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Ysgrifennydd y Cabinet dros Addysg
Cabinet Secretary for Education



Llywodraeth Cymru
Welsh Government

Our ref: MA/LN/2290/25

Buffy Williams MS
Chair – Children, Young People and Education Committee

16 December 2025

Dear Buffy

Thank you for the discussion at the 2026-27 draft budget evidence session on 27 November. Please find enclosed further information on the areas requested by the Committee at the meeting.

Technical note on change to the Welsh in Education Budget Expenditure Line (BEL)

There has been a decrease of £2.426m to the Welsh in Education BEL for 2026-27, with the budget reducing from £6.417m to £3.991m in 2026-27. This does not represent a cut in funding for Welsh in education - it is a purely administrative transfer of Adnodd's funding within this BEL to the Curriculum and Assessment BEL within the Education MEG, following a change in the sponsorship management role for Adnodd from 1 April 2025. The same transfer was actioned in the First Supplementary Budget 2025-26 for this financial year.

With Adnodd now fully operational and relationships across the Education Directorate embedded, we have agreed the transfer of this budget to reflect the ongoing relationship with Adnodd.

Along with other funding within the Curriculum and Assessment BEL for Adnodd, it takes the total funding for Adnodd to over £4m in 2026-27 to continue its work in commissioning high quality bilingual resources in support of the Curriculum for Wales. In its short time of operation, Adnodd has expanded access to bilingual educational resources, supporting the curriculum and Made-for-Wales qualifications.

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

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

Learner participation and outcome data in the Seren programme

In March 2026, an end-of-financial-year report will assess Seren's progress toward the intended outcomes outlined in its theory of change. This report will establish a benchmark for reviewing the effectiveness of the newly implemented delivery team, the school and college support package, revised learner identification guidelines, and the support programme for individuals commencing degree apprenticeships during 2026-27.

Monthly progress reports will present data on engagement levels among various learner groups and geographic regions, facilitating the identification of gaps or areas with reduced participation. This information will support the team in refining engagement strategies where needed. Additionally, the reports will offer insights into the effectiveness of interventions within the delivery programme, ensuring optimal value for money.

The benchmark report will be sent to the CYPE Committee in April 2026, and the subsequent progress reports will be sent in line with the committee meeting schedule. I am including at annex 1, the November 2025 progress report for stage 3 (Year 12 and 13).

An independent review of the Seren Academy has been initiated. This evaluation will examine Seren's progress since the previous assessment in 2018 and will assess whether the interventions implemented under the new 2023 operational strategy are achieving the aims set out in Seren's Theory of Change. The results will provide definitive insights into effective and ineffective strategies, informing enhancements to future programmes and contributing to the refinement of future reporting processes under the new delivery model.

Wider pressures facing the higher education sector

The key contributory factors to the present challenges facing universities are:

- Declines in international student numbers. Following a significant boom in international student numbers across the UK in the immediate post-pandemic period, international student numbers declined significantly in 2024 after new UK Government visa restrictions were introduced.
- Intensifying market competition for domestic students. As UK-wide international student numbers have declined, there is increasing competition for domestic students. Prestigious and higher-tariff universities have significantly increased their home student enrolments in the past two years, which has squeezed other parts of the sector, including several universities in Wales.
- Prolonged impact of Brexit. Welsh universities were significant recipients of EU structural and investment funding, particularly for research and innovation, and the final strands of this funding only fell away from 2023 onwards. The Higher Education Statistics Agency (HESA) data shows Welsh universities saw a drop in EU research funding contracts of £33m in 2023/24.
- Increasing costs, including employers National Insurance Contributions, and Teachers Pensions Scheme costs for post-92 institutions. Unlike other parts of the education sector, neither the UK Government nor the Welsh Government has been able to provide additional funding to cover these costs.

- Although tuition fees are now increasing with inflation, this has followed a decade of real-terms decline. Whilst Welsh Government funding via Medr is only approximately 10% of the sector's total turnover, we recognise that it has declined in real terms in recent years.

Revenue savings for net-zero carbon schools

New schools being designed since January 2022 have been mandated as being Net Zero Carbon in Operation (NZCiO) meaning that the energy, and therefore carbon used, in the school over a year is offset by renewable energy preferably generated on site. Carbon used to build the school called embodied carbon is also measured and currently has a target of 600KgCO₂/m². Our first NZCiO school, South Point Primary, in the Vale of Glamorgan achieved this goal with photovoltaic array and battery storage giving a positive overall position, feeding in the excess to the national grid.

Projects like Pen y Dre High School in Merthyr and Mynydd Isa Campus in Flintshire are designed to generate as much energy as they consume, significantly reducing operational energy costs. While exact annual savings figures for these NZC schools aren't published yet, the expectation is near elimination of energy bills, plus potential revenue from exporting surplus electricity to the grid or local facilities. In the case of Pen y Dre, a private connection to the Prince Charles Hospital will see all excess energy generated at the school used in the local community benefiting the school and the hospital.

Refurbishment and decarbonisation of existing school buildings also benefit from reduced energy costs. Welsh schools implementing energy efficiency and NZC measures have achieved substantial reductions in energy bills:

Since 2009, projects supported by Salix Finance in Wales saved £25.8 million on energy bills over their lifetimes, equating to £1.3 million annually across participating schools. [salixfinance.co.uk]

Savings from introducing advanced energy management tools or building management systems typically achieve a 10% reduction which would equate to between £5,000 per annum to approximately £15,000 per annum dependant on the school size. Further interventions can increase this saving to the region of 40%. For a large secondary school this could be as much as £60,000. [energysparks.uk]

Evaluation of the Taith programme

An [Interim Stage Evaluation of the Taith programme was published in June 2025](#), the second of a three-stage evaluation of the Taith programme. The key aim of the interim evaluation was to review performance to date and inform the ongoing delivery of Taith and future investments/policy development in this area.

The evidence discussed in this report shows that Taith has performed well to date with high levels of satisfaction from each stakeholder group and good progress against output targets. Stakeholders have been particularly impressed by the pace of delivery and the scale of progress in such a short space of time. Perhaps the main achievement is the programme's success in securing engagement from key target groups, specifically underrepresented individuals and non-traditional organisations.

This has been crucial in ensuring that Taith has targeted the support at those who would not be able to benefit from international exchange opportunities otherwise. This success reflects several strengths: innovative programme design, a strategic focus on underrepresented groups, and strong, personalised support from the delivery team.

The programme has achieved Good to Excellent value for money across most of the indicators established. Indicators of Equity were particularly strong, with six out of eight rated as excellent, including proportions of underrepresented and disadvantaged individuals engaged in Taith.

Wavehill make a series of recommendations that are designed to support ongoing delivery. The recommendations vary between some that can be implemented by Taith's delivery team and some that would require action from Welsh Government as the programme's funder. Welsh Government Officials will work with the Taith Executive team to develop an action plan for implementing the recommendations.

The final stage of the independent evaluation of Taith is expected to be published by 31 December 2027.

In addition, the final evaluation of third phase of Global Wales is expected to be finalised in December 2025. Delivered by Universities Wales and funded by Welsh Government via Taith, it built on two previous phases, the first of which was launched in 2015. Wavehill was commissioned in January 2025 to conduct the final evaluation of Global Wales III grant program. The Executive Summary of that evaluation will be published on Taith's website in line with Taith's commitment to transparency.

I trust these responses provide further clarity on the questions raised by the Committee. We look forward to receiving the Committee's report ahead of Final Budget 2026-27.

Yours sincerely



Lynne Neagle MS

Ysgrifennydd y Cabinet dros Addysg
Cabinet Secretary for Education



Vikki Howells MS

Y Gweinidog Addysg Bellach ac Uwch
Minister for Further and Higher Education

SEREN ACADEMY NOVEMBER SUMMARY



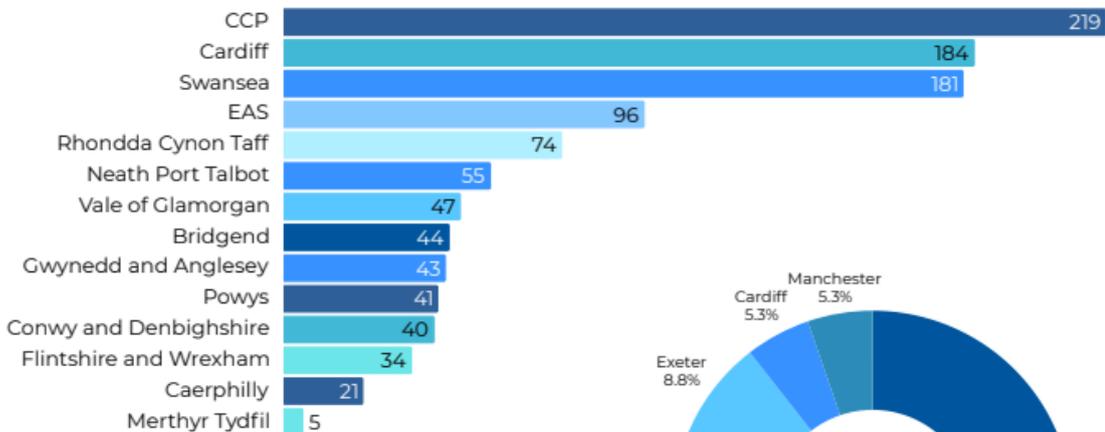
November was a busy month for Seren learners in Stage 3, with highlights including year 12s participating in the Autumn Academic Challenge Masterclasses and year 13s in the Mentoring Programme preparing for interviews at leading universities.

Autumn Academic Challenge Masterclasses

This year's Autumn Academic Challenge consisted of **35 academic sessions** delivered over two weeks, attended by learners from across **all 14 hubs**. There were **18 STEM** and **17 Humanities** sessions. Furthermore, **7 Welsh medium** sessions were delivered. Attendance increased significantly from 2024:

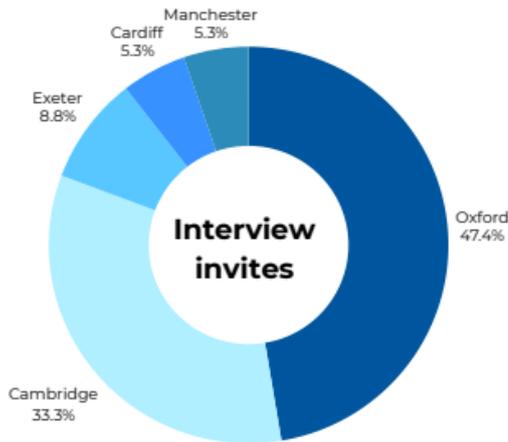


Number of learners in attendance per hub:



Mentoring Programme 2025

All **410 learners** that registered for the 2025 Mentoring Programme were matched with a mentor. 73% of matches have had at least one mentoring session, an increase from 42% in 2024. So far, mentor-mentee pairings have completed **645 sessions** this year, with many more interview prep sessions scheduled for the coming weeks.



60+ learners on the Mentoring Programme have been invited to an interview at a leading university so far.