This evaluation report provides a final assessment of the impact and performance of the programme delivery, together with conclusions and recommendations for potential future actions. It follows the delivery of a series of other evaluation outputs, including an Initial and Baseline Report in April 2024 and a series of short interim evaluation reports compiled between September and December 2024. In addition, several additional papers have been produced as part of the wider learning and research initiative of this commission (see point 3 above), and these are presented separately from this report.

1.1 Programme overview

The ARFOR 2 programme aims to provide innovative methods to support the economy in the strongholds of the Welsh language. The programme's purpose is described as follows:

> 'Supporting our Welsh communities to flourish by developing economic interventions which will also contribute to the prosperity of the Welsh language and also ensure opportunities to increase the visibility and use of the Welsh language as a living language in our communities.'[1]

Between 2019 and the end of the 2020/21 financial year, the Welsh Government provided £2 million for the ARFOR 1 programme with Gwynedd Council as lead. Despite the challenges faced due to COVID-19 lockdowns and developing a new programme in a very short timeframe, there was evidence of positive outcomes including the creation of 238 new jobs; 89 part-time jobs and 226 jobs safeguarded within the ARFOR region. In addition, the evaluation highlighted that there is a lack of data or robust evidence regarding the interrelationship between economic prosperity and the prosperity of the Welsh language; the need for further investment was highlighted and strategic collaboration was established among the members and officers of the four counties.

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[1] ARFOR Action Plan – Phase II (2022/23 – 2024/25), ARFOR Programme Board Proposals to Vaughan Gething AS, Minister for the Economy, Welsh Government, and Cefin Campbell AS, Plaid Cymru Designated Member, 27 July 2022

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As a result, £11 million was approved to deliver a second phase to the programme (ARFOR 2) until March 2025, with four strategic objectives:[2]

1. Create opportunities for young people and families to stay in or return to their indigenous communities
2. Create enterprising Welsh-speaking communities
3. Maximize the benefit of collaborative activity
4. Strengthen the identity and characteristics of our Welsh communities

In response to these strategic objectives, many types of support and activity were part of the ARFOR 2 delivery model including financial support through subsidy schemes, training through the medium of Welsh and entrepreneurship, career support, marketing and communication campaigns, as well as a wide variety of other initiatives and sub-projects. This was delivered through five work-streams:

1. **Cymunedau Mentrus/Enterprising Communities (£4,500,000)** – business grants to create good jobs and increase the use of the Welsh language.
2. **Llwyddo'n Lleol (£3,000,000)** – a marketing campaign to change perceptions about the economic opportunities available in the region. Four initiatives providing support to individuals were available through Llwyddo'n Lleol, which all fed into the marketing campaign:
    o **Profi Initiative**: resources and employability sessions with school and college students to raise awareness of local job opportunities through the medium of Welsh and to develop employability skills in general.
    o **Mentro Initiative:** financial support and training sessions with business experts to help young people interested in starting a business.
    o **Gyrfaol Initiative:** funding work placements for individuals with local employers in an area of interest to them, together with social opportunities.
    o **Ymgartrefu Initiative:** financial support and advice to help encourage families and young people to return or settle in the region.
3. **Y Gronfa Her/Challenge Fund (£2,600,000)** – funding innovative projects for a wider range of stakeholders in line with the programme's objectives.
4. **Bwrlwm ARFOR (£300,000)** – a communication and marketing programme to increase awareness of the programme, promote local businesses and create 'bwrlwm' (a 'buzz').
5. **Monitoring, Evaluation and Learning (£200,000)** – to understand the effectiveness of the programme and learn more about the wider research.

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[2] Ibid.

1.2 The evaluation

The aim of the evaluation, as described in the Invitation to Tender document, was to:

'Evaluate the programme and its processes in full, considering: whether the work-streams have responded to the Strategic Objectives; evaluate programme management and processes and the individual work-streams; (and) need to show the impact the work-streams have had on the economy and its connection to the language.'[3]

The evaluation has been carried out continuously since commissioning Wavehill in July 2023, a few months into the programme's delivery period. The aim of the initial phase was to establish a Theory of Change for the programme and develop an Evaluation Framework.

The evaluation focused on both process and impact. On the process side, considerable attention was given to understanding the effectiveness of different elements in delivering the programme and to identifying key lessons to inform similar interventions in the future. A deductive research approach was applied to evaluate the programme's impact and identify the extent to which the outcomes identified in the Theory of Change havebeen achieved.

1.2.1 Research activities

The research team undertook the following activities between January 2024 and March 2025 to collect data for the evaluation:

- 50 semi-structured interviews with ARFOR officers and external stakeholders
- 119 interviews with businesses and organisations who had received support from ARFOR 2
- 23 interviews with businesses who had received support from ARFOR 1
- Survey of 80 individuals who had received support from the Llwyddo'n Lleol work-stream
- A comprehensive review of the Challenge Fund project reports
- Review of the programme's monitoring data
- Analysis of the socio-economic data
- Statistical modelling to assess the relationship between the economy and language

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[3] Invitation to Tender 'ARFOR Programme: Evaluation, Monitoring and Learning,' Gwynedd Council's Economy and Community Department.

1.2.2 Limitations

It is important to acknowledge the limitations to this research. Firstly, the short delivery period makes it impossible to identify changes in the main economic and linguistic datasets. In addition, ARFOR represents only one intervention – and a relatively small one – among many other interventions. Given the scale of the challenge, it is therefore very difficult to isolate the effect of ARFOR within official datasets and to distinguish it from the impact of other interventions.

The timing of the evaluation also introduced certain limitations. First, the nature of many of the interventions (such as long-term changes within businesses) means that their full impact will only become evident after the programme has concluded. Second, our assessment of the programme's impact relies heavily on self-reported data, as there was insufficient time to develop a counterfactual comparison group which would have enabled a more robust evaluation of the programme (e.g. by using official datasets to develop a control group).

Finally, we note that it was only possible in this evaluation to evaluate the impact on immediate beneficiaries of the programme. This means there are gaps in our understanding of its indirect and more far-reaching effects – mainly, the effect of the Llwyddo'n Lleol campaign on changing perceptions about the region and persuading people to stay or settle.

1.2.3 Report structure

This report is structured as follows:

- **Chapter 2** sets out the context for the report and describes the rationale for the programme.
- **Chapter 3** compares the programme's performance against its contractual targets.
- **Chapter 4** assesses the performance of each work-stream individually.
- **Chapter 5** examines how beneficiaries and stakeholders perceive the overall performance of programme delivery.
- **Chapter 6** provides an assessment of the programme's impact.
- **Chapter 7** outlines key conclusions and discusses possible next steps.

2. Setting the context

This section introduces the context for ARFOR 2 and the evaluation. As a starting point, it provides an overview of the region and the economic, social and linguistic challenges it faces. Next, the rationale behind the programme is discussed as a means of addressing these socio-economic and linguistic challenges.

2.1 Summary of the socio-economic and linguistic profile of ARFOR

A comprehensive assessment of ARFOR's socio-economic and linguistic profile was carried out as part of the first phase of the evaluation at the start of 2024. The findings from this assessment are summarised below and provide a baseline for the programme. Overall, the assessment demonstrated:

- Depopulation in the region, among young people in particular. A decrease of 0.9% was seen in the region's population between 2011 and 2021 and the biggest drop was in Gwynedd (3.7%). The main decrease was among the 35-44 age group (a drop of 13.9%) and the 20-34 age group (a drop of 5.4%), while there was a significant increase among the 65+ population (15.2%).
- A decline in the level of Welsh speakers, with a 13% drop in the region between 2001 and 2021 compared to 14% nationally. This varies by county, with a decrease of 21% in Carmarthenshire, 13% in Ceredigion and 7% each in Gwynedd and Anglesey.
- Between 2011 and 2021, 8% of communities in ARFOR where the majority speak Welsh were lost.
- There is a pattern of 'net' out-migration (i.e. more leaving than entering) to Cardiff up until the most recent year. Out-migration to England is more stable and higher (compared to the number leaving for Cardiff) but the immigration figures are also high, leading to constant net immigration (i.e. more entering than leaving).
- When looking at the relationship between net migration and the ability to speak Welsh, there is a negative relationship between net out-migration trends and growth in Welsh-language ability (i.e. the greater the net out-migration to Cardiff and England the smaller the growth in language ability).
- Looking at the economic statistics, it shows that GVA per capita and GDHI per capita are slightly lower than the national level.
- Although ARFOR, on the whole, has a low number of areas that fall under the WIMD's most deprived category, an analysis of the individual zones shows that the region performs poorly in terms of access to services and housing.
- Overall, we see that job opportunities in the ARFOR area are proportional to the trend in Wales, but with more self-employed and dependent on the public sector, while there is a higher proportion of microbusinesses and fewer large businesses.
- It is also seen that salary levels are slightly lower than the national average.

2.2 Programme rationale and aim

The phenomenon that drove the Government, together with Plaid Cymru, to invest in this programme was the linguistic challenge facing the region where, overall, the proportion of Welsh speakers has fallen significantly over the decades. Although the decline is greater in other parts of Wales, the decrease in ARFOR represents a significant loss of Welsh-speaking communities. In other words, the geographical areas which are home to large percentages of Welsh speakers (the 'strongholds') remain areas of concern.

What is unique about the ARFOR concept is the focus on the relationship between economy and language. The fundamental assumption central to the programme is that economic weaknesses (i.e. lack of appropriate and sufficient jobs) motivate young people to leave the region in order to find better opportunities. This rationale is clearly highlighted in the programme documentation:

> 'Ceredigion, Gwynedd, Carmarthenshire and Anglesey are the counties with the highest percentage of Welsh speakers, but the number has been decreasing... The economic challenges of the four counties – such as low wages, underemployment and a shrinking workforce – are common to many rural and peripheral areas in Wales and beyond; but the impact of these challenges on the Welsh language is unique and far-reaching... The prosperity of the strongholds of the Welsh language is dependent on more than work and pay, but it can be reasoned that the inability of the economy to support residents to fulfil their aspirations – and maintain prosperous places – is detrimental. The out-migration of young people and young families from strongholds of the Welsh language is one reason why the number of speakers continues to decline.'[4]

In general, the research evidence supports these assumptions. The statistics show that until recently there was net out-migration from the ARFOR region to Cardiff and that there was net immigration from England. We also know from our statistical analysis of migration and linguistic patterns in these areas that there is a correlation between fewer Welsh speakers and places where net out-migration occurs.

The evidence suggests that economic factors such as the lack of good jobs contribute towards this (see research findings by Woods and Utz [2022]), although the research also demonstrates that the situation is much more complex and that individuals are influenced by a range of factors. However, it cannot be refuted that the desire for better economic opportunities is an important factor that drives out-migration among young people from the region.

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[4] Tender Opportunity 'Llwyddo'n Lleol in the ARFOR Region', Cyngor Gwynedd's Economy and Community Department

ARFOR was funded as a means of responding to the above challenges. Similarly, there was widespread recognition among a number of stakeholders that it was impossible to 'solve' the problem through a short-term programme such as this one when considering the scale of the challenge.

A group of stakeholders expressed the view that ARFOR was in fact a pilot programme, with the second phase building on the first but still a pilot:

> "The principle is still the same – to better understand the link between economy and language... The idea is that instead of doing more research – that there is something in place to examine more practically. The other element is to look at how to mainstream the Welsh language into economic elements... ARFOR is a catalyst... (and a) case study for other projects..." (Scoping interview with key stakeholders)

Indeed, the need to strengthen the evidence base was a common theme during the interviews, with the programme being described as "a means to acquire better understanding". Some stakeholders were of the opinion that these learnings were more important than the more tangible and immediate outcomes.

Despite this, there was a discrepancy between this point of view and the language of the programme's documentation which suggested that ARFOR's role would be to address the core challenge directly. It became evident during the evaluation that stakeholders held differing visions and understandings regarding the programme's exact role and purpose. Whilst there was a clear understanding of the nature of the challenge and the need to focus on creating economic opportunities, the exact role of ARFOR within that was not entirely clear. That is, a group of stakeholders focused on the need to create economic opportunities directly (e.g. by investing in businesses to create jobs). Others argued that the programme had a more strategic, enabling, and learning role. This tension in terms of the exact purpose of ARFOR has been one of the main challenges of the programme. We discuss this further in section 5.2 of the report.

3. Performance against the programme's contractual targets

The first—and, possibly, most fundamental—assessment of ARFOR's performance is to explore the extent to which its contractual outputs and outcomes targets were achieved.

Several key performance indicators (KPI) were agreed as part of the contractual process with the Welsh Government. Table 3.1 (over the page) demonstrates the final outputs and outcomes reported against these targets. These included targets specific to certain work-streams, and others spanning several work-streams. The three key work-streams (Enterprising Communities, Llwyddo'n Lleol, and the Challenge Fund)[5] contributed to the majority of targets, although the Challenge Fund had a specific set of targets while the other work-streams reported against a small number of targets.

Overall, the outcomes and outputs suggest effective performance. Of the 23 indicators which included a quantitative target, the programme met or exceeded 18 of them (and often exceeded them by a large margin). This included achieving approximately four times the target for the number of young people who had received information and support, and more than three times the target for the number of existing initiatives receiving support. The data also suggests a very strong performance regarding the communication outputs which were a central part of the campaign to change young people's perceptions of the area.

Despite this, the usefulness and design of some of the indicators can be questioned as many seem to overlap and the definitions are not always completely clear. For example, the support provided by Llwyddo'n Lleol, which is responsible for 91% of the outputs for 'young people receiving support', varies greatly. Through this work-stream, only around 200 individuals received intensive support for entrepreneurship, career, or settling in the region. We understand that the Profi Initiative (the employability intervention in schools and colleges) is responsible for the majority of the outputs, but this was a relatively light intervention and therefore the usefulness of combining the figures in this way can be questioned. We also understand that the Profi Initiative is responsible for a large number of the achievements for 'young people receiving information', and therefore there seems to be some overlap between the concepts of providing information and support. Similarly, it is not clear how the programme differentiates outputs between 'young people' and 'young families', raising questions about potential overlap or even duplication among communication outputs.

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[5] These are referred to as the 'key' work-streams due to the level of investment in them compared to the other work-streams.

Table 3.1: Official programme outputs, outcomes and targets

Theme	Output	Target	Total	%
Support for beneficiaries	Young people receiving information	10,000	37,356	374%
	Young people receiving support	2500	10,164	407%
	Young families receiving information	5000	17,022	340%
	Young families receiving support	1500	1,335	89%
	New enterprises receiving support	160	263	164%
	Existing enterprises receiving support	200	678	339%
	Investment generated (Enterprising Communities only)	£2,250,000	£2,464,723.87	110%
	New product/service secured	250	288	115%
	Jobs created	578	327	57%
	Jobs safeguarded	178	295	166%
	Participants in social enterprises	100	52	52%
	Businesses/organisations increasing their use of the Welsh language	200	210	105%
	Number of individuals taking part in activities to improve Welsh language skills	200	141	71%
	Heritage/ culture/ local produce/ sense of place schemes supported	200	71	36%
Challenge Fund	Number of regional and local schemes	40	77	193%
	Value of regional and local schemes	£2,080,000	£2,137,091.17	103%
	ARFOR regional and local events	20	27	135%
	Learning studies and sharing experiences	40	227	568%
	Number of local ARFOR schemes	20	30	150%
	Identify regional and local challenges	No target	224	
Communication outputs	Positive messages cascaded	500	1,346	269%
	Examples of local success identified	150	718	479%
	Number of messages promoting the Welsh language/identity	No target	953	
	Strengthening the relationship and collaboration with Mentrau Iaith	No target	n/a	
Research and learning	Continuous monitoring and evaluation of the ARFOR programme	No target	n/a	
	Create a learning Network during the ARFOR period	4	20	500%
	Create an Engagement Forum	1	11	1,100%
	Create evidence to inform the learning about the connection between Economy and Language	No target	n/a	

Source: Monitoring data shared by the programme, May 2025

3.1 Conclusions

The programme would possibly have benefited from having a simpler set of indicators with clearer definitions. Nevertheless, despite their imperfections, the indicators provide useful insight into the programme's activity. Indeed, the figures are consistent with a common perception identified in the evaluation, namely that the programme has delivered a significant amount of activity in a very short period of time which should be commended.

4. Exploring individual work-streams

It is important to assess the value of each work-stream individually in order to understand which aspects of the programme have been the most successful. This section describes all the activities delivered through the work-streams, and assesses their effectiveness, impact and contribution towards ARFOR's objectives.

4.1 Enterprising Communities

The Enterprising Communities grant fund was administered separately by local authority officers. Although there was some variation in the approach taken, the primary aspects of the scheme remained the same.

Grants between £5,000 and £75,000 were offered which could be used to cover up to 70% of project costs, including both revenue and capital costs. Eligible expenditure covered the employment of Welsh-speaking staff, investment in creating a new product or service, training for the new jobs, working capital that would help create Welsh-speaking spaces (e.g. rent) or other capital costs including small-scale equipment. There was an expectation that any new post would continue beyond the end of the ARFOR programme period in (March) 2025 and that new staff needed to be fluent in Welsh or committed to learning.

Broadly, two types of projects were funded: those aimed at business growth to help them contribute more to the economy and job creation, and those projects aimed at increasing the use of Welsh within businesses, with some projects combining both objectives.

4.1.1 Enterprising Communities application and approval processes

The fund was advertised through Business Wales channels, local authority channels, and social media (which included sharing case studies). This was a fairly effective process and there was a high demand for the support.

The application process required applicants to demonstrate how their projects would contribute towards creating appropriate and good jobs (i.e. offering sufficient income to enable people to realise their aspirations, offered a variety of jobs, and responded to the needs of employers), contribute to the local economy, and demonstrate a benefit to the Welsh language (in terms of creating Welsh spaces, bilingual jobs, and increasing the use of Welsh). In that regard, the grants used a relatively simple mechanism to embed language provision and development in businesses, by requiring applicants to submit plans and score well in relation to the Welsh language and its development within and by the business.

There were differences in the application process of the four counties with some using a two-stage process and others using a simpler process. Advantages and disadvantages to the different methods were noted; for example, the two-step process was an effective way of easily identifying ineligible projects, but the process took longer. There were also differences in how the grants were assessed. The use of a local stakeholder panel was the most common method, but one local authority formed an agreement with Business Wales to support the approval process.

ARFOR officers differed in their opinion regarding these differences. While some welcomed the development of different processes which suited the specific arrangements of the authorities, others argued that harmonisation in structures and use of standardised forms etc. would lead to better effectiveness and efficiency.

Some members of the delivery team suggested that the application process should have been more innovative using a 'Dragon's Den' process asking applicants to present their ideas in front of a panel. It was suggested that this would be a more effective method of examining projects and would also avoid creating a 'box ticking' process. Others suggested that a more competitive application process, rather than the 'first come, first served' system that was implemented, would be better at funding the most appropriate projects.

Beneficiary feedback on the application process was very positive. About half (49%; 26/53) said they were 'very satisfied', and a further 34% were 'satisfied'. Furthermore, 40% reported that the process was relatively clear and easy to complete, while 16% mentioned receiving assistance from officers. Indeed, of those who received support, 88% gave the highest rating when asked about the quality of that support.

The beneficiaries were also very satisfied with the size of the grant, including 75% saying it was sufficient 'to a large extent'. The grant amount generally seems to be higher for small and new businesses than other standard offers, providing them with a better opportunity to accelerate the growth of their businesses.

4.1.2 Enterprising Communities business profiles

Business profiles were explored during our consultation to acquire a deeper understanding of the type of businesses receiving support. The data suggests that around a quarter of the beneficiaries (26%) are social businesses or community groups and around three quarters are other locally-established commercial businesses. Social enterprises were among the scheme's main target groups, but it is our understanding that the team found it difficult to engage with the sector. It is possible that the programme could have used more appropriate communication channels (e.g. sector-specific) to generate more interest. Therefore, this represents a relative weakness in the scheme's promotional activity.

The scheme was also open to businesses located outside the region but who wished to expand or relocate to the region. Engagement with this type of business was low, possibly because the promotional activity did not specifically target them.

It was local and very small businesses which generally received support. Ninety-four per cent reported that they had no offices outside the region, while 80% were micro-businesses and 16% had no employees. This reflects the business profile of the area in general.

Supported businesses came from a wide range of sectors. The main clusters included businesses in the manufacturing industry (many food producers), food and hospitality services, information and communication (digital marketing, media companies, publishers etc.), research and scientific institutions, the arts, business support services and retail. This is in line with one of the main objectives of the scheme, which is to contribute to the variety of jobs available to local people in the area.

In general, the businesses supported can be described as 'Welsh-language businesses' (i.e. businesses operating through the medium of Welsh). The vast majority conducted their marketing and engaged with customers and clients through the medium of Welsh, and many undertook informal internal communications through the medium of Welsh. However, 40% stated that formal internal communication, such as written policies, were not conducted in Welsh. Additionally, 31% said they did not assess candidates' Welsh skills as part of their recruitment processes.

Finally, it is fair to say that ARFOR supported a number of businesses that were already experienced in benefitting from the support infrastructure available in Wales. In total, 72% reported having received support from another programme within the past three years, and 48% stated they had received financial assistance. Business Wales was the most frequently cited source of support.

4.1.3 Enterprising Communities outputs

The data demonstrates that programme officers allocated Enterprising Communities grants effectively with 111 businesses receiving financial support across the four local authorities, from 21 in Ceredigion to 36 in Carmarthenshire. In total, around £4 million was allocated across the region. We saw in Table 3.1 at the start of the previous chapter that the investment leveraged approximately £2.5 million of additional investment in match funding from businesses. This is a significant result, showing that the support encouraged businesses to invest further in growth.

Table 4.1: Analysis of data from Enterprising Communities applications

	Number of businesses	Total grants awarded	Average grants awarded
Anglesey	30	£961,158.29	£32,038.61
Gwynedd	24	£978,562.70	£40,773.45
Ceredigion	21	£1,040,438.10	£49,544.67
Carmarthenshire	36	£1,085,725.21	£30,159.03
Total	**111**	**£4,065,884.30**	**£36,629.59**

Source: Enterprising Communities applications data shared by local authority officers.

The funding supported a variety of growth activities. Most businesses reported spending on new equipment, capital costs, developing new services or products, and creating new employment opportunities (see Table 4.2 below).

Table 4.2: The purpose of the Enterprising Communities / Llwyddo'n Lleol grant

	Enterprising Communities	Llwyddo'n Lleol (Gyrfaol initiative)	All businesses
Capital costs including small scale equipment	86%	22%	67%
Offer new employment	56%	83%	63%
Develop new business opportunities or offer a new service/product	66%	39%	56%
Creating a Welsh-language space (rent, legal costs, decoration costs, fixtures and fittings)	70%	26%	53%
Pay for training	32%	43%	34%
Develop a new business / venture	18%	9%	14%
Safeguard key community resources	14%	17%	14%

Source: Consultation with ARFOR beneficiaries (businesses) (n=50, 23, 70)

4.1.4 Enterprising Communities outcomes

According to the programme's monitoring data, this financial support was responsible for creating or safeguarding 372.5 jobs. This would mean that the programme has created or safeguarded a job for every £10,915.13 allocated in business grants.

There was also evidence in our survey of the scheme's impact on business creation. Eleven beneficiaries of Enterprising Communities who responded to our survey said that the aim of the investment was to develop a new business or venture. Of those, nine said they had launched these businesses while the other two were either about to start a new business or venture or were planning to do so.

The outcomes for businesses are discussed in much more detail in Chapter 6.

4.1.5 Enterprising Communities conclusions

The officers who were directly involved with this stream believed that it had been delivered effectively. The positive outcomes resulting from the projects in terms of creating jobs and growth were noted, as well as the increase in the value of the Welsh language within businesses.

Based on feedback from the wider delivery team and external stakeholders, three main concerns are highlighted. Firstly, it was noted that the funding had been spent quickly, and some believed the process had been rushed, e.g. "you can either spend swiftly or spend effectively" was the comment of one team member.

Secondly, many referred to a lack of clarity and clear requirements and there was concern that there was little to distinguish it from other grant schemes. Some pointed out that there was too much ambiguity regarding the concept of creating Welsh-language spaces. Some believed that a much more direct focus was needed on the linguistic element, but this would possibly go against the programme's main focus (i.e. providing economic interventions for the benefit of the Welsh language rather than providing linguistic interventions).

Thirdly, and on a more fundamental level, some questioned the appropriateness of a grant fund of this type. One stakeholder described this type of support as a "blunt tool" and questioned if this was the best use of resources given that the budget was so small in relation to the size of the challenge. The risk of creating a displacement effect (i.e. taking trade from unsupported businesses) and creating unfair competition was highlighted. There was a certain amount of cynicism about the value of such schemes: "People know what they are doing when it comes to grants, and they are often the same faces". In fairness, there is evidence to support the theory that businesses that are already experienced in accessing public support often received the grants.

Despite these concerns, the officers responsible for delivering this work-stream were satisfied with the portfolio of funded projects, noting diversity in business size, sector and geographic distribution. They cited several good examples where they believed the investment had a significant impact. It appears that the scheme has achieved its main aim in terms of creating jobs and increasing businesses' use of the Welsh language, and the scheme's approach to embedding language provision and development in businesses is an important element that distinguishes it from other schemes. However, questions remain whether Enterprising Communities provided sufficient added value given the availability of other subsidy schemes (e.g. the Levelling Up Fund). One might also question if the scheme was innovative enough to provide new lessons, one of the programme's main aims.

4.2 Llwyddo'n Lleol

Llwyddo'n Lleol was originally a LEADER-funded pilot held in Anglesey only. The activity was extended into Gwynedd during ARFOR 1 and throughout the region under ARFOR 2. The latest iteration was delivered through a collaboration between two intermediary bodies, namely Menter Môn (lead body) and Mentera.

Llwyddo'n Lleol was a marketing campaign designed to convince young people and young families, both in the region and those who had already left, that they are able to fulfil their aspirations with a good job in an exciting field by staying or returning to their indigenous communities. The purpose was to establish a positive conversation around young people staying in the area and starting businesses and developing successful careers, and those who have decided to return.

Support was provided to young people through four main initiatives (Profi, Mentro, Gyrfaol, and Ymgartrefu) which all focused on providing skills, knowledge, or incentives to encourage them to develop careers or businesses locally, or return to the area. Although this was a means of creating immediate outcomes for those individuals, the main aim was to document their journeys and use the content as part of the marketing campaign. Indeed, this was part of the 'deal' when individuals applied for support from the above initiatives, as they were required to be ambassadors for the programme and document their journeys through various media.

4.2.1 Mentro Initiative

The Mentro initiative offered support to young people who were mainly interested in starting a business. The scheme was structured into 15 different cohorts together with some sub-projects, with 176 young people directly receiving support.

The main intervention, the Business Training Programme, provided intensive weekly sessions to individuals with business experts focusing on aspects such as marketing, managing finance and attracting customers; opportunities to network with peers; and financial support of £1,000 to develop their business ideas. Following six weeks of training, Taro'r Nodyn/Pitch Perfect events were held where the participants presented their innovative business ideas to a panel of judges with the successful participant receiving an additional £1,000. In total 59 individuals received this support through five geographically divided cohorts (partly to maximize networking opportunities). In addition 21 Aberystwyth University students received similar support from the University through two further cohorts, while four additional individuals received similar support but through a cohort which focused specifically on creating an outdoor business. In total therefore, 84 individuals received this intensive package of support.

Several other types of programmes with comparable features were trialled as part of this initiative. Six-week training programmes on journalism and creating social events were delivered to 18 individuals. These included more specific training than the general business training above, but financial support was not provided.

The decision to provide this specific training was made following the identification of these areas of interest when engaging with young people. The aim was to deliver a more purposeful offer which responded to specific challenges. In this case, the journalism programme responded to the perception that it was necessary to leave in order to find good opportunities while the social event creation programme was responding to the challenge and the common perception among young people that 'there is nothing good to do here'. Beneficiaries' stories can be seen on the Llwyddo'n Lleol website, and some examples are given below:

> "I decided to join this programme for the opportunity to learn various journalistic skills and get to know new people. I have always been interested in journalism and the media, so this scheme is a wonderful opportunity!" (Journalism training programme Participant)

> "Caryl is a comedian who wants to host a regular Comedy Night which will give individuals who are new to comedy a chance to give it a go, and for those who are more experienced to experiment with new material. Caryl Burke applied to be part of the Social Events programme in order to organise more events." (Social events training programme Participant)

Several sub-projects were also delivered. One example was a support package for eight rugby clubs in Ceredigion to host social events for the benefit of the community and as additional income to support the clubs. Another project focused on supporting young farmers' clubs, and there were several examples of dedicated cohorts and sub-projects such as these. Specific officers were responsible for engaging with young people and identifying opportunities to provide bespoke elements to complement the general business training offer.

This collection of activities and methods demonstrates how the initiative was delivered in a very flexible and streamlined way, underlining the scheme's innovation and differentiating it from mainstream entrepreneurship services. While these different and purposeful activities were not a success every time (e.g. there was not much response to the element that focused on outdoor activities), learning about the failures is equally valuable in any innovative process.

Overall, there was a very high level of satisfaction among beneficiaries with this support. Indeed, 73% gave the highest possible rating stating that they were 'very satisfied'. There was a high level of satisfaction with the application process and the support given by officers during the process as well.

When asked about the most important aspects of the support, the training elements and the financial support were considered almost equally important (but with the former slightly higher). The weekly training sessions were rated as 'very useful' (the highest rating) by 83% and there was also a very positive response to the Taro'r Nodyn/Pitch Perfect event with 82% reporting that it was a useful experience 'to a large extent' (the highest rating). It was noted by 90% that the amount of financial support was sufficient at least 'to some extent'. The financial support was used to invest in various elements, including new equipment (56%), developing new products or services (48%), marketing and additional training (32% each).

Networking opportunities were another important element in the scheme. Indeed, 93% confirmed that they had networked with others – mainly through the training sessions, but the majority (63%) also networked outside the sessions through digital platforms such as WhatsApp. Many referred to these opportunities when discussing their perceptions of the programme's main strengths, as one participant noted:

> "There were plenty of opportunities to meet enthusiastic individuals who were in a similar situation. The programme provided good strategies and ideas to help set up a successful business and to introduce enterprising and successful businesses and have the opportunity to chat with them." (Mentro beneficiary)

Regular networking opportunities with peers are likely to be of great benefit to beneficiaries, increasing the likelihood of future success and building strong and collaborative business communities, which are important for the development of local economies and the entrepreneurship sector. Staff members noted that this was something that developed organically to a certain extent with the beneficiaries developing a close relationship with each other, learning from each other and giving each other confidence.

It was also noted that there was good follow-up for the beneficiaries, with officers continuing to maintain the relationship beyond the period of the formal intervention and that the networks and the relationship between beneficiaries also continued very often. However, some beneficiaries felt that there was not enough follow-up after receiving the support which suggests that this occurred on an ad hoc basis. It is possible that this initiative would have benefited from ensuring clear expectations in terms of progression in order to increase consistency in its provision.

Following the support from the Mentro Initiative, 46% of participants (19/41) reported that they had already started a new business at the time they responded to our survey. A further 41% were either about to start a new business (17%) or were still planning to (24%). On this basis, we can conclude that the scheme has succeeded in terms of its objective of turning ideas into full businesses.

It is also important to consider a counterfactual scenario to understand the real impact of the scheme. That is, to what extent would these individuals have started their businesses anyway? Although all respondents believed they would have started their businesses eventually, 77% (10/13) felt the process would have taken longer without the scheme. It can be deduced therefore that the scheme has accelerated entrepreneurship which is important in terms of promoting economic growth, creating jobs, and driving innovation.

Most of the businesses created operate primarily in Welsh, with 63% (12/19) stating that the business mainly uses Welsh and 32% said they put equal emphasis on Welsh and English. This is important as it suggests that any additional jobs created through the businesses will require Welsh language skills and therefore give local Welsh speakers further opportunities to stay in the region.

4.2.2 Gyrfaol initiative

This initiative offered support to local businesses to employ young people, contributing up to £12,000 for salary and training costs. In total, 83 individuals received work placements through this initiative and, once again, satisfaction was high: 58% chose the highest rating 'very satisfied' and a further 39% saying they were 'satisfied'. A very similar percentage expressed satisfaction with different elements of the support, including the work experience itself and the application process. The vast majority also reported that they received effective support during the application process.

Originally, the Llwyddo'n Lleol team was keen to provide social opportunities for beneficiaries alongside professional ones, recognising that various factors drive motivations for migration, including social factors. The intention was to organise social activities on behalf of the beneficiaries, but beneficiaries showed little interest in socialising this way. According to officers, the lesson taken from the experience was the need to focus on organic social activities rather than 'fake and artificial' ones (e.g. by funding associations to organise their own events as was done through the Mentro Initiative).

Feedback on the appropriateness of the jobs funded and the individuals recruited was mixed. On the positive side, jobs were funded in work fields or sectors that were of great interest to the individuals. This is an important finding because the challenge for young people is often not the lack of availability of jobs, but the lack of available jobs that interest them. This finding suggested that the programme had succeeded in creating appropriate jobs through the Gyrfaol initiative.

At the same time, salary levels varied significantly, with a considerable proportion of jobs offering low pay (e.g. 33% of positions paid less than £18,000). Furthermore, the added value of some of these jobs can be questioned, given that 58% of the individuals (according to our survey) were already employed by the businesses. Often, this investment served to upskill and support the progress of existing individuals or to safeguard their roles, while there were also instances where funding was provided for freelance work. Examples of this are given below (the names of businesses and individuals have been anonymised):[6]

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[6] These examples were received by the Llwyddo'n Lleol team.

[COMPANY NAME] is a very small company with two members of staff, and it took a financial risk by accepting [INDIVIDUAL'S NAME] as an apprentice in engineering before Llwyddo'n Lleol funding. There weren't many opportunities for a young person to receive an apprenticeship in this field, so Llwyddo'n Lleol assisted [INDIVIDUAL'S NAME] in securing a robust basis for his apprenticeship and also giving him financial support to get equipment to support the apprenticeship period and keep the equipment for the next stages of his career.

[INDIVIDUAL'S NAME] was working on a maternity contract with [COMPANY NAME], developing his skills as a junior website developer, and, before this contract ended, the company was looking for ways to keep him on. Llwyddo'n Lleol support came at the perfect time for [INDIVIDUAL's NAME], enabling him to continue working for the company and develop his skills while working.

[INDIVIDUAL'S NAME] was working as a waitress with [COMPANY NAME] before this opportunity. Through Llwyddo'n Lleol support, and the company's faith and confidence in her ability, she has been promoted to her new position as Wedding Planner and Coordinator, at the company's new wedding venue. She has benefited through receiving equipment to do her job, as well as some specific training and received a salary.

Among those who had completed their work placement when surveyed, only 47% (7/15) remained employed with the same company. This again shows very mixed results in terms of creating good and sustainable jobs through this initiative. At the same time, 75% of all respondents (24/32) indicated that they either were still working with the same company or hoping to do so, or in the same field but with a different company. We can deduce that the intervention provided relevant and useful work experience, aligning with the programme's core aims of demonstrating employment opportunities to local people.

4.2.3 Profi Initiative

The Profi initiative extended a scheme that began in 2016 when a pilot was launched at the request of Coleg Sir Gâr and local schools to compensate for cuts to Careers Wales' budget to support the Work Experience programme and learners. As a result of ARFOR's investment, the plan was extended across Carmarthenshire and Ceredigion led by Menter Gorllewin Sir Gâr, and in Gwynedd and Anglesey led by Menter Môn.

The scheme includes visits to schools and colleges to provide employability support through workshops and one-to-one face-to-face support, together with a series of resources on the profi.cymru website. Over 100 sessions were delivered between September 2023 and the end of 2024, with thousands of young people supported.

The young people and school and college staff were very satisfied with the support. Of the ten education institutions responding to our survey, seven reported that the support was 'excellent' and the other three that it was 'good'. Seven also said that the scheme had achieved what they hoped for 'to a large extent'.

Many of the delivery team and external stakeholders emphasised the importance of reaching young people early, before negative attitudes about local opportunities have a chance to form, and the importance of continuously sharing positive messages about the region. It was suggested that the Profi scheme was an effective mechanism to start spreading the message from a young age. This emphasis was also evident in the response from education institutions as 'promoting the importance of the Welsh language' was the second most frequent response when asked for their observations about the main focus of the provision.

There is some concern about overlap between this initiative and other services (mainly Careers Wales). However, Profi fills certain gaps in the provision of Careers Wales (e.g. supporting work experiences) and focuses on encouraging young people to make the most of their Welsh-language skills and to see value in those skills. There was also more focus on promoting local job opportunities within Profi.

In general, the schools and colleges believed that Profi had an important role within the employability provision they offered. Although the majority (7/10) also used the Careers Wales service and provided some employability education themselves (8/10), 8 out of 10 indicated that the Profi scheme was important or very important within the career and employability support provision their pupils received. In addition, when asked their motivation for engaging with the service, one of the main responses (4 comments) was that this would fill gaps left by Careers Wales.

4.2.4 Ymgartrefu Initiative

This initiative was designed to specifically focus on small groups of families and young people who lived outside the area and to explore methods to encourage them to return to the region. The original plan was to offer free residential weekends in the area to give families a taste of the lifestyle as well as discuss practical aspects such as childcare. The idea failed due to a lack of interest among young families, but the value of the learning gained from that was emphasised:

> "What has worked very well with the Ymgartrefu initiative are the lessons learned. In terms of engaging with families we have learned what works and what doesn't. The Ymgartrefu initiative is still evolving. We collect real life cases and get valuable data e.g. one of the main obstacles we have learned is the cost of moving all their furniture and stuff back to North Wales and this could be a way of targeting the funding in the future." (Delivery team)

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The initiative saw a change of course in September 2024 by launching a £5,000 grant scheme to encourage young families to move back to the area. Many were of the opinion that the change in course should have been happened much sooner, while some stakeholders questioned the appropriateness of providing such support. Time constraints once again posed a major challenge for this work-stream, but especially for the Ymgartrefu initiative as the timing is crucial, i.e. the need to reach people at the right time when they are in a position to be able to move house. In terms of the appropriateness of the support, some stakeholders were sceptical that the £5,000 incentive was likely to make a difference to families' decision to move. That is, they were of the opinion that the only families likely to be interested were those who had already decided to move, and if they had not decided this offer was unlikely to be sufficient to persuade.

Nevertheless, seven families 'moved home' to the region from other areas in Wales and beyond after receiving support. We also note that the programme commissioned a booklet called 'Ymgartrefu yn ARFOR' (establishing a home in ARFOR) which assists people to take the next steps in moving back to ARFOR areas. It does so by providing information, advice and guidance regarding some important considerations (housing, jobs and work opportunities, education and childcare, health and care, social events and the Welsh language).

Overall, this initiative has been a very innovative one which has produced important learning following the trial of a number of different activities. It has drawn attention to the campaign encouraging people to settle in the region, even if some publicity regarding the grant offer was negative.

4.2.5 Llwyddo'n Lleol marketing campaign

The marketing model for Llwyddo'n Lleol appears to be novel and effective, using supported individuals as ambassadors for the campaign to provide vivid and compelling examples of the opportunities in the region. In fact, the beneficiaries are required to agree to be involved in the marketing campaign as part of the agreement when receiving support, and they played a prominent role in the campaign. Furthermore, recruiting relevant individuals and businesses was important and there was a clear consensus that the work-stream had succeeded in doing so.

The table below reveals the statistics for the key metrics used to assess progression and reach on online media. It shows that the scheme has reached thousands of people through these various media channels.

Table 4.3: Analysis of Llwyddo'n Lleol social media accounts up to the end of 2024

	Followers	Reach	Videos	Impressions	Users
Facebook	2,405	27.3K			
Instagram	3,686	18.4K			
Youtube			116	3.7k	
X (Twitter)	1,643				
LinkedIn	449				
Website					2.4k

Source: Monitoring data shared by the programme, February 2025

Further information shared by Llwyddo'n Lleol officers indicates that 535 social media messages were posted between July 2023 and January 2025 with these mainly focused on cascading positive messages and sharing successful examples. The programme invested in two advertisements on S4C and ITV Cymru along with visual campaigns across the counties on fuel pumps, in train stations, on the back of buses, on digital vans and so forth. The marketing activity also included several radio items, press releases, and podcasts, while face-to-face marketing through various events (Eisteddfodau, Tafwyl, Gŵyl Canol Dre and more) were further opportunities to promote the campaign.

Overall, this marketing campaign was considered by the delivery team members and some external stakeholders to be one of the programme's primary successes, noting that ARFOR had developed a strong brand and delivered an effective campaign. Reference was made to the use of different media to share messages. Social media was identified as both the principal and the most effective medium in terms of sharing messages, while many also referred to the importance of attending events and the television campaigns.

4.2.6 Conclusions on Llwyddo'n Lleol

The primary objective of Llwyddo'n Lleol was to showcase the professional opportunities and good quality of life that exist in the region in order to challenge and change some of the negative perceptions, and officers were confident that they had largely succeeded in doing this. Some members of the delivery team and external stakeholders were of the opinion that Llwyddo'n Lleol was the most important and effective work-stream for the reasons mentioned above, i.e. the strength of the marketing campaign and its role in addressing the central issue.

Despite the great emphasis in the campaign on professional opportunities and changing negative perceptions about current economic opportunities, a number of activities were funded to draw attention to social opportunities as well. The primary approach to achieving this was through funding events, social clubs, and individuals who were interested in creating enterprises which offered social opportunities. The question arises whether it is the role of a programme like this to fund organisations and activities such as these considering that there are bodies such as the Mentrau Iaith already responsible for this type of activity. Two main reasons were given to justify this. First, it was emphasised that cuts to other bodies' budgets meant that it was necessary to 'fill a gap'. Second, it was highlighted that this was part of the brief for creating content for the marketing campaign and drawing attention to the opportunities available in the region (and that this includes social opportunities as well as economic ones).

With regard to the different initiatives, it was noted that each offered distinct benefits and had been valuable in its own way. The Mentro and Gyrfaol initiatives were frequently identified as the strongest and most significant initiatives in terms of generating content for the marketing campaign. They were recognised for providing valuable opportunities for young people, meeting strong demand for the support, and – particularly in the case of Mentro Initiative – responding effectively to the specific challenges of the region.

The Ymgartrefu initiative was also seen as highly valuable, offering an opportunity to trial different approaches and generate significant learning, whilst also providing incentives for eight families to return to the region. In total, approximately 200 individuals and families received intensive support through these three initiatives, each delivering meaningful outcomes at an individual level.

The Profi Initiative was different, as it contributed differently to the marketing campaign because the participants were school pupils and the intervention was much less intense. However, it was argued that this initiative made a significant contribution to the overall offering given the amount of engagement (i.e. reaching thousands directly compared to a few hundred through the other initiatives) and the focus on the younger age.

Although there was likely to be duplication within the different initiatives, it is important to note that the initiatives' primary function was to support the marketing campaign. Indeed, the team commented that they could have invested the entire budget on the marketing campaign directly which would have fulfilled the brief, but the support was a way to create more effective content.

> "It is important to come back to the brief and the agreement, which is to create a campaign to bring attention to the opportunities in ARFOR. That message is realised in many different ways, including funding events and providing practical support." (Delivery team)

The evidence we have assessed as part of this evaluation suggests that Llwyddo'n Lleol has largely achieved its objective by delivering an effective marketing campaign which has reached thousands of people. However, the campaign's impact on achieving ARFOR's core aim, namely to convince more people to stay and settle in the region, remains unclear. Nevertheless, it seems that this work-stream is possibly the strongest element of the programme.

4.3 Challenge Fund

The aim of the ARFOR Challenge Fund was to generate learning and support developing projects that contributed to ARFOR's core objective of strengthening the connection between the Welsh language and the economy. Funding was provided to businesses and organisations to test new ideas that addressed identified economic challenges and offered solutions in support of the Welsh language. The programme was administered on ARFOR's behalf through a joint arrangement between Mentera and Menter Môn, with the former acting as lead body.

4.3.1 Challenge Fund's structure and aims

There were two streams to the Challenge Fund, the Small Challenge Fund and the Large Challenge Fund. The Small Challenge Fund provided awards of up to £30,000 to support smaller scale research and development projects within a limited timeframe. The intention was to allow various ideas to be tested quickly, which in turn could be further developed and expanded through applications to the Large Challenge Fund.

The Large Challenge Fund was a flexible fund providing financial support of up to £100,000. Applicants were expected to submit joint applications with enterprises, businesses and other organisations, as encouraging collaboration and partnerships was an integral part of the ARFOR programme.

The nature of the challenges faced was based on the definitions provided by applicants when applying. Specific objectives were not set by the scheme to target specific challenges or sectors. Instead, prospective applicants were expected to identify, define and suggest solutions to the challenges they perceived to be relevant to the programme in their individual sectors. This demonstrates the very open nature of the fund, its broad direction outlined that the projects needed to 'explore solutions that strengthen the relationship between the Welsh language and the economy' and to test one of the following:

1. Using the Welsh language boosts the economy
2. Using the Welsh language provides new employment opportunities for employers and staff
3. Using the Welsh language can help create a brand and an attraction for businesses
4. Using the Welsh language can foster a sense of pride, including feeling a sense of belonging to a community and be able to speak to other Welsh-speakers.[7]

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[7] https://www.rhaglenarfor.cymru/index.en.html

We can therefore conclude that the main direction of the Fund was to test some specific assumptions about the relationship between the economy and the Welsh language, with the primary intention of generating learning. However, as discussed below, it is reasonable to question the extent to which the projects have meaningfully and impactfully addressed this core question. It should also be noted that some of the objectives stated above (e.g. fostering a sense of pride) are inherently difficult to define and measure. This, in turn, makes it difficult to evaluate and draw clear lessons, despite being a central aim of the scheme.

4.3.2 Challenge Fund application and approval processes

Applications were considered within specific funding windows of approximately six weeks. Grant recipients were generally satisfied with the application process, with 27% stating that they were 'very satisfied' and a further 47% reporting that they were 'satisfied'.

However, it should be noted that the timetable was particularly tight for developing a work programme – from the initial idea to a fully formed project – especially given the expectation for sophisticated proposals capable of addressing the above requirements and producing useful learning. It could be argued that these tight constraints limited applicants' ability to develop their programmes in a meaningful way, and similarly affected the awarding panel's capacity to make well-informed funding decisions. These challenges were, in part, a direct consequence of the overall programme's limited timeframe.

The application process was relatively interactive, requiring applicants to express interest and discuss the application with an ARFOR development officer before attending a series of workshops on completing applications. It was clear that the work-stream officers provided useful support as the organisations developed their ideas and helped them adjust their ideas to ensure eligibility and meet fund requirements. The workshops were reported to be beneficial in providing help to develop ideas and the majority noted they had made changes following the sessions.

The awarding panel was formed from various ARFOR participants and contractors as well as wider stakeholder representation. The application and procurement process therefore had a strong element of collaboration between ARFOR applicants and organisers, allowing applications to be further developed and refined collaboratively.

4.3.3 Challenge Fund outputs

In total, 30 projects were funded through the ARFOR Challenge Fund. These were delivered predominantly by private businesses (16), but also by third-sector organisations (5), membership organisations and public bodies (5), and universities (3).[8] The data shows that the Challenge Fund's primary focus was on organisations within the professional services, arts and entertainment, and communications sectors, suggesting that the campaign was largely driven by specialist and cultural service providers.

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[8] Data was shared for 29 projects only.

Based on the initial priority objectives, participating projects were asked to report on specific outputs that could be measured quantitatively. The table below presents the numbers of projects that successfully met those objectives:

Table 4.4: Number of projects supporting the Challenge Fund objectives

Aim	Number	Percentage
Facilitate work opportunities for young people, helping them to stay or return to the area	15	52%
Increase use of the Welsh language	27	93%
Strengthening community relations	9	31%
Support local people to stay in their community	13	45%
Create networks between businesses	5	17%

Source: Monitoring data shared by the programme, February 2025

In general, the data shows that there were strong efforts to promote economic, cultural and community activity, with the greatest emphasis on supporting young people and protecting the Welsh language.

As part of our detailed review of the projects, typology groups were developed to categorise the different types of projects that received funding. For the purpose of analysis, these were classified into four specific categories:

- **Category 1: Normalisation (10 projects).** Projects in this category tended to have a particular emphasis on normalising the Welsh language within workplaces and the community by focusing on increasing the visibility of the Welsh language, improving the infrastructure within the organisation to facilitate use of the language, creating more Welsh-speaking content and a focus on education, training and skills.
- **Category 2: Economic projects and business support (12 projects).** Projects in this category had an emphasis on research purposefully designed to provide support to businesses and to promote economic development. This included a focus on education, providing training and skills to assist local workforces in addition to interventions aimed at creating and protecting local job opportunities.
- **Category 3: A combination of the above (4 projects).** Projects in this category combined the priorities of the other categories. They focused on jobs and recruitment support, improving the infrastructure for the Welsh language within organisations and creating more Welsh content. There was also an emphasis in this group on supporting businesses and promoting economic development, and to increase the use of Welsh within businesses by normalising and making it more visible. Several projects in this category included cultural projects.
- **Category 4: Research only (3 projects)**. Projects in this category focused specifically on research and feasibility. This included projects looking at responses to additional challenges, such as the availability of housing within ARFOR areas and childcare provision. Projects in this category also looked at improving infrastructure for the Welsh language and creating more Welsh-language content.

By investing in normalisation, the projects sought to establish the Welsh language as a language which is visible and familiar in society, helping people to use it naturally on a daily basis. This is essential in order to maintain the viability of the Welsh language over time and to establish a relationship between the use of the Welsh language and the economy.

Similarly, the focus on economic projects and business support explored how supporting local businesses to use the Welsh language can contribute to sustainable economic development, whilst ensuring that the language is used in work and commercial environments. This can increase the value of the language as an economic resource, making it relevant to businesses and opening up job opportunities for Welsh speakers.

The focus of the research projects was key in gathering robust data and insights to inform strategic decision-making. This is particularly important for ensuring that initiatives and investments in the Welsh language are evidence-based, enhancing their effectiveness and relevance in a changing society.

4.3.4 Stakeholder satisfaction with the Challenge Fund

Similar to the other work-streams, there was a very positive response from beneficiaries about their experience participating in the scheme, with 65% of beneficiaries stating they were 'very satisfied' with their participation.

The programme's management team and other stakeholders also responded positively when asked about the role and performance of the Challenge Fund's delivery. It was noted that a good team of officers had delivered the Fund effectively – developing sensible processes, administering finances promptly and identifying projects quickly. They also emphasised the Fund's role in supporting ARFOR's core aims, particularly in creating opportunities for innovation and in exploring the relationship between the economy and the Welsh language. It was considered that the Fund's projects might represent the most significant legacy, generating learning that could inform future linguistic planning.

At the same time, some of the main challenges affecting the delivery of the Challenge Fund – and the programme more broadly – were highlighted. Chief among these were the limited time available for delivery and a lack of clarity or a clear brief regarding the type of research projects that should be funded.

It is clear from the consultation that the idea of establishing two separate funds had not worked, with the lack of time being a major contributing factor. The delivery period was too short to implement the original concept – where projects could be piloted on a smaller scale through the Small Challenge Fund before allowing the most promising ones to develop further through the Large Challenge Fund.

More generally, it was noted that the process of designing the Fund had to be rushed. As a result, and combined with the fairly vague brief provided, the project requirements were open to broad interpretation.

Some members of the delivery team noted that they had tried to respond to the brief as best they could, for example by focusing on specific qualities when scoring applications. This included projects that were cross-border, collaborative, and innovative, or those that offered strong insights into the relationship between the Welsh language and the economy. At the same time, both the officers and the wider team felt that a narrower, more clearly defined scope would have been preferable.

4.3.5 Challenge Fund outcomes

Overall, organisations reported that their Challenge Fund projects were delivered as intended, although several highlighted challenges in carrying out effective monitoring, evaluation and research. Indeed, based on our analysis of the final project reports, we note a considerable difference in the quality of research, evaluation and the learning produced. Given that the primary purpose of the Challenge Fund was to generate learning, these weaknesses across a significant number of projects are particularly noteworthy.

The core weakness of the Challenge Fund, beyond the research and evaluation shortcomings, was the failure to clearly define the real challenges facing communities in the ARFOR areas that the project aimed to address. As a result, many of the projects and their outputs are overly dependent on ready-made assumptions about the nature of the relationship between the economy and the Welsh language, rather than questioning and testing those assumptions and strengthening our understanding of this relationship.

It is fair to say that the breadth and variety of projects ultimately supported reflects the scope and ambiguity of the initial call. It could be argued that this delivery method represents the programme's strength to the extent that it allows for 'bottom-up' solutions for community challenges by grassroots participants. On the other hand, it could be construed as a weakness, and a case could be made that the scope and variety of the projects supported represent a lack of core focus and vision, which has led to the funding of some projects whose connection to the programme's core objectives is unclear.

The connection between promoting the language and strengthening the economy remains uncertain, and it is difficult to say whether the Challenge Fund has confirmed the existence or strengthened a specific interpretation of the type of relationship that exists between them. This is partly due to the fact that those objectives listed in the first place are relatively vague and difficult to measure. The fact that the monitoring process is dependent on evidence prepared by the projects themselves also makes it difficult to undertake any unbiased assessment.

Despite this, a number of the funded projects should be commended for establishing interesting and innovative plans which have addressed some of the core issues facing Welsh-speaking communities. Others are less clear in their relevance to the programme's aims.

4.3.6 Challenge Fund conclusions

Overall, the Challenge Fund has produced a number of important outcomes including the development of new partnerships, direct benefits to project participants, and opportunities to pilot projects, generate learning, and build on this in the future. The Fund has offered a different focus compared to other programmes or schemes related to the economy and the Welsh language, and it responds directly to the programme objectives. At the same time, our detailed review of the projects has highlighted several areas for potential improvements in any future programme of this kind. These include establishing more concrete challenges and inviting projects to address those specifically. In addition, setting broad targets for the types and number of interventions to be funded – based on the specific challenge theme – would also be beneficial.

4.4 Bwrlwm ARFOR

The original aim of Bwrlwm ARFOR was to promote the Welsh language and raise awareness of ARFOR's work through a public marketing campaign. The intention was to support the wider work of ARFOR by leading a communication programme seeking to increase the use of the Welsh language and encourage a sense of local pride among stakeholders. It also aimed to improve awareness of the unique socio-linguistic conditions of the ARFOR area and the economic factors influencing its linguistic situation. The company Lafan was commissioned to lead this work.

Two main functions can be identified within the work remit: the communication campaign and a set of projects aimed at fostering a sense of pride. Significant changes occurred in the specific activities and projects during the delivery period, with the work-stream being implemented in a highly flexible manner, adapting as the context evolved.

4.4.1 Communication campaign

It became apparent early on that there was a risk of duplication between the Bwrlwm and Llwyddo'n Lleol marketing campaigns. Llwyddo'n Lleol's primary aim was to deliver a marketing campaign and its objectives overlapped significantly with those of Bwrlwm, in particular, drawing attention to local opportunities and success stories. Llwyddo'n Lleol was a longer-term initiative, whereas Bwrlwm was launched several months after the other work-streams, making it harder to establish its role clearly within the wider programme. It is fair to say that the overlap in remit was one of the programme's weaknesses. The use of multiple brands (e.g. ARFOR, Llwyddo'n Lleol, Bwrlwm, Profi) also contributed to confusion and this was likely to be unclear to the public.

It was reported that Bwrlwm eventually succeeded in addressing the challenges outlined above by focusing specifically on promoting the region's business community (alongside the broader aims of programme) while allowing Llwyddo'n Lleol to concentrate on individual success stories. Valuable collaboration also took place with Enterprising Communities, who effectively led the marketing for the work-stream, as local authority officers lacked the resources to do so. Case studies were developed to showcase the stories of the businesses that had received financial support, and these were published on the Bwrlwm website. Additionally, a decision was made to omit the use of the 'Bwrlwm' name in all external communication, using only 'ARFOR' to ensure more consistent branding.

According to the monitoring data, 715 messages were seen promoting the Welsh language as a result of the Bwrlwm campaign. The management team was of the opinion that they had delivered a good campaign which had consistently shared positive stories from the area through press releases in particular, although it was recognised that there was no easy way to measure this success.

4.4.2 Sub-projects

Several sub-projects were developed as part of the Bwrlwm work-stream. This was a dynamic element where it was agreed to divert funding and change some original ideas as it became clear that they were not appropriate, and new ideas and projects were developed during the delivery period.

One element which remained unchanged was the idea of developing a forum for businesses, individuals, and other organisations interested in the future of the region's Welsh communities to discuss their experiences, what was happening on the ground in their communities and to learn more about ARFOR's activity. The Forum was held virtually with six different sessions from March 2024 until March 2025. Forty organisations attended the sessions which included 18 businesses from the region and 10 external bodies (e.g. universities, mentrau iaith etc.) as well as government representatives and the bodies involved in delivering various elements in the programme.[9]

Two notable events were developed to draw attention to businesses and individuals working through the medium of Welsh. This included the 'World's Most Welsh-language Awards' which celebrated contributions by individuals and businesses to the Welsh language socially and commercially. Businesses, organisations and individuals could nominate themselves or others for one of seven awards, namely: the most Welsh-language brand, product, social media, staff, space, business or individual. An award ceremony was held in Aberystwyth in July 2024 to celebrate the success of the winners.

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[9] These numbers are based on data shared by officers in February 2025 before the last session was held.

Secondly, the ARFOR 2024 Summit was held in November 2024. Similar to the previous event, its main focus was to draw attention to the commercial successes of businesses and individuals operating through the medium of Welsh and who had benefited from the programme. Speakers from all work-streams shared their experiences, together with a guest speaker from Castle Howell, who discussed the Welsh nature of their service and some of the key challenges as one of the largest employers in the region.

A number of officials, stakeholders and businesses noted that the 'World's Most Welsh-language' Awards event was particularly successful, attracting beneficial publicity for the winners and generating a "fantastic response" from the public, according to the delivery team.

Bwrlwm played a key role in fulfilling one of the 'special conditions'[10] outlined in ARFOR's agreement with the Welsh Government, namely the creation of 'Welsh-language spaces'. This built on the work of ARFOR 1, aiming to establish environments that encourage people to use and enjoy the Welsh language whilst working and in their everyday lives. As part of this effort, Bwrlwm launched a public campaign to develop a map of Welsh-language spaces, inviting individuals and organisations to identify and share details of such spaces. This map was made available on Bwrlwm's website and the spaces promoted to the public. It was noted that the resulting resource could serve as a directory to promote Welsh language activities and events in the future.

There were three other projects/activities in the Bwrlwm package. Firstly, the 'Hac Iaith' scheme offering support to four businesses to solve a specific challenge in terms of providing a Welsh language service. Secondly, a series of 'C'mon Cymraeg' podcasts were commissioned to explore the attitudes of ARFOR businesses and communities towards the Welsh language. Finally, 'Bocs ARFOR' was a community engagement scheme in which businesses and members of the public were filmed discussing their use of the Welsh language and its importance to them.

4.4.3 Bwrlwm conclusions

Overall, Bwrlwm has fulfilled its original aims to some extent, namely delivering a communication campaign and supporting projects that promote the Welsh language and raise awareness of ARFOR's work. However, it is important to note that Bwrlwm represented a relatively small part of the overall programme, and few participants received intensive support through this initiative. As a result, identifying and measuring its impact is therefore challenging.

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[10] Three special conditions were agreed, namely: 1) sharing lessons and coordinating good practice in regard to housing regionally (e.g. the effect of second homes); 2) creating Welsh-language spaces; 3) strengthening the identity of Welsh-speaking communities in an inclusive way i.e. try to widen access to the Welsh language for excluded groups.

Questions have been raised about the necessity of running separate communication campaigns through Bwrlwm and Llwyddo'n Lleol, despite efforts to differentiate them. Nonetheless, valuable learning has emerged from the sub-projects, and some trials (such as the World's Most Welsh-Language Awards and the Bwrlwm Forum) were considered particularly successful in promoting businesses and facilitating knowledge sharing. It is worth reiterating that piloting new activities at the intersection of economy and language was one of ARFOR's core aims, and the diversity of projects delivered through Bwrlwm has contributed to that objective.

5. Exploring key findings from programme delivery

Following exploring the individual work-streams, we now turn in this chapter to assessing at programme level, taking into account the overall perceptions of beneficiaries, programme officers, and stakeholders regarding the design and performance of programme delivery. We examine their satisfaction with the programme in general before considering key strengths, weaknesses, structure and design of the programme.

5.1 Beneficiaries' satisfaction with the programme

It is evident from the earlier chapters that a high volume of activity was delivered by ARFOR within a short timeframe. Alongside this, a strong level of satisfaction with the support was also reported by beneficiaries.

5.1.1 Experiences of businesses and organisations

With regard to the viewpoint of businesses and organisations, the high level of satisfaction in all relevant work-streams is shown in Figure 5.1 with the vast majority (71% overall) stating that they were 'very satisfied'.

Figure 5.1: Overall, how satisfied are you with the support you have received so far? (businesses and organisations)
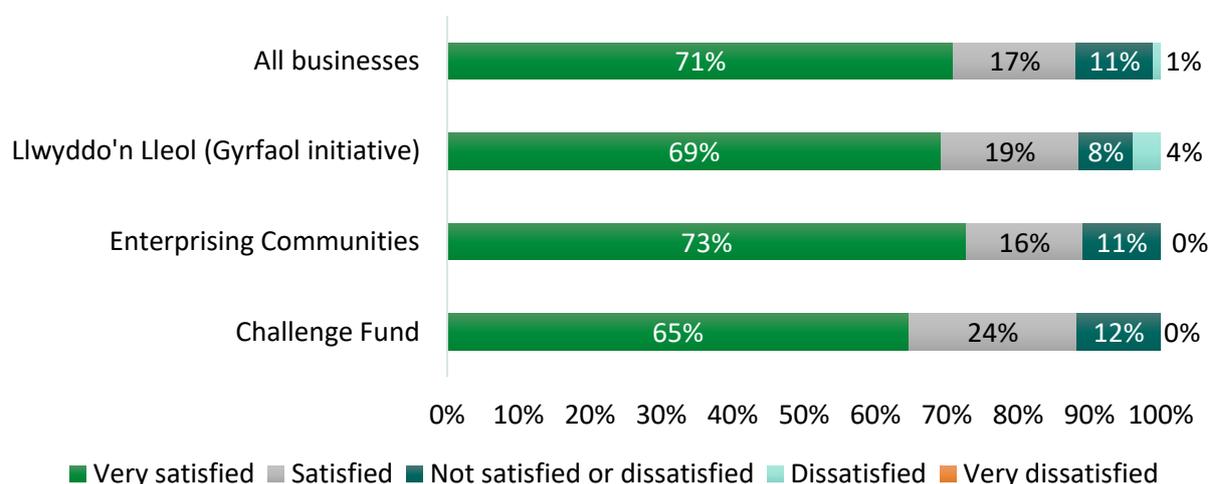
Source: Consultation with ARFOR beneficiaries (businesses and organisations) (n=87, 24, 50, 17)

Three main themes emerged as beneficiaries explained the reasons behind their satisfaction. Firstly, the most commonly cited was the ethos of the programme. Several businesses noted that the programme's aims (particularly its focus on the Welsh language and on providing jobs for local people) aligned closely with their own values. This alignment allowed them to invest in their business objectives with greater confidence. It also contributed to a stronger sense that they could submit a successful funding application (especially when compared to more generic subsidy schemes).

Secondly, attention was drawn to the flexibility and openness of the support. While subsidy schemes are often prescriptive in nature, ARFOR's financial support allowed beneficiaries to invest in their own ideas and priorities. Revenue or capital investments were possible, and there were no restrictions regarding eligible expenditure as is often the case with similar business support.

The third main factor identified by beneficiaries was the accessibility of the scheme as well as effective support from officers. Processes were described as not being overly laborious and respondents noted that there was a good team of local officers with relevant information who worked closely with them to ensure that the process was as straightforward as possible. The combination of factors here meant that the programme was more accessible to small and new businesses in particular, which generally fit in with the profile of businesses in the area.

These themes were consistent across the relevant work-streams.

> "The paperwork for ARFOR is much easier to manage than other similar grants. I like ARFOR's focus on helping Welsh-speaking rural businesses to grow and the emphasis on supporting and promoting the Welsh language. I also like that the administrative staff are based locally and therefore have a good understanding of the issues facing local businesses." (Enterprising Communities)

> "It is very flexible compared to the usual grants we apply for in terms of the type of project and the willingness to fund a pilot project. The qualifying criteria are also great as we are a very new business and wouldn't usually qualify for this level of grant. Another strength is that ARFOR encourages you to make links with other businesses throughout the process." (Challenge Fund)

Beneficiaries were also asked about the main shortcomings of the support. Encouragingly enough, one of the leading responses (22% of the respondents) was that there was no obvious weakness. Beyond that, the significant responses were related to the time constraints.

Around a quarter noted the tight timetable and the challenge of having to spend all the funding by the end of December 2024. Given that the majority did not receive the financial support until 2024, and a significant proportion until the second quarter of 2024 and beyond, it was very challenging for many to carry out the recruitment process and/or procure the correct items and undertake any planned building work in time.

> "The schedule is problematic. The programme is trying to achieve something huge (and it's) great that the money is here, but it doesn't leave room or time for us to be strategic with it." (Enterprising Communities)

A fairly similar percentage reported that another weakness was the delay before approving projects. This is related to the first point; that is, given the already tight schedule, delays in the approval process created even greater challenges.

5.1.2 Experience of individuals

A similar response was received from the individuals who had benefited from Llwyddo'n Lleol support, with the vast majority once again declaring that they were very satisfied with the support (69% reporting this). We see that the cohort receiving help from the Mentro Initiative was particularly positive.

Figure 5.2: Overall, how satisfied are you with the support you have received so far? (individuals)
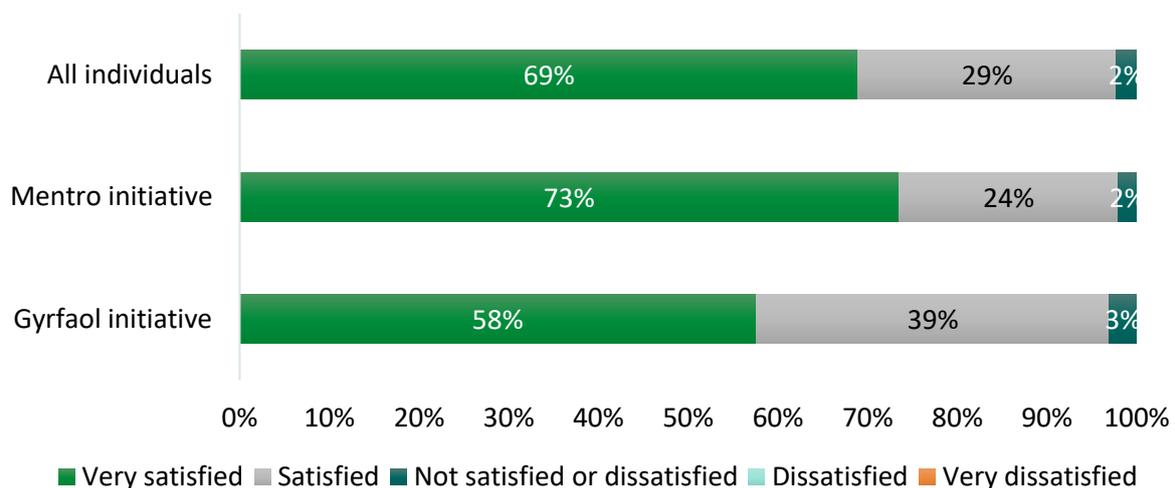
Source: Consultation with ARFOR beneficiaries (individuals) (n=87, 49, 33)

The feedback from the Profi Initiative beneficiaries is also very positive. All our sample from schools and colleges who received help from Profi (10 members of staff) said that their experience of it was excellent or good. Menter Gorllewin Sir Gâr (the main provider for the service) carried out its own survey (sample of 455) which showed that 92% of users of the Profi website rated it as 'great' (42%) or 'good' (51%).

Overall, the evidence suggests a very high satisfaction with the support.

5.2 ARFOR's purpose and design

5.2.1 ARFOR's purpose

As discussed in Chapter 2, it became clear that there was some ambiguity among officers regarding the exact purpose and role of ARFOR. While the nature of the challenge was well understood (namely the loss of young Welsh speakers due to a lack of economic opportunities), there was much less clarity about the programme's specific role in addressing such a significant issue. Was the aim to change perceptions of the region, or to directly address the underlying structural economic conditions?

The programme was inherently very flexible and provided an opportunity for innovation through the Challenge Fund and Bwrlwm ARFOR projects. Llwyddo'n Lleol was a continuation of an innovative project established under the LEADER programme, piloted on a large scale through ARFOR 1 and on an even larger scale through ARFOR 2. This follows the path of several successful initiatives which require constant development over several iterations before seeing a real effect, and therefore the funding given by ARFOR to support the development and evolution of this initiative should be commended.

However, a number of elements were identified that were fairly similar to mainstream activities such as business subsidy schemes, entrepreneurship support and employability. A high percentage of ARFOR's budget was allocated to business grants as a means of creating economic opportunities for retaining young people in the region.

It therefore shows that there is a wide variety in regard to innovation within the activities and the extent to which they attempted to respond to the challenge directly. Some stakeholders and staff were of the opinion that this represented a good balance and an effective package, but for others it reflected confusion and ambiguity regarding ARFOR's role, purpose and remit.

5.2.2 Remit

A recurring theme in consultations with officers and stakeholders was that ARFOR's structure and design seemed to be somewhat 'fragmented', and its remit overly broad, with an ambition to achieve far too much. Spreading resources too thinly risked limiting what could be delivered strategically. Rather than focusing resources on a smaller set of priorities, they were divided across multiple activities and objectives which diluted their achievement. This approach arguably led to duplication and confusion across work-streams, particularly regarding the various communication campaigns. Several officers and stakeholders suggested that the ARFOR's structure was overly complex.

There was also confusion between delivering interventions with an economy>language focus (i.e. the programme's attempt to positively influence the viability of the Welsh language through economic interventions) and language>economy (i.e. interventions related to linguistic improvements to drive economic benefit). The first was the programme's main aim according to original documentation, but several examples of the second were also seen. For example, several Enterprising Communities and Bwrlwm projects focused on increasing language use directly rather than creating benefits for the Welsh language through economic intervention.

> "We had to ensure that the projects met ARFOR's strategic objectives but sometimes the brief was difficult to understand in terms of – was the economy supposed to support the Welsh language or was the Welsh language supposed to be supporting the economy?" (Programme officer)

Some officers acknowledged that they may have been overly eager to respond to different needs, and that the other side of the coin of having such a flexible programme is the risk of drifting away from its original mission.

> "There was definitely a tendency for people to come to us for anything related to ARFOR and ask 'can you do this'. It was seen as a 'one-stop shop' to support living opportunities / returning (to the area). It was hard to say 'no, we can't support it'. Our nature is to collaborate with people, but sometimes we lost sight of the main message." (Programme officer)

It was noted that a number of activities funded by Llwyddo'n Lleol and other work-streams focused on social aspects, and the link with economic factors was weak at times. On the one hand, a more holistic focus would be welcomed, recognising that numerous factors influence individuals' motivations to migrate. On the other hand, this is further evidence of a departure from the original remit and a loss of focus from the core aim.

> "We need to consider whether (the programme) needs to be made clearer and more 'clean cut'. It goes in a lot of different directions. I feel like we need to focus on a smaller, more 'focused' package." (Programme officer)

ARFOR funded a number of activities historically delivered by other organisations. Examples include work experience opportunities provided through Profi and the social elements funded through Llwyddo'n Lleol (e.g. comedy nights, gigs etc.). The justification given for this was that budget cuts to other bodies had led to these gaps, but this raises the question: is ARFOR's role to fill gaps or invest in new things?

5.2.3 Conclusions about ARFOR's purpose and design

Overall, it was clear that the exact role and purpose of the programme had not been defined clearly enough, and this ambiguity was seen seeping into the work-streams. The programme would probably have benefited from establishing a clearer and more limited remit. This should be an important lesson for any similar programme in the future.

5.3 Time constraints

The short delivery period was a major challenge for the programme, as highlighted in the beneficiaries' feedback. This was the primary observation also made by officers and other stakeholders when discussing programme challenges. It likely explains the ambiguity and shortcomings related to the programme's purpose and design referred to above, as there was insufficient time for thorough planning. In terms of implementation, frequent reference was made to the short delivery period, with a consensus that the tight timetable limited what could be accomplished.

> "It feels as if some elements have been rushed. My feeling is that there are a lot of small pots available that are not going to have a big long-term effect." (External stakeholder)

Indeed, the time constraints affected every aspect of programme delivery. The process for allocating grants was rushed, increasing the risk of resources being spent on less effective activities, while beneficiaries also had to complete their projects quickly. Llwyddo'n Lleol officers reported having to launch and promote several different initiatives simultaneously, which likely caused some confusion among the public, while it was noted that the short delivery period also limited the potential impact of the marketing campaign:

> "The challenge was that the period was so short. We tried to promote one initiative after another, and that was confusing for the public... In reality, it needed five years to have time to take root, see a legacy, and use the contents." (Programme officer)

5.4 Marketing, promoting and establishing the ARFOR brand

The marketing and promotion work was considered a major strength overall. Indeed, this was the main response when officers and stakeholders were asked about the programme's main successes. The delivery team felt that a strong brand had been established, that effective marketing was taking place and that there was high awareness of the programme.

Officers tended to refer to the effectiveness of the marketing work for Llwyddo'n Lleol. It was noted that using live examples was an effective and powerful method of highlighting the opportunities in the region to try to change any negative impressions. The social media campaign and all the marketing work during events such as the National Eisteddfod were particularly effective, while some also referred to the television campaigns.

Attention was also drawn to the weaknesses of the marketing campaign and, above all, the use of different brands. The main brands were 'ARFOR' and 'Llwyddo'n Lleol', and differing views were expressed regarding their value. Some believed that Llwyddo'n Lleol was an effective brand and offered a clearer message, while others argued that there was a need to streamline and focus on using only the ARFOR brand. Others were unsure about the effectiveness of ARFOR as a brand at all, suggesting that more familiar geographical concepts should be used:

> "ARFOR, as a geographical term, is not something people are very familiar with. It hasn't really been used as a geographical term beyond government circles and the programme." (External stakeholder)

This once again emphasised the need for more thorough planning over a longer period of time. Ideally, time should have been spent examining the strength of the different brands, the most effective messages, and the most appropriate target audience before launching the campaign as these are the basics of any successful marketing brand. However, the general consensus was that the Llwyddo'n Lleol campaign was effective and had created a strong foundation to encourage young Welsh speakers to stay or settle in the region.

5.5 Management and governance processes

A number of positive aspects regarding ARFOR's structure and design were identified. Overall, the delivery team believed that the programme had been well managed. At a regional level, it was said that it was easy to access information and that help was available whenever needed. The regular meetings were highlighted in addition to good processes for sharing information.

The use of contractors was generally effective with the programme taking advantage of their expertise and networks, whilst participants and stakeholders greatly commended the active, dedicated and enthusiastic officers within these bodies. Officers within the contractor bodies and the local authority teams were fairly young, and several stakeholders were of the opinion that this contributed to the programme's spirit and appeal, i.e. that it is a programme delivered by young people to help young people who were facing similar challenges. There was also good collaboration between the contractors in general as well as between the local authorities. This built on the relationships developed through ARFOR 1 allowing strategic discussions along a north-south axis.

It was clear from the consultation that officers were very satisfied with the role of the Project Manager, but it was also noted that there was not enough resource to coordinate the programme centrally. It was outlined that this represented a risk of being overly dependent on an individual for the active coordination work.

The main weakness was arguably the lack of resources to coordinate the programme at a strategic level. Whilst the programme was effectively managed at an operational level, there was a lack of resources to collaborate effectively with strategic stakeholders, to consolidate efforts where appropriate, and to ensure that the programme's resources were prioritised effectively.

6. Assessing ARFOR's impact

This chapter explores the impact of ARFOR 2 in creating economic opportunities and increasing Welsh-language use in businesses, as well as discussing evidence of the impact on influencing migration patterns (the programme's key aim). The chapter concludes by exploring some of the more strategic impacts, including key lessons learned and the potential to mainstream the programme's most successful elements.

6.1 The programme's economic outcomes

Several economic outcomes for the supported businesses were highlighted earlier in the report. According to official monitoring data submitted to the Welsh Government (see Chapter 3), ARFOR created 327 new jobs, safeguarded 295 existing roles, developed 288 new products or services, and leveraged nearly £2.5 million of investment from businesses. The economic impact on businesses was explored further during our consultation with beneficiaries, with the main findings outlined below.

6.1.1 Business growth

Firstly, we examine the impact of the programme in creating growth within existing businesses, evaluating the impact on jobs, turnover, and soft outcomes in terms of increasing businesses' aspirations to grow.

New jobs

Beyond the monitoring data collected by the programme, there was a detailed examination of ARFOR's impact on the grant beneficiaries within Enterprising Communities and the Career element of Llwyddo'n Lleol during our consultation with businesses (77 respondents). It was found that 73% of grant recipients created jobs as a result of the support. These businesses created an average of two jobs each. Using these averages, we can estimate that the programme has created 311 jobs in total (230 through Enterprising Communities and 81 through the Llwyddo'n Lleol Gyrfaol initiative). This is fairly consistent with the official figures but suggests a slightly better performance as the Challenge Fund was responsible for 74 of the new jobs according to the monitoring data (and Enterprising Communities was only responsible for 205 jobs and Llwyddo'n Lleol for 48 jobs).

Whilst the majority of these new jobs were full-time (63%), a fairly high percentage were part-time (30%) and seasonal (8%) as well. If we therefore look at the number of full-time equivalent (FTE) jobs created through the Enterprising Communities grant schemes and the Gyrfaol initiative of Llwyddo'n Lleol, we estimate that the programme has created 245 new FTE jobs.

We also asked about the potential longer-term impact on employment, acknowledging that business investments often take time to translate into growth. Indeed, the majority of grant recipients (62%) anticipated creating additional jobs within 12 months of the interview as a result of the support, estimating an average of two new jobs each.

The impact of the programme on jobs was also explored by asking businesses for employment figures before and after receiving support. Overall, 62% of businesses reported that they employed more people since receiving ARFOR's support. The average employment change is shown by business size category in Table 6.1 below. We can see a positive effect especially among businesses which had no staff before receiving support, with this cohort employing around four staff members (FTE) following the intervention.

Table 6.1: Average employment growth (FTE) of grant recipients, by business size category

Business size before receiving support[11]	Number of cases	Average before receiving support	Average after receiving support	Change
None	8	0.0	3.6	3.6
1 to 4	35	1.9	3.0	1.1
5 to 9	9	6.8	8.8	2.0
10 to 24	8	14.6	14.5	-0.1
25 to 49	4	34.6	44.0	9.4
50+	2	137.8	123.3	-14.5
All businesses	66	9.9	11.4	1.4

Source: Consultation with businesses receiving grants from Enterprising Communities and Llwyddo'n Lleol

A significant difference could be seen between the two work-streams, with Enterprising Communities beneficiaries reporting an average of 2.2 new members of staff compared to 0.2 among the beneficiaries of the Gyrfaol initiative of Llwyddo'n Lleol. This is consistent with our previous findings that the Gyrfaol initiative invested in a number of existing jobs, but led to upskilling and supporting the progress of individuals within the workforce, or safeguarding individuals' work. Using these averages for the two work-streams, it is estimated that the programme has created 254 jobs (243 through Enterprising Communities and 11 through the Gyrfaol initiative of Llwyddo'n Lleol).

Overall therefore, there is strong evidence that the support has created hundreds of new jobs, with the estimates ranging from around 250 to 330 or possibly even more given the impact of other work-streams as well. These were also jobs which businesses reported could be attributed to the programme's intervention. However, the additionality of these jobs can be questioned, and a high risk of displacement is likely. This is discussed further later in this chapter.

It is also important to consider the appropriateness of the jobs created. Research shows that the 'problem' is not necessarily a lack of sufficient jobs, but a lack of appealing jobs which match the career aspirations of young people in the area. In general, the programme seems to have responded to this specific challenge by creating jobs in a wide variety of sectors and in areas of interest to the individuals.

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[11] These figures refer to the number of employees before receiving support.

Looking specifically at the individuals who received job opportunities through the Gyrfaol initiative of Llwyddo'n Lleol, three quarters indicated their intention to work in the same field, with many either still in their role with the same company or hoping to do so. This shows that the support has been valuable in giving individuals relevant experience to develop a career in their chosen field.

We also know that 94% of the jobs were taken by local people[12] and 81% were fluent Welsh speakers whilst 18% spoke Welsh to an intermediate level (9%) or entry level (8%).[13] Two thirds (66%) were confident that the jobs would continue beyond the ARFOR programme period in March 2025 'to a large extent' with a further 16% choosing 'to some extent'.

The main weakness regarding job quality was likely the salary level, which varied significantly, as shown in Figure 6.1 below.

Figure 6.1: Salary level of the jobs created as a result of the subsidy schemes

Source: Consultation with ARFOR beneficiaries (businesses) (data for the reported 152 jobs reported by 77 beneficiaries who received a grant from Enterprising Communities or the Careers element of Llwyddo'n Lleol)

On the whole, the jobs that have been created are appropriate but possibly with a little too much emphasis on low paid jobs. Examples are given below of the comments made by businesses about the type of job opportunities they have created.

"ARFOR funding helped to create three new jobs including a chef and front of house staff. The grant enabled us to renovate the pub's kitchen which is owned by the community." (Enterprising Communities beneficiary)

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[12] This is defined as people living within 10 miles from the workplace.
[13] Only 1% had no Welsh skills at all.

> "The ARFOR grant helped to create the position of Project Researcher. They had returned from university and had not been able to find another job in the county. This position was full time and linked to their degree." (Llwyddo'n Lleol beneficiary)

> "The ARFOR grant helped us to recruit a local young person to work as a full-time chartered surveyor. She had grown up in the region and wanted to come back after qualifying and ARFOR helped her do that by supporting us with just under half of her £28,000 annual salary." (Llwyddo'n Lleol beneficiary)

Turnover

The impact of the subsidy schemes on increasing business turnover was also measured. According to 75% of grant recipients, the financial support had a positive effect on their turnover. This was mainly due to the creation of new products and services (78%) following receiving financial support, while almost half (48%) said the improved Welsh offering had helped attract new customers.

The impact on business turnover was further tested by asking for the figures before and after receiving support and then asking them to estimate how much of any increase could be attributed to the support, although we note that fewer respondents were willing to share this data. Of those who responded, 81% said their turnover had increased since receiving the support. The exact increase varied greatly and depended on the initial size of the businesses. There was also great variation in the extent to which it was identified that ARFOR was responsible for this change, as we see in Figure 6.2 below. The main response can be divided between a cohort stating that ARFOR was responsible for a relatively small percentage of their increase in turnover (45% stating this) and a similar cohort (48%) stating that ARFOR was responsible for at least 25% of their growth.

Figure 6.2: (If turnover had increased) What proportion of the change in turnover can be attributed solely to the grant received?
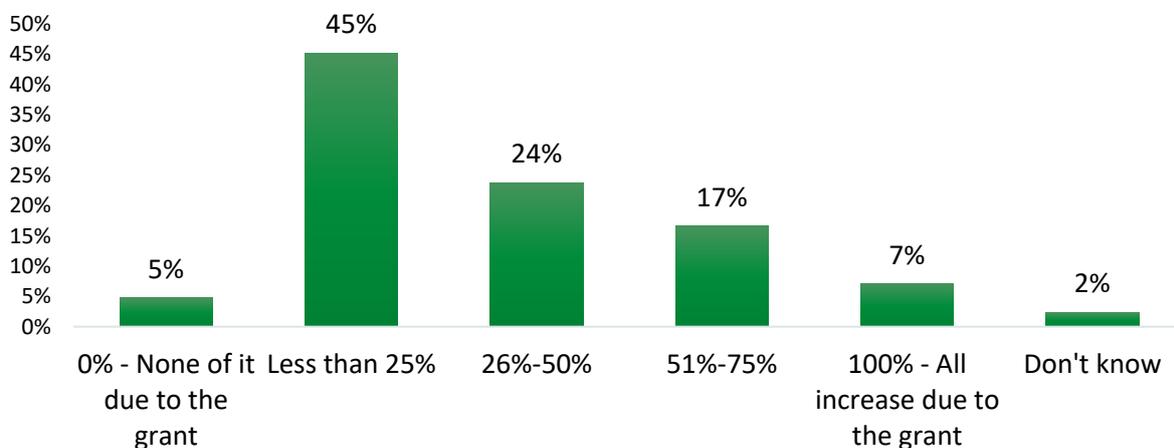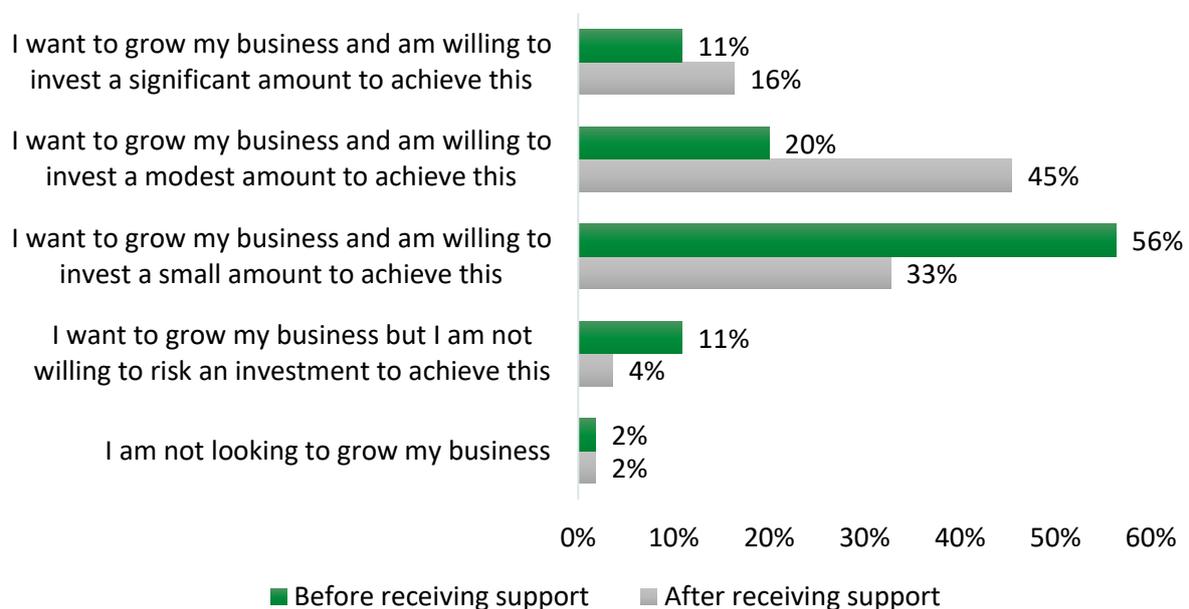

Source: Consultation with ARFOR beneficiaries (businesses) (n=42)

Using this data, we estimate that the support has contributed to an average growth of just over £23,000 in turnover per grant recipient, equivalent to an overall impact of £3.9 million. These findings should be interpreted with caution, as they are based on broad assumptions and a relatively small sample (42 businesses, representing 26% of the total). However, the outcomes provide a useful indication of the potential scale of the effect. The figure is very similar to the grant size allocated of around £4.1 million, suggesting only modest economic gains. Nevertheless, the intervention is likely to generate longer-term benefits for the supported businesses through the products, services, and other improvements in which they have invested.

Beyond the quantitative data, ARFOR officers believed the support had a more far-reaching effect on some businesses by raising their growth ambitions. It was often noted that owners for years had managed businesses that provided for them and their families, but that the experience of recruiting employees following ARFOR's investment had changed their perception of their businesses and increased their desire to grow. As one officer put it: "*It feels like we've ignited something in them*."

This shift was also evident in our consultation with businesses, where several questions explored potential changes in attitudes, aspirations and business culture. When asked directly, 68% of respondents reported that the support had increased their growth aspirations. There was also a slight increase in willingness to make larger investments in business development, as illustrated in Figure 6.3 below.

Figure 6.3: Attitudes towards investment and growth before and after receiving support

Source: Consultation with ARFOR beneficiaries (businesses) (n=55)

Finally, 80% reported plans for making further investments over the next two years. This suggests that the programme has had some effect on increasing businesses' appetite for growth and that further positive economic benefits can therefore be expected in the future.

Additionality

There was mixed evidence regarding additionality [14] —the effect in terms of increasing both employment and turnover among beneficiaries. On the one hand, 78% of businesses reported that they would not have been able to fund the investment without the grant and 82% stated that the funding was necessary to reduce the business risk of making the investment. On the other hand, only 31% indicated that they would not have proceeded with their investment at all without the grant. Most businesses reported a degree of partial additionality, with 43% noting that the grant had enabled them to increase the scale of their investment and 24% indicating that the intervention had accelerated their investment plans. While this shows that the interventions helped to speed up and strengthen investments that were better or more appropriate, it is also suggests that some of the reported outcomes may have occurred even in the absence of support.

It is also important to consider whether the businesses could have accessed similar support through other organisations. Only 55% agreed with the statement 'I was unable to obtain a loan or funding for this investment through other means,' and just 36% reported that they had sought assistance from other programmes or services to finance the project. Furthermore, 50% indicated that they had already received financial support from another programme or service within the past three years. The additional value of some of these investments can therefore be questioned, although many businesses considered the support to have been essential in enabling them to deliver the investment at the scale and within the timescale achieved.

> "I have a small, new business and couldn't afford to build the new gym and equip it without the funding. I had looked at loans, but they would have crippled the business with repayments. I had applied for other grants but they weren't suitable for a small business like mine and was turned down." (Enterprising Communities beneficiary)

Finally, it should be noted that there is a significant risk of displacement, given that a high proportion of beneficiaries' competitors are located within the region. Indeed, evidence from our consultations indicates that, on average, 48% of beneficiaries' main competitors are local. This presents a risk that the growth achieved by beneficiaries may have had an adverse effect on other businesses in the region, thereby limiting the 'net' economic impact.

Overall, there is limited evidence to suggest that the grant schemes represent good value for money when assessed against basic financial metrics.

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[14] Additionality is the extent to which activity occurs, either taking place at all, on a larger scale, faster or within a specific designated target area or group, as a result of the intervention.

6.1.2 Entrepreneurship

Following support from the Mentro Initiative, 46% of individuals had already started their own businesses while an additional 17% were about to do so[15]. If we generalize these findings to the wider population that received support, we can estimate that almost 60 young people have either already started their own businesses or are about to do so. The main effect of ARFOR's support was to speed up this process of starting a business, with 77% (10 out of the 13 in our sample) who had already started a business of the opinion that they would have started a business anyway without the support, but that it would have taken longer. In all, 95% of these new businesses said they mainly operated through the medium of Welsh (63%) or gave equal emphasis to Welsh and English.

New businesses were also established following the support of Enterprising Communities. Of the 11 who responded to our survey stating that their objective was to develop a new business or venture, 9 of them said they had already launched these businesses. On this basis, we estimate that the scheme has led to 18 new businesses.

Several sub-projects and other ARFOR elements also contributed to fostering entrepreneurship. One example is the support provided to rugby clubs through the Mentro Initiative, which helped them host social events. According to programme officers, this support strengthened the sustainability of the organisations by building their confidence to independently organise future events and generating valuable income as a result.

6.2 Businesses' language use outcomes

The requirement for any support to benefit the Welsh language was embedded within the contractual and application processes of the Enterprising Communities business grant schemes. As a result, two broad types of projects were funded: those directly aimed at increasing the use of Welsh, and those focused on creating employment opportunities for Welsh speakers (or a combination of the two). Overall, 53% of grant recipients reported using the funding (at least in part) to create more Welsh language spaces, which was also a central objective of the Challenge Fund.

The impact on the creation of such spaces was clear. Businesses reported that the visibility and use of Welsh within their workplaces had increased, while projects supported by the Challenge Fund had established a variety of Welsh language spaces across different contexts. Some illustrative examples are provided below.

"This will be the first Welsh language e-sports tournament. It will increase the amount of content created online in Welsh. We are creating 4 venues in the region which are all completely bilingual. There is an online portal

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[15] This statement is based on the findings of our survey of the individuals who received support from the Mentro element of Llwyddo'n Lleol (a sample of 41)

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for all of the e-sports players to talk in Welsh." (Challenge Fund beneficiary)

"All of our staff were Welsh speaking before the ARFOR support. However the ARFOR support has meant we have been able to have all of our signage, marketing and branding be bilingual for the first time. This encourages more of our customers to talk to us in Welsh." (Enterprising Communities beneficiary)

"Everything in the cafe / bar is bilingual with Welsh first including branding, marketing menus and signage. All staff are Welsh speaking and have Welsh speaker badges. We play Welsh music in the cafe. Have Welsh-language story and poetry events and gigs. We have also hosted Give Welsh a Go events." (Enterprising Communities beneficiary)

Several questions were asked to assess changes in businesses' use of the Welsh language across different contexts following receipt of support. It is fair to conclude that Welsh-speaking businesses were supported by ARFOR to some degree. As shown in Figure 6.4 below, all reported providing services to customers through the medium of Welsh prior to receiving support, and almost all indicated that colleagues spoke Welsh in informal communication with each other. Indeed, the majority reported using Welsh in each of the scenarios outlined below. At the same time, significant progress was observed within three specific metrics: the proportion indicating using Welsh in their internal formal and written communication as well as in their marketing activities.

Figure 6.4: Staff use of Welsh in the workplace before and after receiving support
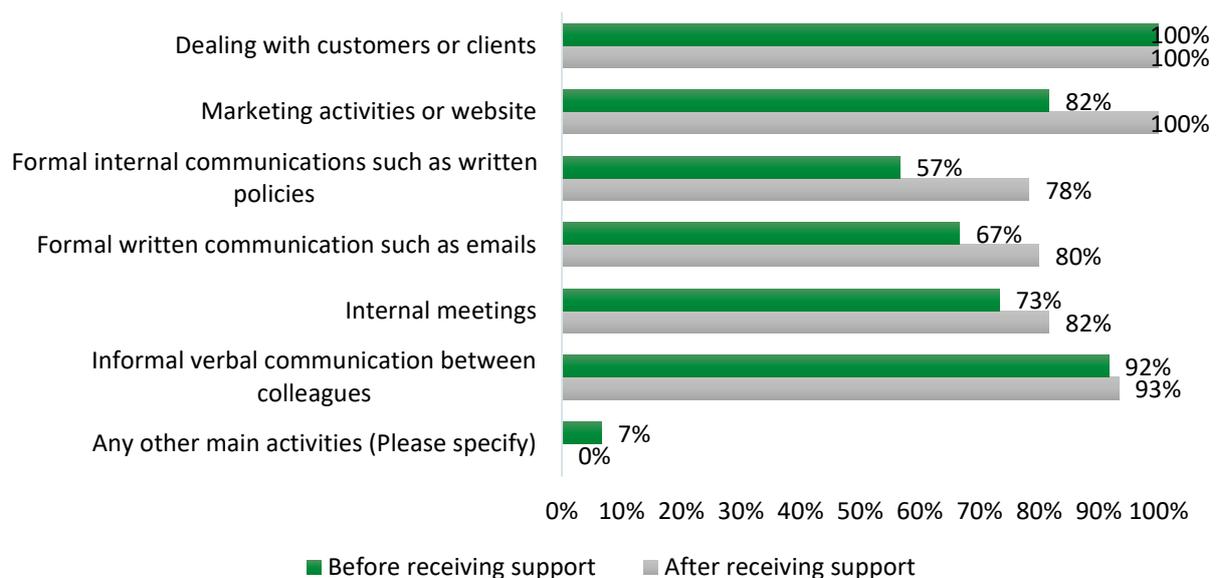
Source: Consultation with ARFOR beneficiaries (businesses) (n=60)

There was also an increase in the proportion of businesses assessing candidates' Welsh language skills as part of their recruitment process (rising from 66% before receiving support to 98% afterwards). Similarly, the proportion of businesses reporting that it was 'very important' to have staff with Welsh-language skills in their workplace increased from 69% prior to support to 87% afterwards.

6.2.1 Etic Lab assessment

Further evidence of this progress was provided through research undertaken by our partner, Etic Lab. For this project, Etic Lab collected a range of data, including a composite variable or score on the use of the Welsh language in businesses. This variable is a composite score of the use of Welsh on businesses' websites, acting as a proxy for their overall use of Welsh. It is calculated by working out the percentage of the company's website that is either written in Welsh or translated. A score between zero and one was assigned to reflect how 'Welsh' a company's website was, with one indicating that the entire website was available in Welsh and zero indicating no Welsh content.

This data was used to compare businesses that had received support from ARFOR with those that had not, in order to assess the impact of the intervention. This statistical analysis showed that companies receiving support from ARFOR were 22% more likely to achieve a high Welsh score than those that did not receive support. These results were statistically significant and reinforced the qualitative feedback from businesses, i.e. that the intervention led to an increase in their use of the Welsh language.

6.3 Impact on migration patterns

Beyond its direct effects, ARFOR's main contribution is through its indirect influence on the region's image and the economic opportunities it offers. Indeed, Llwyddo'n Lleol's central aim through its marketing campaign was to shift mindsets and attitudes towards the region. Furthermore, several members of the delivery team also felt that the programme had succeeded in raising awareness of the brand and had begun the process of changing perceptions.

> "We have started to challenge that stereotype that you only move back to the Welsh countryside when you are looking to retire." (Delivery team)

6.3.1 Impact on the beneficiaries of Llwyddo'n Lleol

There is strong evidence that the programme had an impact on the young people who were directly supported, particularly in relation to their attitudes and motivations to stay or return to the area. This was explored through a series of questions during our consultation, which is the survey of 80 individuals who had received help from the Llwyddo'n Lleol work-stream.

To begin with, we assessed the baseline attitudes of individuals who had received support, focusing on their attitudes towards opportunities in the region and their desire to stay or return prior to receiving support. As shown in Figure 6.5 below, there was a strong desire to stay or return, however a large proportion (73%) also reported feeling that they needed to leave at least to a 'small extent'. The main reasons given for this was needing to find better jobs or opportunities (71%).

Figure 6.5: Baseline attitudes of Llwyddo'n Lleol beneficiaries (individuals)
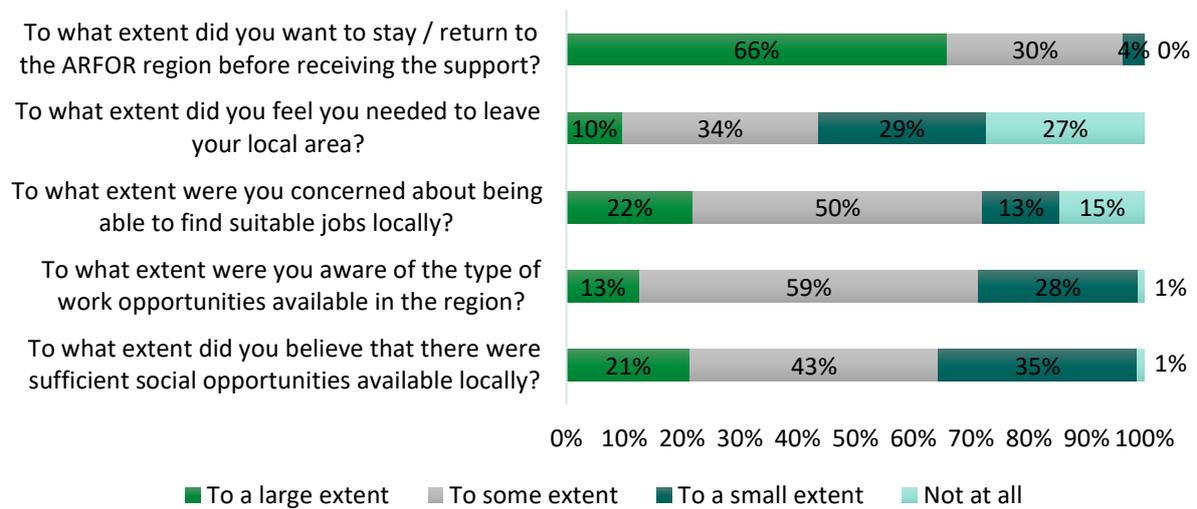
Source: Online survey of ARFOR beneficiaries (individuals) (n=82, 62, 82, 87, 84)

Following receipt of support, 99% (83 out of 84) of survey respondents who had been living in the region prior to receiving aid reported that they had remained. The key finding is that 72% reported that the programme had influenced their decision to stay, with 45% selecting the highest rating of 'to a large extent'.

Figure 6.6: To what extent has the support from ARFOR influenced your decision to stay / return to the area?
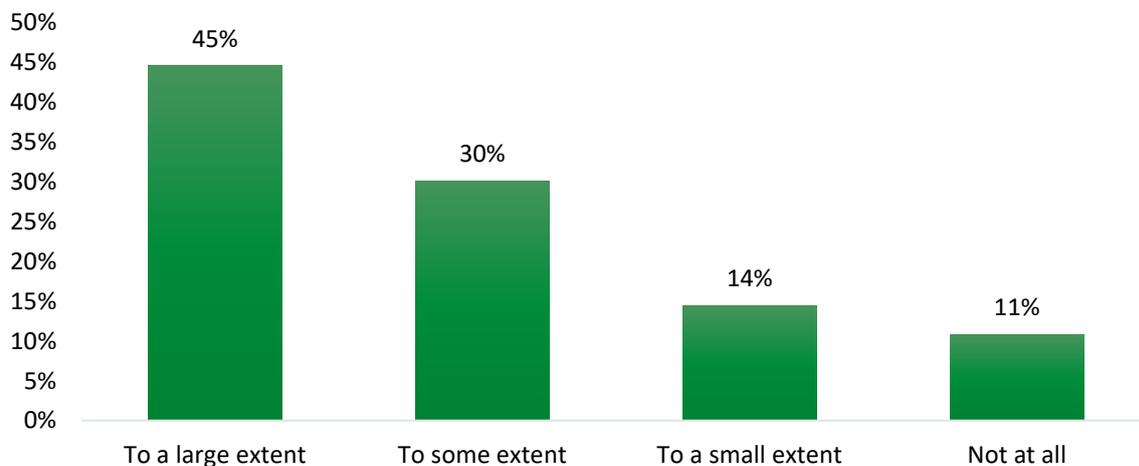
Source: Online survey of ARFOR beneficiaries (individuals) (n=83)

The reasons for this positive response are presented in Figure 6.7. Most notably, the vast majority reported that the intervention raised their awareness and highlighted the availability of appealing career opportunities – the main objective of the Llwyddo'n Lleol campaign. Nearly half pointed to a more direct effect, namely securing a more appealing job or role through the intervention, which in turn increased their willingness to remain in the region. This aligns with other findings from the survey, where 56% indicated in response to a separate question that they had obtained a better job following the support.

Figure 6.7: How has ARFOR impacted your decision to remain in or move back to the area?
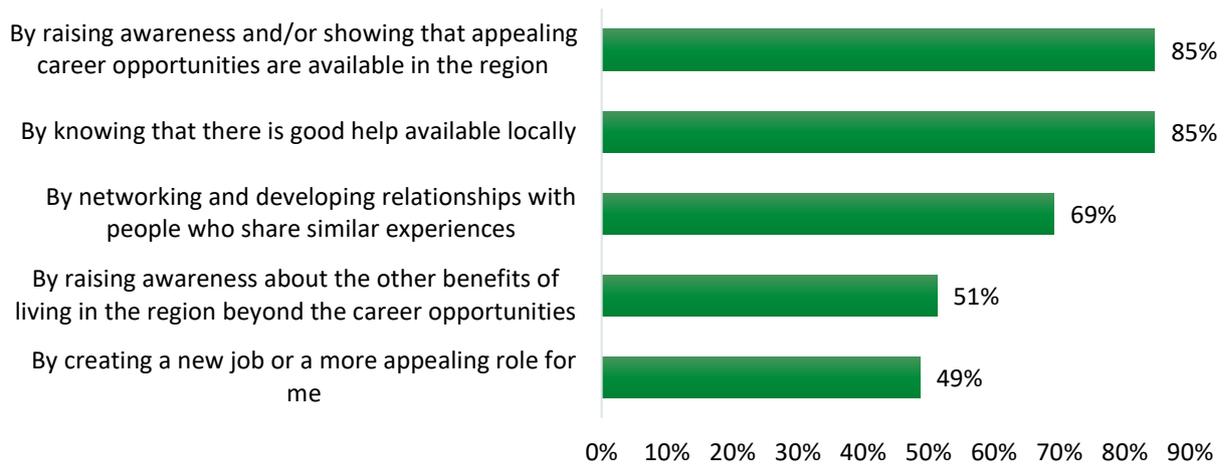
Source: Online survey of ARFOR beneficiaries (individuals) (n=39)

The campaign's impact and direct intervention are demonstrated further in Figure 6.8 below in relation to increasing individuals' confidence and attitudes on the opportunities available locally and the possibility of achieving their aspirations by remaining in the region.

Figure 6.8: Outcomes of Llwyddo'n Lleol support
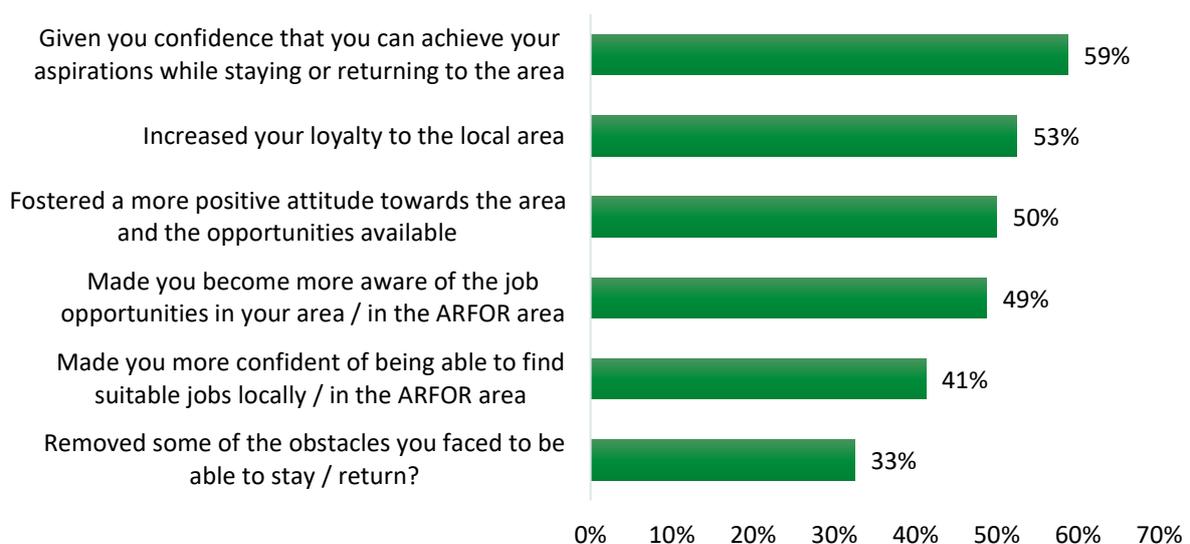
Source: Online survey of ARFOR beneficiaries (individuals) (n=80)

6.3.2 Conclusions on migration patterns

Llwyddo'n Lleol has clearly achieved its intended impact on those directly supported, not only by providing better opportunities but also by reshaping how they perceive the opportunities available in the region and by fostering more positive attitudes. As a result, almost all direct beneficiaries have chosen to stay. We can therefore conclude that ARFOR has had a positive influence on the migration patterns of its direct beneficiaries. The key question that remains, however, is to what extent has the programme's campaign influenced migration patterns more broadly – by changing young people's perceptions in a more far-reaching manner (i.e. beyond the immediate beneficiaries) regarding the opportunities available in the region? Answering this is challenging and would require more extensive research, including measuring wider youth attitudes within the wider population and the identification of changes over time.

6.4 Learning lessons and mainstreaming

ARFOR has generated significant learning, which was one of its primary objectives. Research was commissioned to explore the relationship between the economy and language, through both this evaluation and wider learning study and the Challenge Fund projects. The evaluation report highlights several valuable lessons that can inform further developments and opportunities for mainstreaming. The remainder of this chapter discusses these issues.

6.4.1 Aberystwyth University research findings

Several papers and short reports were produced following research carried out by Aberystwyth University as part of this study in order to examine the connection between economy and language (as well as other relevant issues).

The **Briefing Report 'ARFOR, out-migration and the Welsh language'** was published in January 2024[16] which discussed lessons from contemporary research in the study of migration. The focus was on attitudes of young Welsh speakers towards life in rural Wales, the factors that encourage them to leave, and the factors that influence their return. The research highlighted that out-migration and return migration are shaped by different drivers, and therefore require different approaches. It also pointed to the usefulness of typologies of young people's attitudes in Wales to migration in order to address the challenge for different groups, as well as the value of life course models in interpreting migration trends. These insights should be carefully considered when developing policies or interventions to address the depopulation of young people from rural Wales.

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[16] Dr Huw Lewis and Dr Lowri Cunnington-Wynn from Aberystwyth University, Briefing Report 'ARFOR, out-migration and the Welsh language: Findings from recent research on out-migration to inform the work of the ARFOR II programme', January 2024.

The briefing report **Adroddiad Briffio 'Tu Hwnt i ARFOR: strategaethau datblygu economaidd a'r Gymraeg'**, published in February 2025,[17] examined the extent to which the Welsh language has been integrated into the process of shaping key Welsh economic development initiatives. The analysis found a clear difference between the level of consideration given to the language in the Welsh Government's economic strategies compared with the documents published by Ambition North Wales, Growing Mid Wales and Swansea Bay City Region. The findings indicated a gradual improvement in the extent to which the Welsh language was integrated into the Welsh Government's economic development strategies between 2002 and 2021 (but this seems to be reversed with the publication of its latest strategy in 2023). By contrast, the findings suggest that the Welsh language has remained a marginal consideration in the development of the regional growth deals.

Six recommendations were made on the basis of the study's findings to encourage better policy coherence between different economic development strategies and interventions. In relation to the future of ARFOR (or any programme/body with similar objectives), it was noted that more consideration to its relationship with other regional economic structures, particularly the three growth and municipal deals, was essential. The study highlighted that ARFOR's capacity to deliver economic interventions benefiting the Welsh language is likely to be undermined if larger, longer-term initiatives continue to treat such objectives as marginal considerations. It was therefore concluded that the goals for any future programme or body must be clearly understood and reinforced within the wider framework of other economic development structures.

The briefing report **Adroddiad Briffio 'ARFOR, gweithleoedd a'r Gymraeg'**, published in May 2025,[18] identifies good practice in linking the economy, language and the workplace, drawing on learning from the Basque Country as well as research conducted in Wales. Thirteen recommendations were made, presenting various ideas to increase the use of Welsh in the workplace. These included: strengthening recognition of the significance of workplaces in language planning; developing an initiative to share good practice; embedding language management within organisations that promote higher management standards; and several proposals highlighting the role of social enterprises in increasing linguistic considerations in the workplace.

This collection of papers developed by Aberystwyth University provides useful learning to help inform language planning, policies, and interventions that will follow the ARFOR 2 programme.

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[17] Dr Huw Lewis from Aberystwyth University, Briefing Report 'Tu Hwnt i ARFOR: strategaethau datblygu economaidd a'r Gymraeg' ('Beyond ARFOR: economic development strategies and the Welsh language), February 2025.

[18] Dr Elin Royles from Aberystwyth University, Briefing Report 'ARFOR, gweithleoedd a'r Gymraeg: Gwersi arfer da o ran effaith gweithleoedd ar ieithoedd rhanbarthol neu leiafrifol i gefnogi gwaith rhaglen ARFOR II' ('ARFOR, workplaces and the Welsh language: good practice lessons on the impact of workplaces on regional or minority languages to support the work of the ARFOR II programme'), May 2025.

6.4.2 Key lessons from Challenge Fund projects

The Challenge Fund was ARFOR's main mechanism to pilot new initiatives and, by doing so, generate learning. When considering the Challenge Fund as a whole, its overall impact on the economy and the Welsh language remains unclear. It is difficult to determine the extent to which the Fund has contributed to strengthening the language or enhancing the economic viability of the ARFOR areas. In order to fully assess the impact of these investments on the economy and the Welsh language in the region, more comprehensive data and in-depth analysis will be required in the future. This will also help ensure that resources are allocated effectively going forward.

It is worth noting that the predominant projects funded are those which include a strong element of research. This is because they have created a knowledge base to be used to plan interventions in the future and that their influence and their potential to extend beyond the life of the project are strong.

The strongest projects in this regard, suitable for mainstreaming or further development, include:

1) **University of Wales Trinity Saint David's project:** Workplace Language, Workforce Language: Exploring the use of the Welsh language in workplaces and by the workforce in ARFOR counties

2) **Cwmni IAITH:** Developing linguistic assertiveness in the field of childcare

3) **Cwmni Bro Aelhaearn:** Antur Aelhaearn housing and language project

4) **Bangor University** projects

5) **Golwg:** Extend the local websites across ARFOR

6.4.3 Summarising key lessons from the evaluation

Several findings from this evaluation can inform future interventions and activities. The main implications of the Challenge Fund projects have been discussed above. Regarding the other work-streams, it was found that Enterprising Communities grants were beneficial to the direct beneficiaries. However, questions remain about whether the returns represent good value for money and if this is the best use of funding for a programme of this scale, given the level of investment required to achieve change at a macro level. There is a stronger case for continuing the Llwyddo'n Lleol campaign, as it provides a distinct focus compared to other interventions and has been effectively delivered, despite a gap in understanding its impact (if any) on individuals not directly involved in the programme. Lastly, several strong examples of activities supported through Bwrlwm ARFOR were identified. Notably, the key event was the 'Most Welsh-language Awards in the World', a relatively low-cost event which received praise for successfully attracting attention to the winners and generating the intended buzz.

There are also several important process-related lessons as well. Mainly, the evaluation highlights the need for sufficient planning and delivery timetable to avoid rushed decisions and activities. It also demonstrates the risks of ambiguity regarding the programme's exact role, particularly when addressing a challenge of this scale and complexity. Lastly, it emphasises the value of adequate resources for strategic coordination and alignment with relevant services and wider regional economic structures. Further discussion of these key lessons can be found in the final chapter of the report.

7. Conclusions & recommendations

ARFOR 2 has achieved a great deal in a short timeframe and has received a very positive response from the participating individuals and businesses. ARFOR has also generated valuable insights for addressing the fundamental challenges at the heart of the programme.

At the same time, there is widespread recognition that the scale and complexity of the challenge cannot be resolved through a short-term programme alone. Instead, a long-term, sustained approach is needed. While there is a strong case for continued investment, this evaluation highlights the need for more thorough planning to clearly define the future purpose and remit of the programme.

Economic factors are clearly an important driver which contributes to the challenge of the outmigration of young people from rural Wales (and this, in turn, has a detrimental effect on the Welsh language). However, it is also evident that the reasons young people leave are broader than just economic concerns. There is a strong argument for moving beyond focusing solely on the relationship between the economy and the Welsh language, as this can artificially separate interlinked issues. Any future programme or body should instead focus on the wider challenge: the outmigration of young Welsh speakers from the region.

Although the evidence indicates that ARFOR 2 interventions produced short-term positive economic outcomes and influenced individual beneficiaries' migration patterns, a programme of this scale cannot directly resolve the problem. Given this, a programme like ARFOR is likely to have a more significant long-term impact by adopting a more strategic role – one that focuses on influencing, facilitating and enabling – rather than attempting to directly subvert the region's structural economic challenges. This would also help to minimise the risk of duplicating existing activities or interventions.

7.1 Broad recommendations

We suggest three broad recommendations which offer a way forward for further investment and policy development in this area. Each broad recommendation includes a series of more detailed suggestions.

Recommendation 1: Establish a long-term intervention
A challenge as large and complex as the one discussed in this report requires a long-term, stable intervention in order to make a real difference. Indeed, that was also the conclusion of the Commission for Welsh-speaking Communities when considering the future of ARFOR:

> 'The Commission recognises [ARFOR 2]'s valuable contribution and is keen to see continuity of work in this vital area. The Commission therefore considers that ARFOR itself, or a similar body, or indeed another body..., should be established on a permanent basis.'
> (Report by the Commission for Welsh-speaking Communities)

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Our recommendation is that a future long-term programme should possibly be smaller with a team of core officers responsible for three main functions:

- **Sharing good practice and providing strategic coordination and guidance**. This would help ensure that efforts to address youth depopulation and its adverse effect on the Welsh language remain on the political agenda. In addition, the programme would have a key role in coordinating the relevant activity of bodies, programmes and projects, in order to promote effective collaboration and ensure that opportunities are fully exploited by uniting efforts where appropriate.
- **Research, testing and piloting**. The programme could also be responsible for investing in emerging priorities and themes regarding young people and depopulation. This may include research projects or relevant pilot projects e.g. funding the project 'Keeping in Touch with Young People' which is currently the subject of a feasibility study through the Challenge Fund.
- **Marketing and communication**. The body or programme should be responsible for marketing and communication campaigns aimed at changing young people's perception of the region as a place to live and work. This could be a continuation of the Llwyddo'n Lleol campaign and/or other communication platforms of the programme.

Recommendation 2: Use a transition period to plan thoroughly for the long-term intervention

It is our understanding that there may be a possibility of funding for a 'transition period' to avoid a sudden end to programme activities and established procedures, which could otherwise require re-establishing later. The priority during any transition period should be to define a clear purpose and remit for future work, plan for a long-term solution, and sustain, expand, or mainstream ARFOR 2 activities where appropriate. Based on our evaluation of the programme, we recommend that the following elements should be included:

- **Planning for the next phase / long term solution**. The primary aim of the transition period should be to invest in activities that support preparations for long-term solutions. One example is the opportunity to commission experts in behaviour change to explore the most effective types of messages in changing young people's perceptions of the region as an attractive place to live. Insights from this work could help shape future communication and marketing campaigns. It is also important to acknowledge the current 'data gap' – specifically, the limited evidence on the programme's impact to date in changing perceptions among young people beyond direct beneficiaries. Further research to assess the impact at that level would therefore be highly valuable.

- **Continue to deliver the 'Llwyddo'n Lleol' campaign on a smaller scale.** Our consultation identified that this work-stream has already created enough 'content' to maintain the marketing campaign in the future. We therefore recommend that resources should be allocated to uphold this campaign and that there is no need, for the time being, to invest further in direct support for businesses and individuals through the Llwyddo'n Lleol elements (i.e. the focus should be on the marketing campaign itself only).
- **Work to mainstream the successful and innovative elements of the programme.** In addition to the recommendation to continue the Llwyddo'n Lleol campaign, there is an opportunity to invest further in other innovative and successful aspects of the programme. For example, consideration should be given to mainstreaming or further developing some of the most effective projects funded through the Challenge Fund (as referred to in section 6.4.2). Similarly, consideration should also be given to mainstreaming some of the most successful activities and sub-projects of the other work-streams as well, such as Bwrlwm ARFOR's 'The World's Most Welsh-language' Awards event.

Recommendation 3: Applying the research's main lessons to inform the next steps

Finally, several recommendations were made through evaluation and learning commission's wider research which can help inform linguistic planning, policies, and interventions succeeding the ARFOR 2 programme. Appropriate attention should therefore be given to these findings when planning ahead.

7.2 To conclude

Overall, the ARFOR 2 programme has largely delivered on its intended plan and achieved a great deal in a short timeframe. The tight schedule, however, posed challenges—most notably the limited time available for thorough planning, which may have contributed to some ambiguity about the programme's precise role and purpose, resulting in an overly broad remit. Nevertheless, the programme has generated valuable insights and learning that leave an important legacy for policymakers and has made a significant contribution by sustaining discussion and developing ideas for possible solutions to address the core challenges.

ARFOR 2 has again highlighted the scale of the challenge it sought to address, while underlining that it is not realistic to expect transformational change within such a short timeframe. Instead, the challenge requires an intensive, long-term, carefully planned response. The findings from this evaluation should therefore be used to inform the development of such long-term solutions.

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Agenda Item 3

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Cymraeg 2050: A million Welsh speakers 2021 - 2026

Evidence Paper on the Cymraeg 2050: A million Welsh speakers strategy during the sixth Senedd (2021–2026)

February 2026

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Introduction

Context—Cymraeg 2050

The purpose of this Evidence Paper is to provide the Senedd's Culture, Communications, Welsh Language, Sport, and International Relations Committee with an overview of Welsh Government's delivery and achievements against the Cymraeg 2050 strategy during the sixth Senedd.

Our journey towards a million Welsh speakers and increasing the daily use of our language by 2050 has moved from setting a visionary strategy into a phase of robust action, underpinned by legislative change. This period has been defined by a collective determination to ensure the Welsh language belongs to us all in Wales, however much we speak, and wherever we live.

While Census 2021 presented challenges, recording 538,300 speakers (17.8% of the population), there are also positive indicators: the schools census shows that the percentage of Year 1 pupils studying through the medium of Welsh has been increasing generally over the last decade, and there are more adults taking Welsh language courses than ever before. There has been an increase in the status of the Welsh language and the enthusiasm and energy that can be felt in our schools, communities and workplaces provide confidence in our shared linguistic mission. Cymraeg belongs to us all in Wales—so does the responsibility for its future.

We know that growing Cymraeg requires practical interventions alongside strategic policy changes, including legislation.

The Welsh Government's programme of work over the last five years has encompassed creative and innovative measures that have delivered for the people of Wales. It has also included ground-breaking work, including the first Act we have drafted in the Welsh language: the Welsh Language and Education (Wales) Act 2025—designed to provide Cymraeg with a firm foundation for future generations.

The Committee has recognised the Welsh Government's commitment to Cymraeg, and the Committee's work has contributed vital scrutiny, challenge and fresh thinking to our work. We will provide a full response to the Committee's recent Report on its Inquiry, 'Cymraeg i Bawb?' within the normal timeframe.

Cross-cutting strategies and policies

This Evidence Paper provides the Committee with a breakdown of our key activities and achievements against the headings of the Cymraeg 2050 strategy.

We start with a summary of some of the strategic and long-term legislative and policy changes introduced during this Senedd to underpin the sustained, systemic and ongoing growth of our language from now to 2050. These are bold and far-reaching programmes of work, including:

Welsh Language and Education (Wales) Act 2025

We delivered our Programme for Government, and Co-operation Agreement commitment to introduce a Welsh Language Education Bill during the sixth Senedd. The Welsh Language and Education (Wales) Bill was laid before the Senedd on 15 July 2024 and was passed unanimously in the Senedd on 13 May 2025 following the Senedd's scrutiny process, followed by Royal Assent on 7 July 2025.

The Act provides a statutory basis for the target of a million speakers and ensures that clear targets for the planning of Welsh language education are set at a national, local and school level. It establishes a new method for people of all ages to describe their ability in Welsh based on the Council of Europe's Common Framework of Reference for Languages (henceforth, the 'CEFR'). Each school will have a Welsh learning goal to aim towards, with that goal corresponding to the CEFR levels appropriate to the school category. A statutory body will be established, the National Institute for learning Welsh (the Athrofa) by August 2027. The Athrofa will co-ordinate the support of learning Welsh across the education system, the workplace and the community. It will provide training, resources, and support to the workforce and learners of all ages.

We're already at work implementing the Act. This includes an intensive programme of internal and external engagement in preparation for consultation in the Autumn of 2026 on a refreshed Cymraeg 2050 strategy, a draft National Framework for Welsh Language Education and Learning Welsh and on a draft Code to Describe Welsh language ability. We held a joint conference on 4 December 2025 with the National Centre for Learning Welsh, which was attended by over 200 participants. This was an opportunity to highlight how the CEFR is used in international contexts.

The impact of the Act goes beyond education. It's about culture, identity and community. It makes our language a part of everyday life by empowering every child, young person and adult to use it. Fully realised, the Act establishes the framework through which we reach a million Welsh speakers by 2050, and through which Cymraeg is sustained as a living language in our communities.

Commission for Welsh-speaking Communities

The use of the Welsh language varies considerably from one part of Wales to the other, from community to community. Only by understanding these spatial and cultural challenges—and responding structurally and systematically to them—will we grow our language across Wales.

In 2022 we established the independent Commission for Welsh-speaking Communities to look at the challenges facing the language within its traditional heartlands. The Commission published its report 'Empowering communities, strengthening the Welsh language' in August 2024. We responded to the report's findings and recommendations in May 2025. Work is on-going on the implementation of the recommendations we've accepted. We've also accepted in principle the recommendations on designation of areas of higher density linguistic

significance. We've held discussions with stakeholders, including local authorities and community groups which have a significant role to play in future designation processes. The Cabinet Secretary for Finance and Welsh Language will make a statement on a proposed pathway to designating areas based on linguistic characteristics on 24 February .

Each area in Wales is on its own journey with Cymraeg. So, in August 2024 the First Minister launched the second phase of the Commission's work, which is currently looking at the future of the Welsh language as a community language in other parts of Wales and beyond. The Commission will publish its Phase 2 report shortly and we look forward to its findings.

Both reports combine to provide the Welsh Government with an in-depth and comprehensive review of the Welsh language at community and grass-roots level complemented by Prosiect BRO, a detailed sociolinguistic survey which we're funding—and a firm evidence-base to develop policy and legislation in the coming years.

These crucially important strategic programmes underline our enthusiasm for and commitment to Cymraeg, the results of which will be felt over the next decades, and beyond.

The next section of the Evidence Paper provides a summary of our direct delivery priorities, activities and achievements.

Theme 1: Increasing the number of Welsh speakers

1. Language transmission in the family

Our policy on Welsh language transmission and use in families commits to behavioural science-led interventions to help parents who have Welsh language skills to use their Cymraeg with their children. The main delivery agent for the policy is Mudiad Meithrin. We fund them to manage the Cymraeg i Blant programme, which supports families to introduce and use Welsh at home. This is done by working with midwives and health visitors and through parent and child activities such as yoga and baby massage to support early language acquisition. During 2024/2025, 3,392 Cymraeg i Blant sessions were held with 27,664 parents and 27,818 children supported. Alongside this work, a pilot behavioural science project—which we run jointly with Mudiad Meithrin and independent behavioural scientists—analyses how toys, music, and information can help prompt the use of Welsh in families who may not, for many reasons, use the Cymraeg that they have with their children. This work will conclude at the end of 2025/26 and we're currently working on plans for dissemination.

2. The early years

Cymraeg 2050 also supports Welsh-medium early years education through the Cymraeg i Blant programme, as well as initiatives like Sefydlu a Symud (Set up and Succeed). Mudiad Meithrin support the aims of Cymraeg 2050 by expanding provision, training the workforce, and helping families use Welsh at home, as outlined previously. Through the support of Mudiad Meithrin, over 400 Cylchoedd Meithrin and 45 Private Nurseries provide Welsh-

medium early years care and education to around 22,000 children in Wales every week - children from varying linguistic backgrounds.

The Co-operation Agreement between the Welsh Government and Plaid Cymru committed to 'expanding free childcare to all two-year-olds with a particular focus on providing and strengthening Welsh-medium childcare.'

Our Cymraeg 2050 strategy set a target to open or expand 150 Welsh-medium childcare provisions by 2027/28 and the target of supporting 60 provisions during the current term of the Senedd has already been met. The Sefydlu a Symud programme, now in its eighth year, has already supported 101 Welsh-language childcare provisions by either opening new, or expanding current provisions to increase their capacity to accept more children, with an additional 11 currently being supported.

In 2022, we announced that the Flying Start programme would be expanded to 2,500 more children under the age of four as part of the first phase of the extension of childcare to all two-year olds in Wales, in line with the Programme for Government. Cylchoedd Meithrin are contributing to the expansion with over 2,500 children receiving Flying Start provision in 2024/25. This represents 22% of children who attend Cylchoedd Meithrin across Wales. Almost half of the provisions supported through the Sefydlu a Symud programme deliver Flying Start.

In addition to this, we allocated further funding of £3.787m to Cwlwm over a three-year period (2022-23: £0.903m, 2023-24: £1.706m, 2024-25: £1.178m) to support the delivery of the commitments in the Programme for Government and the Co-operation Agreement relating to the expansion of Welsh-medium activities. We awarded part of this funding to Mudiad Meithrin to deliver Welsh-medium childcare qualifications at levels 3 and 5 through their Cam wrth Gam programme. We awarded further funding again during 2025-26 and following a competitive grant process, Mudiad Meithrin will continue to deliver Cam wrth Gam for a further 3 years from 2026-27. The programme has been awarded 'Direct Claim Status'—a quality assurance standard by City & Guilds and WJEC examination boards for providing these qualifications.

There has been a steady increase in the number of children attending Cylchoedd Meithrin across Wales over the past five years following the COVID-19 pandemic. In 2024–25, 11,360 children (of the 22,000 children catered for by Mudiad Meithrin through its combined activities) attended Cylchoedd Meithrin, a figure that is now in line with pre-COVID-19 levels. The total sum of weekly care hours provided by Cylchoedd Meithrin has increased annually over the past 10 years, with 9,276 care hours provided during 2024/25 compared to 6,180 in 2015/16. The increase over the years reflects that more Cylchoedd are providing full day care rather than sessional care.

3. Statutory education

Welsh in Education Strategic Plans

The Welsh in Education Strategic Plans (WESPs) have been operational since September 2022. These ten-year plans outline how local authorities will drive change, growth and improvement in their provision of Welsh-medium education. All authorities have committed to ambitious targets, aligned with Cymraeg 2050, for increasing the amount of Welsh taught and studied in their schools. There are commitments in the WESPs to open 23 new Welsh-medium primary schools and expand at least 25 Welsh-medium primary schools across Wales over the coming decade. Since 2022, 56 capital projects to increase Welsh-medium provision across Wales have already been completed. These include opening or relocation of 17 new schools to increase their capacity to accept more learners, and the completion of 39 capital projects to expand Welsh-medium provision, including childcare projects, additional learning needs projects and late immersion centres.

In 2021, we consulted on and published non-statutory guidance in relation to 'school categories according to Welsh-medium provision.' The categorisation policy is a key mechanism for several local authorities to meet their WESP target. Eight local authorities committed to move up to 42 schools along the continuum within their ten-year WESPs, with others committing to adopting the new arrangements as they expand Welsh-medium education provision in new areas within the county. Since 2022, there have been consultations to change the language category of 8 schools across Wales. A further 3 local authorities have pipeline proposals to change the language category of schools, but no further consultations are currently 'live.'

Changes to the PLASC (Pupil Level Annual School Census) arrangements to include the new categories were completed in the autumn term of 2023 and by 2024, all schools were assigned to a language category.

With a strategic outlook across seven key outcomes—from early years and primary provision to immersion, language category changes, capital projects, secondary and additional learning needs provision, and the teaching workforce—these plans bring together the strands needed to drive change across the sector. Against a challenging backdrop of falling birth rates more generally, we've continued to see that most authorities are broadly maintaining their percentages of learners in Welsh-medium education as well as laying the groundwork for sustained growth by the end of the plans.

14 local authorities have reported an increase in the numbers and/or percentages of 3-year-olds receiving their education through the medium of Welsh. The expansion of Welsh-medium Flying Start provision has been particularly successful, with nine local authorities reporting an increase in the number of Flying Start settings, and 17 local authorities reporting a rise in the provision and uptake of Welsh-medium Flying Start places.

The Welsh Language and Education (Wales) Act 2025 provides a firm legislative foundation for future Welsh language education planning in Wales, including a National Framework for Welsh Education, Local Welsh in Education Strategic Plans (which will replace the WESPs) and school-level Welsh Language Education Delivery Plans.

Late Immersion Programme

The Cymraeg 2050 Work Programme for 2021-2026 and the Programme for Government include our commitment to expand the Late Immersion Programme to ensure that everyone has access to a Welsh-medium education when they need it and wherever they are on their Welsh language journey.

During 2021, an Initial investment of £2.2m was announced to support Welsh learners undertaking late immersion in schools, and to support the progression of learners in the Welsh language following the COVID-19 pandemic. Since then, we've invested a further £8.8m during this Senedd term in late immersion to support the continuation as well as establishment of new late immersion provisions in all local authorities. Since the grant was established in 2021, over 9,000 learners have benefited from late immersion programmes— nearly half of whom were completely new to the language. The funding also covers intensive support for learners who need to reinforce their Welsh language skills. It also supports over 60 specialist staff across Wales. Late immersion funding increased to £3m during 2024-25 and 2025-26 and now forms part of the Local Authority Education Grant (LAEG).

We established and continue to facilitate Wales' first National late immersion network in 2023 where over 40 late immersion practitioners, local authority staff, and researchers meet to share best practice, academic research and support the ongoing development of late immersion education across Wales. Working with the Network, we've begun developing our first late immersion guidance, fulfilling an Estyn recommendation from its 2022 Thematic report 'Welsh Immersion Education – Strategies and approaches to support 3 to 11-year-old learners'.

e-sgol

To enable learners to access a wider curriculum through the medium of Welsh at GCSE and A-level, we continued to fund the e-sgol project which has been expanding year on year since it first launched in 2018. By now, the number of courses offered through the hybrid learning model has reached to over 150 and the number of pupils increasing to over 1,500.

In March 2021, 'Carlam Courses' were introduced as part of the e-sgol project, a series of free, virtual sessions through the medium of Welsh and English to support pupils in years 11, 12 and 13 across Wales. Carlam review sessions continue to be offered, and to date, the scheme has produced over 1,000 videos of sessions which have been viewed over 100,000 times. The videos are now also available via the Carlam Cymru app.

During 2023-24, e-sgol expanded into the primary sector, with pupils across Wales taking advantage of the provision. A range of different projects and provision have developed since then, including offering international languages and creative writing sessions for more able pupils. Primary provision will continue to expand during 2026-27.

Cymraeg i Bawb

In 2023, we supported the South East Wales Welsh-medium Education Promotion Partnership (which includes the region's Local Authorities, Mentrau Iaith, Cymraeg i Blant, Rhieni dros Addysg Gymraeg and the Welsh Government) to deliver a pilot Cymraeg i Bawb campaign to work collaboratively to promote Welsh-medium education.

The programme has strengthened knowledge and awareness within local authorities through shared best practice, and supported schools to develop more inclusive, community-focused approaches to engagement. It has also introduced a more streamlined, consistent way of presenting Welsh-medium education options to parents.

Following the success of the pilot, Mentrau Iaith Cymru was appointed to expand Cymraeg I Bawb across Wales, supported by a new grant scheme enabling Welsh-medium schools to actively promote their provision within their communities. The grant has been exceptionally well received by partners, prompting the allocation of additional funding to meet demand.

4. Post-compulsory education and training

Coleg Cymraeg Cenedlaethol

Our Cymraeg 2050 strategy is focused on creating more opportunities for young people to learn and train through the medium of Welsh so that more young people enter the workplace able to work bilingually.

During this Senedd, the role of the Coleg Cymraeg Cenedlaethol has been expanded to cover Further Education, and work-based learning. The Welsh Ministers have also designated the Coleg as a statutory advisor to Medr in relation to its duties relating to the Welsh language across the entire tertiary sector.

As the body now responsible for funding and overseeing post-16 education and research, Medr has a vital role in expanding the Welsh-medium and bilingual offer in tertiary education. Medr is working with the Coleg and other stakeholders from across the tertiary sector on a new National Plan for the Welsh Language, which it aims to publish by August 2026. To support the delivery its National Plan, Medr is also developing a regulatory condition for the Welsh Language, which is set to take effect from August 2027.

The Coleg is driving initiatives to increase Welsh-medium and bilingual provision across vocational learning. This includes supporting provider capacity, offering scholarships, and ensuring learners have opportunities to develop and use Welsh in both education and the workplace.

The Coleg's annual funding has increased by over £3 million since the start of this Senedd term and, because of this investment, over 20 percent of activities in colleges and over 40 percent of work-based learning activities now involve an element of Welsh or bilingual delivery. However, there's more ground to be gained, particularly across vocational pathways.

In the higher education sector, the Coleg continues to implement its latest Higher Education Academic Plan (2022), as well as working with the providers to ensure that students have access to Welsh-medium learning experiences as part of their studies.

National Centre for Learning Welsh

Providing opportunities and encouragement for young people and adults to learn Welsh and continue to develop their Welsh language skills is a key part of our Cymraeg 2050 strategy. We've invested record amounts in the work of the National Centre for Learning Welsh during this Senedd Term, and the latest data shows that over 18,300 learners are learning Welsh each year.

Since 2022, the Welsh Government has provided additional funding to the National Centre to deliver the Ymlaen gyda'r Dysgu scheme, which offers free Welsh lessons to 16 to 25-year-olds. Provisional data for 2024-25 shows that 980 learners completed one of the National Centre's bespoke courses for 16 to 18-year-olds, with a further 776 learners aged 18-25 following mainstream courses for free in community settings. 198 learners also followed one of the Centre's courses tailored for the HE sector.

The National Centre has also expanded its role supporting schools and now provides free Learn Welsh training to the education workforce. This is supported by an annual grant of £1.1 million from us.

In February 2023 the National Centre for Learning Welsh started to work with the regional consortia, local authorities and sabbatical scheme providers, to plan and develop a programme for practitioners to learn Welsh. Since September 2024, 2,000 practitioners have enrolled in either online, self-taught or face-to-face courses to develop their Welsh skills.

Learning Welsh in the workplace helps to strengthen employees' confidence to use Cymraeg in everyday situations. The National Centre's Cymraeg Gwaith (Work Welsh) continues to thrive and is supported by an annual grant of over £2.6 million.

As we've already outlined, the Welsh Language and Education (Wales) Act 2025 establishes the National Institute for Learning Welsh ('the Athrofa'), which will start operating on 1 August 2027. The Athrofa will take over the functions of the National Centre and will support lifelong Welsh language learning, helping more people to learn and use Welsh every day, and giving everyone the chance to progress along their language journey.

In January 2026, we announced that Llinos Roberts would be Chair of the Athrofa.

5. The education workforce, resources and qualifications

Welsh in Education Workforce Plan

Our Welsh in Education Workforce Plan has been implemented since 2022 and includes a number of initiatives led by the Welsh Government and partners to attract, retain and upskill more practitioners who can teach through the medium of Welsh. Under the plan, the Cynllun

Pontio conversion scheme has enabled around 100 primary teachers to transfer into secondary settings. The Retention Bursary offers £5,000 to teachers in their fourth year of teaching to encourage them to remain in Welsh-medium education. The Workforce Capacity Building Grant directly helps schools to undertake projects and professional learning to improve in targeted areas of the curriculum.

The Coleg Cymraeg Cenedlaethol promotes studying Welsh at A Level, and targets undergraduates to become teachers through Dysgu'r Dyfodol. We've made improvements to Welsh language provision in ITE and offer the Iaith Athrawon Yfory incentive scheme to encourage new entrants. The National Centre for Learning Welsh supports the development of teachers' Welsh language skills through a range of bespoke programmes, including intensive courses through the Sabbatical Scheme, dedicated tutors working within local authority areas, and a range of other methods of delivery including self-study, virtual, face-to-face, and residential.

Adnodd

We established Adnodd on 1 April 2023 as a company limited by guarantee, marking a significant milestone in the reform of educational resource provision in Wales. The 2023–24 financial year represented a transition phase, during which Adnodd appointed its Board, Chair and Chief Executive, and began building organisational capacity.

While Adnodd was in its early stages, we ensured continuity of provision through existing contracts and grants. This included further investment in Welsh-medium textbooks, resources reflecting diversity and Welsh history, and materials to support learners with additional learning needs. Work also continued on long term programmes such as Ein Llais Ni, focused on oracy, confidence and wellbeing through the medium of Welsh.

Adnodd launched its first Strategy (2025–2028), setting out a clear vision for equitable access to high quality bilingual resources and aligning its work with Welsh Government priorities, including literacy, numeracy, wellbeing and Welsh history. A substantial volume of new and updated bilingual resources was made freely available to schools, with a particular emphasis on supporting new GCSEs. Significant investment was also made in books and digital resources, including accessible formats for learners who are blind or partially sighted, immersive digital tools, and resources supporting Welsh language acquisition across age ranges.

Adnodd expanded support for innovation and collaboration across the sector, including targeted funding for projects focused on equity, anti-racism, literacy and well-being, and professional learning programmes for practitioners.

Theme 2: Increasing the use of Welsh

6. The workplace

Cymraeg Gwaith

The Welsh Language and Education (Wales) Act 2025 strengthens our approach to supporting Cymraeg in the workplace—including through the development of a consistent new approach to measuring Welsh language skills and the establishment of the National Institute for learning Welsh.

Our current grant funding for the National Centre supports the Cymraeg Gwaith (Work Welsh) scheme, which offers varied and flexible training to strengthen Welsh language skills in the workplace. The scheme has expanded over this Senedd term to offer to offer sector-specific provision including provision tailored for the education workforce, the health and social care and childcare sectors.

Since 2022, the Welsh Government has provided additional funding to the National Centre to deliver a programme of support for the health and social care sector, in support of the Welsh Government's Mwy na Geiriau (More than Just Words) Plan.

Between 2023 and 2025, around 1,500 staff enrolled on the National Centre's 'cyrsiau Codi Hyder' (Confidence-building courses), with around 6,000 workers taking part in the wider Learn Welsh programme for the Health and Social Care sector. The programme is being expanded in 2025-26 to include specifically tailored courses for the Neurodiversity, and Dementia Care workforce.

The National Centre also provides a programme of support for Welsh Government staff, to support our ambition to increase the use of Welsh within our internal operations and therefore helping to build a confident bilingual workforce. This is one of the elements that support our Cymraeg: It belongs to us all strategy which aims for us to be a truly bilingual workplace by 2050. Early progress has shown a substantial increase in the numbers of our staff learning Cymraeg, from 73 in 2020 to 653 in 2025 (an increase of 795%).

Organisational development and Cymraeg—Leading in a Bilingual Country behaviour change programme

Our Leading in a Bilingual Country programme works with senior leaders to increase the use of Cymraeg in organisational culture. Rooted in organisational change methodology, it complements other language policy work and advocates for positive, inclusive communication and leadership that fosters gradual, celebrated increases in Cymraeg. Three cohorts of leaders have taken part in the programme since 2021, a fourth is underway, and we've conducted many day-long or 'taster' sessions. We're currently examining ways of expanding the programme.

ARFer

We've invested in the research and development of **ARFer**, a language pledges in the workplace project which aims to increase the use of the Welsh language, now available in **app** form. Teams within the Welsh Government and other organisations have trialled the app and, out of 704 responses, 82% of users reported that ARFer had increased their Welsh language use.

7. Services

Welsh language Standards

We've worked through the Welsh language Standards (referred to as 'Standards' below) work programme as set out in our Programme for Government. Standards serve as an important contribution to our Cymraeg 2050 strategy by increasing the provision of Welsh language services and enabling people more opportunities to use the Welsh language in their daily lives. Standards also introduce duties on bodies to provide more Welsh language services to their employees and help bodies increase the use of Welsh in their administration.

During this Senedd term, we've made Welsh Language Standards Regulations ('Standards Regulations') for healthcare regulators and for water and sewerage companies who provide services to members of the public in Wales. In March 2025, we added additional public bodies to existing Standards Regulations, and Standards Regulations for housing associations were laid at the Senedd on 10 February with a debate scheduled for 24 March.

In addition, we sought opportunities to add new public bodies to existing Standards Regulations through legislation. For example, we used primary legislation establishing the Corporate Joint Committees, Citizen Voice Body for Health and Social Care and the Commission for Tertiary Education and Research to add these bodies to existing Regulations.

There was also a commitment to implement Standards for public sector. There changes afoot in the public transport sector. This includes the establishment of GBR (Great British Railways) to coordinate rail travel across England and Wales in 2026, and the Bus Services Act which recently received Royal Assent. To ensure that they are fit for purpose, Standards Regulations for public transport providers will not be finalised until these policy developments have been completed.

8. Social use of Welsh

Community-based delivery

The work of our grant recipients continues to provide invaluable spaces for people to use the Welsh language socially.

Urdd Gobaith Cymru delivers a wide programme of extracurricular opportunities for children and young people. Its cultural, sporting and social activities give members practical, enjoyable ways to strengthen their Welsh-language skills and to use the language confidently in informal settings. The Urdd's cultural offer has grown again this year with the

reestablishment of Y Cwmni, the Urdd's national youth theatre. With our funding, the theatre has already staged several plays and is currently planning for a large-scale production in the Wales Millenium Centre this Summer. The Urdd Eisteddfod is attracting more and more competitors year on year. The 2025 Urdd Eisteddfod achieved a record 119,593 registered competitors across around 400 competitions, alongside a 43% increase in the number of new young Welsh speakers taking part compared with the previous year.

The National Eisteddfod is far more than just a week-long festival. Their offering provides multi-year engagement and participation projects with a focus on increasing the use of Welsh within communities. The Eisteddfod plays an important role in bringing communities together and creating new opportunities for people to learn and use Welsh. We'll soon launch a strategic legacy framework in partnership with the National Eisteddfod to fully embed this way of working. In recent years, as with the Urdd Eisteddfod, we've helped the Eisteddfod broaden its reach by providing free tickets to low-income families, improving access to the festival. This support is built into the event's core funding, making the approach sustainable for the future. We are also supporting the National Eisteddfod to mark the Eisteddfod's 850th anniversary this year.

The network of **mentrau iaith** have an important role in developing community-based projects and have recently provided more emphasis on community empowerment. All the mentrau iaith prepare local language profiles that enable them to understand the linguistic needs of the communities they serve. These are valuable tools to help inform and develop projects and campaigns. We also provide funding to Mentrau Iaith Cymru, which is an umbrella organisation for the mentrau iaith and support the network in a wide range of key issues, including training, marketing, HR and staff development.

Wales' Young Farmers Clubs give young people a social space to meet while developing a broad mix of skills—including increased confidence in using Welsh. In recent years there has been notable growth in participation from members and clubs that previously used less Welsh, with more young people taking part in Welsh-medium activities such as the National YFC Eisteddfod, public speaking competitions and Welsh-language residentials. The funding has enabled several county federations to plan and promote Welsh-language activities more strategically and to encourage their members to use the language more frequently.

In 2025, **Dydd Miwsig Cymru** celebrated its 10th anniversary. More than 40 community gigs took place across Wales, giving thousands of school pupils the chance to experience Welsh music live. The day also led to a substantial rise in the streaming of Welsh-language songs, with levels remaining higher than before—clear evidence of its growing impact year on year and its role in strengthening the Welsh language through music and community participation.

Dydd Miwsig Cymru continues to attract significant media attention, including coverage from major UK outlets such as The One Show and The Guardian, as well as Welsh platforms including ITV Cymru, Wales Online and the Western Mail. This visibility helps to showcase the

vibrancy of the Welsh language and culture, while raising awareness of Wales and Welsh music across the UK.

A number of case studies have shown that Dydd Miwsig Cymru has inspired people not only to begin learning Welsh but also to connect more deeply with the Welsh-language music scene. This, in turn, encourages greater everyday use of the language. Promoters across Wales now see the celebration as a catalyst for organising events in areas where Welsh-language gigs have traditionally been less common, creating new cultural opportunities and helping to build social capital within Welsh-speaking spaces.

Theme 3: Creating favourable conditions—infrastructure and context

9. Community and economy

Welsh Language Communities Housing Plan

In 2022 we created the Welsh Language Communities Housing Plan with the aim of bringing housing, economic development, community development and language planning policy areas together to support Welsh-speaking communities with high numbers of second homes. The plan included a numerous intervention which includes:

- The Perthyn Project which provides a bespoke advice and support service to community groups.
- The Perthyn Grant Scheme providing early intervention financial support to help communities to develop their ideas into viable social enterprises and community led housing schemes.
- A Cultural Ambassadors Network that raises individuals' awareness of the Welsh language and help them share key information about the language and promote its use within the community.
- The Fair Chance Scheme that supports property sellers wishing to prioritise local buyers by taking some practical steps.

The Welsh Language Communities Housing Plan is currently being evaluated. This evaluation will help inform the way the plan and its interventions are implemented in the future.

Second Homes and Affordability

We've also worked across-government on a package of interventions to address affordability and the negative impacts linked to high numbers of second homes. The Dwyfor Second Homes and Affordability Pilot is also trialling several interventions that aim to reduce the effects high concentration of second homes can have on the long-term sustainability of communities.

ARFOR programme

£11m was made available for phase 2 of the ARFOR programme (as part of the Co-operation Agreement) to support a small number of strategic interventions aimed at supporting the economy and Welsh language in the ARFOR region—comprising of Ynys Môn, Gwynedd, Ceredigion and Carmarthenshire. The programme—delivered as a grant to Cyngor Gwynedd on behalf of the 4 local authorities—aimed at piloting approaches to support the economy and Welsh language has been delivered via several contracted services, as well as some elements of direct delivery via the local authorities themselves. The programme has focussed on several key elements including having as its core helping communities flourish economically while also strengthening the Welsh language. It does this by encouraging young people to stay or return to their home regions, supporting local businesses, and promoting the use of Welsh in the workplace and community.

We commissioned Wavehill Consulting Ltd to provide an ongoing monitoring and evaluation of the Programme. Funding for the ARFOR 2 programme came to an end at the end of March 2025. For this financial year, £500k has been made available to continue aspects of the ARFOR programme—and to 'pause and reflect' on the lessons learnt / best practice from ARFOR 1 and 2, the independent evaluation by Wavehill, opportunities for mainstreaming and help inform the Government's response to elements of the Commission for Welsh-speaking communities' report.

10. Culture and media

We're working across various sectors and policy areas to implement Cymraeg 2050. In this respect, all our arm's length bodies in the culture and sport sector are committed to supporting our target to increase language use and reach a million Welsh speakers by 2050. We want to see and hear the Welsh language widely used in popular culture in all its forms, in arts, media and literature, and in theatre, film and television. The use of Welsh by role models such as sportsmen and women, musicians, actors, and other prominent figures and organisations is a means of raising the status of the Welsh language as a living language.

Our Priorities for Culture, published in May 2025, include an ambition to ensure culture supports and promotes the Welsh language and reflects Wales as a bilingual and multilingual nation.

Additionally, the creative industries continue to play a central role in promoting the Welsh language. S4C remains a cornerstone of Welsh-language broadcasting, while high-end drama and global streaming platforms such as Netflix and Disney+ have expanded the international reach of Welsh stories and culture. This enhanced visibility is helping to normalise the Welsh language on screen and raise awareness of contemporary Welsh identity with global audiences.

Creative Wales has invested strategically in Welsh language content creation, sustaining jobs in Welsh-speaking communities and supporting Welsh businesses. Between 2020-21 and 2024-25 alone, Creative Wales' Production Funding mechanism supported 10 Welsh

language productions, including productions such as *Hafiach*, *Cleddau/The One That Got Away*, and *Golau/The Light in the Hall*. On film, the co-funding of *Effie yn Blaenau* marks the first Welsh language feature film developed in partnership with S4C. The Sinema Cymru fund has further accelerated the development of ambitious, Welsh language cinema, supporting a new wave of projects, from literary adaptations like *Llyfr Glas Nebo* to original screenplays such as *MOGI* and *Cwlwm,* showcasing the depth and diversity of Welsh language storytelling.

Through close collaboration with Creative Wales, in 2024-25 the Books Council of Wales supported more than 138 Welsh-language books, 14 magazines and the Golwg360 digital news service, while expanding provision for learners and improving representation through targeted publishing initiatives. Collectively, these achievements demonstrate the breadth of Welsh-language media provision and its central role in delivering Cymraeg 2050 objectives.

11. Wales and the wider world

We've continued to place the Welsh language at the heart of our work in implementing our International Strategy for Wales. The Welsh Government was part of the UK's formal delegation to Mondiacult—UNESCO's World Conference on Cultural Policies and Sustainable Development—in Barcelona for the first time in 2025, reflecting Wales's growing profile and ambition in international cultural engagement.

Language-based cooperation is a central feature of our international work, including through our bilateral agreements with international governments such as Ireland, where culture, language and heritage are explicit areas of collaboration, and with the Basque Country, Catalonia, Flanders and Brittany, where language policy is identified as a key shared priority.

We're also a full member of the Network to Promote Linguistic Diversity. The NPLD is a Europe-wide network working in the field of language policy and planning for Constitutional, Regional and Small State Languages throughout Europe. The primary aim of the NPLD is to raise awareness at European level of the importance of linguistic diversity. Another aim is to facilitate the exchange of best practice among governments, policy makers, practitioners, researchers and experts from across Europe.

We continue to chair the British-Irish Council's Indigenous, Minority and Lesser Used Languages work group, and continue to take advantage of this forum to share good practice and expertise with people from different backgrounds.

12. Technology and the Welsh language

We're proud of our ground-breaking and innovative work to ensure that the Welsh language is at the forefront of new technological developments, including artificial intelligence. Our work is recognised for being world-leading, with the Cymraeg approach often adopted by other countries and organisations, including UNESCO, as a model for other multilingual and minority-language situations.

Our focus at the start of the Senedd term was to continue to deliver the **Welsh Language Technology Action Plan** (2018-2024) which prioritised developing and openly sharing new infrastructure for our language which, in its launch in 2018, set the Welsh Government ahead of the curve in responding to emerging trends by looking specifically at artificial intelligence (AI). As part of that Plan, ChatGPT was improved and used within Bangor University's chatbot **Macsen**, and we **announced a partnership with OpenAI** to openly share Welsh language resources. We made **Cysgliad**, a suite of Welsh language grammar checking and spellchecking tools available free of charge to individuals, the education and third sectors and to organisations with 10 members of staff or fewer—over 15,000 have accessed Cysgliad for free as a result. We also funded Bangor University's openly available bilingual synthetic voices, used in their **Transcriber**. These improvements in turn fed into their voice banking service, **Lleisiwr**, which enables people with Motor Neurone Disease for example to use **a synthetic personalised version of their voice in Welsh** after they lose the ability to speak. Our work with Tobii Dynavox, a leading communications company, also led to **TD Snap Express Cymraeg**, software that supports children and adults who have difficulty speaking. All of these components are available on our **Helo Blod list of Welsh language tools and resources**, which we regularly update.

We published our new **priorities for Welsh language technology and AI** in January 2025. These include making sure that everyone can access Welsh language technology. With this in mind, we support and work with the technology sector to ensure use of the language technology components we've funded and openly shared. As part of our partnership with Microsoft, we've shared resources and collaborated to create a **simultaneous interpretation facility in Microsoft Teams** meetings for example. This facility is provided at no additional cost to Microsoft 365 license users. Work continues with Microsoft to further develop this facility, as well as Copilot in Welsh (ahead of many of the world's larger languages) and bilingual transcription and captions in Microsoft Teams (we believe this is the first case of bilingual transcription available in Teams), aiding bilingual working. We've also recently published 'Cymraeg mewn Clic', a one click app on our corporate network that reduces friction to using Welsh in technology, making it easier for more of our staff to have a full Welsh language experience using Microsoft on their work laptops. In the current financial year, we're investing £402,150 into our work in technology, with £406,400 earmarked for 2026-27.

We hope that this will lead to the creation of similar and new resources for languages spoken around the world, based on our work here in Wales. We also continue to work with other global companies and organisations such as The Government of Catalonia on their **AINA project**, and with UNESCO as part of their Decade of Indigenous Languages, so that our work on this can help multilingual communities around the world.

13. Linguistic infrastructure

Welsh Linguistic Infrastructure Policy

Towards the beginning of this Senedd term, we held a consultation on a draft policy for linguistic infrastructure (i.e. the things that help us to use Welsh in everyday life, like dictionaries, terminology resources, linguistic corpora, and research and standardisation work) aimed at making it easier for people of all walks of life to use Welsh.

We published our **Welsh Linguistic Infrastructure Policy** in 2023, and our priorities in this area continue to be those set out in the policy. Our work has included launching the **GetWelshWords** web pages. These pages offer easy access to the main Welsh dictionaries and termbases, along with user notes to help people choose the right one for them and were developed following input by the Centre for Digital Public Services to better understand the requirements of different audiences and ensure they have the best possible experience.

We fund several key linguistic infrastructure projects and bodies, including Geiriadur Prifysgol Cymru (the historic, academic dictionary of the Welsh language), Y Termiadur Addysg (Education Terminology dictionary) and Cymdeithas Cyfieithwyr Cymru (the Association of Welsh Translators and Interpreters). Given the high level of expertise that exists in Wales, we've worked consistently with partners to further develop relationships with and between key stakeholders, seeking new opportunities to collaborate, and forging new connections.

In 2021 we reinstated a panel to address a number of Welsh language orthography issues, under the chairmanship of Dr Dylan Foster Evans of Cardiff University. The Panel's decisions are mainstreamed into the primary dictionaries and termbases. The Panel is now preparing its second programme of work. Also during the first half of the Senedd term, a work group was set up to standardise **terms in relation to race and ethnicity**, chaired by Delyth Prys of Bangor University. This group consulted with key stakeholders and individuals to create an up-to-date list of terms to help people discuss anti-racism in Welsh in both work and personal contexts.

Welsh place names

We've continued work to safeguard Welsh language place names across Wales in collaboration with key partners, including Cadw, which holds responsibility for historic place names, and the Welsh Language Commissioner, who standardises Welsh place names for cities, towns, and villages through a **publicly available online database**.

We've safeguarded Welsh language place names through commitments in the Programme for Government and the Co-operation Agreement with Plaid Cymru. We set out our initial steps during this period in our **Welsh Language Communities Housing Plan**, which we published in October 2022, and **Welsh Linguistic Infrastructure Policy**, published in June 2023, both of which identified the need for stronger evidence to inform future policy interventions.

To address this, we commissioned research to better understand where, how, and why place names are changing in Wales. We published the findings in *Place name changes in Wales: research on current trends* on 6 June 2025. Based on the report's findings, the Cabinet Secretary for Finance and the Welsh Language made an **Oral Statement** in September 2025 setting out our priorities for Welsh place names.

Recording and data collection remain central to safeguarding place names for future generations. The statutory List of Historic Place Names of Wales, maintained by the Royal Commission on the Ancient and Historical Monuments of Wales on behalf of the Welsh Government, continues to expand. Established in 2017, the List now contains over 700,000 names, with thousands of additional entries added in the past year alone. To complement this, the Welsh Government has launched a Place Names Recording Tool via DataMapWales, enabling members of the public to record Welsh and historic place names that are not currently shown on digital maps. This supports wider data sharing with partners such as Mapio Cymru / OpenStreetMap and Welsh Wikipedia, with the aim of increasing the visibility of Welsh place names on digital mapping platforms and strengthening the evidence base for continued use of Welsh place names.

Officials have continued to engage with a wide range of stakeholders. We've established a Local Authority Welsh Place Names Forum with participation from Ynys Môn, Gwynedd, Ceredigion and Sir Gâr local authorities to share best practice and learn about pressures as they arise. Building on this work, engagement with officers from all 22 Welsh local authorities is being expanded through existing forums.

Place names remains a challenging area of work, and while the research report we mentioned above focused on property names, business names, and street names, it also highlighted the need for further research into topographical names—especially those used by tourism and outdoor pursuits communities and later adopted locally and online, and which by their very nature are more elusive. We continue to explore avenues for this second phase of research.

14. Language planning

In essence all elements of this paper cover our language planning efforts. However, below we've focused on our approach to mainstreaming *Cymraeg 2050* and language planning across the Welsh public sector.

Over the last five years, we've significantly strengthened Wales's language planning capacity across national, regional and local levels. This has included building a clearer understanding of language planning principles across government and partner organisations and increasing both leaders' and staffs' language planning capability. The introduction of Leading in a Bilingual Country has helped increase public organisations' focus on bilingual working more consistently. This has enabled leaders across the public sector to contribute to implementing our national Cymraeg 2050 strategy.

We've also helped senior leaders across government to articulate the role of *Cymraeg 2050* within wider government priorities, helping to ensure that the conditions needed for the language to thrive—socially, economically and culturally—are considered more consistently in decision making. Continuing to build on this momentum remains a key priority.

15. Research, evaluation and statistics

Over the last five years, we've continued to develop the evidence base underpinning Cymraeg 2050 by planning, commissioning and delivering research, analysis and evaluation, and by expanding collaboration with the wider research community.

We published the **first results from Census 2021 about the Welsh language** in December 2022. This was followed by **publications analysing Welsh language ability by various characteristics**, including an analysis of Welsh language transmission within the household. Following the publication of these statistics, we published a **joint work plan with the Office for National Statistics on the coherence of Welsh language statistics**, with the aim of improving our understanding of the main survey and administrative data sources used to produce statistics about the Welsh language. We also published data from the **Welsh language use survey 2019-20 by several topics** including Welsh language use in the workplace, which provided a snapshot of Welsh language use in the nine months prior to the COVID-19 pandemic. We also continued to publish **quarterly updates of Welsh language statistics from the Annual Population Survey** and **data from the National Survey for Wales**.

A significant development is Prosiect BRO: a three-year sociolinguistic study launched in 2023 that explores Welsh language use and linguistic change at a granular, community level using mixed research methods. The project is led by researchers from the University of Wales Trinity Saint David, the University of the Highlands and Islands, and Jesus College Oxford, and is supported by Welsh Government grant funding. Its first output—a compendium analysing census data at local authority and LSOA level—was published as part of the Commission for Welsh-speaking Communities' first phase report. The research team has undertaken community surveys and ethnographic observation in Welsh-speaking communities, and emerging findings are already being shared. The project aims to generate practical policy recommendations and tools to support these communities.

We've commissioned several research and evaluation projects to inform our work in a range of areas. As noted above, an evaluation is underway to assess the implementation and impact of the Welsh Language Communities Housing Plan. We've commissioned research to examine the contribution of the Sefydlu a Symud programme in expanding Welsh-medium childcare and early years provision. We've published several research reports on immersion education, including an **evidence assessment of effective approaches and methods in immersion education**; a **map of Welsh-medium late immersion education**; and a **scoping review of late immersion and intensive language provision**.

An important recent development has been the publication of the **Cymraeg 2050 Areas of Research Interest (ARI)**. This document communicates to the research community—in Wales and beyond—the types of evidence that will be most valuable in informing policy decisions linked to *Cymraeg 2050*. Covering areas such as the early years, education and training, health and social care, the economy and community regeneration, its purpose is to

support knowledge exchange, stimulate new research aligned to *Cymraeg 2050* priorities, and encourage increased investment in research relating to the Welsh language. Publication of the ARI follows publication of a **Cymraeg 2050 Research and Evaluation Framework** in 2022, which provides guidance on the methodological considerations, context, assumptions, risks, and data sources relevant to research and evaluation relating to *Cymraeg 2050*.

Conclusion

This Evidence Paper provides an overview of work to deliver the Cymraeg 2050 strategy—including Programme for Government and Co-operation Agreement priorities—during the sixth Senedd.

We've implemented wide-ranging activities on the journey to achieving 1 million speakers and to increase the daily use of Cymraeg, from work to encourage early-years transmission of the language to lifelong opportunities to learn and use Cymraeg in our communities. Firm foundations are also in place, through the Welsh Language and Education (Wales) Act 2025 in particular, to underpin our long-term vision with the infrastructure required to achieve our goals.

We look forward to responding formally to the Committee's recent recommendations in the coming weeks.

Welsh Language Standards (Registered Social Landlords) Regulations

Consultation response form

Your name: Hayley Macnamara

Organisation (if applicable): Community Housing Cymru

email/telephone number: hayley-macnamara@chcymru.org.uk

Your address: Community Housing Cymru, 14 Neptune Court, Office 26, Vanguard Way, Caerdydd/Cardiff, CF24 5PJ

Responses should be returned by **16 September 2025** to:

Cymraeg 2050 Division
Welsh Government
Cathays Park
Cardiff
CF10 3NQ

or completed electronically and sent to: email: Cymraeg2050@gov.wales

Summary

Community Housing Cymru (CHC) is the voice of housing associations (HAs) in Wales. We represent 30 not-for-profit housing associations that provide almost 165,000 homes to 10% of the Welsh population. Our collective vision is to make Wales a country where good housing is a basic right for all. We welcome the opportunity to respond to the Welsh Government's consultation on draft Regulations to make Welsh language standards specifically applicable for Registered Social Landlords (RSLs) as providers of social housing in Wales.

We support the Welsh Government's aspirations to nurture and grow the use of the Welsh language within Wales. RSLs already have a strong track record of supporting the Welsh language. Many provide bilingual services through their existing Welsh language schemes, ensuring that tenants can engage with them in the language of their choice. In many cases, this has resulted in housing associations offering bilingual communication and services as part of their ongoing commitment to accessibility and inclusion. The new regulations would enhance this existing offer.

While we support the principle of the proposed standards, we must highlight the significant financial burden they will place on RSLs, that ultimately needs to be met by tenants' rent payments and so divert investment from new and existing social homes. Implementation will require substantial ongoing investment in translation, digital infrastructure, and IT systems alongside comprehensive reviews of service designs, procurement and recruitment activities. We urge a proportionate, flexible and phased approach to setting and implementing these standards which acknowledges the current demand for Welsh language services.

The proposed Welsh language standards introduce significant financial burdens on RSLs, which will ultimately be covered by tenants' rent payments, diverting crucial investment from new and existing social housing. This comes at a time when the sector's financial capacity is already severely constrained due to unavoidable cost increases in areas such as repairs, maintenance, and new housing developments over the past five years. RSLs also face considerable regulatory and strategic demands, all of which carry cost implications.

We echo TPAS Cymru's concerns about cost and proportionality, urging the Welsh Government to ensure that these regulations are tenant-focused, proportionate, and adequately supported. This approach will allow the regulations to both strengthen the Welsh language and enable RSLs to continue their vital work of providing safe, affordable homes in diverse communities across Wales.

Considering RSLs' regulatory duty to provide value for money to tenants, the significant additional costs associated with these standards (particularly in regions with minimal or no demand for Welsh language services) raises substantial concerns regarding regulatory alignment. The investment in time and resources, diverted from frontline and core services, is disproportionate to the actual demand for Welsh language services in many areas of Wales. Even RSLs operating in predominantly Welsh-speaking communities have expressed concerns about the cost and resource implications.

Absorbing these compliance costs would strain the sector's capacity to build and improve homes, diverting resources from essential housing and support services at a critical time. With over 94,000 individuals currently on housing waiting lists, this could exacerbate the housing crisis.

It is imperative that the Welsh Government supports this transition by maintaining a supportive funding environment and providing practical tools and accessible language training to mitigate the impact.

We are also concerned that the measures outlined could constitute increased control by the Welsh Government over the operation of RSLs, which brings the risk of reclassification. RSLs are and should remain independent organisations guided by a social purpose. This is one of their unique characteristics, allowing the sector to leverage private investment - currently this private finance totals £3.5bn, rising to £4.5bn by 2027. Increased intervention by national and local government could give rise to the ONS reviewing the classification of RSLs and deciding that their debt should sit on the public balance sheet. Should the alignment of RSLs to the public sector continue to be progressed in multiple legislative environments, they run the risk of being reclassified by the ONS. This could lead to the UK Treasury placing borrowing limits on HAs, which would impact their ability to deliver new social homes at scale.

CHC has engaged extensively with our members to gather views from across this diverse sector in preparing our submission. We have also encouraged individual RSLs to provide their own responses to illustrate the specific impacts on their services. Our response aims to provide a collective perspective from the sector as a whole, while recognising the importance of flexibility to reflect different operating contexts.

We provide a summary of the key points we highlight throughout the document here:

- **Proportionate and flexible implementation:** All RSLs advocate for a proportionate and flexible approach to applying the standards, taking into account their operational capacity and tenant needs.
- **Alignment with tenant needs and demand:** Standards should allow RSLs the flexibility to align their services with existing Welsh language demand. We echo TPAS Cymru's concerns, urging the Welsh Government to ensure that these regulations are tenant-focused, proportionate, and adequately supported.
- **Harmonised digital standards:** The standards should be consistent across all digital platforms (websites, online chats, apps, and self-service machines), employing a tiered standards approach.
- **Realistic implementation and support:** To ensure compliance we request realistic implementation timeframes supported with clear pathways for compliance. We also require free and accessible Welsh language skills development support, and a supportive funding environment from the Welsh Government.
- **Enhanced Guidance:** Both CHC's and individual RSL responses underscore the need for further clarity. We seek clear and enhanced guidance on interpreting the standards, which is essential for sector-wide consistency and to mitigate negative impacts. Support and

examples of compliance prior to the next stage of commissioner consultations would be welcomed.

- **AI Translation Recognition:** AI translation tools can aid compliance, reduce operating costs, and support longer implementation timeframes. We seek clarification on whether AI-generated translations are accepted for compliance.
- **IT Market Reliance:** We urge the Welsh Government and the Commissioner to ensure that the Standards' requirements reflect the realities of the IT supplier market. For some RSLs, the current proposed technology standards are unachievable until tech providers advance.
- **Regulatory Alignment Clarity:** Our response highlights several areas where regulatory compliance must align. We seek clarification on how RSLs should navigate alignment with the Welsh Government Regulatory Framework and requirements from other bodies.

We hope that this consultation will result in regulations which both strengthen the use of the Welsh language and enable RSLs to continue delivering positive outcomes for tenants across the full range of their functions and obligations.

Question 1 – Do you have any comments on the service delivery standards proposed in the draft regulations for registered social landlords (RSLs)? (You are welcome to make reference to matters raised in the consultation document, or to any other matter.)

Welsh Registered Social Landlords (RSLs) are diverse in scale, scope, and service delivery. Our members range from organisations operating within a single local authority to larger bodies with a regional or pan-Wales footprint.

Beyond the core function of providing and managing affordable housing, their service portfolios are equally varied; some deliver specialist care and support services, develop market as well as social housing, student accommodation, and manage repairs through either in-house teams or external contractors. Uniting this diverse sector is a profound commitment to social purpose, with all RSLs delivering vital community regeneration projects and welfare support for the most vulnerable in society.

The level of tenant demand for Welsh language services is not uniform, it varies significantly across Wales from one locality to another. In some areas, particularly in urban regions, demand for other language services far outweighs the demand for Welsh.

Bron Afon provides a stark example, identifying just one customer out of 17,777 residents who speaks Welsh, contrasting this with an RSL like Adra in Gwynedd, which would expect much greater demand. Many of our members report that demand for other languages including Polish, Tigrinya, Spanish, and Slovak, Somali, Arabic, Urdu, and Bengali etc. far outweighs the demand for Welsh. In Cardiff, 30% of CCHA's tenants' first language is not English and only one tenant currently requests information in Welsh.

Following the same pattern, the proportion of Welsh-speaking staff differs greatly between organisations and service areas, with many RSLs facing recruitment challenges where local demand is minimal. RSLs ensure that their staff can accommodate the diverse language preferences of their communities. For instance, at CCHA in Cardiff approximately 30% of tenants speak community languages such as Arabic. Therefore, a proportionate and flexible approach to implementing these standards is essential to allow RSLs to effectively serve the varied linguistic needs of their tenants, staff and communities across Wales.

It is therefore imperative that the proposed Welsh Language Standards are designed with the flexibility to accommodate these different operating contexts. We urge the Welsh Government and the Welsh Language Commissioner to ensure that standards imposed must reflect the current demand for Welsh services so that RSLs can successfully plan and adapt services in a phased manner.

We acknowledge that many of the draft standards provide for this flexibility, and that the upcoming consultations with the Welsh Language Commissioner will allow for discussion on the application of the standards. However, to ensure the Standards are both practical and proportionate, and following consultation with our members, we have identified several proposed amendments to the service delivery standards within Schedule 1. These are outlined below.

Standards 25-29: simultaneous translation for meetings open to the public

RSLs regularly host open meetings for tenants and the public, including for example community consultations, feedback sessions, one-to-one drop-in sessions with Housing Officers, and tenant groups. The provision of simultaneous translation for every single one of these open meetings when requested would incur a considerable cost, and in some areas there would be consistently low demand for the service. We suggest that these standards should provide the same flexibility afforded in standards 24, where there are various standards stating a range of minimum % requests for Welsh language provision at a meeting, rather than the minimum of one person (standard 27) for open public meetings which would incur huge costs for all RSLs.

We also strongly urge consideration of more pragmatic and cost-effective solutions, such as leveraging remote or AI-powered translation services like Language Line, to avoid imposing unfeasible costs on RSLs.

Standards 30 and 31: public events

It would be useful to set a minimum funding threshold to accompany the standards rather than a percentage as the range of funding can vary greatly depending on the types of grants/financial support that RSL's offer. It would not be possible to justify staff time and resources to ensure that small community events, for example, comply with the requirements of these two standards.

Standard 32: publicity and advertising materials

We support the principle of ensuring publicity and advertising materials are fully bilingual. However, we seek clarification on the application of Standard 32 to ensure it is implemented in a practical and proportionate manner.

As currently written, the standard could be interpreted as a retrospective requirement, mandating the replacement of all existing materials. This creates an inconsistency with the more pragmatic, phased approach applied to other areas, such as Standard 50 for signage, which applies the requirement when items are "new or renewed." A retrospective application would place a significant and disproportionate financial burden on RSLs, leading to unnecessary cost and environmental waste from the disposal of current stock.

To address this and ensure a consistent framework, we propose that an Interpretation of "publicity and advertising material" is included within the standards. This interpretation should specify that the requirement applies to all newly produced or substantively revised materials.

Standard 45: Apps published by a body

We recommend that the requirements for apps under Standard 45 are amended to ensure consistency with the more flexible and proportionate standards applied to websites.

The current regulations create a disparity between two key digital channels. While Standards 40-44 and 87 provide a tiered framework for websites, ranging from bilingual homepages to fully bilingual sites, Standard 45 mandates that all apps must be *fully* functional in Welsh.

This presents a challenge for the sector for two key reasons:

1. Third-Party Development: Many housing apps are developed and maintained by specialist third-party suppliers, often based outside of Wales, many of whom do not currently offer Welsh language functionality.
2. Technical Complexity: We are not aware of any app currently available to the sector that provides full Welsh language functionality, particularly concerning the integration required with core housing management systems for services like rent accounts and repairs logging.

To create a realistic and achievable pathway for compliance, we propose that the tiered approach available for websites is replicated for apps. This would allow RSLs to introduce Welsh language functionality in a phased manner. We also recommend that Standard 45 is applied to newly created or substantially revised apps (as with signage), rather than retrospectively, and that the standard would not apply to those provided by a third party but branded by the RSL.

Standard 46: Online chat facilities

We recommend amending the proposed standards for online chat to ensure consistency with the flexibility offered for other communication channels, particularly telephone calls.

As currently drafted, the standard implies a requirement for immediate, live-time Welsh language provision. This presents a significant operational and resource challenge, demanding a level of instant staffing capacity that may not be required for telephone services (the standards permit callbacks, for example). Many RSLs lack the Welsh-speaking staff or the specific technology to meet this immediate demand across all service hours. While some RSLs use AI-driven chat facilities, this technology has known limitations in handling complex or sensitive tenant queries, frequently requiring a handover to a human agent.

To create a more practical and proportionate framework, we propose that the tiered compliance options available for telephone calls under **Standards 11 and 19** are replicated for online chat. Adopting this model would allow for more flexible implementation pathways. For instance, an RSL could offer an initial Welsh language interaction with the clear option to arrange a continuation of the conversation with a Welsh speaker via another channel if a live agent is not immediately available.

This approach would ensure consistency across communication standards, respect the user's choice of language, and allow RSLs to develop their bilingual services sustainably.

Standard 49: Self service machines

The regulations do not define what constitutes a "self-service machine." This ambiguity is a significant issue because modern practices are moving away from traditional, single-purpose kiosks. Many RSLs now use versatile, cost-effective hardware like tablets or iPads in reception areas. These devices function as self-service points but are not purpose-built "machines." The standard needs to clarify whether these multi-use devices fall under its scope.

In addition, the requirement for "full" Welsh functionality is much stricter than the tiered and flexible approach afforded to websites, as stated previously. A tablet in a reception area is often just a device used to sign into the building or to access an RSL's website or a dedicated tenant app. It is illogical for the standards for a tablet to be stricter than the standards for the website or app it is accessing. We therefore suggest that the standards should be harmonised and consistent across all digital platforms, allowing for the same tiered approach for websites, online chats, apps and self service machines.

Standards 63 and 64: Courses offered

We suggest that these standards must clarify the definition of 'education' courses and clarify whether these standards apply to all levels of training or courses delivered by an RSL, or specifically to education courses provided by external education providers. Furthermore, we suggest greater flexibility within these standards to address the difficulties in securing Welsh-speaking course tutors, especially for highly specialised subjects.

Question 2 – Part 3 of Schedule 1 to the Regulations includes interpretations for some of the service delivery standards. Do you have any comments on the interpretation of standards as set out in Part 3?

We have highlighted opportunities to improve clarity under Question 1 of the consultation. In addition, we have identified several areas where further clarification would support RSLs in complying with the proposed service standards.

Firstly, it would be helpful to define whether the terms *"individuals"* and *"members of the public"* refer specifically to residents or contract-holders and the general public, as opposed to professional stakeholders such as contractors, suppliers, or local authorities. RSLs have indicated that extending the standards to professional audiences would create significant and unmanageable resourcing pressures.

We also welcome further guidance on how the standards would apply to **text messaging**. Text messages are frequently used by RSLs as an initial point of contact with tenants, for example, to share service updates or arrange discussions regarding tenancies. Greater clarity on whether these communications fall within the scope of the standards would be beneficial.

In relation to **Part 3 of the Standards (specifically clauses 25a–c)**, which note that compliance is not required in the event of an emergency, we suggest including a clear **definition of "emergency"** to ensure consistency of interpretation across RSLs.

We also seek confirmation that **Standards 23 to 24CH** (relating to public meetings) would not apply to **online meetings**. Given that automated translation tools are widely available for virtual settings, it may not be proportionate or necessary to apply the same standards as in-person meetings.

Regarding **Standards 35 to 39** (Documents and Forms), we suggest that these should apply only to documents and forms produced by the RSL, such as tenancy applications or occupancy contracts, and not to externally generated documents such as planning applications or court documentation. The additional time and resources required to translate large, external documents could result in delays and impact service delivery.

Recent advancements in **AI translation technologies** present an opportunity to reduce the financial and operational burden associated with traditional translation services. We would welcome clarity on whether AI-generated translations, when used alongside robust quality assurance processes, will be accepted as compliant under the standards.

Question 3 – Do you have any comments on the policy-making standards proposed in the draft regulations for RSLs?

These standards would apply to strategic decisions and the development of strategic plans, research and consultation undertaken by RSLs.

We seek clarity on what constitutes "consultation" versus informal engagement, and what qualifies as 'research'. This is particularly relevant where informal discussions with small groups of customers precede formal consultations.

We would also like to note that decisions about the 'content of legislation' as specified in 2(a) within Part 2 'interpreting the policy standards' would not apply to RSLs.

Standard 72: policy on awarding grants

We have concerns about the unintended consequences of Standard 72 when applied to hardship and community benefit grants.

During 2025/26 RSLs will provide access to approximately £1.235m through their hardship funds. These are a critical safety net for tenants facing acute financial distress. They are a last resort to assist with essential living expenses when a tenant is struggling financially. Consequently, the sole criterion for awarding these grants must be the applicant's level of need which is determined at the discretion of the RSL.

Standard 72 requires the Welsh language to be a determining factor in awarding grants. Applying this standard to hardship funds could create a disproportionate and inequitable outcome. It risks penalising society's most vulnerable individuals by making their access to emergency support conditional on a factor unrelated to their crisis.

Many RSLs also provide community grants as part of their community benefit programmes. In certain areas where the proportion of Welsh language speakers is very low, applying this standard could lead to a disproportionate outcome where Welsh speakers receive preference over others who may have a greater need for support. As an example, in Cardiff Welsh speaking is primarily contained within more affluent communities and not within the communities in which RSLs work, such as Butetown.

We request that the regulations provide clarity on this matter. We recommend that the standards be amended to include a specific exemption for grants awarded on the basis of demonstrable hardship. This would ensure that support continues to be distributed fairly to those in need.

Question 4 – Do you have any comments on the operational standards proposed in the draft regulations for RSLs?

Many RSLs have highlighted that the operational standards will require significant changes to their business functions and services.

Adhering to the proposed operational standards will have significant cost implications and place additional strain on resources, particularly for translating HR policies and intranet content, and procuring or developing Welsh-language training modules. There are concerns about limited internal capacity, especially in HR and L&D teams, to deliver Welsh-language services without external support.

Achieving the standards will necessitate a significant increase in Welsh language proficiency across RSLs. While tools like translators and software offer some support, they are not a substitute for genuine linguistic skill. To meet these new requirements, RSLs will need to undertake a comprehensive assessment of current language capabilities across all services. Following this, a substantial effort will be required to upskill the workforce, which is particularly challenging in areas where the demand for Welsh language services has traditionally been low. Targeted support from the Welsh Government is essential. Given the substantial financial burden, we propose that the government assists by providing free, accessible Welsh language training for existing RSL staff. This would empower employees with the skills they need.

There is concern regarding the current capacity of the workforce within some RSLs to comply with these new standards from the outset. The challenges are twofold: recruiting new staff with the required Welsh language skills is already difficult in a competitive market, and upskilling existing, experienced staff presents its own set of practical and financial hurdles. The resource and cost implications of providing the necessary training, backfilling to support services while staff are learning, and developing bilingual resources will be significant for many housing associations, potentially diverting funds from other essential frontline services that tenants rely on. For many RSLs, it would take years to achieve the required level of Welsh language proficiency amongst staff to comply with the proposed standards.

To ensure these important standards are successfully implemented without negatively impacting RSLs' core services, we would like to see a flexible approach to the implementation of these standards, with a phased approach to compliance.

Standard 79: Staff policies As currently written this could be interpreted as all policies becoming bilingual from the compliance date. We suggest that flexibility is provided here so policies are translated only when **formed or revised**.

Our members have also raised concerns and seek clarity on how the proposed standards will **align with other bodies.** The new proposed operational standards could introduce a range of challenges across key areas.

For example, in complaints management, the need to translate written acknowledgements and responses may affect compliance with the Public Services Ombudsman for Wales (PSOW) standards on response times. In health and safety, translation of verbal and written materials could delay incident investigations and the gathering of witness statements. In corporate governance, the translation of large Board and Committee packs could hinder timely distribution and potentially impact board effectiveness by lengthening meetings. Data protection is also a concern, as translating documents for Subject Access Requests (SARs) could significantly increase response times and costs, potentially affecting compliance with Information Commissioner's Office (ICO) requirements.

There is a pressing need for clarity on how to manage these overlaps and which regulatory body's requirements would take precedence in cases of conflict.

Standard 102 requires an assessment of the need for Welsh language skills in a new or vacant post. If this was assessed as essential, we seek clarity on whether this could be considered indirect discrimination by putting certain people at a disadvantage because of a protected characteristic. We would welcome clarification on whether this could be considered under Schedule 9, paragraph 1 of the Equality Act 2010 as a genuine occupational requirement.

Question 5 – Do you have any comments on the record-keeping standards and standards dealing with supplementary matters proposed in the draft regulations for RSLs?

While some record-keeping related to Welsh language skills and recruitment can be integrated into existing systems, new processes will be needed, and the availability of appropriate system replacements with Welsh language packs available in the IT market pose a concern.

The requirements will also lead to significant translation costs to adjust policies and procedures.

Question 6 – Do you have any comments on how the standards proposed in the regulations for RSLs might apply to RSL subsidiaries or commercial activities?

There are mixed views amongst our members on the application of the standards to subsidiaries and commercial activities, however many RSLs are of the view that applying the standards to these should be a **voluntary matter,** aligning with the parent company's internal Welsh Language Policy rather than being enforced by regulation.

Operating in commercial circumstances presents significant viability challenges. Adding the operating costs associated with these Standards to the work of subsidiaries would be disproportionate.

Encouraging further action at commercial subsidiaries, stemming from the parent company's commitment, would be a more effective approach. The work carried out by the parent RSL will naturally support and influence the provision of services by its subsidiaries.

We are also concerned about the impact these regulations will have on third-party suppliers, particularly local SMEs in the construction sector that RSLs use for services like repairs and maintenance. Extending these regulations to them could create a disproportionate compliance burden due to their limited resources, without consultation or sector-specific impact assessment.

This additional burden will disproportionately affect contractors appointed prior to the regulations' implementation. Therefore, we recommend that this requirement only applies to contracts procured after the regulations come into effect.

Many third-party suppliers are small and medium-sized enterprises (SMEs) in the construction sector. These businesses often operate with limited administrative capacity and may not have the resources - financial, linguistic, or operational - to meet the requirements of Welsh Language Standards. If Welsh Language Standards become a prerequisite for contracting, SMEs unable to comply may be excluded, reducing supplier diversity, increasing costs, and limiting RSLs' ability to work with trusted local providers. RSLs can promote the Welsh language through their own practices without imposing statutory duties on unequipped suppliers.

Question 7 – Do you agree with the proposal to add Community Housing Cymru (CHC) to the Welsh Language Standards (No.2) Regulations? (If your answer is no, please feel free to list another set of existing Welsh language standards regulations you feel might be more appropriate for the body.)

Agree	☐	Disagree	✔	Neither agree nor disagree	☐

Supporting comments

Community Housing Cymru is a small, independent, charitable organisation that provides support and services directly to its member housing associations. It provides no public services, nor takes any public funding. It represents independent housing associations, not public bodies.

We strongly oppose the proposal to include CHC in the regulations as we believe it is a disproportionate burden. CHC has engaged with its Board and membership, and this view is unanimous. CHC can continue to support its members effectively and efficiently by strengthening its voluntary scheme. We have written separately to officials to explain our position.

Question 8 – Do you agree with the proposal to make all standards within the Welsh Language Standards (No.2) Regulations specifically applicable to CHC? (If not, please explain why.)

Agree	☐	Disagree	✔	Neither agree nor disagree	☐

Supporting comments

We strongly disagree with the proposal to include CHC in the regulations, as explained in our answer to question 7.

Question 9 – What, in your opinion, would be the likely effects of the proposals on the Welsh language? We are particularly interested in any likely effects on opportunities to use the Welsh language and on not treating the Welsh language less favourably than English.

- Do you think that there are opportunities to promote any positive effects?
- Do you think that there are opportunities to mitigate any adverse effects

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The proposals have the potential to increase opportunities to use the Welsh language in everyday interactions with RSLs and to ensure that Welsh is not treated less favourably than English. By embedding bilingual requirements across correspondence, digital platforms, and tenant services, the standards can normalise the use of Welsh, support tenant choice, and strengthen confidence among Welsh speakers and learners alike.

The introduction of Welsh Language Standards will have a varied impact on current and future staff. For fluent Welsh speakers and learners, the changes are likely to be welcomed, offering more opportunities to use the language in the workplace. However, for others who do not speak Welsh, there may be uncertainty around how the standards will affect their roles, progression, and confidence at work. This reflects broader recruitment difficulties in areas with lower levels of Welsh language proficiency. We are concerned that these challenges may intensify, affecting the ability to fill roles and maintain bilingual service delivery.

There are clear opportunities to promote positive effects, particularly through integrating Welsh into core housing services, providing staff training, and phasing in bilingual functionality for digital services.

However, the benefits can only be realised if the standards are phased and implemented proportionately. There may be challenges in recruiting and retaining Welsh-speaking staff, particularly in areas with smaller language pools, which could in turn create inconsistencies in tenant experience if smaller or localised RSLs are held to the same expectations as larger organisations.

Without support, the additional financial and resource burden risks diverting funding away from essential housing services and creating difficulties in staff recruitment. These adverse effects can be mitigated by support from Welsh Government, accessible Welsh language training for staff, and a phased, flexible approach to compliance tailored to the diverse contexts in which RSLs operate.

Question 10 – In your opinion, could the proposals be formulated or changed so as to:

- have positive effects or more positive effects on using the Welsh language and on not treating the Welsh language less favourably than English; or
- mitigate any negative effects on using the Welsh language and on not treating the Welsh language less favourably than English?

Yes. We believe the proposals could be strengthened to achieve more positive effects on the use of the Welsh language, while also reducing potential adverse impacts on RSLs and tenants.

Positive effects could be enhanced by ensuring that implementation is phased and proportionate so that progress is achievable and sustainable. Providing free and accessible Welsh language training for RSL staff at all levels would help build capacity across the sector and embed Welsh more naturally into everyday service delivery. There is also scope to encourage collaboration across the sector through shared tools, resources, and best practice, and reducing duplication of effort whilst ensuring consistency in the tenant experience. Community Housing Cymru would like to work collaboratively with the Welsh Government and the Welsh Language Commissioner to support our members to achieve this.

Negative effects could be mitigated by the continuation of a supportive funding environment for RSLs to support the significant translation, IT, and training costs. In addition, clarity on the scope and interpretation of specific standards as highlighted within our response would help ensure that requirements are realistic, consistent, and do not create unnecessary financial or operational burdens.

Enabling flexibility in how RSLs comply with the standards, while recognising the diversity of operating contexts, local demand, and workforce capacity across the sector, will be critical to ensuring that the proposals are both fair and deliverable.

These changes would ensure the regulations both advance the Welsh Government's ambition to grow the use of Welsh and remain proportionate for housing associations, enabling them to continue their core mission of tackling the housing crisis while supporting the language to thrive.

Question 11 – We have asked a number of specific questions. If you have any related issues which we have not specifically addressed, please use this space to report them:

Care and supported living services

Many RSLs deliver care and supported living services, including older persons' accommodation, extra care schemes, and specialist housing for people with complex needs. These services are often delivered in partnership with or commissioned from non-RSL providers, who are not subject to the same Welsh language standards. This creates an unfair and unbalanced regulatory environment, particularly in a sector already constrained by limited and highly competitive funding.

In regulated care settings where services are already subject to oversight by Care Inspectorate Wales (CIW) the proposed standards may duplicate or conflict with existing person-centred approaches. Many providers are already working towards or have achieved the Active Offer of Welsh language services, in ways that are responsive and proportionate to individual needs. In these settings, the broad application of the Standards risks undermining flexibility and person-led care. We believe a tailored approach, developed in conversation with the Welsh Language Commissioner, is essential to ensure the Standards enhance rather than hinder care delivery.

Operationally, there are also serious practical and resource implications. In Care and Support services, colleagues often work rota-based shifts, making it difficult to accommodate structured Welsh language training within working hours. The cost and capacity required to provide training, alongside backfilling roles to maintain safe staffing levels, could divert funding from frontline support. This is particularly challenging at a time of national workforce shortages in the social care sector, and for colleagues who may themselves face language or literacy barriers.

For RSLs working with specialist managing agents in supported housing, such as mental health services, crisis provision, or emergency accommodation, the situation is equally complex. For example, 14% of United Welsh's properties are supported housing, managed by external partners who may lack the infrastructure or capacity to meet the full Welsh language standards. Requiring compliance could lead to increased costs or the withdrawal of providers, further straining an already fragile market.

We therefore recommend a bespoke approach for Care and Supported Housing settings that recognises the unique regulatory context, operational realities, and needs of residents and does not compromise the person-centred principles of care.

Tenant literacy and community cohesion

Social housing tenants are among the most vulnerable in society. Many face intersecting disadvantages including financial stress, health issues, or disability, and a notable proportion also experience significant literacy challenges. Around 36% of UK adults report struggles with reading, writing, grammar, comprehension, or spelling, and more than one in five (22%) find it hard to

understand important documents or contracts. It is reasonable to assume similar or higher levels of difficulty in the social housing sector.

RSLs understand their tenants' unique needs and are well placed to shape services in ways that are accessible, for instance choosing plain language or prioritising visual or spoken communication. The introduction of additional Welsh language requirements risks undermining this tailored approach.

Tenants with literacy difficulties might feel confused or embarrassed when faced with complex bilingual introductions on telephone calls or dense Welsh-English documentation. These communications can feel overwhelming, especially when English is already a challenge. RSLs are concerned that this could result in reduced engagement, heightened anxiety, and limiting access to important services.

We must prioritise making information understandable and accessible to all tenants regardless of their reading or language skills. One practical path forward would be to incorporate implied consent or use Census-based language preference data into standards, where clear tenant preferences are unknown. This flexibility would allow RSLs to adapt communications appropriately, ensuring services remain inclusive for those most at risk of being left behind.

Tenant feedback

Tenant consultations conducted by some RSLs indicate that there is support for the principles of the proposals, yet significant concerns persist regarding costs and value for money.

We echo TPAS Cymru's concerns about cost and proportionality, urging the Welsh Government to ensure that these regulations are tenant-focused, proportionate, and adequately supported. This approach will allow the regulations to both strengthen the Welsh language and enable RSLs to continue their vital work of providing safe, affordable homes in diverse communities across Wales.

Responses to consultations are likely to be made public, on the internet or in a report. If you would prefer your response to remain anonymous, please tick here:

Dear SeneddCulture@senedd.wales,

We are researchers at Bangor University and the University of Leeds, and we have completed a project on Basic Income for the Arts in Ireland (BIA).

We have created a seminar on our findings and wonder whether this would be of interest to the Culture, Communications, Welsh Language, Sport, and International Relations Committee.

There has been recent interest in BIA in the Welsh media, and we wondered whether the Committee would be interested in our seminar or in questioning us about our findings and how a similar basic income could help the arts in Wales. The seminar addresses questions such as whether the BIA was a good investment for the Irish Government. Please see the seminar abstract below.

The seminar might also be of interest to your Senedd colleagues in health and social services, since previous trials of basic income in Wales have involved disadvantaged care leavers.

Best wishes,

Dr Hefin Gwilym

Bangor University

Rhun Gwilym

University of Leeds

Ireland's *Basic Income for Artists* and its implications for musicians in the *Electronic Dance Music* sector.

Rhun Gwilym is a PhD Music student at the University of Leeds, researching authenticity in Electronic Dance Music (EDM)

Dr Hefin Gwilym is a lecturer in social policy at Bangor University and has published extensively on poverty and welfare. He is a regular contributor to BBC Radio Cymru on social policy issues.

The seminar explores the rationale for introducing BIA as a policy intervention to support the creative industries—a key component of Ireland's cultural and tourism landscape. It also extends beyond the pandemic to consider additional pressures confronting EDM musicians, including the rise of artificial intelligence and the complexities of the contemporary streaming economy. The findings offer original insights into musicians' responses to the BIA, particularly the empathy and guilt associated with its lottery-based allocation. They also highlight the positive effects of basic income support on well-being, innovation, and creative productivity, with notable benefits for women. Finally, the study situates BIA within the wider global

context of basic income piloting, drawing comparative lessons from international pilot programmes. Overall, the seminar will examine how BIA is shaping creative practice in Ireland and consider the policy's potential to support EDM musicians and the wider artistic community in the years ahead.

Good morning,

Following our consultation last summer on how we would implement the new requirements under Part 5 of the Media Act relating to local news and information on local analogue commercial radio stations, I wanted to let you know that Ofcom has today published its statement setting out our final decisions.

Following careful consideration of consultation responses, our decisions include the following:

- All local analogue commercial radio stations, apart from those with a very low turnover, must provide local news at least hourly during daytime weekdays and peak-time weekends;
- Some local news must be locally-gathered, which will require journalists to be physically present in the relevant areas. We do not propose to specify how much local news must be locally-gathered or how frequently it should be broadcast;
- Stations with a very low turnover will not be required to broadcast local news on the weekends or include news which has been locally gathered.
- All stations must broadcast local information regularly throughout daytime weekdays (06.00 to 19.00) and at peak times on the weekends (07.00 to 12.00).

We have also modified our proposed implementation timeframe. Stations who have not previously been required to provide local news will now have two years to comply. All other licensees will have a one-year implementation period.

The full statement, including further detail on our decisions, can be found here. Alongside this, we have also published an update on our implementation of the Media Act to date, including an overview of our planned work for the remainder of 2026 which may be of interest.

I hope this is helpful – do let us know if you have any questions or if useful to provide any further information.

All kind regards,

Bethan

Comisiynydd
Cenedlaethau'r
Dyfodol
Cymru

Future
Generations
Commissioner
for Wales

the audience agency

Culture for Future Generations.

A Culture Act for Wales:
Green Paper

Report commissioned by the Future
Generations Commissioner for Wales
and written by The Audience Agency.

February 2026

On 1st of March 2025, the Future Generations Commissioner for Wales called for a Culture Bill for Wales, and he included this as a key recommendation in the Future Generations Report 2025. To support that call for a Culture Bill, the Commissioner asked The Audience Agency, an independent research and development non-profit, to prepare a Green Paper to stimulate a discussion about the future of culture in Wales. You are invited to share your views on this important subject through **this form** by the 6th of April 2026. We will collate responses and present them to the new Welsh Government.

Mae'r ddogfen hon ar gael yn Gymraeg / This document is also available in Welsh.

Executive summary

In September 2025, the Future Generations Commissioner for Wales commissioned The Audience Agency to deliver a paper answering the question: "What is the best way to ensure that culture is protected, promoted and prioritised by public bodies in Wales for the well-being of future generations?"

Evidence shows that culture is in crisis in Wales, with major cuts in funding since the Well-being of Future Generations Act became law in 2015. Among the 250 stakeholders and members of the public consulted as part of this research, there was broad consensus that the status quo is not working.

Existing legislation has not protected culture effectively. More needs to be done to ensure that the foundation of the Well-being of Future Generations Act results in lasting improvement for future generations. There is now a major opportunity to weave culture more deeply into Welsh life and the work of Welsh public bodies.

A Culture Bill could provide an opportunity to demonstrate the importance of culture and put it on a statutory footing, bringing it into line with other devolved areas like the Welsh language or active travel.

However, a Culture Bill is not the only lever to ensure that public bodies protect, promote and prioritise culture. Many of the aspects that would be required to make a Culture Bill a success could be addressed through other means. An overly vague and general Culture Bill without sufficient attention to implementation is likely to achieve little real change.

> Key actions to ensure that culture is protected could include:
>
> - Defining culture in line with international definitions to ensure a shared understanding
>
> - Establishing cultural rights – in law or in guidance – that can provide a foundation for decision-making and action by public bodies
>
> - Establishing duties on public bodies to ensure that Welsh people are able to exercise their cultural rights
>
> - Pursue civic involvement in decision-making around culture
>
> - Make budgetary commitments, such as in the "percent for culture" model

What is clear is that there is not one single solution to protect culture in Wales. The Spanish Cultural Rights Plan provides inspiration for an integrated package of measures – statutory and non-statutory – based on a foundation of cultural rights. Although more research is needed, this is a promising direction for future travel.

Introduction

In the ten years since the Well-being of Future Generations Act was passed, culture in Wales has faced serious challenges. Over the past decade, the Welsh Government's revenue funding for culture and sport has decreased by 17%, and local authority funding by 28%.[1]

The Future Generations Report 2025 concluded that "culture is in crisis." In response, the Future Generations Commissioner has called upon Welsh Government to introduce a Culture Bill, "making culture a statutory requirement for public bodies and safeguarding our cultural rights."[2]

In September 2025, the Future Generations Commissioner for Wales commissioned The Audience Agency to deliver a paper answering the question: "What is the best way to ensure that culture is protected, promoted and prioritised by public bodies in Wales for the well-being of future generations?" This research has been undertaken with just eight weeks from initiation to reporting. Despite the tight timeline, it has involved consultation with over **250 people**, including **100 responses** to a call to evidence. (See Appendix 2 for further detail.)

This paper considers a range of options for protecting, promoting, and prioritising culture in Wales. Some of these options might fall within a potential future Culture Bill for Wales – such as bringing cultural rights into law or making certain types of cultural provision a statutory requirement – but many could also be implemented in different ways. The paper also explores other kinds of options beyond legislation and statutory measures.

These questions are not straightforward and there are still significant political decisions to be made. However, the report aims to stimulate debate and help build consensus for ways forward for better protecting, promoting and prioritising culture in line with the Well-being of Future Generations Act.

[1] https://senedd.wales/media/ekumt3dy/cr-ld16899-e.pdf

[2] https://futuregenerations.wales/discover/about-future-generations-commissioner/future-generations-report-2025/

Background

In 2015, the Well-being of Future Generations Act was passed by the Welsh Assembly. It was revolutionary in that it presents culture as a well-being goal in itself: something with intrinsic value, not merely a tool for the achievement of other goals.

■ Vibrant culture and thriving Welsh language

A society that promotes and protects culture, heritage and the Welsh language, and which encourages people to participate in the arts, and sports and recreation.[3]

This explicit inclusion of culture reflects a position adopted by the British Council and others in international sustainable development policy that culture is 'the missing pillar' of sustainable development – not represented internationally in the Sustainable Development Goals to 2030.

It might have been expected that having culture as an explicit goal within this legislation would underline the centrality of culture to integrative, future-facing policymaking in Wales – and the extent to which it is resourced and supported.

Yet a 2025 report from the Culture, Communications, Welsh Language, Sport, and International Relations Committee of the Senedd notes that although capital funding has nearly doubled, there has been "a 17 per cent real terms reduction in revenue funding for culture and sport between 2014-15 and 2024-25" and that "[b]etween 2013-14 and 2023-24, local authority revenue funding of libraries, culture, heritage, sport and recreation reduced by 28 per cent in real terms." The Committee Chair, Delyth Jewell MS, described this as a "consistent and brutal under-funding of culture and sport."[4]

Background

This assessment has supported by the sector itself. Commenting in 2024 on funding cuts, the chief executive of Arts Council Wales warned that if trends continue, "there will be no professional sector in 10 years."[5] In 2024, creative industries unions Equity, Bectu, Musicians Union, Writers' Guild of Great Britain and National Union of Journalists came together "to call for urgent action to address the current decimation of Welsh arts and culture."[6] A 2025 Creu Cymru Sector Snapshot report states that "the sustained pressure that the [performing arts] sector has experienced over the last 14 years has left it severely depleted," making a direct equation between funding cuts and reduced sector activity.

It further notes that:

The performing arts runs through and underpins areas of society in unique and intrinsic ways, including health, education, community and social care. Funding cuts don't only affect the arts industry but have direct impact on the wellbeing and vibrancy of communities and Welsh society.[7]

> The Future Generations Report 2025 concludes that financial pressures on public bodies have resulted in:
>
> - A shrinking cultural sector, limiting access to the arts for many communities.
>
> - Job insecurity and redundancies across the creative and cultural workforce.
>
> - Cuts in academic cultural courses.
>
> - Higher entrance fees, reduced opening hours, and reliance on volunteers in venues and cultural sites.
>
> - Public funding being withdrawn from key cultural landmarks.[8]

With **7 in 10 people** in Wales taking part in arts and cultural activities, culture would appear to still be important to most people's and communities' lives. But arts attendance for adults and children and young people has not recovered to pre-pandemic levels.[9]

The Well-being of Future Generations Act is not the only legislation with relevance to Welsh culture. However, laws putting the provision of cultural services on a statutory basis have also had mixed results. The Public Libraries and Museums Act 1964 requires local authorities to "provide a comprehensive and efficient library service" and to "encourage[e] both adults and children to make full use of the library service."[10]

[5] https://www.bbc.co.uk/news/articles/cd0gkkv220yo   [6] https://www.equity.org.uk/news/2024/equity-join-union-call-to-save-welsh-culture
[7] https://creucymru.com/sites/default/files/2025-01/Creu%20Cymru%20Sector%20Snapshot%20Research%20December%202022024_0.pdf
[8] https://futuregenerations.wales/discover/about-future-generations-commissioner/future-generations-report-2025/   [9] Figures quoted from
Future Generations Report 2025 and 2024   [10] https://research-articles/the-future-of-public-leisure-and-library-services/

"With 7 in 10 people in Wales taking part in arts and cultural activities, culture would appear to still be important to most people's and communities' lives."

Background

But this has not stopped Welsh libraries from closing or cutting staff. In 2017 the BBC reported that "**One in three of Wales' libraries** has closed or changed hands in the last seven years due to budget cuts," with further closures planned.[11] Most recently, Caerphilly Council proposed to close **10 libraries.** This decision is now on hold pending judicial review, demonstrating that the statutory duty exerts some influence over the allocation of resources by local authorities, but not perhaps as much as the lawmakers who created the legislation intended.[12]

The former Librarian of the National Library of Wales has called the Public Libraries and Museums Act "toothless" and outdated, and called for a new Act to "reaffirm the statutory basis of the library service, and… define more unambiguously what a satisfactory service would consist of."[13]

Published in 2025, the Welsh Government's Priorities for Culture seeks to "place culture where it belongs: at the heart of Welsh life."[14] However, it has been critiqued as offering "broad statements of intent… rather than tangible commitments," and lacking a concrete plan for implementation.[15]

Issues around public resourcing are not necessarily specific to culture. A 2025 report by the Auditor General finds that although the Well-being of Future Generations Act has influenced the discourse in Wales, it "is not driving the system-wide change that was intended."[16] The report highlights the challenges around joined-up working by public bodies to set and achieve well-being objectives. It underlines the importance of both funding and 'implementation' to ensure that legislation – and the WFGA in particular – achieves its desired outcomes.

[11] https://www.bbc.co.uk/news/uk-wales-38654997 [12] https://www.bbc.co.uk/news/articles/czxpr3y1egko [13] https://gwallter.com/libraries/a-new-public-libraries-act-for-wales.html See also: https://www.iwa.wales/agenda/2023/01/do-we-need-a-wales-libraries-act/ [14] https://www.gov.wales/priorities-culture-html [15] https://research.senedd.wales/research-articles/welsh-government-priorities-for-culture-when-is-a-strategy-not-a-strategy/ [16] https://www.audit.wales/sites/default/files/publications/No_time_to_lose_Lessons_from_our_work_under_the_Well-being_of_Future_Generations_Act.pdf

Background

Existing legislation has not protected culture effectively. This may be due to shortcomings in legislation – and may point to the need for further legislation – but equally underlines that future legislation may be equally ineffective without attention to joined-up policy and implementation.

Sharing this evidence of Welsh culture in crisis is not to suggest that the situation is irretrievable. Another way of looking at it is to say there is a perception that things can no longer go on as they are – that it is time to make a significant change in the way Wales defines, engages with and supports cultural life.

The Well-being of Future Generations Act was a landmark not merely in Wales, but internationally. However, there is now a recognition that, when it comes to culture, more needs to be done to ensure that the foundation of the WFGA results in lasting improvement for future generations. There is now a major opportunity to weave culture more deeply into Welsh life and the work of Welsh public bodies. The question is how.

> **"It is time to make a significant change in the way Wales defines, engages with and supports cultural life."**

Challenges and barriers

The consultation carried out under this commission in September and October 2025 confirms broad agreement from consultees that culture is "in crisis". Consultees are critically concerned about funding for and investment in culture. However, responses identified many wider challenges and barriers to people in Wales enjoying a rich cultural life.

All quotes below are from the call for evidence that was conducted as part of the consultation.

■ What is culture? Who is creative? What is culture for?

There is confusion over what culture is.

"I think we need to think very hard about what the arts are and what makes them different from other creative disciplines like design, research etc. Those decisions should then influence policy."

Many report that significant numbers of people in Wales believe culture is "not for me." This is likely because many people perceive 'culture' to mean traditional high culture such as opera or ballet which do not form part of their own cultural lives. This sentiment can equally apply to the galleries or arts centres round the corner.

Challenges and barriers

"…culture, music, arts and culture being see[n] as a 'special' thing that only certain people do, and only certain types of culture have value - rather than something core to our being, experienced in many different ways"

"sense of belonging, [being] included and relevant"

This is reinforced by the definitions and framing of 'culture' within the WFGA and other Welsh policy. But focus group participants who viewed themselves as "not engaged with culture" often proved to be passionate about cultural issues. Exclusive definitions of culture are seen as significant barriers to many people enjoying their basic rights to a cultural life:

"Lack of validation and / or understanding of cultural norms & expressions of culture within communities."

"Worry that they won't fit in, that they have to wear something special, that they won't 'get it'."

Creativity itself can be seen as exclusive – for 'creative people' – instead of as an essential component of humanity. This is more likely when people don't know others who engage in creative or cultural activities or work. The idea of "personal creative development" beyond formal education or paid work is not widely understood or appreciated. This is reinforced by mainstream – including social – media where there is a lack of representation of ordinary people being creative beyond the less relatable representations of "being a pop star".

Overcoming such structural and class barriers is possible but:

"…community arts and producing organisations are being underfunded, meaning they either have to charge or raise ticket prices, or reduce provision, limiting people's access."

The conflation within the WFGA outcomes of Welsh language with culture – and the framing that this carries with it – is not always helpful to cultural diversity:

"I live in a Welsh language area, and the language is important to the culture, but it is not the total of it. Opportunities to celebrate and engage in the diversity of the local people are what is needed, with Black, Queer and Disabled led work happening locally."

The idea of 'cultures' rather than a singular 'culture' is a useful principle:

"barriers to mixed ethnicity embracing new cultures whilst still respecting Welsh culture… more schemes to help integrate different minorities making them feel more a part of Welsh community."

"The idea of "personal creative development" beyond formal education or paid work is not widely understood or appreciated."

Challenges and barriers

There is confusion over what culture is for and the WFGA framing of all outcomes as 'well-being' does not help with this – albeit that its definition is meant to be broader than most common interpretations of the term:

"…we need all our cultural and artistic services to be recognised for their impact (not just well-being, but this is an important outcome) and universal appreciation for the role they play in society for the good of the people of Wales."

Whilst resources are regarded a crucial to a successful cultural future for Wales, so is 'vision'.

■ Who decides?

Decisions about cultural provision are too often being made for communities rather than with them.

"People with lived experience of inequality, disability, neurodivergence, poverty, migration, or rural isolation are often invited to "consult," but rarely empowered to lead or to make decisions."

■ Culture as a 'nice to have' – for those with more resources

Culture has come to be viewed as a luxury rather than an essential part of life.

"Arts and Culture are not seen as important or valuable assets within society. It has become socially acceptable to treat arts and culture as inessential or even insignificant to collective benefit… We must change the impression that the arts are subsidiary."

Poverty and inequality make it difficult for people to engage with culture because of the costs of admission to activities, as well as the complexities, time consumption and costs of travel (see below).

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Challenges and barriers

"Coming from a lower socio-economic background, and having worked in the arts for many years, I often am put off from being able to attend a cultural event due to the cost of the ticket.".

"For those who would benefit most from the cohesion this activity engenders and the support it add[s] to well-being it may become an unaffordable luxury and that is problematic in and of itself."

"For those living in poverty, even free events can be costly, due to transport costs."

This is especially acute for younger people – the future generations which are the focus of this paper:

"Going to things on a regular basis locally is just inaccessible due to such high costs. In England things are much cheaper. Future generations are missing out due to these high costs."

Barriers to equality of access

Many respondents cited a "lack of equity for all" to having a cultural life and participating in the culture of people's communities.

People need to overcome "barriers [to] entering establishments…[include] knowing you belong" depending on "how accessible [facilities] are, [how] welcoming". Often this is compounded by a "lack of information" and a "lack of… awareness of access or activities" and "access [being] dependent on people around you knowing and understanding what opportunities there are".

"often people don't know about the local archives as a resource they can use to investigate their history or the history of the area they live in"

So, achieving greater equity isn't just about the availability of cultural activities. As a precondition to engagement are both people's awareness that these activities exist as well as their accessibility – in every sense – to all kinds of people. This is a known problem – a "lack of audience/public engagement, always speaking to the same people…" to which there are known solutions through "actively promot[ing] access".

"For those living in poverty, even free events can be costly, due to transport costs."

"Achieving greater equity isn't just about the availability of cultural activities."

Challenges and barriers

"There are… structural and societal barriers to people accessing creative and cultural provision (whether active and participatory or more passive) - these are well documented, and efforts should always continue to focus on improving access for those members of our communities that continue to be underserved."

But such solutions require focus and expertise. 'Audience development' and 'public engagement' in culture are not just marketing, nor are they the same as public engagement with other publicly supported services, education or research.

Provision is "patchy across Wales" – a "postcode lottery". Coupled with this, lack of affordable transport is one of the most serious barriers to engagement with culture and is more acute in rural areas. Public transport in many areas is expensive, infrequent, and stops running too early in the evening for people to attend and return from events. Many do not have cars. For others the travel and parking cost of a cultural activity would be prohibitive for them.

■ Cultural and creative learning and activities for children and young people

Schools – and education more broadly – have the potential to make access to culture near universal at a critical life stage which can set the conditions for future cultural engagement.

"I've noticed the reason that many people in… Powys don't access the cultural activities on offer is because they haven't done it before. They didn't do it as children."

The new Curriculum for Wales includes Expressive Arts as one of six Areas of Learning and Experience, with "creativity and innovation" treated as an integral skill for achieving its four key purposes.[17] Arts Council Wales also offers creative learning programmes in schools.[18]

However, many consultees still feel that children and young people do not have adequate access to a cultural education in school or via out of school activities. Despite revisions to the curriculum, a sense remains that schools are focused on producing skilled workers rather than rounded individuals.

Areas of specific concern include Welsh and local history,[19] as well as making music and art. Lack of resources, information and travel are recurring themes. "Tightened budgets for schools" is cited as a cause for reductions in music education as well as a lack of "awareness of the existence of…instruments and the settings in which they are embedded". Parents or carers having to self-finance long round trips for their children to take part in group music activities is a specific example.

Intergenerational interactions – perhaps already limited by shifts in media consumption habits which differ significantly between age groups – within culture are limited:

"Lack of intergenerational design - older and younger people are often isolated from each other in cultural life, limiting shared learning and belonging."

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[17] https://hwb.gov.wales/curriculum-for-wales/expressive-arts/   [18] https://arts.wales/our-impact/how-we-help-make-art/creative-learning
[19] Although the study of Welsh history is compulsory under the new curriculum /www.gov.wales/written-statement-welsh-history-curriculum-wales

Challenges and barriers

Respondents suggested that children and young people should be taught at school about the cultural rights they are due in Wales due to the UK being a party to a number of international agreements.

Mainstream media – including streaming TV services – can often substitute in people's business lives for more niche culture. Film, TV, radio, radio, audio and written content about Welsh history, language and culture and about non-mainstream culture in general can help to inspire and engage people of all ages. But for young people especially, just producing this content isn't enough if they are unlikely to seek it out. It needs to 'cut through' the noise of social media, digital content, messaging and other apps.

◼ The cultural sector: challenges and support

The cultural sector is facing a financial crisis.

"Costs are [t]ight… these sectors need to employ people which [cost] is ever increasing and funding has in real terms been cut, so the gap between [the] fund[ed] amount and cost is widening all the time."

"the arts sector is on its knees, it has never fully recovered from Covid and changes in audience behaviour, and combined with Arts Council cuts and local authority cuts, pretty much everyone is massively struggling"

As are adjacent, culture-supporting sectors:

"Many of the places that have kept parts of the live industry afloat - live music venues, hospitality venues and the like - are themselves facing an existential threat from hugely increased costs"

Public support to culture varies widely.

"There is a sporadic approach to how [culture] is supported and regarded"

Challenges and barriers

"Massive funding gaps for cultural third sector organisations, and a lack of provision for those wanting to work in the arts [but] not across the board, some councils… seem to have good support".

Public resources would appear to be disproportionately focused on a particular view of culture that may not correspond with many voters' or taxpayers' view of it.

"Funding is focused on the prestigious (predominantly white) institutions (e.g large theatres or opera) where the majority of people in Wales access culture in some form through the smaller, more accessible community arts organisations."

The situation in rural Wales is more acute:

"Organisations serving rural Wales often operate on minimal core support, making it hard to plan, retain skilled staff, or build meaningful local partnerships."

A more enterprising approach can address funding shortfalls, but this can come at a cost to accessibility:

"Many areas of culture can engage in more commercial activity, but this changes its focus and presents then its own barrier to attendance or participation."

There is a confusion of what public funding is for – what it is investing in. It can be seen just as subsidy of activity, support to non-profit organisations or careers development. But this is too short-term and blinkered a view. Thinking long-term, as the WFGA encourages all to do, investment in culture needs to be investment into different kinds of 'cultural capital' that reaps benefits over the long term, perhaps best seen as a kind of civic infrastructure.

"…sustaining cultural rights means addressing not just access but infrastructure: investment in people, places, and long-term relationships that allow culture to take root and grow in every community across Wales."

In terms of specific artforms, respondents cite a "need for large scale contemporary visual arts galleries that programme touring [of] diverse exhibitions", for greater "Investment in dance - funding, space for making… seeing [and] programming" and "financial support for artists to create work, to network together, to develop shared spaces (such as artists studios) to create work".

Not all the infrastructure to support creative and cultural activities are necessarily 'cultural' – some is more generally social:

"Lack of a community hub/community centre. Lack of youth club provision." [suggested barrier]

"A more enterprising approach can address funding shortfalls, but this can come at a cost to accessibility."

Challenges and barriers

■ Creative and cultural careers and talent

Financial considerations affect the accessibility of cultural and creative careers as well as the participation of different publics in cultural activities:

"Funding and finance are huge barriers - at present only those who already have money, or who are supported by other means can afford to try to make a living in the creative industries."

Creative careers are fragile and precarious, particularly for freelancers – "working within culture and the arts is considered economically risky."

Creative and cultural work could be more inclusive:

"Neuro-exclusion and ableism - cultural spaces and working practices are rarely designed with sensory, cognitive, or communication diversity in mind."

AI is seen as a threat to the viability of such careers.

Career progression is essential to developing and retaining talent and this requires creative freedom, infrastructure and support:

"Amazing things can emerge from small scale talent, which is not always tied to community, but rather needs the freedom to purely create. People need affordable space to practice and the opportunity to build community and awareness of their activity."

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Opportunities

To redefine and reframe culture in a more inclusive, accessible way:

"It must be a consideration in public bodies, educators, and organisations that their decisions and language used around arts and culture have the effect of impacting social behaviour to see culture as lesser."

To make more of Wales and Welsh culture, addressing the challenge of:

"A lack of appreciation of the value of culture to the communities and brand of Wales."

To change Wales' society and democracy through culture:

"Democratising culture means embedding co-production, participatory governance, and neuro-inclusive design at every level of cultural policy and practice in Wales."

To remember to make the best use of culture throughout society and economy, our personal and professional development and health:

"We forget that it is the arts sector that takes on the responsibilities of social wellbeing not covered by statutory provision. We forget that it is the Arts that take on the provision of creative education when we cannot provide it in our schools. We forget that the arts are an economically viable industry that can offer an enormous amount of benefits socially, economically and in terms of collective health."

Opportunities

To have culture and creativity supported through public bodies and budgets which are not exclusively cultural – including in health and care, as mentioned by this respondent, but also education and transport:

"Arts Council Wales are the main funder with limited budgets, so demand outstrips provision. The cost should be shared across sectors, including health and social care. The benefits of the arts cuts across all the social determinants of health. Welsh Government and public bodies need to be ringfencing prevention monies to support the arts."

To support people's individual cultural and creative lives as well as supporting the formal cultural sector:

"It would be great to have 'Creative Mentors' - people who can help people with specific things - I have a load of stories that are half finished because I get to around 15,000 words and I get stuck, having a mentor to help me through that barrier would be great."

To better support the development and inclusivity of creative and cultural workers, start-ups and other organisations:

"There is a role to play for intermediary and sector-support here… many of these are independent non-profit organisations which are often working at grass-roots level in underserved communities, but as organisations rely on external funding to pay core-costs. With better support those organisations can directly provide networking and training and best practice guidance, but can also ensure that underserved and remote communities can benefit"

To make more of tourism to support culture as well as local creative and wider economies:

"…many tourists visit to enjoy the beaches and mountains [but] leave with little understanding of the rich Welsh culture… local shuttle bus services could provide a convenient link for visitors to move from hot-spot beauty locations to a local museum, art gallery, cafe or small business shopping area. This would encourage them to diversify their experience."

"Welsh Government and public bodies need to be ringfencing prevention monies to support the arts."

What are the options?

Consultations with stakeholders and members of the public have brought forward a diverse range of opportunities to improve cultural life in Wales. The question is how to take advantage of those opportunities. Given the integrated ways of working required by the Well-being of Future Generations Act it is important to take a holistic rather than piecemeal approach to cultural policy.

This analysis begins by examining the options around a potential Culture Bill – and the pros and cons to introducing one. However, it goes on to consider broader options, some of which might be either statutory or non-statutory. It is important to note that there is potential for an even wider approach to culture, of which a Culture Bill might form only a part. The Spanish Cultural Rights Plan (see case study) is an extremely relevant example.

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What are the options?

Case Study

The Spanish Cultural Rights Plan 2025-2030 is described as the "first initiative of its kind in Europe,"[20] drawing inspiration from both existing international treaties and covenants non-binding declarations like the Fribourg Declaration on Cultural Rights.[21]

The justifications offered for its introduction bear comparison to the Welsh context:

- Culture not viewed as sufficiently urgent/important
- Structural inequalities forming the main barriers to access
- Precarity in the sector
- Paucity of policy, especially long-term policy
- Limited attention paid to wider benefits of culture

The Plan is an integrated package bringing together:

- the concept of culture as a human right – which is foundational;
- strategic priorities;
- legislative commitments;
- budgetary commitments;
- and proposed governance mechanisms including participatory practice.[22]

[20] https://www.ejiltalk.org/the-future-is-a-cultural-act-spains-first-plan-on-cultural-rights-a-new-paradigm-for-europe/ [21] https://droitsculturels.org/observatoire/wp-content/uploads/sites/6/2017/05/declaration-eng4.pdf [22] https://planderechosculturales.cultura.gob.es/dam/jcr:bbb5e0c7-55da-4354-aa66-364caa9c1853/resumen-ejecutivo-plan-ddcc-eng.pdf

What are the options?

◼ Why a Culture Bill?

A Culture Bill could provide a foundation for a new, integrated approach to culture. It could demonstrate that culture is a priority by putting it on a statutory footing, bringing culture into line with other key devolved areas, such as health, education, and active travel. Such a bill could be compared to the recently passed Welsh Language and Education (Wales) Act 2025, which sought to provide a statutory basis for language targets, place duties upon Welsh Ministers, and create accountability for linguistic planning at different levels of government.[23]

A Culture Bill could enable:

- Fairer access to culture across Wales, ending a 'postcode lottery' approach where access varies depending on local authority

- A more culturally democratic approach to culture by shifting emphasis towards the experience of culture within communities, avoiding the accusation that policy and funding is driven by a cultural sector lobby

- More integrated planning and implementation by public bodies that considers the substance and specifics of people's cultural and creative lives

- Better use of public funding, with public bodies outside the culture sector using culture to meet wider wellbeing goals

- Legal challenges, if the Bill fails to deliver its ambitions.

Giving evidence to the Culture Committee of the Senedd, Jane Richardson, Chief Executive for Amgueddfa Cymru – Museum Wales, offered a clear vision:

"a Culture Act isn't about protecting the institutions of Wales. That's not what it's for; it's about safeguarding the cultural access and enjoyment of Wales within the context of future generations."

"This is as much about local choirs meeting in village halls. It's about… the fact that Wales should lead the world on culture. We are the country that captured culture as a sustainable development principle. We led the way with future generations. We can do this with culture." [24]

That is the opportunity that a Culture Bill could potentially provide.

[23] https://business.senedd.wales/m... [24] https://record.senedd.wales/Committee/15662

"A Culture Bill could provide a foundation for a new, integrated approach to culture."

What are the options?

◼ Legislation isn't everything

A Culture Bill is not the only lever to ensure that public bodies protect, promote and prioritise culture. Many of the aspects that would be required to make a Culture Bill a success could be addressed through other means – such as policy actions like training, communications or non-statutory guidance, or amendments to statutory guidance for the Well-being of Future Generations Act (and potentially other legislation).

Past evidence shows clearly that legislation has not always been effective. An overly vague and general Culture Bill without sufficient attention to implementation is likely to achieve little real change. There is also a risk of a 'tick-box' compliance-based approach by public bodies that fails to embrace the spirit of the legislation and then aims for the minimum allowed. Criticisms have legitimately been made of 'gestural' legislation designed to send a message rather than really change things.

In considering the potential elements within a Culture Bill, we examined the potential roles of public bodies and formats of public funding. Broadly, public bodies can have powers, duties and within these the ability to disburse funds.

What are the options?

Whilst bodies can have duties to provide a service, equally services can be commissioned or there can be a broader duty to ensure a level of supply – which may be in relation to defined minimum service levels or can be more flexibly related to evidence of demand in any area. Bodies can take supervisory role over the satisfactory fulfilment of duties including the delivery of services, usually be paired with monitoring a range of things – like the fulfilment of duties, demand or broader situation like the health of a particular sector – and some kind of reporting to an overseeing body like the Welsh government and/or the public. Public bodies can have duties to consult specific stakeholders – or powers to take their views into account – including powers or even duties to convene one or more groups or bodies. Finally, they can issue guidance or standards – to supplement existing legislation and policy – which can have a statutory basis.

In terms of formats of public funding, whilst there can be a tendency to default to thinking about revenue grants or commissioning services, there are many other uses of public funds to support policy goals including loans or recoverable grants, guarantees and other incentives to reduce risk for other investors and quasi-commercial finance on more advantageous terms than the market will provide. For more detail see Appendix 2.

We also reviewed the duties which the 'UK government' has under the international instruments to which it is a party, as potential source material for duties within a Culture Bill. These duties are outlined in Appendix 3. These reviews challenge many people's assumption that the substance of a Culture Bill would necessarily be ranged around a duty on local authorities to themselves deliver cultural services. There are many other options.

To be effective, a Culture Bill would need to bring together guiding principles (whether via cultural rights or another approach); new duties and obligations for public bodies; resourcing to support implementation; and granular, specific statutory and non-statutory guidance to enable culture to be addressed in a system-wide way. It would need to place duties and obligations upon all public bodies in Wales, not just central government and/or local authorities.

> **"To be effective, a Culture Bill would need to bring together guiding principles."**

What are the options?

■ Defining culture

To ensure that culture is protected, promoted and prioritised, there should be a clear shared understanding of what it means. Some stakeholders have a sense that the Well-being of Future Generations Act defines culture. In fact, there is no supporting definition of culture within the act, although the relevant well-being goal gives some sense of its shape:

A society that promotes and protects culture, heritage and the Welsh language, and which encourages people to participate in the arts, and sports and recreation

Despite common assumptions about what "culture" is – both inside the sector and among members of the public – there is no consensus. We can identify some obvious points of uncertainty: is heritage part of culture? Or sport? Or the creative industries? Beyond this, too many people feel that culture is not "for them," because they see it as an exclusive practice, not relevant to their daily lives.

Stakeholders have been clear that it would be risky to move forward with a Culture Bill if it does not establish a shared understanding of culture, offering a definition of scope that makes it clear what it is that public bodies are expected to support.

UK cultural policy – including Welsh policy to date – commonly tends to describe culture as relating to certain sectors of the economy. For example:

- **Welsh Government Priorities for Culture** make specific reference to "the arts, museums, libraries, archives and the historic environment sectors" – excluding sport and the creative industries, while noting that "there is a clear link between their work and cultural well-being."[25]

- Supporting material created by the **Future Generations Commissioner** to present the **Well-being of Future Generations Act** uses culture "as a term to encompass archives, arts, heritage, language, libraries, museums, play and sport."[26]

This is a suitable approach if the main purpose behind the Culture Bill is to support a sector of the economy. However, there are good reasons for treating culture as more than an industry.[27] The sector-by-sector model of culture commonly used in UK cultural policy can be a barrier to joined-up policy, because it is less immediately obvious how or why other sectors should contribute to the health of the culture sector.

[25] https://www.gov.wales/priorities-~~~~~~~~~~~~~~~~~~~~~~~~~~erations.wales/wp-content/uploads/2025/02/Culture-Wales-Topic-5.pdf
[27] See, for example, Justin O'Connor, Culture is Not An Industry (Manchester, 2024).

What are the options?

Definitions of culture do not have to be based on the structure of the cultural sector or the way government happens to work, although they often are. They can centre the experiences of individuals and communities. This approach is more in line with the interdisciplinary, sustainable development approach of the Well-being of Future Generations Act[28] – as well as being more in line with international definitions of culture.

The definitions of culture contained in UN conventions and declarations take a people-first approach, focusing on the place of culture in the lives of communities and societies. Ironically, it is this exact people-centred approach that the British Council encourages policymakers and practitioners in other countries to adopt,[29] whilst the concept is much less understood or adopted within the UK itself.

UNESCO's working definition from 1982 was adopted by the UK in 2001 in the UNESCO Universal Declaration on Cultural Diversity:

Culture should be regarded as the set of distinctive spiritual, material, intellectual and emotional features of society or a social group, and that it encompasses, in addition to art and literature, lifestyles, ways of living together, value systems, traditions and beliefs.[30]

The 2003 Convention for the Safeguarding of the Intangible Cultural Heritage in 2024 (to which the UK acceded in 2024), defines intangible cultural heritage as:

the practices, representations, expressions, knowledge, skills – as well as the instruments, objects, artefacts and cultural spaces associated therewith – that communities, groups and, in some cases, individuals recognize as part of their cultural heritage.[31]

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[28] See, for example, the Welsh Centre for Public Policy paper on cultural well-being, designed to support Public Service Boards to address this theme. https://www.wcpp.org.uk/wp-content/uploads/2021/09/Cultural-Well-being-WCPP-Evidence-Briefing-Paper.pdf [29] https://www.britishcouncil.org/sites/default/files/ch4ig_essays_torreggianiwoodley_web.pdf [30] Adopted by the UK and other member states in the 2001 UNESCO Universal Declaration on Cultural Diversity https://adsdatabase.ohchr.org/IssueLibrary/UNESCO%20Universal%20Declaration%20on%20Cultural%20Diversity.pdf based on the 1982 Mexico Declaration on Cultural Policies by UNESCO www.culturanat.gob.... UKI [31] 2003 Convention for the Safeguarding of the Intangible Cultural Heritage to which the UK acceded in 2024 https://ich.unesco.org/en/convention#part1

What are the options?

This includes "oral traditions and expressions, including language; performing arts; social practices, rituals and festive events; knowledge and practices concerning nature and the universe; [and] traditional craftsmanship."[32]

There are risks to defining culture in law. Too narrow a definition could leave out important aspects of cultural experience, privileging certain types of culture over others. It could support the view that there is one Welsh culture rather than a diversity of cultures and cultural expressions within Wales that are worthy of support. Too wide a definition could be unworkably vague.

Still, drawing on these definitions could form a useful basis for proposals for policy and legislation on culture that specifically reflect the role of culture in the sustainable development of Wales and its impact on future generations in Wales. This could help drive integration of culture across public policy and public services – and shift the focus to the experiences and well-being of individuals and society.

In theory, such a definition does not require legislation – it could appear within policy. But if it doesn't appear within legislation, then it will be just another definition amongst many emanating from an actor in the field – the Office of the Future Generations Commission or Welsh Government, for example – in a crowded space, with many other bodies working with their own definitions. This route would provide no requirement to understand or adopt the definition. And it could change as political directions change.

If it were defined, within a Culture Bill – standalone or amending the Well-being of Future Generations Act or statutory guidance to it – future legislation referring to culture could by default use this definition and existing legislation could be amended through the bill to also use this definition. Passing a bill requires a higher and more formal degree of consensus than agreeing policy so the definition would come with that authority. Getting time to remove or amend legislation takes time and political capital, and so the definition would stand a better chance of withstanding changes in policy and government.

Statutory options

Bring international conventions relating to culture into Welsh law

The Welsh Government Priorities for Culture sets out the ambition that "Cultural democracy and cultural rights are central to culture in Wales." Our recent consultation showed overwhelming consensus that people in Wales should be able to enjoy a broad range of cultural rights.

[32] Ibid

What are the options?

The UN Special Rapporteur for Cultural Rights – who has been consulted in the production of this paper – offers the following definition:

Cultural rights protect the rights for each person, individually and in community with others, as well as groups of people, **to develop and express their humanity, their world view and the meanings they give to their existence and their development** [emphasis in original] through, inter alia, values, beliefs, convictions, languages, knowledge and the arts, institutions and ways of life.

Cultural rights also protect access to heritage and resources that allow such identification and development processes to take place.

The mandate on cultural rights does not aim to protect culture or cultural heritage per se, but to promote the conditions allowing all people without discrimination to access, participate and contribute to all aspects of cultural life in a continuously developing manner.[33]

Some cultural rights already exist in UK law. Rights around Intellectual Property can be viewed as a type of cultural right, as can the right to the freedom of expression.[34]

Beyond these, the UK is a signatory to a number of international conventions that involve both cultural rights (for citizens) and duties and obligations (for public bodies).[35] Upholding these rights – often phrased in discussions of international law as a duty to "respect, protect and fulfil" – is already likely a responsibility of Welsh Government as it is a responsibility of the UK government and culture is a delegated competency to Welsh Government. However, because the conventions are not incorporated into domestic law, there is limited awareness of these rights and limited ability to ensure that they are enforced.

What are the options?

The maximalist option would be to directly incorporate international conventions into Welsh law. Precedent has been set by the Scottish Government, which is seeking to incorporate international human rights legislation into Scots law.[36] A Supreme Court challenge in 2021 led to a rethink around the approach, but there are still plans to move forward with a Human Rights Bill.[37]

Direct incorporation is not the only option. Other options are potentially more workable and more effective:

- **Indirect incorporation**, which "gives a treaty some effect in national law through another legal mechanism."[38] For example, statutory guidance for Well-being of Future Generations Act and/or other legislation – with respect to culture or other sectors such as health, transport etc – could require due regard to be taken of the rights and duties[39] within international conventions.

- **Piecemeal incorporation:** Welsh legislation could establish rights to culture that are based on existing treaty provisions, without bringing the treaties themselves into Welsh law.

- **Additional rights.** A Culture Bill need not be constrained by treaties and conventions to which the UK is already a signatory. It could establish rights specific to the Welsh context. It could also be inspired by wider international thinking such as the Fribourg Declaration on Cultural Rights, or Barcelona's Cultural Rights Plan.

There is a risk that rights could be too vague to be enforceable and/or justiciable. They would need to be supported by additional statutory and non-statutory guidance; a bill could also establish specific compliance duties for Welsh public bodies to ensure that rights are respected and enforced and to have regard to them in their policymaking and decision-making.

Publicity and education around cultural rights would also be an important part of implementation.

> "Cultural rights also protect access to heritage and resources that allow such identification and development processes to take place."

[36] See a briefing paper on the part played by cultural rights: https://www.hrcscotland.org/resources/final-the-right-to-cultural-life-in-scotland-march-2023-1.pdf [37] https://www.gov.scot/publications/summary-human-rights-bill-scotland-discussion-paper/pages/1/
[38] https://www.law.ed.ac.uk/sites/default/files/2020-12/Different%20types%20of%20incorporation%20infographic%5B1%5D%20-%20ACC.pdf
[39] The conventions also include duties on the state to protect and support the enjoyment of cultural rights. These are summarised in Appendix 3.

What are the options?

■ Establish statutory duties to ensure provision

This would likely involve statutory duties on public bodies (primarily local authorities) to provide, or ensure the provision of, a minimum level of cultural services.

This could follow the existing model that applies to library and archive services – which is a duty on local authorities to themselves delivery a cultural service. However, there is significant scepticism from stakeholders about this model, due to its perceived lack of success at stopping library closures. Stakeholders fear that a minimum level of provision would be viewed as sufficient, and public bodies will have no impetus to go beyond this. This model also means a focus on public institutions and cultural organisations rather than the experiences of communities or the cultural activities of individual practitioners.

The default position of local authorities having to provide, ignores the reality on the ground of a highly mixed model of cultural provision – with third sector organisations, businesses, artists and other freelancers and civil society (community and voluntary organisations and individuals and communities) already providing many of the opportunities for people to enjoy a rich cultural life. Local authority involvement in such opportunities already ranges across:

- Providing the cultural services themselves

- Commissioning cultural services from others

- Providing buildings, faculties or other resources to support provision

- Subsidising the delivery of such services through grants to cultural organisations and/or community groups.

Alternatively, local authorities – and other public bodies – could be given the duty to ensure provision that is sufficient to enable people to exercise their cultural rights. This would follow a similar model to the Childcare Act 2006 and its implementation in England and Wales.[40] This approach reflects the plurality of cultural provision and creative activity across the public, private and third sectors as well as those very much led by civil society. It also recognises that culture is traditionally subject to the 'arm's length principle' in English and Welsh cultural policy.[41]

[40] https://www.legislation.gov.uk/ukpga/2006/21/not~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~lturenet.cz/coKmv4d994Swax/uploads/2018/08/The-Arm%E2%80%99s-Length-Principle-and-the-Art-Funding-System.doc
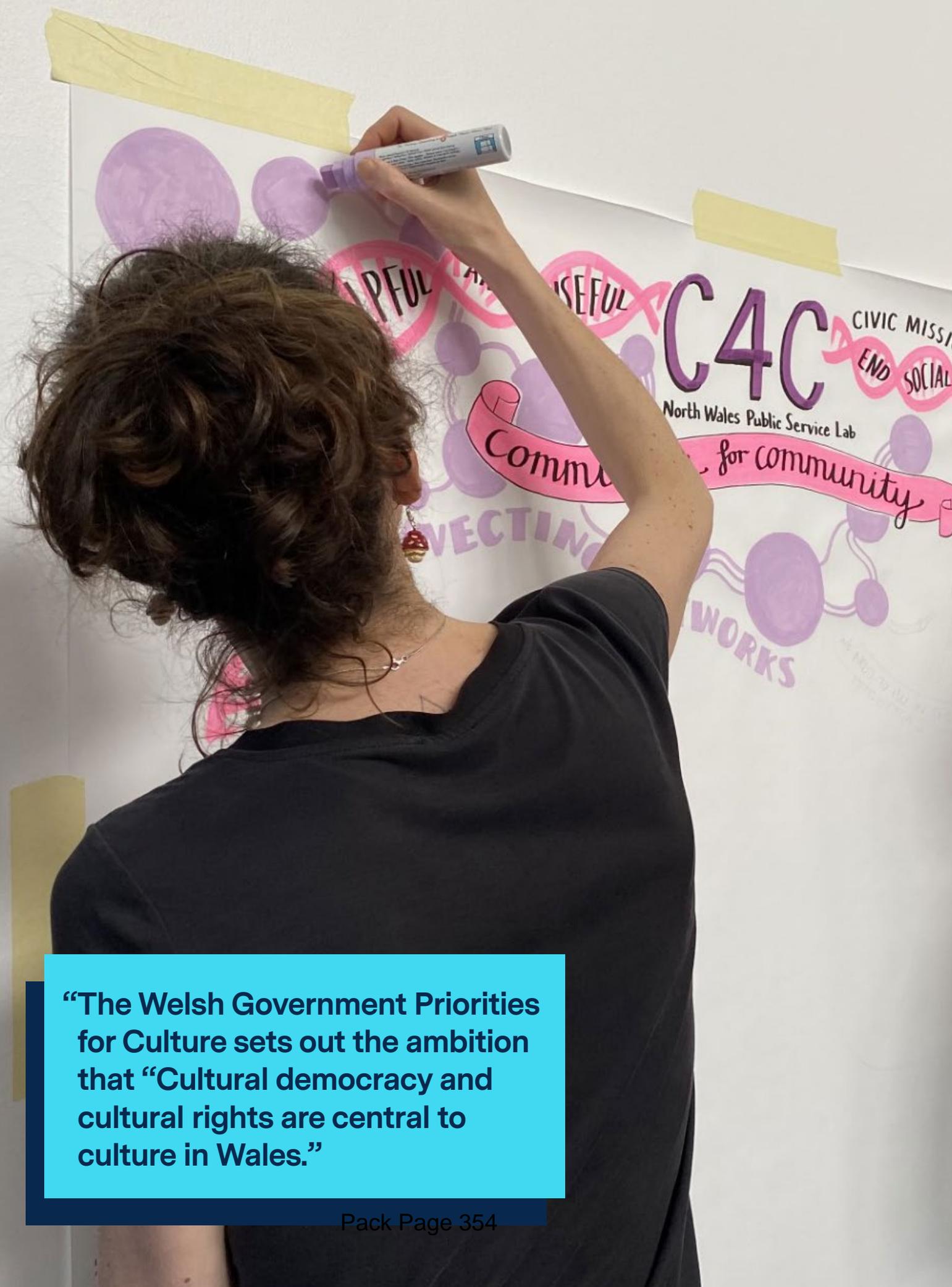
"The Welsh Government Priorities for Culture sets out the ambition that "Cultural democracy and cultural rights are central to culture in Wales."

What are the options?

The Active Travel (Wales) 2013 Act[42] is a useful reference for how to use targeted legislation to define and create a web of duties around a specific kind of provision to achieve well-being and other outcomes.

Inspired by these acts, the package of duties 'to ensure sufficient provision' on local authorities (or other public bodies) could include:

- to map cultural provision against needs/wants of local communities;

- to report on granular cultural indicators and evaluate cultures contribution to well-being outcomes;

- to ensure provision whether that is delivered by themselves, public bodies, charities, businesses or civil society;

- to build capacity within and between organisations, creative and cultural workforce and civil society, including volunteers;

- and to intervene to provide support through funding, training, promotion or otherwise where local provision does not meet local needs.

Duties to promote and provide information are such a significant duty that they deserve to be considered separately to this package.

What are the options?

■ Establish statutory duties to promote culture

As is noted above a broad concept of 'promotion' is necessary to ensure that people participate in cultural and creative activities. Merely ensuring that cultural services and other opportunities to be creative are available do not mean that they will be taken up or be equitably used beyond those who already confidently engage in culture or creativity or have well-being outcomes, especially for those who are otherwise disadvantaged.

This kind of promotional role for local authorities mirror similar roles in legislation for active travel and childcare and family services provision. International conventions to which the UK is a party likely already impose or at least imply duties on Welsh Government[43], given that culture is a delegated competency. These duties include:

- To promote cultural **diversity** – including through educational and **public awareness** programmes

- To support the **diffusion** of culture

- To create an **environment** which encourages individuals and groups to have access to diverse cultural expressions

- To integrate culture into **all levels of policies** supporting sustainable development in particular fostering the… **promotion** of cultural diversity[44].

As noted above, public bodies can do more than provide services or fund others to provide services. Other policy levers include leadership, convening, advocacy, promotion and the use of human and physical resources such as buildings and facilities.[45] This would reflect a culture change in the bodies themselves towards recognising and understanding – a clearer and more citizen-centred idea of – culture. Hence the focus up front on redefining it away from sectors of the cultural industries and the arbitrary boundaries between the remits of public bodies.

Finland's Act on Cultural Activities in Local Government 166/2019 states it is "the duty of the local authorities to provide cultural activities," and offers a list of activities necessary to fulfil this duty.[46] Most of these focus on promotion and fostering the conditions for cultural life, as opposed to direct provision.

43 See Appendix 3 for more detail. 44 See Appendix 4 for more detail. 45 See p28 of https://www.local.gov.uk/publications/creative-places-supporting-your-local-creative-economy 46 "In order to fulfil this duty, local authorities shall:

1. promote equal access to and broad use of cultural and art services ;

2. create conditions for professional artistic work and activities;

3. promote active involvement in the arts and culture and related civic activities;

4. offer opportunities for goal-oriented artistic and cultural education covering different forms and fields of culture and art;

5. promote the preservation and use of cultural heritage, and activities that foster and develop local identities;

6. promote the arts and culture as part of residents' health and wellbeing, inclusion and community engagement, and local and regional vitality;

7. promote cultural interaction and international activities, and carry out other artistic and cultural activities."

https://www.finlex.fi/en/legislation/translations/2019/en/166

What are the options?

◼ Statutory guidance for implementation

Implementation will be crucial to ensure the success of a Culture Bill. Therefore, guidance for public bodies about the way they consider and embed culture in their work will need to be stiffer, tighter and more detailed than what has been offered hitherto.

If it is decided to define culture in statute or policy, then statutory guidance can refer explicitly to definitions in Welsh law or international treaties.

If a cultural rights approach is taken, guidance should include explicit reference to public bodies needing to consider the enjoyment of these rights and potential harms or risks to the enjoyment of these rights.

The exact form of any statutory guidance will depend on the legislative and policy approaches that are taken.

◼ Civic involvement in decision making

Cultural democracy is a rich and complex area of practice, and a detailed discussion is beyond the scope of this report. It is sometimes used to describe grassroots participatory approaches to culture by arts organisations and funders.[47] But it also describes a model where citizens and residents are directly involved in making decisions about cultural policy.

An example of this is participatory budgeting. The Scottish Government aims for 1% of local authority budgets to be distributed by participatory budgeting.[48] There has also been some interest in this in Wales,[49] and some experimentation, for example in Gwent.[50]

[47] https://64millionartists.com/what-we-do/cultural-democracy/   [48] https://pbscotland.scot/blog/2023/7/14/what-is-the-1-local-government-participatory-budgeting-commitment   [49] https://wcpp.org.uk/publication/participatory-budgeting/   [50] https://sharedfuturecic.org.uk/wp-content/uploads/2024/04/PB-Evaluation-Toolkit-Final-May-2023-web.pdf

What are the options?

There are also non-budget-focused approaches to civic involvement. The West of England Mayoral Combined Authority has created a Citizens' Assembly to shape its new culture plan, tasked with considering the question "What would culture and creativity look like in the West of England if they were for everyone?"[51]

■ Budgetary options

Financial decisions – and in particular tax-raising powers – are normally reserved to governments, because these are essentially political decisions which, in a very literal sense, a difficult to legislate for.

Making financial commitments in law is unusual but not unheard of. It was used for to cement the UK's commitment to spending on international development[52]. Although it is 'gestural' – because legislation can always be repealed or amended – legislation is more difficult – costly, complicated, publicly visible, requiring a higher degree of consensus – to unpick than policy. And the gesture can be important, because such a firm and longer-term commitment can align other stakeholders – even potentially other funders or asset holders – to invest or commit other resources.

However, some of these commitments could be made politically as opposed to being made in law – meaning that these can be considered as both statutory and non-statutory options.

■ Minimum basic income

Minimum basic income for artists – there was some support for this in the consultation but also notes of caution. A pilot scheme in Ireland that ran from 2022 through 2025 will now be continued and potentially expanded from 2026.[53]

■ Set a minimum percentage for culture in budgets

This could relate to a percentage of the total budget of the Welsh government or of specific public bodies, or a percentage of specific receipts. There are a number of models and precedents that range from large scale to small, across a range of sectors:

- UK Government commitment to spend 5% of budget on defence[54]

- Liverpool City Region's "1% for Culture" initiative commits to spending 1% of its devolution funding on cultural activities.[55]

- Already mentioned, the Scottish Government's target for 1% of local authority spending to be decided by participatory budgeting

[51] https://citizensforculture.info [52] https://www.legislation.gov.uk/ukpga/2015/12/contents [53] https://www.citizensinformation.ie/en/employment/ unemployment-and-redundancy/employment-support-schemes/basic-income-arts/ https://www.rte.ie/culture/2025/1007/1537249-budget-2026-basic-income-for-artists-scheme-to-become-permanent/ [54] https://www.gov.uk/government/news/uk-to-deliver-on-5-nato-pledge-as-government-drives-greater-security-for-working-people [55] https://www.liverpoolcityregion-ca.gov.uk/news/liverpool-city-region-introduces-1-for-culture-programme-to-support-cultural-activities

"Implementation will be crucial to ensure the success of a Culture Bill."

What are the options?

A "percent for culture" model (or similar) targeted at the budgets of public bodies in Wales would be particularly suited to supporting cross-sectoral working, ensuring that health and transport spend (for example) took culture into account.

However, this is not advisable in isolation: there needs to be clear guidance and principles that ensure this budget is allocated in a joined-up way and oriented towards the achievement of a coherent set of goals in order for it to achieve maximum impact.

◼ Hypothecated taxes

Another approach is hypothecated taxes,[56] whose resulting net revenues are dedicated to culture. The Senedd has given Welsh local authorities the option to introduce a visitor levy from April 2027.[57] Revenue can be used, among other things, to promote Welsh language and culture.[58]

Other models include the Edinburgh visitor levy, where 35% of funds raised are earmarked for culture, heritage and events.[59] As the English devolution process proceeds, England's Local Government Association is advocating for more tax raising powers for councils in relation to tourism.[60]

The BID (Business Improvement District) model gets around the fact that local authorities don't have the authority in primary legislation to raise additional levies on businesses. It is used in some English BIDs to support tourism and culture.[61]

> "If it is decided to define culture in statute or policy, then statutory guidance can refer explicitly to definitions in Welsh law or international treaties."

[56] https://researchbriefings.files.parliament.uk/documents/SN01480/SN01480.pdf [57] https://www.gov.wales/visitor-levy-small-contribution-lasting-legacy [58] https://www.gov.wales/the-visitor-levy-how-we-can-all-benefit [59] https://worldcitiescultureforum.com/city-project/edinburgh-visitor-levy/ [60] https://www.local.gov.uk/lga-submission-english-devolution-and-community-empowerment-bill [61] https://researchbriefings.files.parliament.uk/documents/CBP-10158/CBP-10158.pdf

What are the options?

■ Non-statutory options

As discussed previously, a Culture Bill is not the only way to move forward. Political decisions can be made around budgets – and to the extent that the "culture crisis" is considered to be a funding crisis, political decisions will need to be made in order to address it.

Putting legislative and budgetary options to one side, some of the options discussed here could still be taken forward by the Future Generations Commissioner. Non-statutory guidance around the implementation of the Well-being of Future Generations Act could, for example:

- Define culture in practice

- Recommend that public bodies take into account existing cultural rights

- Create a cultural rights charter to which organisations could sign up

- Recommend that public bodies pursue civic involvement in decision-making

To convene, promote, advise and publicise are also within the power of the Future Generations Commissioner – as they are also, to some extent, within the power of the cultural sector itself. However, it could be argued that these interventions have already been tried, hence making the case for statutory interventions.

Conclusion

This paper has taken a high-level look at options for action to ensure that culture is protected, promoted and prioritised by public bodies in Wales for the well-being of future generations. Given the short timeframe of the research, the ambition was not to reshape the whole of cultural policy for Wales, but to suggest directions for future travel.

The evidence is clear that the current approach to culture is not working. There are a range of potential interventions to improve cultural outcomes, many of which include both statutory and non-statutory options. However, it is equally clear that there is not one single silver bullet: there needs to be an integrated package of measures based on an overall framework (with the Spanish Cultural Rights Plan providing a useful model for this approach).

Although there are risks as well as opportunities to a Culture Bill, bringing forward new legislation as part of a package of measures could offer a strong demonstration of the importance and centrality of culture in Wales – and put it upon a firm footing for the long term.

This Green Paper represents the next step following the Future Generations Commissioner for Wales' call for a Culture Bill for Wales. Developed with The Audience Agency, it is designed to stimulate a discussion about the long-term future of culture in Wales. You are encouraged to **respond** to this Green Paper, and reflect on its content. We will collate your feedback and present it to the new Welsh Government, helping to inform the next phase of action.

Appendix 1: Research questions

What is the best way to ensure that culture is protected, promoted and prioritised by public bodies in Wales for the well-being of future generations?

This top-level research question was broken up into subsidiary research questions reflecting a process of:

- Laying some conceptual, policy and contextual groundwork

- Considering options for a Culture Bill

- Looking at the implications of such options.

Laying the groundwork

- What are the opportunities and challenges for culture in Wales?

- What are the most appropriate understandings of "culture" to be used within the Green Paper?

- What concepts of public cultural rights are most appropriate to be considered within the Green Paper?

- What public policy approaches have been taken to the main research question in other parts of the UK and other comparable countries and regions?

Options analysis

- What statutory and other public policy options (duties, powers etc) are available to protect, promote and prioritise culture for the well-being of future generations in Wales?

- What opportunities – and challenges, barriers, risks and harms – are associated with these options, including the status quo option?

- What might be the social, economic and environmental outcomes associated with the options considered?

- Which of these options would be the most effective and workable?

Working out the implications

- What might the role of different public bodies be (including requirements on them to collaborate)?

- What might the purpose and format of public funding be?

- Would new approaches to governance and delivery be required?

Appendix 2: Stakeholder consultation

Over a period of 6 weeks in October and November 2025, more than 250 people were consulted:

- 99 people responded to a call for written evidence. The call was disseminated at key events (Sŵn Connect, the Welsh Festival Forum, Wales Arts, Health and Wellbeing Network meetings, Charitable Trusts CEO meetings) and via partner mailing lists (including What Next? Cymru, Arts Council of Wales, Creu Cymru and The Audience Agency's own database of 400+ cultural organisations in Wales).

- Approximately 80 stakeholders attended the Future Generations Culture Forum and/or the October Charitable Trusts CEO Meeting. These included representatives of cultural, heritage, arts, sports and community organisations in Wales (including senior figures from Arts Council of Wales, Cadw, Amgueddfa Cymru, Creu Cymru and others), local authorities, 'umbrella' cultural and leisure sector bodies, representatives from wider sectors (transport, fire services and natural resources), artists and freelancers.

- Twenty members of the public attended two online focus groups. Participants represented a wide range of interests and demographics, including: rural and urban communities in Wales; young people; people who identified as actively engaged in culture, as well as those who didn't; a range of ethnicities and ages; first-language Welsh speakers, learners and non-Welsh speakers.

- One-to-one discussions with five key stakeholders in the Welsh cultural sector, as well as with the UN Special Rapporteur on Cultural Rights, Dr Alexandra Xanthaki and the Director of Cultural Rights of the Spanish Ministry of Culture.

- A workshop with five members of the School of International Futures 'Pledge Network' – working across the United Nations system to bring future generations into international policymaking – to bring additional international perspectives

- A sense-making session was held to inform initial findings, with 23 stakeholders with experience of cultural leadership, policy-making and cross-sector working in local government.

Appendix 3: Potential roles of public bodies and formats of public funding

Statutory bases

In public law, statute and convention, public bodies can have:

- Duties which require them to do something

- Powers which enable them to do something, including regulations:

    - Requiring others to do something – eg use Welsh language (or another language) in certain contexts

    - Requiring others not to do something – eg not to demolish listed buildings without consent

- Funding to disburse or commit – which can in theory be ringfenced or predetermined but in practice parliaments[63] and the ministers they delegate to retain discretion over most aspects of public finance allocations[64]

Duties can, for example, be:

- To provide a service – through a variety of delivery models which include delivering the service itself or ensuring that a service is provided through commissioning it

- To supervise, monitor and/or report – to an overseeing body (eg Welsh government) and/or to the public

- To consult – specific bodies (eg official consultees for planning), sector bodies, the public etc

- To convene a body or group – which can be given advisory (eg to a government minister) or stronger powers

- To issue guidance and standards – which supplement existing legislation and policy

In other words, there is more than one 'maximum' option. It isn't necessarily to have a to duty to provide a service or ensure that rights are protected and enjoyed (see next section on rights).

The different roles of public bodies

Considering the different statutory bases for culture noted above, different bodies can have different roles with respect to a single duty, power or allocation of public resources.

For example:[65]

- **Supervisory** – providing oversight, requiring reporting with some powers of sanction/intervention in case of failure or risk of failure[66]

- **Advisory** – providing governance mechanisms to involve a mix of stakeholders and sectors beyond government and public bodies

- **Regulator/inspectorate** – where there is significant specialisation and risk – eg education, health, financial services etc

- **Public service delivery** – directly or through commissioning whilst remaining responsible for the delivery

- **Publicly owned corporation** – trading but publicly held for public benefit.

[62] As in formulae for allocation of funding to local authorities or parts of the education system   [63] Both UK and Welsh parliaments relevant here   [64] Notable exceptions include the pensions 'triple lock' and commitments to energy feed-in tariffs.   [65] In part informed by https://www.gov.wales/organisations   [66] Per https://www.gov.uk/government/publications/... ...raries-as-a-statutory-service/libraries-as-a-statutory-service in England and https://www.gov.wales/sites/default/files/publications/2025-04/public-libraries-supporting-sustainable-and-connected-communities-the-seventh-quality-framework-of-welsh-public-libraries-standards-2025-to-2028.pdf in Wales noting https://www.iwa.wales/agenda/2023/01/do-we-need-a-wales-libraries-act/

Appendix 3: Potential roles of public bodies and formats of public funding

Public funding options

Public funding from various sources can be allocated to public bodies fulfilling different roles or instead be allocated to the cultural sector, civil society institutions or direct to individual members of the public etc.

The 'various sources' can be raised through general taxation or specific levies[67] – nationally, regionally or locally – and disbursed by government or public bodies, or others on their behalf.

In terms of 'formats', funding can be:

- deployed to provide resources within government or public bodies

- disbursed as grants to subsidise operations or part or fully finance capital spent or one-off costs[68]

- used to commission services

- structured as loans (or other debt finance) or repayable grants[69]

- used to provide guarantees or incentives which encourage the commitment of funding or other resources from others

- quasi commercial finance.[70]

[67] Otherwise known as hypothecated taxes such as tourist taxes, the BBC licence fee or local authority care precept.   [68] Often in the cultural sector to non-profits although as CRF and Innovate UK funding showed there with the appropriate policy justifications it can be made to for-profits as well   [69] Like some of the BFI which 'recoups' alongside other investors where projects or products are commercially successful   [70] Such as that provided by the British Business Bank or by fund managers such as Creative

Appendix 4: Cultural rights and related duties

Cultural rights that subsist from Universal Declaration of Human Rights, 1966 International Covenant on Economic, Social and Cultural Rights and 1966 International Covenant on Civil and Political Rights are:

1. The right to take part, or not, in the cultural life of their choice

2. To right to start, revise and cease their own cultural practices

3. The freedom to be creative and to the conditions necessary to exercise and develop their own creativity

4. The right to choose, express and develop cultural identities including the right to take part in, or not, particular collectives and to refer, or not, to specific cultural heritage – and to change those choices

5. The right to freedom of thought, conscience and religion

6. The right to interact and exchange with others, regardless of group affiliations or frontiers

7. The right to seek, receive and impart information and ideas in all forms including written, spoken, art and media regardless of frontiers – in order to have freedom of expression

8. The right to freedom of peaceful assembly and association

9. The right to access and enjoy cultural resources such as the arts and cultural heritage, including that of others, together with knowledge including scientific knowledge

10. The rights of ethnic, religious or linguistic minorities to enjoy their own culture, to profess and practise their own religion, or to use their own language

11. The right to shape and implement policies and decisions that affect the exercise of cultural rights

Obligations under 1966 International Covenant on Economic, Social and Cultural Rights and UNESCO 2005 Convention on the Protection and Promotion of the Diversity of Cultural Expressions:

1. To create an environment which encourages individuals and social groups to create, produce, disseminate, distribute and have access to their own cultural expressions, being mindful of the circumstances and needs of minorities.

2. To create an environment which encourages individuals and groups to have access to diverse cultural expressions from within Wales, the UK and other countries.

3. To recognise the contribution of artists, others involved in the creative process, cultural communities and organisations that support their work.

4. To promote cultural diversity through educational and public awareness programmes, amongst other things.

5. To encourage creativity and strengthen production capacity through education, training and exchange programmes in the cultural industries.

6. To support the development, diffusion and conservation of culture

7. To support cooperation for sustainable development and poverty reduction capacity building in the public and private sector, SME development and technology transfer, particularly in the cultural industries and enterprises.

8. To integrate culture into all levels of policies supporting sustainable development in particular fostering the protection and promotion of cultural diversity.

Culture for Future Generations.
A Culture Act for Wales: Green Paper

Report commissioned by the Future
Generations Commissioner for Wales
and written by The Audience Agency.

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Dear Peredur and Mark

Challenges and opportunities for Welsh public services

As you are aware, I am approaching the end of my term as Auditor General over a period that coincides with the Senedd election. Whatever the policy priorities for the next Welsh Government, the incoming administration faces some big questions around the future sustainability of our public services.

We recently released a podcast series that explored my perspective on some of those issues. My reflections built on the work of Audit Wales over the past eight years, as also summarised through my earlier Picture of Public Services reporting, my 'Firefighting to future-proofing' commentary, and my 'No time to lose' report on implementation of the Well-being of Future Generations (Wales) Act 2015. The podcasts also touch on themes discussed during my appearance at the Finance Committee on 5 November 2025 as part of its Welsh Government budget scrutiny and in my supporting written evidence. That evidence highlighted various relevant examples from my more recent work.

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As your committees reach the end of their own terms, I wanted to put on record a summary of some of the thinking that sits behind the podcast series, although this is by no means exhaustive.

Frustratingly perhaps, much of what I have set out is not new; for example, my reflections around our public service landscape mirror issues raised by my predecessor and, before that, by other commentators. These issues are, in my view, ever more pressing. In the course of my time as Auditor General, I have seen much that is good. But the challenges facing public services are huge and the scope for improvement considerable. I hope that these reflections, and the fabulous work of my colleagues at Audit Wales, will be drawn on by the next Senedd and Welsh Government as they seek to address those issues.

As I step down, I should like to thank both Committees and the wider Senedd for their support for the work of Audit Wales throughout my tenure.

Yours sincerely

ADRIAN CROMPTON
Auditor General for Wales

Copied to: Senedd Policy & Legislation Committees

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Auditor General reflections on challenges and opportunities for Welsh public services

Wales has a strong and capable public service

The people of Wales rely on our public services – we see their impact and delivery all around us in our schools, our hospitals, our homes, our environment, our communities.

Those services in turn rely on the skill, hard work and dedication of hundreds of thousands of public servants – frontline staff, politicians, senior leaders – whose motivation is to serve their communities and to improve the lives of others.

Services have been tested by two decades of financial pressure, demographic and social change, ever increasing demand, and wider challenges from climate change, Brexit and global events. The COVID-19 pandemic rocked our society to its core and called for an unprecedented response. The residual effects of the pandemic are still with us today in the shape of pent-up demand for services and fundamental changes to society and behaviours.

There is much to reflect on and learn from the pandemic response, as we are still seeing played out through the UK public inquiry and wider scrutiny. However, we should recognise we also saw the very best of the public service in Wales during the response. Frontline workers continued their vital work, often under immense pressure; the NHS and local and central government collaborated to deliver life-saving initiatives such as the Test, Trace, Protect programme and mass vaccination; all parts of the public service adapted swiftly through remote working and service redesign to continue supporting their communities.

Though a dreadful time for so many, the response showed what can be achieved when public services are united around a clear, common objective and pulling in the same direction. We saw this too in how public services worked together to accommodate and support displaced Ukrainians arriving in Wales from early 2022 onwards, building on learning from the pandemic response.

But excellent service delivery is not just about responding to emergencies. The public have a right to expect it always and for the flexibility, collaboration and pace we saw in the pandemic to be standard. They should also expect that public money is well-managed and delivering good value.

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Persistent and emerging challenges

Through the work of my office, I have consistently reported on some persistent challenges faced by the public sector.

Financial pressures

In local government, budgets have been squeezed. Fast rising costs in areas like children's services and temporary accommodation are bringing some councils to the very edge of financial sustainability.

Generally, we see councils having a sound grip on their immediate financial pressures but with many relying on reserves to balance budgets.

This approach is unsustainable in the long run. Individual councils, and the sector as a whole must strengthen their long-term planning, forecasting and oversight if they are to remain financially viable.

In the NHS, the Senedd passed legislation in 2014 requiring individual health bodies to break even over a three-year period and to have medium-term financial plans that are approved by the Welsh Government. Yet despite these statutory expectations, most health boards have been unable to meet that break-even duty for several years.

Despite record levels of investment and ever-increasing levels of savings, health boards are struggling to control costs driven by rising demand for services, overall growth in pay costs, and other inflationary pressures. With most health boards still unable to produce financially balanced three-year plans, the overall NHS deficit position is unlikely to change for the foreseeable future.

Those financial pressures stimulate an understandable focus on short-term financial management. But this reactive approach hinders the longer-term planning and transformational changes that are needed to create more financially sustainable services.

This is all before we add into the mix wider pressures, for example around the investment needed to support policy priorities around decarbonisation, deal with the impacts of climate change, and help society adapt. I have reported previously that the scale of spending that might be needed in these areas, and where that funding will come from, remains unclear.

Against this backdrop, making the most of every pound of public spending is essential. The work of my office gives assurance that, overwhelmingly, public money

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is well managed. Many public bodies demonstrate strong governance and accountability. However, there is still waste, error, and fraud. Exercises like the data matching we facilitate as part of the UK-wide National Fraud Initiative are an important part of our counter fraud landscape. However, there is much more that public bodies need to do to raise their game in response to increasing fraud risks.

Demand and performance

Demographic and societal change, and the lingering impact of the pandemic are driving ever-increasing demand.

In some important areas, service performance and quality are declining. My 2025 report on cancer services, for example, described a failure to meet key waiting time targets and growing inequalities in outcomes despite increased funding. These issues are compounded by workforce shortages, ageing infrastructure, and rising public expectations.

Simply allocating more funds does not guarantee a solution. Except for 2022-23, the NHS has seen large, above inflation increases in its funding in recent years yet still it is unable to break even and performance in many areas is unsatisfactory.

And that ever-growing share being taken by the NHS undoubtedly squeezes the resource available for other areas. That changing pattern of funding between sectors needs to be rebalanced if important services are to be sustainable, and better outcomes need to be achieved across the board with the public money that is available.

Complexity and fragmentation

The public service delivery landscape in Wales is crowded. By way of illustration, my office audits the accounts of close to 100 larger public bodies and structures, even before considering other smaller bodies that I audit, notably the over 700 town and community councils.

In addition, various partnership and collaborative arrangements exist to address the challenges and problems that cannot be addressed by individual organisations alone; for example, Public Services Boards, Regional Partnership Boards and Corporate Joint Committees.

These partnership structures are of variable effectiveness – with some very good and others less so. They often work on differing geographical footprints and can have

overlapping memberships and objectives. They each require contributions from many of the same players, so spreading available resource more thinly.

While every one of our public bodies and partnership structures is no doubt rooted in a well-intentioned rationale, the combined effect is overly complex.

That complexity leads to a system that can be fragmented and slow-moving, with overlapping responsibilities and unclear lines of accountability. This complexity can hinder transformation and make it difficult for citizens to navigate services or understand who is responsible for what.

Our work also shows how many public bodies often fail to capture the service-user perspective. This affects service design, public understanding of lines of accountability, and the ability of service users to navigate what can be complex and poorly signposted systems.

Trust and confidence

I have growing concerns about declining trust and confidence in public services and governance structures across Wales.

That is not unique to Wales and is fed in part by factors beyond our control – broader geopolitical and domestic political issues, societal changes, change in the way people access media, information and analysis, the public's view of politics nationally and internationally.

Some factors, though, are much more within our gift. To win and maintain public trust and confidence, we must consistently demonstrate public service delivery that is timely and of good quality. When outcomes are poor and are not seen to improve – or seen to worsen – it is unsurprising that the public loses confidence in the public sector's capability. Not so much in the efforts of individuals and frontline services, but organisationally and system-wide.

We know from our own work and wider evidence that poverty and inequality remain deeply entrenched in many communities despite the best efforts of local government and others.

Similarly, my work in the NHS has shown that the failure to meet targets in key areas such as elective waiting times and ambulance handovers has sadly become the norm. This is demoralising for staff and will colour patients' views.

A further factor, on which I have a direct line of sight, is governance. It might not sound the most obvious cause of low public confidence, but I believe it is important.

The overwhelming majority of public sector organisations are well governed most of the time. Regrettably, though, I have reported on too many examples of poor organisational governance at every tier of the public sector – from the Welsh Government itself to the NHS, local government, some central government organisations, and the smallest tier of government in our town and community councils.

I fear even a small number of such cases colour the public's perspective of public sector governance in the round. These failures invariably feature some weaknesses in process such as poor record-keeping, application of policy, or a lack of transparency. But more significantly, in my view, many governance failures in public organisations are rooted not in process but in human behaviour.

If those in the public sector, especially in positions of leadership, lose sight of the required values and behaviours, the effects are damaging. They manifest in the form of poor decision making, relationship breakdown, wasted public money – on settlement payments, legal or consultancy fees – and distracted organisational leadership and service provision.

And every time the public sees such examples, it further undermines their confidence and trust: trust that is essential if the public is to support the kind of transformation required to make our public services sustainable for the long term.

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Opportunities to do things better

Getting the basics right

Effective public service delivery begins with getting the basics right. Years of financial pressure has left some important areas under-invested and this needs addressing if we are to improve services and increase public sector productivity.

Digital

The technology already exists to transform service delivery, reduce costs and improve the user experience. I recognise that the public sector is already working to improve its approach to realising benefits from digital solutions and identifying services requiring transformation.

This work must replace antiquated IT systems, improve the quality and shareability of data, recruit and retain scarce skills in high demand across the economy, and reshape service delivery with citizens and users at the heart. The challenge is considerable.

The potential efficiency gains in those services are enormous, with more modern and responsive public services delivering improved service to customers. However, I have also emphasised the importance of balancing spending on infrastructure with work to tackle the root causes of digital exclusion. And while artificial intelligence presents great opportunity, it is not without risk.

My work on councils' digital strategies has revealed uneven progress. Only half of Welsh councils had up-to-date digital strategies, and many lacked robust arrangements for resourcing, monitoring, and evaluating impact.

In the NHS, digital transformation can be extremely slow and made more difficult by funding and capacity constraints, information governance challenges, and a lack of consistency on the 'Once for Wales' approach.

One prime example of these challenges can be seen in my previous reporting on the implementation of the Welsh Community Care Information System where, unfortunately, the reality of implementation did not meet the original ambition.

More specific and closer to home, my audit work could be made far more efficient and effective if the bodies we audit had modern systems for their financial and

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performance information. In many cases, bodies instead have ageing, unreliable systems that are difficult to interrogate or integrate.

Many systems are outdated and not fit for purpose, limiting the ability of organisations to manage operations effectively or provide timely, reliable data for audit and decision-making. This technological deficit hampers both assurance and accountability, and crucially the ability to modernise and join up services to make them more efficient and improve the end-user experience.

So investing in updated finance and performance platforms is not simply to benefit the auditor – that is a relatively marginal matter. The more important question, and what should be front of mind for senior leaders, is how can they expect to run well-governed organisations, and take informed decisions, without them? Outdated systems can also increase cyber-security risks, something public bodies cannot afford to be complacent about.

Workforce

Workforce pressures are a recurring theme across my work. In all sectors and many specialised areas, staffing challenges – exacerbated by rising demand – have strained service delivery.

Examples from our work include capacity and capability challenges within the Welsh Government's civil service, pressure resulting from recruitment and retention challenges in the NHS and education, and in other specialised areas such as digital transformation, planning, active travel, building safety, and flood defence.

We see in our audit of accounts work too that many organisations are struggling to recruit and retain high quality finance professionals. This is concerning, and not just because we need these people to help produce good quality sets of accounts but because the finance profession has an important role to play in plotting a path to a more sustainable future for our public services.

Competition for specialist skills is inevitable, even within the public sector, and there will always be questions for public bodies to ask themselves about what they do in-house and what could be done by other organisations. But there needs to be a stronger approach to developing coherent workforce strategies, aligning staffing models with future service needs, and developing staff accordingly. Without this, policy ambitions risk being undermined by operational constraints.

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Asset and infrastructure management

The efficient maintenance and improvement of existing assets such as roads, hospitals, schools and flood defences is every bit as important as getting value for money in building new infrastructure. After all, new assets will only deliver promised benefits if they are properly maintained.

All too often our work has highlighted the false economy of allowing maintenance backlogs to build up. Not least within the NHS where challenges with an outdated estate can drive inefficiencies, cost and impact negatively on patient care.

So a disciplined approach to asset management, for each part of the public estate, is an essential component of the change we need to see.

Overall, the Welsh Government spends more than £3 billion a year on infrastructure, although a lot of that is delivered through other public bodies. My recent review of how the Government is managing that significant spend shows clear effort to align it with wider strategic outcomes.

But these benefits will not magically materialise. It will need a concerted effort to line up the machinery of government – baking these benefits into plans from the outset and ensuring they are delivered over the longer-term. These issues are within the Welsh Government's gift to put right but rely on a sustained improvement in programme and project management that has not been achieved to date.

The underlying weaknesses in some of these basic building blocks of our public service contributes to the second area where I believe change is required, namely productivity and value for money in the public sector.

Productivity and value for money

In the face of rising demand pressure and ever-more stretched budgets, improving productivity and delivering better value for money is essential.

Our work points to some of the productivity challenges for the public sector, especially in the NHS where outputs in terms of activity have not increased in proportion to additional inputs in terms of money and capacity in areas such planned care.

I am sure that leaders across the public sector share an ambition to make a step change in productivity. There's enough evidence from the positive examples we have found in our work to be confident that significant amounts of public money can be

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freed up. But it will take a disciplined, focused, cross-government approach over several years to fully realise the potential and make the exceptional the norm.

Hence, my reports consistently highlight that VFM is not just about spending less, it is about making the money we do have work better. A good example is the number of people who are in hospital awaiting discharge. While there has been some recent improvement, the picture across Wales remains challenged, absorbing huge costs and adversely affecting patient flow and the optimal rehabilitation of patients.

Many discharge delays are a result of waiting for social care support, often linked to funding and resource pressures in local authorities. Better funding to increase social care capacity would therefore free up significant NHS resource and represent a cost-effective way of improving patient experience and outcomes.

In a context of constrained budgets and rising demand, public bodies must focus on outcomes, not just outputs, and ensure that every pound spent contributes meaningfully to public well-being. At a very basic level, our work shows that too often public bodies lack reliable data with which to assess value for money and are unclear as to the outcomes they are looking to achieve.

My work on Active Travel, for instance, demonstrated how the Welsh Government itself is unclear about how assessment of its policy is to be achieved. As a result, significant sums had been invested without a robust means to assess its effectiveness and value for money.

And I have reported previously on how the Welsh Government had not done enough to ensure its investment in affordable housing contributes to wider policy objectives and to be able to tell a clear story on that front.

Many public organisations struggle to report on outcomes effectively. Performance tends to focus on outputs—such as the number of services delivered—without evaluating the difference those services make.

It is vital too that the public sector views value for money through the lens of the Well-being of Future Generations Act, which requires public bodies to consider long-term impacts, prevention, integration, collaboration, and involvement. As I have emphasised through my reporting on implementation of the Act, we cannot afford for public services to design solutions that do not meet people's needs, burden future generations with avoidable higher costs, or miss opportunities to deliver more with the same or less.

That much sharper and relentless focus on the delivery of value for money also requires a mindset shift to one focused on prevention and the longer term.

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Shifting to a long-term, preventative mindset

Public Health Wales has estimated that for every £1 invested in public health interventions, there is a return of £14. This includes reduced demand on hospitals, social care, housing, and emergency services.

But too often, public services operate in crisis mode, responding to immediate pressures rather than planning for the future. This short-termism is reinforced by annual budget cycles, reactive funding decisions, and political incentives that prioritise quick wins over sustainable outcomes.

The Well-being of Future Generations Act provides a legislative framework to do something different – to act for the long-term and to act preventatively by addressing the root causes of issues, rather than dealing with the symptoms.

However, I have highlighted recently some prime examples where public bodies have been struggling to make a meaningful shift towards prevention, as evidenced for example in my work on cancer services and on how councils are managing temporary accommodation demand. This is despite there being clear evidence that investment in prevention makes sense from a value for money perspective.

Though Wales has an overarching, legislative framework to drive a longer-term, preventative mindset, our work suggests it is not yet doing so.

One of the challenges with prevention is that benefits take time to materialise. This lag can make prevention politically and operationally difficult, especially in a climate of financial pressure. However, the long-term gains—in health, well-being, and cost savings—are substantial and well-evidenced.

The Welsh Government has a critical role in enabling prevention. This includes setting coherent policy frameworks, aligning funding mechanisms, and creating incentives for collaboration.

It must lead a shift towards long-term financial planning, integrated delivery models, and cross-sectoral working. This means breaking down silos and ensuring that prevention is a whole-of-government priority.

Prevention cannot be achieved through isolated programmes. It requires a more radical, whole-system change and joined-up working between a range of agencies such health, social care, housing, education, and the third sector, with aligned accountabilities and funding streams and shared outcomes. Prevention must be embedded not just in strategy documents, but in everyday decision-making,

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budgeting, and service design. Without this any policy aspirations around prevention risk becoming more rhetoric than reality.

Reducing complexity

As noted earlier, the current landscape of Welsh public services is characterised by a web of organisations, partnerships, and governance structures. The cumulative effect is a system that is fragmented and difficult to navigate.

While it is not for me to blueprint the alternative, I am clear on the need to simplify and avoid further complexity. If starting from a blank sheet of paper, we would surely not design the arrangements we currently have in place.

Reducing complexity is not about dismantling collaboration but about streamlining it. We need fewer, clearer structures with well-defined and sharper lines of accountability.

This is also not simply about rationalising the number of public bodies or making their collaboration with each other more effective. Reducing complexity and strengthening integration and collaboration applies just as much to the internal functioning of public organisations. These are expectations set by the Well-being of Future Generations Act where our work demonstrates much more needs to be done.

Citizen-centred design must underpin this simplification: services should be organised around the needs of people, not the convenience of institutions. This means engaging communities in shaping services, using plain language in communication, ensuring that performance information is meaningful and accessible, and considering the equality and other impacts of decisions. It also means being honest with the public about what constitutes safe and affordable public service provision, especially in relation to health and care services.

A simpler, more streamlined public service in Wales would also help breakdown silos within and between sectors and support better sharing and embedding of good practice. The latter is something that Wales seems to struggle with and all too often my work points to unexplained and often unacceptable variation in performance across different public bodies. This is despite our relatively small size and the close connections of many in the public sector. When good practice is established in part of the public sector, a more robust approach to 'adopt or justify' elsewhere may be required.

As Auditor General I see complexity manifested in other ways, including through our annual audit of the accounts of public sector bodies. A dry topic to some, this work is

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essential if the public and the Senedd are to have an accurate and timely picture of the state of the public finances. For individual organisations, that accuracy and timeliness are essential if good decisions are to be taken.

For our local authorities, for example, the financial regime in which they operate is becoming increasingly technical with disproportionate emphasis on things like asset valuations and pension liabilities. Important, but obscuring what truly matters to users – councillors, officers, the public – namely, how public money is spent and the value it delivers.

I see some particular challenges emerging in this area which, if not addressed, will quickly weaken the overall financial regime and lead to poor decision making and a reduction in transparency.

Leadership

Addressing the areas I have mentioned will require political and executive leadership.

That means being honest about the scale of change required, making difficult decisions, and communicating clearly the necessary trade-offs. It also means modelling the behaviours we want to see: integrity, collaboration, and a relentless focus on outcomes.

The Welsh Government has a pivotal role to play in enabling this transformation. It is our system leader, sets the tone, and provides the legislative and financial frameworks within which other public bodies operate. While the Welsh Government does much that is good, too often I find myself reporting that it needs to be clearer and firmer in its system leadership.

My work has also highlighted examples where the Welsh Government can do more to support implementation of legislation it has introduced and follow up on whether it is being implemented effectively and having the desired impact.

It must provide clarity and coherence across policies, funding, and accountability frameworks. Mixed messages – such as promoting prevention while incentivising short-term performance targets – undermine progress.

This has been my central message in much of the work we have done around the Well-being of Future Generations Act. So that, for example, the expectation on organisations to plan and act for the long term and with prevention in mind, is not undermined by funding decisions, target setting, and accountability frameworks that incentivise the opposite.

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I recognise the intense pressures faced by public sector leaders. These are difficult jobs. It is testament to them that our work often highlights examples of good practice where leaders have taken bold decisions in difficult circumstances.

But as noted already, my work on governance and transparency has also shone a light on the small number of cases where leadership fails to uphold the desired values. The result can be costly, public confidence erodes and service effectiveness suffers.

The challenges facing Welsh public services are complex and systemic. They cannot be solved by technical fixes or incremental change. They require bold decisions, honest conversations, and a shared commitment to doing what is needed.

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Conclusion

Despite the significant challenges facing public services, there is potential for meaningful reform and improvement, especially if the themes I have described are sincerely addressed.

Wales is a small, tightly networked country; a population of just over three million people; a newly expanded legislative parliament and a government with significant autonomy; its public spending budget of nearly £30 billion represents almost one third of Welsh GDP; and despite challenges its public sector is highly capable and well-resourced compared to many countries.

One of our advantages is our scale. We are big enough to act strategically but small enough to be agile, collaborative and innovative. We can convene the key players on any issue, enabling us to act swiftly and cohesively in a way that is much harder in larger jurisdictions. That is a great base to work from.

The expansion of the Senedd to 96 members marks a further significant milestone in Welsh democracy. The public sector will rightly look to that new Senedd and Welsh Government for leadership in tackling the challenges I have outlined.

I very much hope that the larger legislature uses its additional capacity to improve scrutiny and accountability, and thereby to strengthen evidence-led policymaking. If not, a hard-won constitutional change will have been wasted.

As it does so, the message I would leave after eight years in the role of Auditor General is that radical transformation is needed.

It is possible, but difficult, and will require a clarity of purpose on the scale of that seen during the Covid years.

Public service leaders across Wales recognise the scale of the challenge and many are already navigating complex environments with limited resources. But the pace and progress need to be increased.

If not, our current model of public service delivery is not sustainable. Money will become even more thinly spread, services will continue to deteriorate, and outcomes will worsen. There must be a shift from short-term firefighting to long-term futureproofing, as I have called for consistently.

The Welsh Government has a critical role in providing leadership and in creating the conditions for transformation. This includes reducing funding uncertainty where possible, aligning policy and delivery frameworks, incentivising collaboration and

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encouraging investment in prevention. It must also lead by example, embedding the sustainable development principle in its own operations and ensuring that its actions match its policy intent.

And even then, success will hinge on individuals making the right choices. Funding, process, frameworks and policies are important, and of course the work of auditors, regulators, politicians, and the media are essential in holding public organisations accountable. But those scrutineers should not, and cannot, be everywhere. Ultimately, our public services rely on thousands of people making the right choices, taking the right decisions, and acting in the right way.

The challenge for government and organisational leaders throughout the public sector is to make that as easy as possible – to lead by example, to role model desired behaviours, to give clarity about the scale of challenge and permission to make the changes required, and to create an environment in which all those in public service can play their part.

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Agenda Item 7

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