

CYMRAEG



Llywodraeth Cymru
Welsh Government

Cymraeg 2050: A million Welsh speakers

Annual report 2017-18

Cymraeg 2050: A million Welsh speakers, Annual report 2017-18

Audience

Welsh Government departments; public bodies in Wales; third sector organisations in Wales; private sector companies in Wales; education institutions in Wales; organisations working to promote the use of Welsh; organisations working with families, children and young people, and communities; and other interested parties.

Overview

In order to fulfil the requirements of the Government of Wales Act 2006, *Cymraeg 2050: A million Welsh speakers* was launched in July 2017, when the previous strategy came to an end.

The Government of Wales Act 2006 requires an annual report to be published to monitor progress against the Welsh Language Strategy.

Further information

Enquiries about this document should be directed to:

Welsh Language Division

Welsh Government

Cathays Park

Cardiff

CF10 3NQ

e-mail: UnedIaithGymraegWelshLanguageUnit@gov.wales

 [@Cymraeg](https://twitter.com/Cymraeg)

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This document is available on the Welsh Government website at www.gov.wales/welshlanguage

Related documents

Welsh Language (Wales) Measure 2011; *Cymraeg 2050: A million Welsh speakers* (2017); *Cymraeg 2050: A million Welsh speakers, Work programme 2017-21* (2017); *Technical report: Projection and trajectory for the number of Welsh speakers aged three and over, 2011 to 2050* (2017); *Welsh in education: Action plan 2017-21* (2017)

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Ministerial Foreword

It is a pleasure to publish this report on our first year of implementation under the [Cymraeg 2050 – a million Welsh speakers](#) strategy.

The strategy's vision is an ambitious one, and means that this is a very exciting time for the Welsh language, and the beginning of a very busy period as we expand upon existing policies, and develop new plans and procedures.

During my period as Minister with responsibility for the language, I have been pleased with the variety and breadth of the activity in this area, not only that which is led by the Welsh Government, but also by our partners, individuals and grass roots groups on their own initiative. Since the launch of *Cymraeg 2050*, important and ambitious work has taken place to lay the foundations, and the strategy is clear that we need to act in several areas to increase the number of speakers, increase the use of the language, and put the infrastructure in place to facilitate that.

The challenge in relation to education is evident – to increase the number of young children who begin their journey in Welsh-medium education, improve the infrastructure by increasing the number of teachers able to teach Welsh as a subject and teach other subjects through the medium of Welsh, and improve how we teach Welsh in English-medium schools. Because of the importance of education, therefore, one of the Welsh Government's priorities during the first year of *Cymraeg 2050* was to launch the document *Welsh in Education: Action Plan 2017-21* in December 2017.

This Action Plan for education sets the direction of travel as well as specific actions, and emphasises the need to improve the support available to children and young people who are learning Welsh. From preparing the new curriculum, to the education workforce's professional development, and changing the way we support learners with additional learning needs, ensuring that the Welsh language is at the heart of these developments is essential.

These developments in relation to education will be a way to build on the positive attitudes that exist towards the language, in order to increase the number of people who speak and use it. In this respect, it was interesting to note that the National Survey for Wales 2017-18 showed that 86% of people felt the language was something to be proud of, and 62% of those who didn't speak Welsh said they would like to speak it. This is a solid foundation on which to build for the future.

Unlike previous annual reports, in which the data was included as a series of tables in an appendix at the end of the document, we have taken a new approach in this document. You will see that relevant data and charts are included in the document itself, so that readers can see progress in context, with a narrative to explain the data.

The data shows the challenge that the Welsh Government faces in some areas, for instance in relation to increasing the number of teachers and ensuring that young people continue on their journey with the language after they leave compulsory

education. We acknowledge these challenges in the report. Steps are being taken in these areas, and we will expand upon these in the next report for 2018-19.

During these early years of the strategy, the emphasis is on laying the foundations. Our aim is to take key strategic steps now that will enable us to see progress over the long term.

Eluned Morgan AM
Minister for International Relations and the Welsh Language

Background: Transition between two strategies

A living language: A language for living 2012-17 - wrapping up the strategy

A living language: A language for living was the Welsh Government's Welsh language strategy between April 2012 and the end of March 2017. As officials refined and prepared *Cymraeg 2050*, the strategy that followed, *A living language: A language for living* was extended for an additional 3 months until July 2017. The period covered by this report therefore includes 3 months of implementation under that previous strategy.

The actions that had not already run their course under *A living language: A language for living* continue under *Cymraeg 2050*, and these are reported on under the 3 themes set out in the new strategy.

These activities establish a firm foundation and, alongside the ambitious new action points we are taking forward in a variety of policy areas, help to set the course towards a million Welsh speakers.

Cymraeg 2050

The *Cymraeg 2050* strategy was launched in July 2017. It sets out the Welsh Government's long-term approach to reach the target of a million Welsh speakers by 2050. This commitment was also included in *Taking Wales Forward 2016–2021*, the Programme for Government.

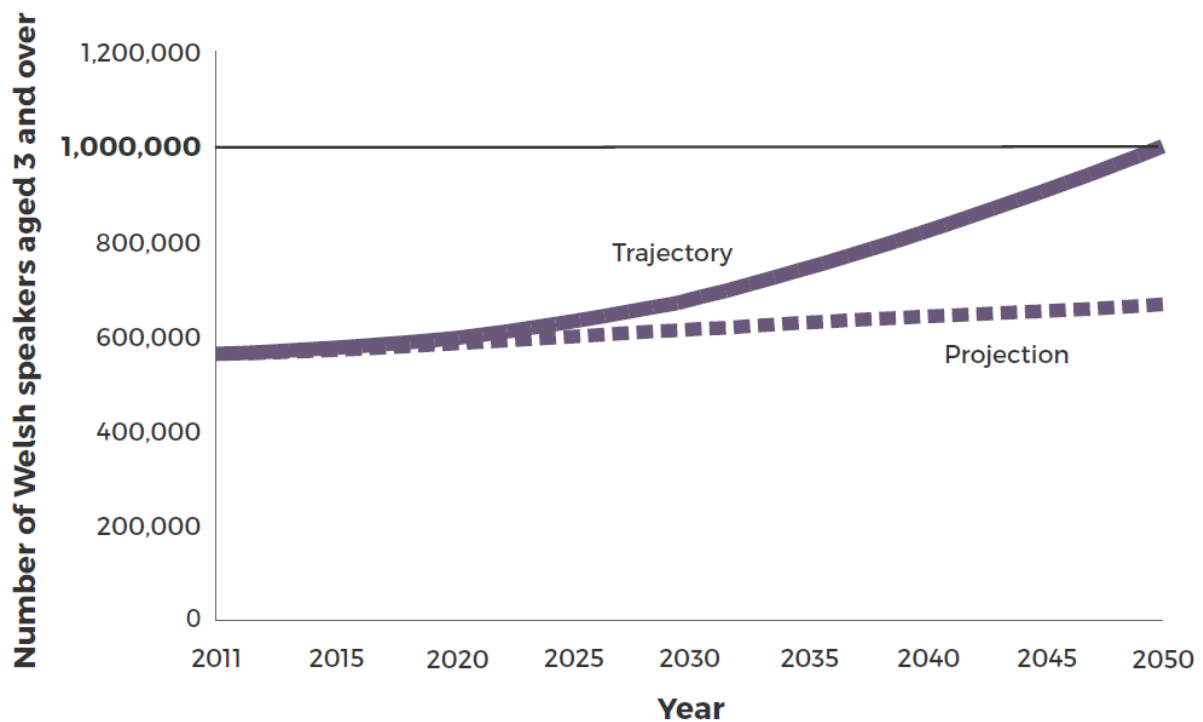
In order to realise this vision, we have three strategic themes:

- Theme 1: Increasing the number of Welsh speakers
- Theme 2: Increasing the use of the Welsh language
- Theme 3: Creating favourable conditions – infrastructure and context

This report follows these themes in order.

We have stated that the initial years will focus on establishing firm foundations in a number of areas, in order to put the necessary elements in place to allow an increase in the number of Welsh speakers and the use of the Welsh language over time. The chart below shows a projection and a trajectory for the number of Welsh speakers aged three and over between 2011 and 2050.

Chart 1: Projection and trajectory for the number of Welsh speakers



The bottom line offers a projection of the number of Welsh speakers, based on population projections and 2011 Census data. The projection is based on a scenario whereby the policy context for the Welsh language and Welsh in education had remained as it was before the launch of *Cymraeg 2050*.

The top line of the graph shows one possible trajectory for the increase towards a million speakers, based on *Cymraeg 2050* policy objectives. As seen in the graph, a small amount of progress is envisaged during the first years of the strategy, with greater progress becoming apparent towards the end of the first decade after the launch of the strategy.

Using this trajectory and the assumptions on which it is based, milestones were set for the journey towards a million Welsh speakers. For the first phase, the milestones to show that we are on track will be:

- a small increase in language transmission rates in families by the 2021 Census, continuing the trend seen between 2001 and 2011
- an increase in the percentage of learners in Welsh-medium education, from 22 per cent (based on 7,700 seven-year-old learners in 2015/16) to 24 per cent (around 8,400) by 2021, in order to be on course to reach 30 per cent (around 10,500 in each age group) by 2031, and then 40 per cent (around 14,000 in each age group) by 2050.

During the first years of implementing the strategy, much of our focus is therefore on advancing these two areas of work between now and 2021 in order to strengthen the foundations for the future.

To facilitate an increase in Welsh-medium education we have set the following aims:

- to aim to support the expansion of Welsh language early years by 40 new nursery groups by 2021
- to support growth in the number of teachers in Wales who can teach Welsh or teach through the medium of Welsh by 2021 as follows:
 - 3,100 primary teachers who can teach through the medium of Welsh (from a baseline of 2,900 in 2015/16)
 - 600 secondary teachers who can teach Welsh (from a baseline of 500 in 2015/16)
 - 2,200 secondary teachers who can teach through the medium of Welsh (from a baseline of 1,800 in 2015/16).

We will also keep a close eye on indicators of language use associated with the target of increasing daily use from 10 per cent of the population to 20 per cent in 2050. Our first milestone will be to increase the target from 10 per cent to 11 per cent by 2021.

The report below sets out our activities to implement the strategy during the 2017-18 financial year, and notes our progress where there are appropriate figures¹.

¹ In this report, you will notice that some elements have changed since previous reports in relation to *A living language: A language for living*. For example, some datasets have been omitted in order to focus on the new strategy's high level objectives. That information (e.g. activity in relation to the Language Initiatives, the Urdd, the National Eisteddfod, S4C, DVLA, Welsh Books Council) is still available on relevant websites.

THEME 1: Increasing the number of Welsh speakers

Perhaps the most significant development during the reporting period was the work to finalise the new *Cymraeg 2050* strategy itself, which was published in July 2017. This document will set the direction of travel in this area for years to come. It now needs to be implemented, establishing the foundation for progress over time. This is a long-term project, but it has been taken forward immediately in accordance with the strategy and Work Programme.

In accordance with the strategy, the aim of achieving a million speakers means developing further the methods which are most likely to lead to the necessary increase. There are two main methods of creating Welsh speakers: transmitting the Welsh language from one generation to the next, and developing and maintaining skills through education and training.

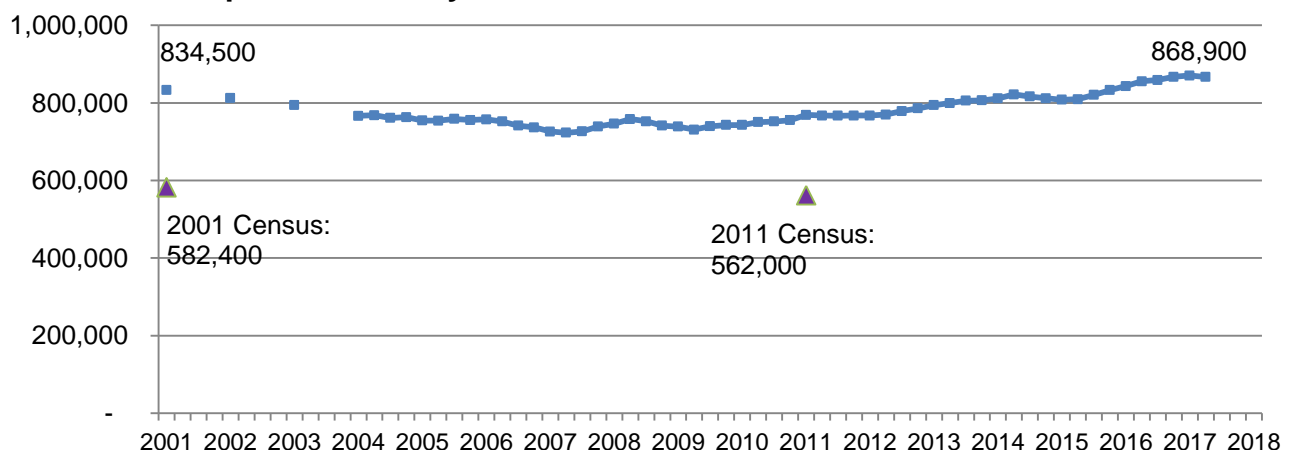
The strategy recognises the key contribution of language transmission in the home to the vitality of the Welsh language. It also recognises that the contribution of Welsh speakers who acquire the language outside the home is vital to the success of the strategy. That being so, creating the right conditions for new learners of all ages to be able to develop and use their skills is essential – from the early years, through every stage of compulsory education and post-16 provision, to opportunities for adults to learn Welsh.

In the strategy, we mention how the concept of *mudes*, or ‘adaptations to language behaviour’ at key points, provides a useful basis for understanding how people develop their language skills and practices over their lifetime. The strategy, therefore, emphasises the life-course approach, and taking specific action at crucial points in an individual's linguistic journey.

The current situation - how many people can speak Welsh?

The Census is the source used to monitor progress towards our target of a million Welsh speakers. But as the Census is only held every 10 years, the Annual Population Survey is used to gain more regular figures in terms of the number of Welsh speakers. Traditionally, however, the estimates produced by this survey have been far higher than Census estimates - see the chart below:

Chart 2: Number of people aged 3 and over able to speak Welsh according to the Annual Population Survey and Census



Although the Annual Population Survey figures tend to be far higher than Census figures, they are useful for seeing patterns or trends in the number of Welsh speakers.

According to the Annual Population Survey, 868,900 people aged 3 and over were able to speak Welsh in the year ending 31 March 2018. Although the Annual Survey figures vary a little from year to year, the emerging trend is that the numbers seem to have been increasing gradually since 2008.

Language transmission in the family

Following the publication of the research study on *Welsh Language Transmission and Use in Families* in June 2017, a series of workshops was held with relevant stakeholders during 2017-18. The findings of the workshops and research will form the basis of a language transmission policy, to be published during 2019-20.

In order to improve provision in this area, a contract was awarded to conduct an independent evaluation of the Welsh for Children programme in March 2018, with the aim of revising and refining the programme, and ensuring adequate support and information is available to parents and carers who wish to introduce Welsh at home. This evaluation will be completed during the 2019-20 financial year, and the findings and recommendations will feed into the future planning of Welsh for Children provision from April 2019.

As beginning language transmission as early as possible is an important part of *Cymraeg 2050*, the Welsh for Children programme also continues to work alongside the National Health Service (NHS) nationally and locally in order to share key messages with parents and prospective parents. During 2017-18, Welsh for Children messages continued to be included in scan cards, maternity folders and Personal Child Health Records (the 'Red Book') provided to all families in Wales through the NHS.

In order to reach a million Welsh speakers, *Cymraeg 2050* states that the small increase in language transmission rates seen between the 2001 and 2011 Censuses needs to continue by 2021. The Census is the main source of information for language transmission in the home.

The early years

As there is a limit to the additional number of Welsh speakers that can be produced by language transmission from one generation to the next, ensuring Welsh-medium education is available from the early years onwards is essential in order to reach the target of a million Welsh speakers.

The aim is to expand Welsh-medium provision in the early years as an access point to Welsh-medium education. This includes supporting the work of expanding Welsh-medium early years provision by creating 40 new Welsh-medium nursery groups by 2021, in order to reach a figure of 150 more nursery groups by 2026-27.

Preparatory work was done by Mudiad Meithrin during 2017-18 to identify priority areas for establishing new Cylchoedd Meithrin (i.e. Welsh language nursery groups run by Mudiad Meithrin) from April 2018. Information about our progress against this target will be provided in the next annual report.

Furthermore, the Childcare Offer was trialled in parts of seven local authorities from September 2017. Parental choices in terms of the language of childcare within the Childcare Offer were monitored in order to gain a better understanding of the demand for Welsh-medium provision and how families wish to make use of these services. This information was fed into the development of the Offer as it was expanded to new areas.

Mudiad Meithrin provided a broad range of support to its members and held the 'Academi' training programme for staff and volunteers in locations across Wales. Mudiad Meithrin gathered additional data from its members in order to improve our understanding of the connection between the provision of childcare and education. This additional information was shared with local authorities in order to enrich the data for developing Welsh in Education Strategic Plans (WESPs).

As part of the Cwlwm work programme, a consortium of five prominent childcare bodies in Wales, support was provided for locations across the childcare sector so that they could take part in the Childcare Offer during 2017-18. Cwlwm members have also been considering methods of co-operating to strengthen childcare provision, including Welsh-medium and bilingual provision across Wales.

The National Centre for Learning Welsh also worked closely with Cwlwm members during the year to gain a better understanding of the current workforce's Welsh skills. The Welsh skills of 600 childcare practitioners across the sector were assessed during 2017-18, and the results of these assessments were used to plan the Centre's offer in relation to the childcare sector.

Statutory education

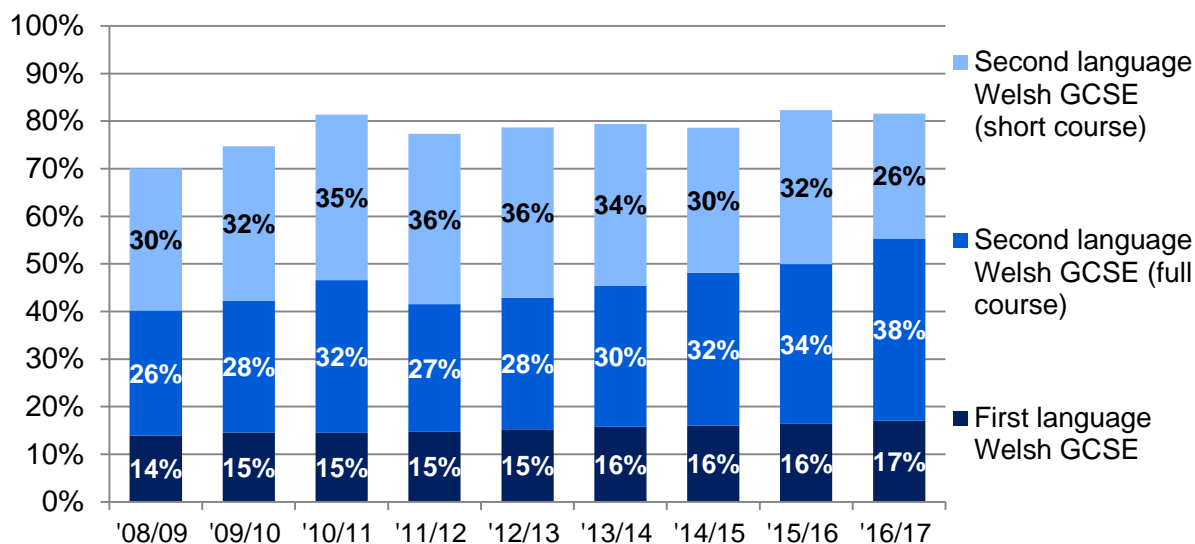
Based on research and evidence, and following a period of discussion and development in partnership with key stakeholders, in December 2017 the [Welsh in Education: Action plan 2017-21](#) was published, a national policy for the teaching and learning of Welsh in our statutory education system. The plan describes how the education system will contribute to our aim of increasing the number of confident Welsh speakers.

The *Cymraeg 2050* strategy sets targets for education, and the *Welsh in Education: Action Plan 2017-21* uses indicators to monitor our progress against those targets. This section reports on our progress against both the targets and indicators.

One of the main targets in *Cymraeg 2050* was to see an increase in the percentage of learners leaving school able to speak Welsh, with a target of 70% of children leaving school able to speak Welsh by 2050. According to the 2011 Census, 33% of 16-17-year-olds were able to speak Welsh - this is therefore our baseline.

In order to monitor more consistently the percentage able to speak Welsh, we use the percentage of Year 11 learners assessed in Welsh (first language and second language).

Chart 3: Percentage of Year 11 learners assessed in Welsh (first language and second language)



The chart shows an increase in the percentage of children sitting a first language and second language (full course) Welsh GCSE since 2008/09. The percentage sitting the second language short course over the last five years has dropped (the short course was discontinued in September 2017), but on the whole the percentages sitting a Welsh GCSE have increased slightly since 2008/09.

Welsh within the new curriculum

The development of a new Welsh curriculum that will inspire future learners to learn and use Welsh is essential in realising our vision for children and young people in Wales. Welsh is included in the Languages, Literacy and Communication Area of Learning and Experience within the new curriculum, which will be introduced from 2022. As with each part of the new curriculum, the Languages, Literacy and Communication Area of Learning is developed by teachers and specialists through a network of Pioneer Schools. During 2017-18, the pioneer schools involved in developing this Area of Learning and Experience focussed on planning a strategic framework.

Welsh in Education Strategic Plans

To further develop strategic planning in the area, Aled Roberts was appointed in February 2018 to establish and chair an independent Advisory Board to look at Welsh education planning processes. Aled Roberts had already held a Rapid Review of the Welsh in Education Strategic Plans (WESPs) in 2017, and the Board is using the recommendations of that Review to inform discussions. The Board members were appointed and the first meeting held on 17 May 2018, with the aim of meeting every 4-6 weeks until March 2019.

One of the Advisory Board's priorities is to review the existing legislation which underpins the planning of Welsh education. In conjunction with the Welsh Government's legislation branch, a timetable was agreed to reform the *Welsh in Education Strategic Plans and Assessing Demand for Welsh Medium Education (Wales) Regulations 2013*.

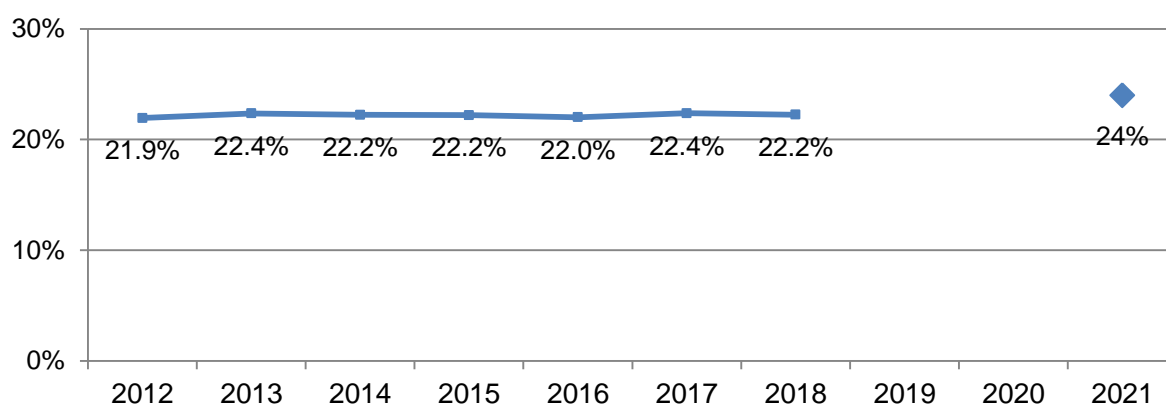
Capital funding

To help create the demand for Welsh-medium education, in January 2018 funding of £30 million was announced for capital projects to support and increase places for children and young people in Welsh-medium education. This is in addition to the allocation which was announced for Band B of the 21st Century Schools and Education Programme. The funding was allocated at a rate of 100%, with the aim of boosting developments that would not have otherwise been possible, as we are eager to ensure rapid and meaningful growth in the Welsh-medium sector.

Proportion of learners in Welsh-medium education

One of the *Cymraeg 2050* targets was to increase the proportion of learners in Welsh-medium education from 22% of seven-year-old learners in 2015/16 to 24% by 2021, in order to be on course to reach 40% by 2050. Chart 4 shows our progress against this target.

Chart 4: Percentage of Year 2 learners (7 years old) in Welsh-medium education per academic year

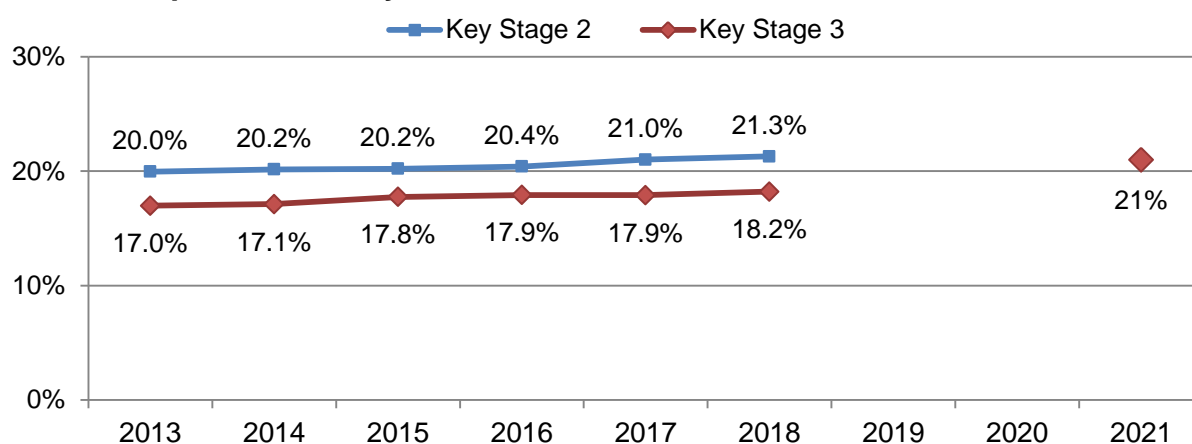


The chart shows that 22.2% of seven-year-old learners were in Welsh-medium education during the 2017/18 academic year. This percentage has remained fairly consistently around the '22%' mark since 2011/12.

As stated above, the target is to increase the percentage of seven-year-olds in Welsh-medium education from 22% to 24% by 2021. The current reception class cohort (in the 2018/19 academic year) will be the seven-year-old cohort in 2021. We do not have data on how many learners in the current reception class cohort study Welsh as a first language, but data for the current Year 1 and Year 2 classes suggest the percentage will be around 23% by 2020. By the summer of 2019 we will be in a better position to report on whether we will be on course to meet the target of 24% by 2021.

The *Welsh in Education* action plan also states that we want to see learners continuing to improve their language skills as they transfer from primary school to secondary school. Chart 5 shows the percentage of learners at the end of key stage 2 (i.e. year 6, the last year of primary school, 11 years old) and the percentage of learners at the end of key stage 3 (i.e. year 9 of secondary school, 14 years old) assessed in Welsh (first language).

Chart 5: Percentage of learners at end of key stages 2 and 3 in Welsh-medium education per academic year



One of the targets in the *Welsh in Education* action plan was to increase the proportion of Year 9 learners assessed in Welsh (first language) from 17.9% in 2016/17 to 21% by 2021. Chart 5 shows that the percentage of learners in Welsh-medium education has increased slightly since 2013 for those at the end of key stages 2 and 3.

Chart 5 also shows the tendency for the percentage of learners in Welsh-medium education at the end of key stage 2 to be around 2 percentage points higher than at the end of key stage 3 three years later.

We are continuing to work and to strengthen our ties with each of our partners, such as local authorities, regional consortia, schools, early years providers and the post-16 sector, to improve the progression rate between each phase of education. Recommendations 1 and 3 of Aled Roberts' Rapid Review of WESPs relate to agreeing the most suitable and appropriate outcomes for the next round of WESPs.

In response to Aled Roberts' recommendations, the process of defining schools according to linguistic categories will be discussed and considered by the WESP Advisory Board.

In order to increase demand for Welsh-medium education, a national marketing campaign was developed through the Welsh for Children project. The aim of this campaign was to share support and information with parents about their choices and the advantages of Welsh in education, and digital content was created based on a variety of families who had been through the process.

In terms of providing more opportunities for learners to have Welsh-medium education through provision for latecomers, local authorities are required to describe in their WESP how they will increase late immersion opportunities for learners who

wish to have Welsh-medium education. The Government and local authorities will continue to work in partnership to improve the opportunities available to latecomers.

The *Welsh in Education: Action plan 2017-2021* states that we also wish to see more learners studying for qualifications through the medium of Welsh. Two targets have been set to monitor progress in this area:

- Increase the percentage of learners registered for the First Language Welsh GCSE who are registered for at least two other Level 1/2 qualifications through the medium of Welsh from 82.8% in 2015/16 to 86.0% by 2021
- Increase the percentage of learners registered for the First Language Welsh GCSE who are registered for at least five other Level 1/2 qualifications through the medium of Welsh from 57.6% in 2015/16 to 65.0% by 2021.

Chart 6 shows our progress in relation to the two targets above.

Chart 6: Percentage of learners registered for the First Language Welsh GCSE who are registered for at least two or five other Level 1/2 qualifications through the medium of Welsh

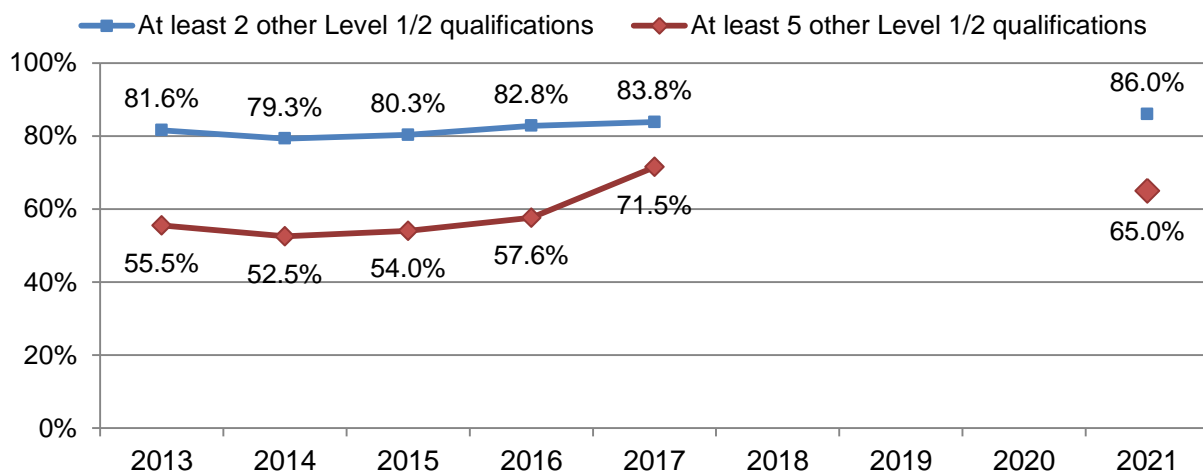


Chart 6 shows that 83.8% of learners registered for the First Language Welsh GCSE are also registered for at least two other qualifications through the medium of Welsh. The percentage has increased slightly since 2014 and appears to be on course to reach the target of 86.0% by 2021.

71.5% of learners registered for the First Language Welsh GCSE are also registered for at least five other qualifications through the medium of Welsh. This percentage has increased significantly since 2016, and appears to have reached the target of 65% by 2021.

Post-compulsory education

According to Census results, the number of Welsh speakers drops substantially after 16 years old. A range of complex social factors influence young people, including post-16 training and study opportunities, social activities (including social media), the language of the home and employment opportunities.

Given the increase in the number who say they are learning Welsh at school, and the role of the education system in reaching a million Welsh speakers, we must ensure these individuals continue to find opportunities to speak Welsh so that they continue to consider themselves Welsh speakers. Reducing this post-16 drop a little would help us reach a million speakers more quickly.

The Coleg Cymraeg Cenedlaethol's responsibilities have now been expanded to include the post-16 sector, in response to the recommendations of a task and finish group that reviewed the Coleg Cymraeg Cenedlaethol's activities during 2017. The task and finish group's report was published in December 2017, and the Coleg immediately began to implement the recommendations for the post-16 sector. An Advisory Group was formed with representatives from the further education and work-based learning sectors to advise the Coleg on producing an ambitious action plan. The intention is to develop the post-16 sector to increase provision, ensuring linguistic progression so that learners can continue with their education through the medium of Welsh and bilingually. As well as provision, continuing to maintain and develop learners' social skills in Welsh is very important. The Action Plan will be published before the end of 2018.

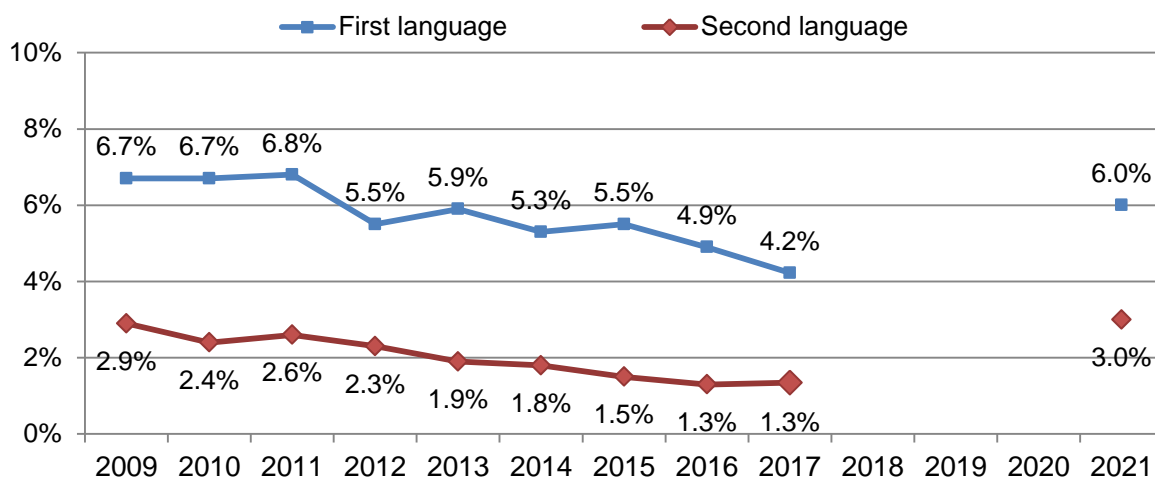
We want to see more students in post-16 education studying subjects through the medium of Welsh in schools, further education institutions, community learning and work-based learning settings.

The Welsh in Education action plan depends on an adequate supply of university graduates in Welsh, from a pool of learners who have studied Welsh at A-level. In order to increase the number of students with advanced language skills in Welsh, the following targets have been set:

- Increase the total number of A-Level First Language Welsh course enrolments as a percentage of the number of GCSE First Language Welsh course enrolments two years previously from 4.9% in 2015/16 to 6.0% by 2021
- Increase the total number of A-Level Second Language Welsh course enrolments as a percentage of the number of GCSE Second Language Welsh course enrolments two years previously from 1.3% in 2015/16 to 3% by 2021.

Chart 7 shows that the percentage of learners registering for first and second language Welsh A-levels has been decreasing consistently since 2009.

Chart 7: A-level Welsh course enrolments as a percentage of GCSE Welsh course enrolments two years previously - first and second language



By the 2017/18 academic year, 4.2% of learners registered for the first language Welsh GCSE had registered for the first language Welsh A-level. And 1.3% of learners registered for the second language Welsh GCSE were registered for the second language Welsh A-level.

Generally, it appears that the increase in the number sitting the Welsh GCSE (see Chart 6) does not transfer to the number following the Welsh A-Level.

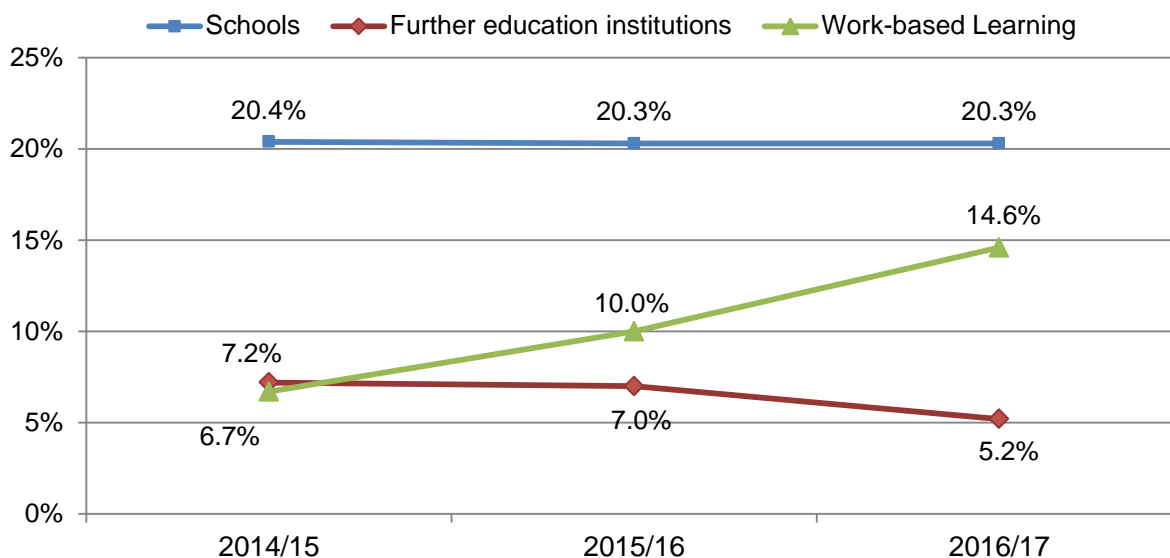
The Welsh in Education action plan contains a specific objective to address the challenge of increasing the numbers sitting the Welsh A-Level. A stakeholder group, including the Coleg Cymraeg Cenedlaethol, Qualifications Wales, WJEC, university Welsh departments, the Urdd, regional education consortia and teachers, has been established to take the work forward.

The Welsh language is not unique in this respect. A number of A-Level subjects have seen a reduction in students during recent years because of the increasing choice in subjects open to school students. This has affected the number following the English A-level course for example, as well as the Welsh equivalent.

In order to develop the Welsh-medium and bilingual provision in further education, we have continued to work with our partners to encourage an increase in the number of learners taking advantage of Welsh-medium and bilingual provision, monitoring the growth of that provision in conjunction with the Welsh Government's Post-16 Education Planning and Funding Branch. The Coleg Cymraeg Cenedlaethol's action plan will offer further direction and support to increase future provision.

Chart 8 shows the percentage of educational activities conducted in Welsh or bilingually according to the type of provider.

Chart 8: Percentage of educational activities conducted in Welsh or bilingually according to the type of provider



* Further analysis was undertaken to understand the reason for the decrease from 7.0% (2015/16) to 5.2%. Analysis showed that two FEIs had seen a large decrease in their learning activity data, namely Grwp Llandrillo Menai and Coleg Cambria. Both institutions revisited their data and identified that data had not been correctly inputted into the LA26 field (the LLWR field that records medium of delivery) during the year, and had not been properly scrutinised prior to finalising the data by the closing date. Grwp Llandrillo Menai also suggested that as more learners are re-sitting their GCSE English examinations this has slightly affected the overall percentage of Welsh-medium and bilingual learning activities. Further analysis showed that, had the two institutions recorded their data correctly and if it had been similar to the 2015/16 data, the overall further education learning activities for 2016/17 would have been 7.6%, a growth of 0.6 percentage points on the previous year.

The percentage of educational activities conducted in Welsh or bilingually in schools and further education institutions has remained fairly consistent over recent years. An increase of 4.6 percentage points can be seen in the Welsh and bilingual activities held in the form of work-based learning.

To ensure more of the learners following work-based learning programmes, apprenticeships and further education programmes are assessed through the medium of Welsh, we have continued to work with our partners to promote Welsh-medium and bilingual vocational training and education. As part of the Coleg Cymraeg Cenedlaethol's work and the direction which will be set by the Post-16 Planning Group, the apprenticeships sector will be an integral part of the action plan with the further education sector.

Higher Education

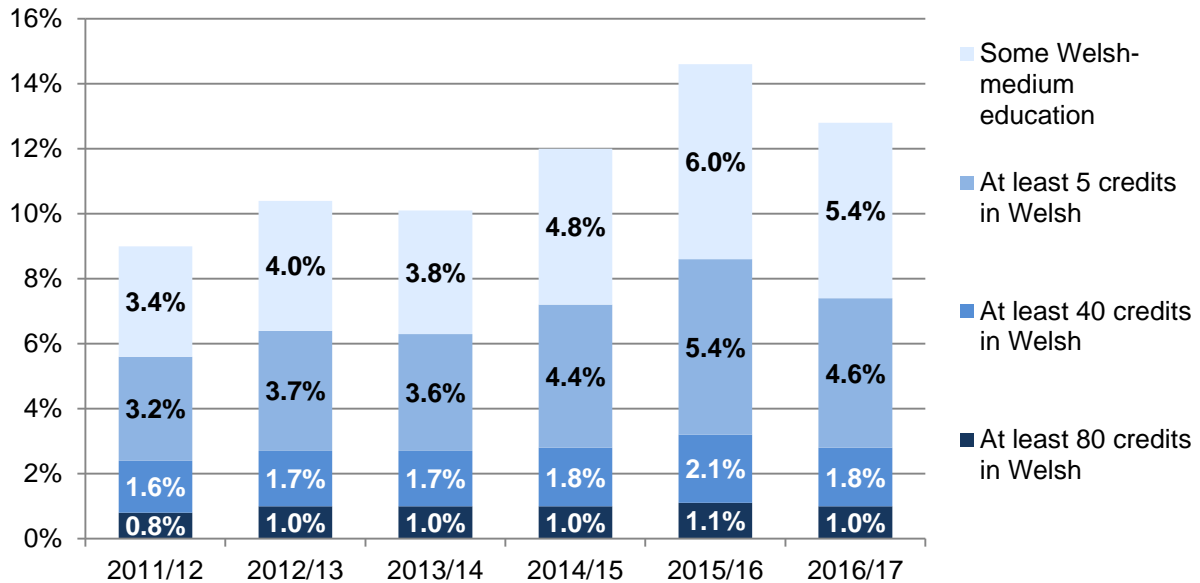
The Coleg Cymraeg Cenedlaethol is supported to develop the Welsh-medium higher education sector in partnership with the institutions themselves. The work is divided into three categories:

- increase Welsh-medium higher education provision, ensuring linguistic progression
- support core activities including academic planning, promotion of Welsh-medium higher education, and supporting research, along with development of the Welsh Language Skills certificate

- and the scholarship plan offering financial support to students completing some or all of their studies through the medium of Welsh.

Since the Coleg Cymraeg Cenedlaethol was established in 2011, the number of students registered in Welsh universities using at least some Welsh in their education has gradually increased over the years. The percentage taking at least 40 credits in Welsh has remained fairly stable. See Chart 9.

Chart 9: Percentage of students registered in Welsh universities using Welsh in their education²



Source: HESA student record (2017/18 data will be published in July 2019)

Welsh for Adults

The National Centre for Learning Welsh was created to provide strategic guidance to the Welsh for Adults sector, and its first year of operation was the 2016-17 academic year. One of the Centre's first tasks was to rationalise provision, and a new regime of 11 Welsh learning providers was established. *Gyda'n Gilydd*, a pioneering strategic plan that has led to significant changes, was also developed.

During 2017-18, a national curriculum was created for the first time, which forms the basis of a new national learning and teaching scheme. A pioneering digital platform was developed - learnwelsh.cymru - allowing learners to search for courses and register, use digital resources to support learning, learn online and receive information about opportunities to use the Welsh language. New plans were developed, including a national festival for learners, 'Ar Lafar', and a quality framework was introduced to encourage excellence in the sector.

In April 2017, a new programme was established called 'Work Welsh', to support Welsh learning in the community. The aim of the programme is to provide training

² The number of students studying some of their course or at least 5 credits in Welsh was lower in 2016/17 after one institution recorded a substantial increase in short courses in 2015/16 that did not continue due to a lack of resources.

and support for employers to enable them to provide services through the medium of Welsh. Over 3,000 employees from a range of public and private sector employers benefitted from the programme during 2017-18.

Further detail about the work of the Centre, including 'Work Welsh', is available in its most recent annual report - https://dysgucymraeg.cymru/media/3468/ffeinal-nclw-annual-report-2017-18_web.pdf

The education workforce, resources and qualifications

The early years workforce

In order to expand the Mudiad Meithrin national training scheme so that more individuals qualify to work through the medium of Welsh in the childcare sector, Mudiad Meithrin has continued to offer staff and volunteers opportunities to develop skills in a variety of areas through the 'Academi' programme. Mudiad Meithrin has also provided early years workers with the opportunity to gain a Level 3 Childcare Diploma through the medium of Welsh.

Teachers

To facilitate an increase in Welsh-medium education, *Cymraeg 2050* states that we will support growth in the number of teachers in Wales who can teach Welsh or through the medium of Welsh.

To this end, Aled Roberts recommended in his Rapid Review of Welsh in Education Strategic Plans that training and recruitment should be looked at (*Recommendation 13 - Urgent planning and action to increase the number of teachers trained to teach through the medium of Welsh*). The Welsh in Education action plan identifies a number of specific points to be implemented in order to address the challenge of increasing the number of Welsh-medium teachers. In addition, a number of reforms are being made in the initial teacher training area, and work is ongoing among officers in the appropriate education policy areas (e.g. in terms of developments with the Consortia, and teacher training and recruitment processes) to ensure the necessary progress by 2021.

Cymraeg 2050 states that we will increase the number of teachers in Wales who can teach through the medium of Welsh to 3,100 primary teachers and 2,800 secondary teachers by 2021.

Chart 10 shows our progress towards these targets by the 2017/18 academic year.

Chart 10: The number of teachers who can teach through the medium of Welsh

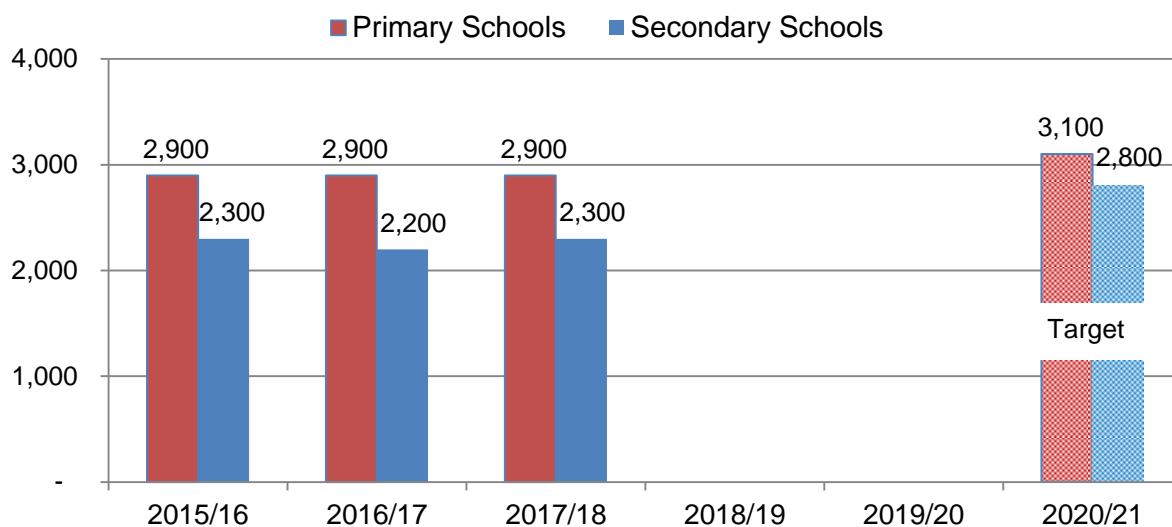


Chart 10 shows that the number of teachers able to teach through the medium of Welsh has remained relatively consistent since 2015/16.

In order to develop a clear understanding of the education workforce's Welsh language skills, during 2017/18 the regional consortia conducted an audit of practitioners' Welsh language skills and their ability to teach through the medium of Welsh.

Securing sufficient numbers of teachers to drive the increase in Welsh-medium and bilingual education remains a challenge. There are early indications that there is a need to focus specifically on increasing the number of secondary school teachers able to teach Welsh and through the medium of Welsh. We have three academic years left to ensure that we reach 2021 targets.

The Welsh Government has introduced, or is in the process of introducing, a number of interventions to meet this challenge, for example:

- A digital marketing campaign for our Postgraduate Certificate of Education (PGCE) Incentives was launched in January 2018. The outcomes of this marketing work, which was very precisely targeted, were used to develop a new creative media campaign, to launch in the autumn of 2018, to promote the profession and recruit the best and brightest to the teaching profession.
- In 2017/18, there were twenty graduate teacher placements in Welsh-medium schools. We will continue to work with our partners to ensure that this route continues to generate teachers for the Welsh-medium sector.

We will be outlining more interventions in this respect in the 2018/19 annual report, to be published in due course.

Another important aim is to foster student teachers' appreciation of the Welsh language and provide opportunities for them to develop their proficiency in Welsh and expertise to teach through the medium of Welsh. To that end, the Accreditation Criteria for Initial Teacher Education (ITE), published in March 2017, have been reconceptualised. They now make it a requirement that ITE Partnerships are clear regarding the activities which are included in their programmes for developing the Welsh of those who wish to follow a career in Welsh or bilingual schools, and the provision for improving every ITE student's skills in Welsh.

The work to develop a professional learning programme is key to ensuring that every practitioner can continually develop their Welsh language skills. Since April 2017, the regional consortia have received additional funding to run various programmes in the field of professional development. This work will continue to develop and evolve in 2018–19.

In September 2017, a one-year sabbatical course was established to target teachers in English medium primary schools. There were 36 teachers on the course that ended in July 2018. As well as the one-year course, sabbatical courses using other models have been held, as per usual. The work of commissioning a further evaluation of the sabbatical course is underway.

The Post-16 workforce

To support the post-16 education workforce develop their Welsh language skills, support tailored to the needs of further education practitioners was provided as part of the National Centre for Learning Welsh's Work Welsh programme. Intensive training of 100 hours or more was offered through this programme to practitioners at 11 further education institutions across Wales in 2017-18.

Education resources

Another essential aspect of Welsh language education infrastructure is ensuring that the relevant resources are produced for the curriculum and for qualifications. Following the summit on Welsh-medium resources held in April 2017, the Bilingual Educational Resources Stakeholder Group was established to discuss options for creating a national infrastructure for developing and producing relevant resources in a timely manner to support the curriculum and qualifications in the future. The Group will produce a plan for discussion by April 2019.

The Welsh-medium Resources in Education Branch continues to identify the need for relevant resources for 3-19 year olds and panels were arranged with teachers during the summer of 2017 to identify needs. Alongside this, a grant was awarded to the Welsh Joint Education Committee (WJEC) to provide Welsh language versions of textbooks to support the new qualifications. Work is also underway with the Coleg Cymraeg Cenedlaethol to collate information about the current provision of resources in the post-16 sector and to identify the gaps in provision.

Ideas were also suggested by practitioners for resources to support learners with additional learning needs, and the Welsh Government will commission these resources through tender in due course.

We are working with Qualifications Wales to ensure that our constructive relationship continues in order to meet the needs of the Welsh-medium and bilingual sector. As part of the Coleg Cymraeg Cenedlaethol's action plan, which was submitted to the Welsh Government at the end of 2018, Welsh-medium qualifications and assessments will be an integral part of its work in the future.

THEME 2: Increasing the use of the Welsh language

One aspect of our vision is to move to a situation where there are a million Welsh speakers. However, a thriving language is a language which is used. We therefore want the use of Welsh to be a routine part of everyday life, so that speakers at all levels feel confident to use it in formal and informal situations, and that products and services are offered proactively in Welsh.

People need opportunities to use Welsh in a variety of situations which reflect their way of life. These include opportunities within the family, in the workplace, in local activities, or in wider interest networks and communities which can span continents.

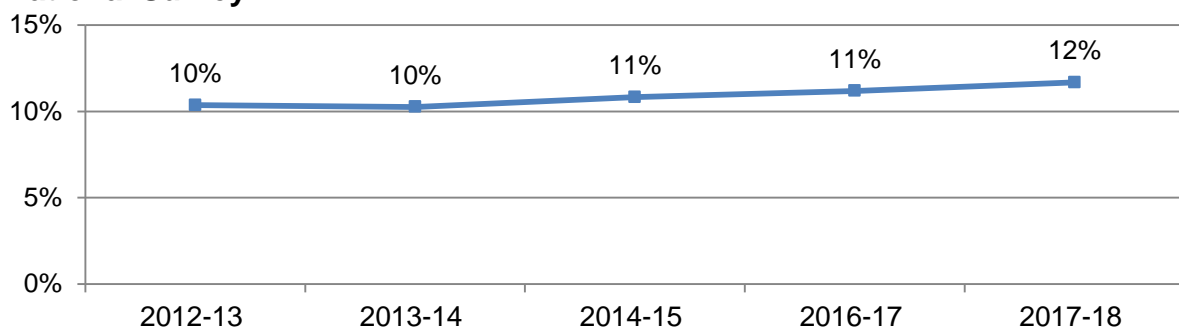
The current situation - how many people use Welsh?

It is very difficult to measure language usage. One way to attempt to do so is by conducting language use surveys. The latest [Welsh Language Use Survey](#) regarding Welsh was conducted in 2013-15.

One of the principal targets for *Cymraeg 2050* is to increase the percentage of people 3 years old and over who speak Welsh daily, and can speak more than just a few words of Welsh³, from the 10% recorded in the 2013-15 Welsh Language Use Survey to 11% per cent by 2021 (and 20% by 2050).

Therefore, Language Use Surveys will be used to monitor progress towards this target. However, in order to get results more regularly, we will also use the results of the National Survey for Wales for adults 16 years of age and over.

Chart 11: The percentage of people aged 16 years and over who speak Welsh daily and can speak more than just a few words of Welsh according to the National Survey



According to the National Survey, 12% of adults aged 16 years and over spoke Welsh daily and could speak more than just a few words of Welsh in 2017-18.

Although the National Survey's figures can vary slightly from year to year, the percentage can be seen to have increased a little since 2012-13. Examining these

³ This is also one of the [national indicators](#) set to assess progress against the aims for well-being in the [Well-being of Future Generations \(Wales\) Act](#).

results by age group, there has been no change during this period in the use of Welsh by those over 45, therefore the increase is mainly taking place amongst those under 44 years of age.

The vision in *Cymraeg 2050* is that Welsh will be used in every aspect of life by 2050, and that there will be goodwill and a feeling of ownership regarding the language amongst those who do not speak it. To monitor this, questions were included in the National Survey for Wales 2017-18 about Welsh speakers' confidence in using their language skills and about people's attitudes to the language. The results were published in a [statistical bulletin](#) on the National Survey's website.

Regarding confidence, the survey found that:

- 68% of Welsh speakers felt confident speaking Welsh
- 72% want to speak it with other Welsh speakers
- 36% worry they'll be judged on how well they speak Welsh
- Welsh speakers' fluency levels were strongly correlated with their confidence when speaking Welsh.

And regarding attitudes, the survey found that:

- 86% of people feel that Welsh is something to be proud of
- 67% believe more needs to be done to support the Welsh language
- 62% of those who cannot speak Welsh would like to be able to do so
- 40% agree that the Welsh language will be stronger in 10 years' time.

It is not surprising that the most confident Welsh speakers are those who speak it fluently and those who speak it daily, whereas those who are less fluent or who don't speak it as frequently are more likely to lack confidence and to worry about being judged for the way they speak. Despite this, it's heartening that 62% of the people who couldn't speak Welsh say that they would like to be able to speak it, and that 85% of the people who can speak some Welsh would like to speak it better.

In order to continue to monitor Welsh language use, we will consider ways of gathering information by conducting further Language Use Surveys.

The workplace

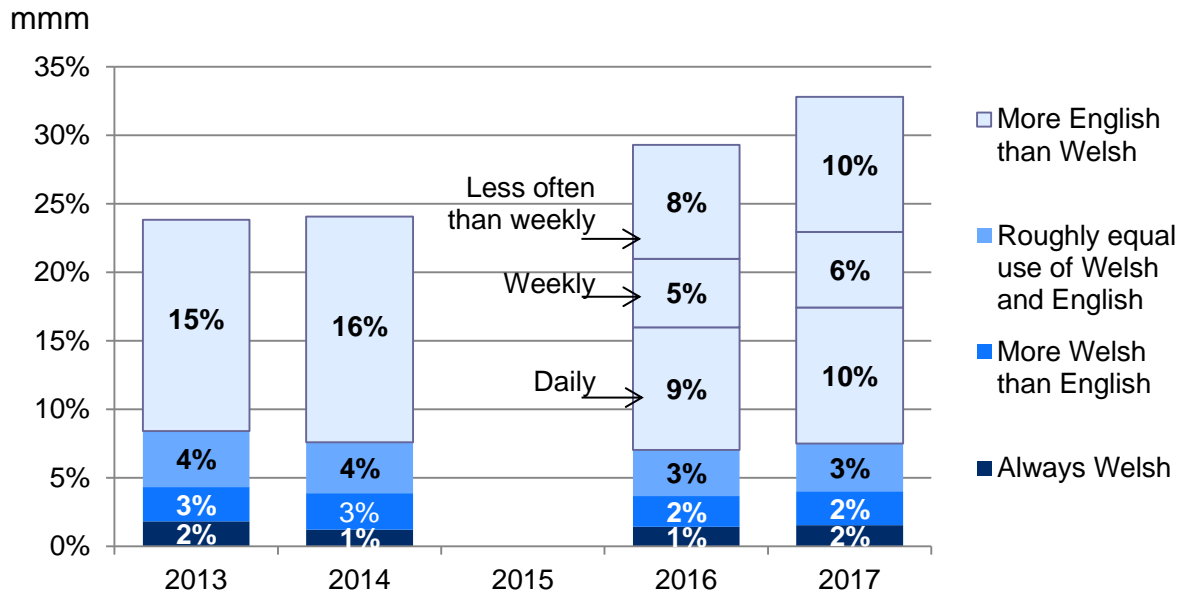
As we set about attempting to increase the use of Welsh in the workplace across every sector, the Welsh Government has a duty to lead by example by promoting and facilitating the use of Welsh within its own workforce.

During the reporting period, we saw the Welsh Language Standards taking root in the Welsh Government. Training and various workshops were held to develop front line staff's capacity to offer a high standard of service to customers. In this regard, there was a successful effort to market and promote Welsh language services across the Welsh Government, as well as to encourage the public and stakeholders to use Welsh when dealing with the organisation.

More information about the Welsh Government's compliance with the Welsh language standards, and the language skills of Welsh Government staff can be seen in the [Welsh Language Standards annual report 2017 to 2018](#).

The Welsh Government's annual staff survey, the People Survey, asks employees which language they use to do their work. Chart 12 shows how this has changed over recent years.

Chart 12: The percentage of the government's workforce who use Welsh to do their work, by frequency of use (a)



(a) The survey was not held in 2015, and in 2016 the 'More English than Welsh' category was divided into three further categories which are 'more English than Welsh' but speaking Welsh daily, weekly, or less often.

The chart shows that the percentage of staff who 'always speak Welsh' or more Welsh than English has remained fairly stable since 2013. In 2016, 22% said they used some Welsh in their work but more English, and 25% were saying this by 2017. The possible answers were amended in 2016 to give the option to say 'More English than Welsh' - but using the potential answers 'using Welsh every day/ every week/ less often than weekly'. It is likely that presenting these 3 sub-options has changed how people answer the question. Despite this, it appears that one in three of the Government's staff (33%) used some Welsh in their work in 2017 and 17% used it at least daily.

Work Welsh

There is crucial work to be done to expand Welsh medium training opportunities in the workplace. In order for Welsh to thrive across every sector it is necessary to ensure that learners can get training and support in the workplace. An extremely important development in this context was the National Centre for Learning Welsh's first year of operation in the 2016-17 academic year. During that time, the Centre produced the first ever dedicated national curriculum for this area and developed an interactive site which operates as a central point of contact for learners.

As stated previously, the Work Welsh programme was established by the Centre in April 2017, with the aim of developing the capacity of companies and organisations to provide services in Welsh by offering training and support to employers. The programme offers a wide range of training, ranging from online training to residential and intensive courses. Over 3,000 employees from the public and private sectors benefitted from the Work Welsh programme during 2017-18.

Welsh and the world of business

Another priority regarding workplaces is encouraging businesses and third sector organisations to welcome bilingualism, and to this end the new *Welsh for Business* network was established in August 2017.

The network employs 10 officers and one manager who work across Wales to provide services to businesses and charities regarding how to use Welsh. They focus on specific interventions to increase the presence of Welsh in the linguistic landscape, to help businesses to recognise Welsh language skills in the workplace, and to recruit and market bilingually. A framework to measure impact is being developed to measure the linguistic outcomes of the work. This is the first step towards developing and introducing a national support framework as part of a new programme to promote Welsh and facilitate bilingualism in the workplace.

As we set about increasing the emphasis on language awareness and workforce planning, in accordance with the strategy, work also began on planning the Understanding Bilingualism programme. This included initial research on local government's use of language awareness training, and the content and learning outcomes of course materials. This work will continue during 2018-19 with the ultimate aim of producing a detailed policy in relation to this crucial area.

Welsh language services

Improving the Welsh language's position in the workplace will also facilitate our efforts to provide more and better services in Welsh.

In this regard, the strategy sets out the need to improve on the number and the quality of services offered to Welsh speakers by reviewing the Welsh Language (Wales) Measure 2011, with the aim of ensuring there are effective arrangements for promoting and facilitating the use of Welsh. As the work of implementing this began, in April 2017 the results of an engagement activity with bodies falling under the Welsh Language Standards in February-March 2017 were published.

During the period August to October 2017, we consulted on a White Paper *Striking the right balance: proposals for a Welsh Language Bill*, and a report and an analysis of the responses to the consultation were published in January 2018. The White Paper argued that the policy emphasis had shifted too far in the direction of regulation at the expense of work to increase the use of Welsh.

We continued to formulate Welsh Language Standards regulations within the compass of the legislation, in order to increase the number of workplaces which offer opportunities to use Welsh. The Welsh Language Standards (No.7) Regulations

2018 were approved by the National Assembly in March 2018, and by now the Commissioner has issued compliance notices to the bodies in the health sector named in those Regulations. Approval of these Regulations meant that about 120 bodies fell within the scope of the Welsh Language Standards by the end of March 2018.

Staying in the health sector, it was decided that the time was right to commission an evaluation of the follow-on strategic framework *More than just words: . . . Follow-on Strategic Framework for Welsh Language Services in Health, Social Services and Social Care 2016–2019*, to assess the progress made against it. Tenders to conduct the evaluation were invited later in 2018.

With regard to Welsh speakers' experiences of health services, a series of questions was asked in the National Survey for Wales 2017-18 about people's use of Welsh when using health services. Of the people who had a hospital or GP appointment, 15% said they had been asked about their language preference. A [statistical bulletin](#) was published on the results of the questions.

Research into behaviour change techniques to deliver better services has inspired a pilot research project initiated through a *Cymraeg 2050* grant. This project experiments with linguistic 'promises' to change patterns of Welsh language use in an institution. If it proves a success, the hope is that the project will be extended to further institutions.

Social use of Welsh

Our aim is to establish positive language use practices, supported by formal and informal opportunities to use Welsh socially.

One way of doing this is to produce a meaningful framework which encourages positive language behaviour amongst children and young people in order to foster better connections between schools, youth organisations and community groups. During the year, the Urdd and the Mentrau Iaith worked together closely to map the provision, at county level, regarding social opportunities for children and young people to use Welsh. The plans developed as a result of this work will be useful in encouraging stronger connections between the main providers at county level, with the aim of ensuring that the community provision strengthens the work done in schools. They also aim to ensure that children and young people have a wide variety of opportunities to use Welsh socially in every area.

The Welsh Language Charter

The work of building on the Language Charter in Welsh medium primary schools continued nationally. With the support of the four regional education consortia, at the end of March 2018 over 250 schools were using the programme to encourage positive behaviour and informal use of Welsh. The figure has continued to grow since then. Support also continued for over 25 Welsh medium secondary schools to develop plans to encourage positive language patterns amongst pupils.

Grants

A Welsh Language Promotion Programme was established during the year in question, which included establishing a Planning Board of external stakeholders to steer the work. This work included establishing and awarding the Cymraeg 2050 Grant which concentrated on innovative technology and community projects for increasing the use of Welsh.

In funding organisations which promote the Welsh language, it is necessary to ensure that the funding opportunities are in keeping with the strategy as well as with local needs. Grants worth £4.2m were awarded to support organisations to stage activities which promote and facilitate the use of the Welsh language. 2017-18 was the second year in a three-year cycle, and the following core partners received grants through this scheme.

- Young Farmers' Clubs
- Cymdeithas Eisteddfodau Cymru (Eisteddfodau Society)
- National Eisteddfod of Wales
- Merched y Wawr
- Mentrau Iaith Cymru
- Mentrau Iaith (Welsh Language Initiatives)
- Urdd
- Papurau Bro (Local Papers)

Two meetings of the Promotion Group were held, which includes partners funded by us through the grant scheme to promote and facilitate the use of Welsh, as well as other key partners. Amongst the highlights were a presentation by the Welsh Language Commissioner on the Promotion Standards, workshops about *Cymraeg 2050* and the *Work Programme 2017-21*, the S4C review and the experimental National Eisteddfod.

The Welsh Government also provides funding for the Papurau Bro, which have a wide monthly distribution and a host of volunteers helping with the task of maintaining them. The Papurau Bro are an important community resource, and during the reporting period a national meeting of Papurau Bro was held to share good practice.

The Welsh Government also worked closely with Mentrau Iaith Cymru to develop the document *Raising the Stakes*, which focusses on matters such as:

- improving the quality and governance of the Mentrau Iaith
- better joint working with developments at a national level
- innovation, branding, marketing and reaching new audiences

As regards the National Eisteddfod, which is sponsored by the Welsh Government, 147,498 people attended the National Eisteddfod in Anglesey, where every record regarding Maes B was broken with almost 13,000 attending. The National Urdd Eisteddfod at Bridgend had an attendance of 90,000. Over 38,000 people came through the gates at Tafwyl in 2017, and the Mentrau Iaith succeeded in holding over 150 festivals and gigs.

Our funding plans also support families to encourage their children to use Welsh outside school. Opportunities were funded for families to use Welsh in events across Wales, including weekly activities and clubs for children and families, summer festivals, and a variety of other popular events.

Two meetings were held with the Wales Council for Voluntary Action and the Welsh Language Commissioner to start planning areas of work for mainstreaming the Welsh language. This has led to stronger links with third sector organisations in order to improve their ability to provide Welsh language services, as well as to attract and retain Welsh-speaking volunteers.

Work also began on developing a national programme for supporting new Welsh speakers, in partnership with the National Centre for Learning Welsh and community partners. The National Centre for Learning Welsh has piloted a scheme called *Siarad*, which is based on Catalonia's *Voluntariat per la Llengua* scheme. The scheme pairs a learner with a more experienced speaker who shares their interests to give learners an opportunity to use their Welsh in an informal context. Pairs commit to spend at least 10 hours together using Welsh.

THEME 3: Creating favourable conditions – infrastructure and context

The aim of the steps in Theme 3 of the strategy is to support our efforts to increase the number of Welsh speakers and the use of Welsh. This is about creating suitable conditions and an environment where the Welsh language and its speakers can thrive.

Although there are targets for increasing the number of Welsh speakers and the number of people using Welsh, neither one nor the other can be achieved without a suitable infrastructure.

Community and economy

To support the socio-economic infrastructure of Welsh language communities, in October 2017 a revised version was published of *Technical Advice Note (TAN) 20: Planning and the Welsh Language*. The revised advice provides guidance to those Local Planning Boards in the process of preparing or revising their Local Development Plans.

Out of 25 Local Planning Authorities, 22 have adopted a Local Development Plan, which vary regarding how much attention is given to the Welsh language. The Planning Act (2015) as well as the revised TAN 20 should ensure that there is more consideration and consistency between Planning Authorities as Local Development Plans are reviewed over the coming years. The work of preparing a National Development Framework (NDF) continued all year.

Concerning economic development, one of the Welsh Government's objectives is to develop a new regional focus to help all parts of Wales prosper and to support each area to develop its own distinctive identity. To that end, Regional Chief Officers were appointed to each of the three regions (North Wales, South-east Wales, and Mid and South-west Wales) to take the work onwards. Since their appointment, the Regional Chief Officers have been in discussion with key stakeholders in their regions, reporting back to the Welsh Government. They will be working to develop Regional Business Plans which will note regional opportunities, challenges and priorities as well as strategic responses to them. The work to develop Arfor has begun in partnership with the Local Authorities in Anglesey, Carmarthenshire, Ceredigion and Gwynedd. The aim of Arfor is to boost business growth and strengthen the community infrastructure in the face of external challenges, with a specific focus on promoting the Welsh language.

Our communities are facing a variety of challenges, and in the context of Welsh-speaking communities, ensuring that the language thrives is key. The hope is that by establishing Arfor, there is practical help available to communities and innovative businesses to secure their long-term sustainability.

From the perspective of the farming industry, following the Brexit vote, the importance of ensuring that support continues for the agriculture industry as a key employer within the Welsh-speaking heartlands was recognised. Discussions were

held across the government about how to mitigate the impact on Wales resulting from the United Kingdom's departure from the European Union. The possible impact on the Welsh language is considered as part of this work.

Work was begun on looking at ways of managing the impact of large developments on the Welsh language, and on creating a framework in partnership with the developers of Wylfa Newydd. Following initial discussions with officials in the Planning Department, we will be looking at ways of giving practical support to Planning Authorities in relation to Welsh language considerations when they draw up Local Development Plans.

Officials also worked with the Planning Department on the National Development Framework for Wales and Local Development Plans, and also to ensure that there is a good understanding of this field in the various policy areas across the Welsh Government.

Discussions are continuing with the Business Wales team to ensure that information is gathered about the Welsh language skills of the service's clients. This will provide a baseline to assess whether Welsh speakers use the services and whether further intervention is needed to promote services which would support Welsh speakers to set up new businesses.

Welsh Language Music Day

In its third year, Welsh Language Music Day continued to grow and it gave the Welsh Government an opportunity to work in partnership with Learn Welsh, the BBC's Horizons Project, EE, Rhys Ifans, S4C, Radio Cymru, the Forte project for emerging artists, the Mentrau Iaith and many more.

4,330 participants attended stakeholder events across Wales. 183 businesses and 318 schools also participated. The entire campaign, which included PR, marketing and social media meant that over 74 million people were reached with the hashtags #DyddMiwsigCymru and #WelshLanguagemusicDay (the initial target was 5m).

Culture and the media

The Arts Council of Wales has set up a Welsh Language Monitoring Group to advise on ventures which help with the training and professional development of its staff. The Group also offers direction and guidance on the Welsh Language Standards' requirements and how to reflect Wales' bilingual nature, to organisations which receive revenue funding, as well as all the organisations which receive project funding.

Organisations are invited to state in their applications for Lottery funding how they will reflect the bilingual nature of the community in which they and their target audience operate. The data will be used to:

- assess the impact on Welsh for every grant awarded

- develop targeted initiatives to address any gaps identified or under-represented areas.

We are also promoting Welsh amongst young people in Wales and encouraging them to use the language, and are doing so through our Creative Learning Programme. 475 schools are taking part in this programme.

Tourism and Visitors

We set about developing the Welsh language offer as part of multi-sector marketing campaigns in Wales, developing a Sense of Place, and the visitor's experience. Content was also developed in Welsh to promote Wales and will be using that content on multilingual platforms in future. We are continuing to develop the new 'Wales' brand in ways which will strengthen the Welsh language's identity and presence in campaigns and materials as the need arises.

Broadcasting

In terms of broadcasting and the Welsh language, we continued to stress the importance of the Welsh language provision of S4C and Radio Cymru to the UK Government and Ofcom, as well as to the BBC. In the review of S4C commissioned by the UK Government, we welcomed the emphasis on S4C's importance in achieving the Welsh Government's aim of reaching one million speakers. We will continue to work with S4C to fulfil our aspirations for the language.

We also continued to regularly raise with Ofcom the need to consider linguistic factors when radio licences are awarded or revised for stations in Wales. This included our response to the consultation on Ofcom's annual report for 2018-19. This is reinforced by the fact that the agreement sets out that a specific number of hours will be broadcast in Welsh, as well as a statement about Welsh language content on the web, such as text, streaming and video clips. When awarding and regulating services for Wales, language diversity should be set as a target, especially with regard to the Welsh language in services in Wales.

To ensure that a wide choice is available to meet the demand from different audiences, we continued to support the publishing industry, ensuring that there is a wide range of publications available in Welsh in various formats. The Welsh Government's financial backing via the Welsh Books Council ensured that it was possible to continue to help publishers to produce books and magazines for adults and children. The Books Council also led with regard to commissioning and producing the Amdani series (20 books for leisure reading for Welsh learners) in cooperation with the National Centre for Learning Welsh.

Furthermore, Dr. Siwan Rosser was commissioned by the Welsh Books Council to conduct a survey of the children's and young adults' books market, and are being taken in relation to the report's recommendations. The Welsh Government continues to fund Golwg360 through the Welsh Books Council, and single visits increased from 9,868 to 14,741; page visits increased from 131,689 to 144,575; Twitter followers increased from 11,095 to 12,133; and Facebook from 2,720 to 3,211.

Wales and the wider world

One of the aims of *Cymraeg 2050* is to ensure that the Welsh language is an integral part of our efforts to enhance Wales' relationship with the wider world, and used to welcome and integrate people who move to Wales.

We lead by example when making connections with the wider world by ensuring we seize every opportunity to incorporate our unique culture into important national events. The Welsh Government's Major Events Division Works closely with the Welsh Language Commissioner's Promotion Team, referring all events supported to the services offered by that team. When we operate abroad, we always strive to promote the language as one of Wales's most valuable assets, and ensure that Wales is promoted as a bilingual country.

All events which receive grant support from the Major Events Division are encouraged to introduce a Welsh language policy to promote the language, and to help them use it effectively when holding and marketing the event. During the period in question, the events supported varied from the Champions League final in Cardiff, to the Llangollen International Musical Eisteddfod.

In order to make the Welsh Language more visible to people who move to Wales, the *Welcome to Wales - Welcome to Welsh* pack was launched jointly with Anglesey County Council. The initial pack was distributed to various organisations which welcome incomers to the area. Trials of this intervention are continuing. It will also be trialled in Carmarthenshire in due course.

The Welsh language can also be a powerful way of promoting integration. As part of its innovation grant, the National Centre for Learning Welsh funded two projects in the Cardiff and Newport areas to provide Welsh learning sessions to refugees and asylum seekers. These projects were developed by Welsh for Adults providers, in cooperation with community partners.

The Welsh Government gives an annual grant of £90,000 to the London Welsh School, which promotes Welsh in London and provides Welsh-medium primary education for children, a number of whom return in due course to the Welsh-medium education system in Wales.

One project in Patagonia, Argentina means that teachers are seconded to key communities, native teachers are developed, structured courses developed and Welsh language activities promoted. It is managed by the British Council on behalf of the Welsh Government, in conjunction with Cymdeithas Cymru-Ariannin, Cardiff University's School of Welsh, the Urdd, and the National Centre for Learning Welsh.

The Welsh language will also be a part of our work as we forge new relationships and attempt to consolidate international relationships that already exist as we prepare to leave the European Union.

Digital technology

Ensuring that the Welsh language is integrated into new technology is crucial as we attempt to realise the ambition of Cymraeg 2050.

Digital technology has transformed the way we live our lives, and it is vitally important to invest in technological developments in order to ensure that it is possible to use the Welsh language in as many contexts as possible, through voice as well as keyboard.

One of our objectives is to invest more in innovation work in the field of language technology to facilitate the use of Welsh. We began to do this with the Cymraeg 2050 Grant. Applications were invited for grants of up to £20,000 each. We received 137 applications and a total of £425,000 was awarded to 26 projects, with several of these dealing with technology.

To support our technological infrastructure, we explored opportunities to invest, to co-operate and to share resources and technologies. This is essential to ensure that the Welsh language can be used on electronic devices. The University of Bangor's Language Technologies Unit was given a grant to further develop *Macsen 2* (artificial intelligence technology), and work was also carried out with the Minister's Welsh Language Technology Group to draw up a long-term action plan to address the Welsh language's needs in terms of language technology.

In considering support for developing new bilingual digital resources, the Welsh-medium Resources in Education Branch continues to identify the need for resources for learners between the ages of 3 and 19. Panels were held with teachers to identify needs during the summer of 2017, and consideration was given to developing resources digitally as well as in print. Since the 2017 summer term, over 30 digital resources have been published.

In addition to holding discussions with several technology companies this year, the focus of our work has been on developing the Welsh language's technological infrastructure. In due course, as we implement our new Welsh Language Technology Action Plan (the final document was published in October 2018 - there will be further details in our next Annual Review), our intention is that it will be possible for organisations of all kinds to use the components which are created to support Welsh speakers.

The National Library of Wales was given a grant for a project called *Wicilechyd*, which has increased the number of Welsh language articles about health. As a result, 4,699 new articles in Welsh were created on Wikipedia.

Linguistic infrastructure

The work done on Welsh language technology sits alongside and reinforces our efforts to develop the language's linguistic infrastructure. During the reporting year, the task of assessing the different elements of that infrastructure was begun. This includes dictionaries, terminology, corpora, and the translation profession, to see what already exists and what is needed to move forward. It is clear that a great deal

of work has already been done over the years by the Welsh Language Board and the Welsh Language Commissioner, to improve the user's experience and the way linguistic infrastructure is coordinated. The Government's aim is to build on that work.

Over the next period we will be developing the policy, as well as taking action regarding technology and Welsh, with the aim of being innovative and coordinating the linguistic infrastructure in Wales better, and ensuring that the area progresses strategically to the benefit of Welsh speakers of all abilities.

The Welsh Government provides grant funding for the Geiriadur Prifysgol Cymru (GPC) project, which contributes to a number of the steps noted in the *Cymraeg 2050* strategy, including creating conditions which are favourable to the language, creating digital technology and promoting the use of Welsh. This funding also acknowledges the importance of GPC as a linguistic cornerstone of the Welsh language.

Funding was also provided via the Cymraeg 2050 Grant for GPC to develop the GPC+ scheme, which allows members of the public to transcribe the dictionary's archive slips (GPC has about 2.5 million untranscribed slips of paper, prepared from 1921 onwards, and the collection is still growing. Despite this, fewer than 20% of these slips appear in the dictionary as quotes).

To help translators and interpreters to meet the increasing demand for their services, the Welsh Government continued supporting Cymdeithas Cyfieithwyr Cymru. This is the body that maintains, quality assures, and promotes professional standards in translation by improving and developing translators' skills and knowledge. The aim of ensuring that the latest machine translation systems are available to the sector, in order to improve the accuracy, speed and consistency of translations, interconnects with our work on the technological infrastructure (translation using computer aids, artificial intelligence technology etc). The work begun with stakeholders to create a long-term action plan to address the language technology needs of the Welsh language reinforces the work done in the field of translation.

Evaluation and research

In June 2017, *Welsh language transmission and use in families* was published, a research study commissioned by the Welsh Government to examine transmission patterns and the use of Welsh within families with children 0-4 years of age. Welsh Government Knowledge and Analytical Services collaborated with the report's author, Cardiff University, to hold a discussion on the work's findings at the 2017 National Eisteddfod on Anglesey.

During the period leading to the publication of *Cymraeg 2050*, Knowledge and Analytical Services worked with policy officials to develop the evidence base and the research context for the strategy. Also during the year, research was completed to support the teaching of Welsh in the context of developing the curriculum and assessment arrangements in Wales. The report *An overview of approaches to second language acquisition and instructional practices* was published in February 2018. During the same period, Welsh Government Knowledge and Analytical

Services continued to collaborate with research officers across policy areas to mainstream the Welsh language in social research.

After the strategy was published, the process of exploring ways of adding to our understanding of speakers' linguistic experiences over their lifetime was begun, with a focus on education. A research project was agreed upon, to examine the progression of studying Welsh as a first language in schools, to be undertaken as a research project at Cardiff University in 2018/19.