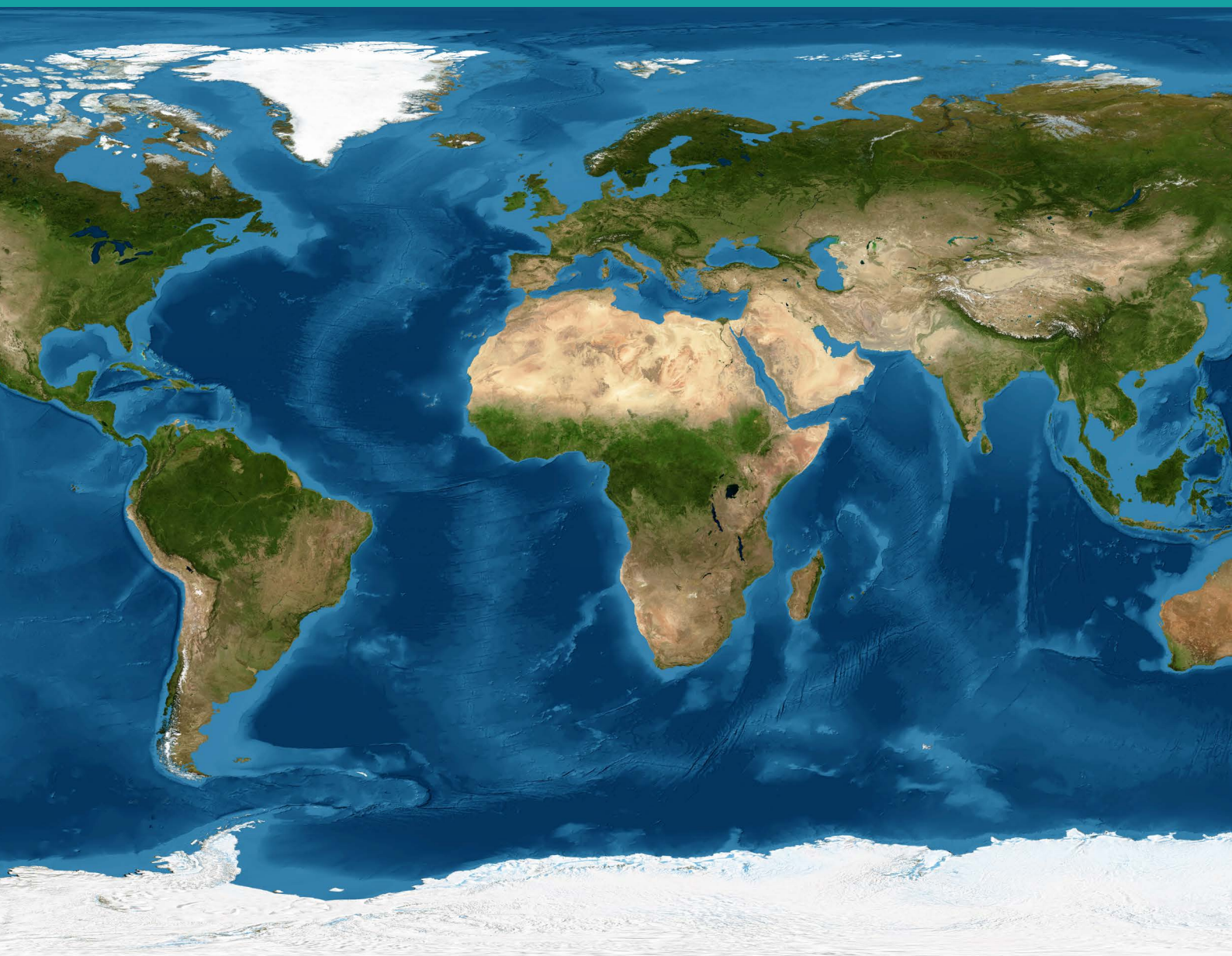


# Wales and the World

## Research Briefing

December 2024



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# **Wales and the World**

## Research Briefing

December 2024

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**The Committee for the Scrutiny of the First Minister is holding a session on 13 December 2024 with the First Minister, Eluned Morgan MS, focusing on issues relating to “Wales and the World”.**

**This briefing sets out some of the key topics the Committee may cover.**



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## 1. Introduction

International relations are reserved matters, as provided by paragraph 10 of Schedule 7A to the Government of Wales Act 2006. This also applies to international trade and international development assistance and co-operation.

Nevertheless, there is scope within the reservation for the Welsh Government to act in an international capacity in the areas listed above. A closer look at the devolution settlement reveals that many aspects fall to the devolved nations, which have their own international histories, partners and approaches. For example, the **Welsh** and **Scottish governments** have their own international strategies and **non-binding agreements** with other countries and regions. Some other practical examples are that the Welsh Government:

- can open offices overseas and meet with counterparts from other countries;
- can make representations about any matter affecting Wales, including on international affairs; and
- must observe and implement international legal obligations.

Wales has many international connections, some of which predate the formation of the United Kingdom, and these are reflected in its international relations arrangements.

## 2. Roles and responsibilities

This section summarises the main **roles and responsibilities** in the Welsh Government for international relations.

### First Minister

International relations moved to the First Minister's portfolio in 2021 after a decision not to reappoint a minister for international relations to the Cabinet (a position held by the current First Minister between December 2018 - October 2020). The First Minister is responsible for:

- international relations including the overseas office network;
- Wales and Africa;
- Wales and Europe;
- national security, including counterterrorism and cyber security; and

- the Ministerial Code (which contains international obligations duties).

## **Deputy First Minister and Cabinet Secretary for Climate Change**

The Deputy First Minister, Huw Irranca-Davies MS, is responsible for:

- oversight of borders policy; and
- constitutional affairs.

## **Cabinet Secretary for Economy, Energy and Planning**

The Cabinet Secretary, Rebecca Evans MS, is responsible for:

- international trade policy;
- export support; and
- coordination of the UK-EU Trade and Cooperation Agreement (TCA). The TCA sets the terms for UK-EU relations post-Brexit.

## **Cabinet Secretary for Social Justice, Trefnydd, and Chief Whip**

The Cabinet Secretary, Jane Hutt MS, is responsible for:

- co-ordination of issues relating to refugees, asylum-seekers, migration and community cohesion; and
- equality and human rights, including the rights of EU citizens living in Wales post-Brexit.

# **3. International Strategy: overview**

2024 marks the fourth year of the **Welsh Government's International Strategy** (2020-2025). The Strategy sets out three core ambitions to:

1. raise Wales' profile on the international stage;
2. grow the Welsh economy by increasing exports and attracting inward investment; and
3. establish Wales as a globally responsible nation.

**Five action plans** accompany the Strategy on:

- i. Diaspora engagement;
- ii. Priority regional relationships and networks;
- iii. International relations through public diplomacy and soft power;

- iv. Wales and Africa; and
- v. Export Action Plan.

## Priority relationships

The Strategy identifies Wales' priority relationships as:

- **Priority countries:** Germany, France, Ireland, US and Canada.
- **Priority regions:** Basque Country, Brittany and Flanders

These were chosen:

because of common cultural and linguistic heritage, shared values and common economic and social interests.

A more detailed rationale is provided in the Strategy for why each priority partner was chosen. For example, Germany and France are important trading partners and Ireland is Wales' closest European neighbour.

## Overseas offices

The Welsh Government's network of **20 overseas offices in 11 countries** support the Strategy's delivery. Each office has a remit, set out in a **2020 document**, explaining how each office:

applies a differing level of focus to each ambition to reflect the potential return and relevance to the country in which they operate. Each office, however, has a common remit to source inward investment opportunities, identify trade opportunities and build strong diaspora networks within its country.

The Welsh Government publishes annual overseas office network reports. There have been three so far for **2021-22**, **2022-23** and **2023-24**.

## International bilateral agreements

The Welsh Government can conclude non-binding agreements, like Memorandums of Understanding, joint action plans and friendship pacts, in devolved areas. It has agreements with countries, regions and cities.

Nine agreements are shown on a **dedicated webpage** on the Welsh Government's website which was established at the request of the committee responsible for international relations, the Culture, Communications, Welsh Language, Sport



and International Relations Committee (“Culture Committee”). The webpage’s original title was ‘International bilateral agreements’ but this was later changed to ‘Cross-cutting bilateral agreements’ as the Culture Committee **exchanged correspondence** with the former First Minister, Vaughan Gething MS, on agreements which appeared to be missing from it. For example, the Welsh Government’s **healthcare recruitment agreement** with the Indian state of Kerala is not on the webpage. The former First Minister explained that:

The web page has been updated to reflect and clarify that the bilateral agreements on this page are those that are delivered across government, coordinated by my International Relations team, rather than single policy agreements.

The result of this revised approach is that there is not a specific place on the Welsh Government’s website (or elsewhere) which sets out how many international bilateral agreements the Welsh Government has in place, and with whom.

The agreements on the webpage are with:

1. Ireland
2. Quebec
3. Basque Country
4. Oita Prefecture
5. Flanders
6. Brittany
7. Baden-Württemberg
8. Silesia
9. Birmingham, Alabama

## Promotional ‘Wales in’ years

Since 2021, the Welsh Government has focused on a different international partner each year. So far, it’s been Germany (2021), Canada (2022) and France (2023).

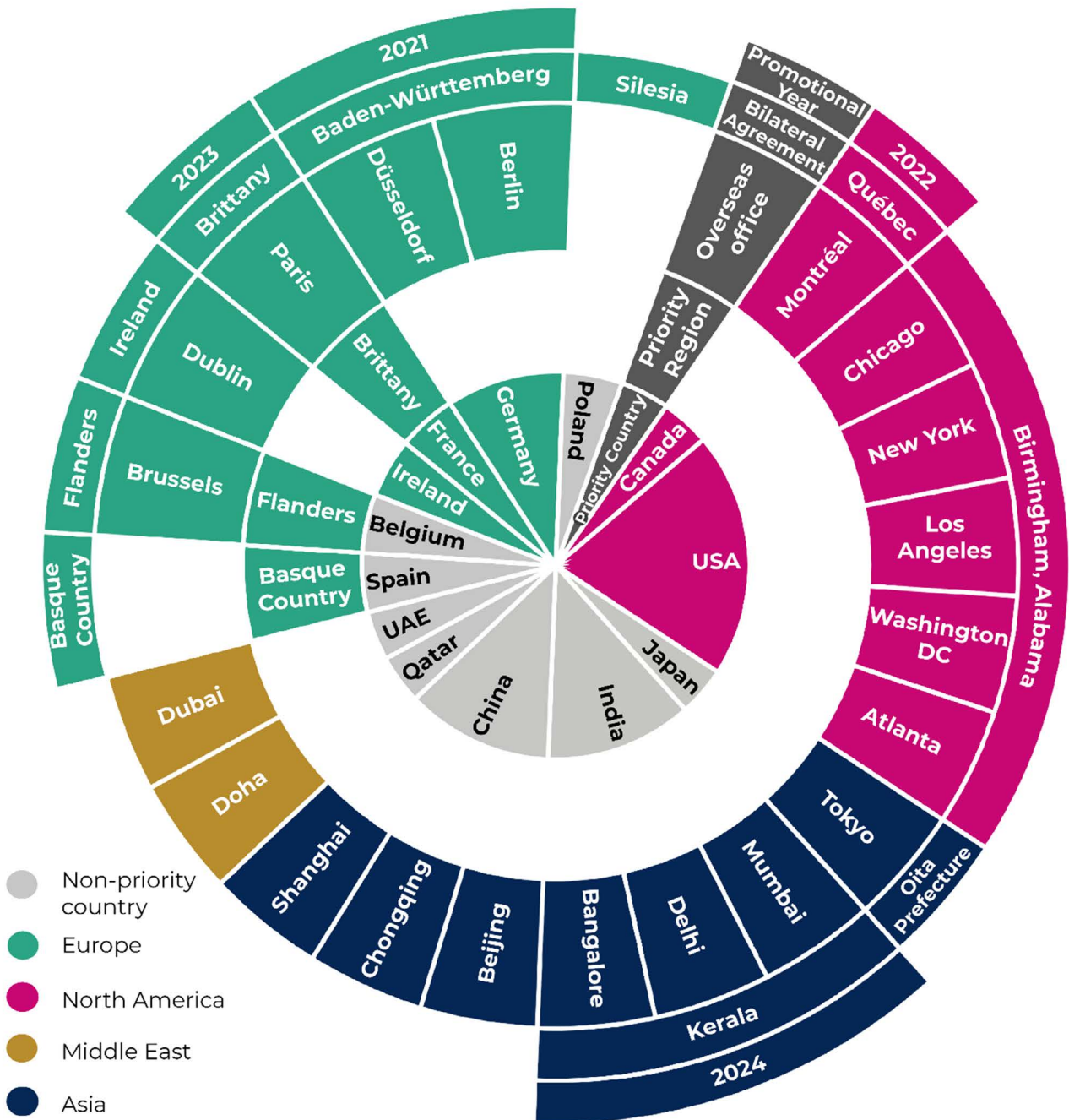
The aim is to showcase relations between Wales and these countries, supported by a planned programme of activities and events that celebrate their links.

2024 is the year of ‘Wales in India’, which has a **budget of £246,830**. The plans for the year are summarised in a **Senedd Research article**. 2025 will be ‘**Wales in Japan**’.

The Welsh Government **has advised** that previous ‘Wales in’ years have been subject to evaluation (either in-house or independent) but these are not published. These were not been shared with the Culture Committee following a **request to the First Minister**.

### Infographic

The infographic below shows the Welsh Government’s priority relationships, overseas offices, international agreements and promotional years.



## 4. International Strategy: delivery

The International Strategy was published in January 2020 and its five action plans in November 2020. While the International Strategy does not include specific dates for delivery of its actions, some action plans list 'short term' (2020-21) and 'medium term' (2022-25) activities without specifying which year they will be carried out.

There are approximately 270 actions in the Strategy and action plans. The list comprises actions categorised as short or medium term, which are preceded by 'we will' or which are placed in a separate actions text box.

Examples include to:

- grow our economy by increasing the contribution that exports make to the Welsh economy by 5%;
- increase our presence in EU member states and work to ensure that the EU remains our strongest partner;
- become known as the first country to put the UN Sustainable Development Goals (SDGs) into law by promoting the Well-being of Future Generations Act;
- hold a minimum of three meetings per year with individual diaspora engagement organisations; and to
- become known as a world-leading nation for recycling.

The **Culture Committee has sought** to ascertain how many of the Strategy's 270 actions have been delivered and how many remain to deliver.

In June 2024, the Committee shared its list of actions with the former First Minister, Vaughan Gething MS, and asked for confirmation on whether the Welsh Government agreed with its analysis. The former **First Minister wrote** to the Committee on 1 August to say:

I would like to thank the Committee for providing the list of actions that you have identified across the Strategy and its associated action plans. As mentioned during our scrutiny session, I have asked officials to move away from report writing and focus on delivering our activity. That said, I agree with the comments made by the Committee that it is important to have a clear set of deliverables which can be used to measure progress and I believe that these actions provide that clarity.

On plans to refresh the International Strategy as its 2025 expiration approaches, he added that:

Officials are undertaking a review of progress against delivery as part of the review into the refresh of the International Strategy taking place in the coming months. I have asked officials to provide you with a separate briefing on the deliverables, as part of the work being undertaken on the refresh, to ensure that the most up to date information is provided.

The Committee has not yet received this information and has not ascertained how many actions have been, or remain to be, delivered.

## 5. International relations beyond 2025

As the International Strategy's expiration approaches, the Culture Committee has discussed the Welsh Government's international relations beyond 2025 with the former First Ministers, **Mark Drakeford MS** and **Vaughan Gething MS**. The former committed to refreshing the Strategy in 2025 to cover the time until the 2026 Senedd election, and the latter confirmed plans to review the refresh were underway. Both former First Ministers committed to involving the Culture Committee in this work.

The Committee has an open consultation on the **Welsh Government's international priorities** with a closing date, by coincidence, of this Scrutiny of the First Minister Committee meeting (Friday 13 December).

On 22 October, its Chair, Delyth Jewell MS, **asked the new First Minister a FMQ** on her international priorities and the Strategy's refresh:

Could you set out the current timescales that you have in mind for this important work, including when you will be consulting stakeholders and with the committee?

The current First Minister, Eluned Morgan MS, responded:

what's of interest to me now is delivery on the policies and strategies that we have, and I'm eager that people continue to focus on that until we get to a point when we turn our attention to the next phase.

When we do start to prepare what comes next in terms of priorities, I'm sure that things such as the fact that we've had an investment summit that was extremely successful across the UK, what is our role and what can we do in terms of attracting more inward investment into Wales—

There are lots of things that we could do when it comes to prioritisation for the future, but what I'm interested in now is delivery on what is contained within the current strategy. But there will be an opportunity, of course, for people to join in with that consultation.

## First Minister announces new International Delivery Plan

On 21 November, the **Welsh Government issued a press release** detailing how the First Minister had hosted a reception in London with UK-based ambassadors and high commissioners. This, it said, was an opportunity for the First Minister “to meet with the wider diplomatic community, set out her priorities and discuss opportunities for Wales with representatives from other nations”. It also quotes the First Minister saying that:

Early next year the Welsh Government will be publishing our International Delivery Plan, which will set out the international activities to support the delivery of my four priorities.

The release does not confirm whether this refers to the First Minister’s **four domestic priority areas** or to new international priorities.

## Wales-USA relations

The USA is one of the Welsh Government’s **priority international relationships**.

Following the re-election of President Donald Trump, the First Minister **posted on X**:

Congratulations President-elect Donald Trump.

Llongyfarchiadau ar gael eich ethol yn Arlywydd Unol Daleithiau America.

Wales and the USA have a strong relationship which we highly value. We look forward to continuing that partnership for the benefit of all our people.

On 14 November, the First Minister appeared on Radio Five Live and **responded to a question** on whether she believed President Trump is racist. Her response, as transcribed from the broadcast, was as follows:

I shouldn’t think he is, to be honest. There were a hell of a lot of black people and Latinos who voted for him in the election and you’ve got to respect the vote of the American people. That is what happened. It makes sense and we need a strong relationship with the United States, irrespective of who leads the country. It’s our biggest area in terms of inward investment. We’ve got a lot of American companies invested in Wales. We’re keen to make sure our exporters can export and we are worried about the potential of additional tariffs on them because it will hit our economy so we’ve got to try and keep as good a relationship with the United States as we can, irrespective of who is the President.

The Economy, Trade and Rural Affairs (ETRA) Committee held a **general scrutiny session** with the Cabinet Secretary for Economy, Energy and Planning, Rebecca Evans MS on 14 November. The Cabinet Secretary was asked whether the Welsh

Government could “redirect business to Europe if the pathways to the US become very difficult”. She responded:

It is early days and we have yet to see what the Trump administration’s actions will be. But I know it’s very firmly on our minds in terms of being able to provide the right information, advice and support to our businesses, because America is a really important market for us as well.

On the Middle East and President-elect Trump, the **First Minister said on 19 November in FMQs** that:

I’m afraid it doesn’t look like there’s much progress in terms of settling the issue in the middle east. I know that there’ll be a lot of interest, when a new Government takes over in the United States, to see if and whether that makes any difference at all, and how that will affect it but I think it is important that we stand with the sorrow and the suffering of the people in Gaza.

Prior to the US election result, she **addressed the implications for environmental issues** during FMQs on 5 November.

We’ll all be watching with bated breath the outcome of that election, which will have a profound effect on Wales and the world. There will be an impact on climate change, depending on who wins, and it will impact on all of us. So, the importance of our protecting nature in Wales is well understood. I do hope that the people of the United States understand their responsibilities as well in that space.

## 6. EU relations

### UK-EU relations reset

In July, the Prime Minister, Keir Starmer MP, hosted the fourth **European Political Community summit** at Blenheim Palace and reiterated his aim to “reset” the UK-EU relationship. He has listed areas for closer cooperation as defence and security, climate change, irregular migration, and on delivering economic growth.

To deliver the reset, the **UK Government advertised** a new post in November described as a “a senior and personal representative of the prime minister at international summits and engagements”. A Cabinet Office **spokesperson advised**:

As we reset our relationship with the EU, building closer trade and security links and encouraging more investment from around the world, this new role will oversee that work. [...] Reporting to the minister for European Union relations, they will lead official-level discussions with the EU as we drive economic growth.

The **UK and EU have also announced** their intention to hold regular summits at

leadership-level to oversee their relationship, starting in “early 2025”. It is unclear how or whether this will interact with the governance arrangements established post-Brexit as part of the Trade and Cooperation Agreement’s institutional framework, including its oversight body, the Partnership Council.

## Wales-EU relations

Both recent former First Ministers often highlighted the significance of the EU to Wales, describing it as “**one of our most important and long-standing**” relationships (Mark Drakeford MS) and the “**most important trading partner**” (Vaughan Gething MS).

In 2021, the **Culture Committee concluded** that:

It is clear that the UK-EU relationship remains an important priority for the Welsh Government and for stakeholders in Wales. However, the absence of dedicated strategies to UK-EU relations at a UK- and Wales-level presents challenges when navigating, and providing effective scrutiny of, the post-Brexit UK-EU relationship

By November 2023, the Culture Committee had **issued key recommendations** for Wales-EU relations, including calling for a dedicated EU strategy and for the EU to be included as a priority relationship. The **former First Minister, Mark Drakeford MS, responded** that the European dimension of the International Strategy could be “made more explicit” when it is refreshed in 2025.

Also in November 2023, the **Legislation, Justice and Constitution Committee recommended** that the Welsh Government should articulate “strategic priorities and a clear vision” for EU relations, either in a dedicated EU strategy or in the revised International Strategy. The **former First Minister, Mark Drakeford MS**, said he didn’t believe a separate EU strategy was needed at that time, a position with which his successor, Vaughan Gething MS, **agreed in June 2024**.

The new First Minister is yet to provide her view on how she will take these matters forward.

## Wales-EU trade

The EU is Wales’ largest trading partner. Wales is more reliant on exporting to the EU, and less reliant on importing from the EU, than the other UK nations and the UK as a whole.

Wales’ **latest trade statistics** (year ending June 2024) show that export values to

the EU account for around 58.6% of Welsh export values (£10.9 billion) compared with 50.3% for the UK.

For imports from the EU, Wales import values are less than other UK nations and the UK as a whole. EU imports account for 35.3% of Welsh import values (£7.5 billion) compared with 54.4% for the UK as a whole.

On 14 November, the Cabinet Secretary for Economy, Energy and Planning, Rebecca Evans MS, **told the Economy, Trade and Rural Affairs Committee** that:

we have a really, really laser-like focus on trade with the EU.

### **Trade and Cooperation Agreement implementation review**

UK-EU relations post-Brexit are governed by a number of bilateral agreements. The main agreement is the **Trade and Cooperation Agreement** (TCA) which applied from 1 January 2021 and entered fully into force from 1 May 2021.

An implementation review is required every five years, the first of which is expected to take place throughout 2025.

Former Cabinet Secretaries for Economy, Energy and Welsh Language and Culture and Social Justice, Jeremy Miles MS and Lesley Griffiths MS, confirmed in June that the **Welsh Government's priorities** for the review are:

1. The need for a veterinary and plant health (Sanitary and Phytosanitary or SPS) agreement to minimise administrative burdens and non-tariff barriers to trade (this would reduce the need for inspections of live animals and animal products);
2. Addressing issues relating to mobility of workers and provision of services, such as the new barriers faced by touring artists;
3. The need for improved arrangements on the Mutual Recognition of Professional Qualifications to facilitate economic activity in key service sectors, such as research; and
4. Exploring options to re-join EU programmes such as Erasmus+ and Creative Europe. After Brexit, the Welsh Government developed its own international learning exchange programme, Taith. Taith's **budget was reduced** by £1.6m (from £8.1 to £6.5m) for 2024-25 - a reduction of 19.8%.

The Cabinet Secretaries added that “further priorities will be developed as the review approaches”.



## 7. Topical international issues

### International conflicts

#### Middle East

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On 17 October, the Welsh Government announced a £100,000 donation to the DEC Middle East Humanitarian Appeal. The matter has been closely followed by both the Petitions and Culture Committees following a **Senedd petition** calling on the Welsh Government to provide aid to Gaza. The Welsh Government said **it would donate** if the DEC launched an appeal and that its **ability to donate** would be impacted by budget cuts (17.4% to its international development budget for 2024-25).

On 4 November, the **Petitions Committee agreed** to write to the Welsh Government seeking clarity on non-financial donations and what more could be done.

Senedd Members have **raised others matters** in relation to the conflict, including on divestment, arms manufacturers and due diligence in respect of human rights and procurement.

On 27 February 2024, the **Senedd voted to withhold consent** to the **Economic Activity of Public Bodies (Overseas Matters) Bill** which subsequently did not proceed because of July's UK General Election.

The Bill would have prevented public bodies from being influenced by political or moral disapproval of foreign states when making procurement and investment decisions. The **former UK Government said** it would stop local authorities and other funded bodies from "pursuing their own foreign policy agenda". The Bill's **impact assessment** referred to campaigns "overwhelmingly" targeting Israel. It was introduced in the UK Parliament in the June prior to the 7 October 2023 Hamas attacks.

In the **Welsh Government's Legislative Consent Memorandum**, the then Minister for Finance and Local Government, Rebecca Evans MS, said the Bill was "disproportionate and unnecessary". The Welsh Government's view was that the Bill would limit the executive competency of Welsh Ministers in making decisions about procurement and investment. Furthermore, she said:

I cannot recommend consent is given whilst questions remain as to the compatibility of this Bill with [ECHR] convention rights and international law.

## Ukraine

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The Welsh Government and Senedd have taken numerous steps to support Ukraine and Ukrainian arrivals in Wales since Russia's full-scale invasion in February 2022, as explained in the below articles.

- [The Senedd in solidarity with Ukraine](#) (immediate response)
- [Wales, Ukraine and the war](#) (early impacts on diplomacy, food, energy, Brexit, trade)
- [Wales and Ukraine: one year on](#) (includes a summary of NATO's 2014 Wales Declaration)
- [Wales and the war in Ukraine: two years on](#) (focus on refugees and trade)

The wider implications of the conflict in Ukraine were referred to at the Senedd on 3 December, when the [First Minister pointed to the war](#) as one reason for increased energy costs during FMQs.

## Nation of Sanctuary plan

The Welsh Government had committed to [carrying out a refresh](#) of the [Nation of Sanctuary plan](#). In January 2024, the then Minister for Social Justice, Jane Hutt MS, said:

We have begun the process of refreshing our Nation of Sanctuary Plan. We will engage with stakeholders who are affected by our policies, including local government, the third sector, private sector and people with lived experience. This work will continue throughout 2024 to ensure our revised plan is fit-for-purpose, meeting the needs of Welsh communities, including those seeking sanctuary.

However on 17 June 2024, the then Cabinet Secretary for Culture and Social Justice, [Lesley Griffiths MS suggested there was a change of approach. She told the Equality and Social Justice Committee](#) :

Personally, I don't think it needs a refresh, as such; I think we need to make sure that we are absolutely delivering. So, I've asked for more of an update, really, for the plan, rather than a complete new plan. I think we just need to look at what we've got, which is working—we know it's working, you only have to look at the number of Ukrainians, for instance, that we've had join us here in Wales. So, I would say—I think I'm right, aren't I, Amelia [Welsh Government official] —rather than a refresh, we're going for an update.

In November 2024, the Welsh Government published an [updated Anti-racist Action Plan](#) with a chapter on the Nation of Sanctuary (pp 66-71). It states that:

This refreshed chapter consolidates, and updates previous commitments made in the Nation of Sanctuary 2019 Plan, the 2022 ArWAP chapter, and commitments made elsewhere [...] It is not possible to anticipate the next set of changes and world events, so the revised approach puts principles at its heart, rather than focusing too heavily on identified actions.

## Carbon border taxes

The UK Government has **published more detail** on its plans to introduce a carbon border tax in 2027.

Carbon border taxes apply to imports from carbon-intensive industries. Imports into a territory with a carbon border tax in place can face taxes and additional reporting requirements. They are often referred to as “CBAMs” (Carbon Border Adjustment Mechanisms).

CBAMs are designed to stop “carbon leakage”, where companies move production to places with laxer climate rules to avoid domestic emissions-reducing measures, or when domestic goods are replaced by more carbon-intensive imports. In such cases, domestic attempts to reduce emissions can be undermined, and jobs may be lost, while the country’s carbon footprint stays the same, or even grows.

The first phase of the EU’s CBAM came into effect in October 2023 whereby EU importers have had to report emissions attributed to their imports from six industries, including iron and steel, cement and fertilisers. Extra charges will apply to imported goods from January 2026, based on the imports emissions.

More information on CBAMs and their implications for Wales, including its steel industry, can be found in the Senedd Research article, **[The EU’s race to net zero and why it matters to everyone else](#)**.

## Funding for international climate change initiatives

Representatives from the Wampís Nation in the Peruvian Amazon visited the Senedd during November and met with Members of the Climate Change, Environment and Infrastructure Committee.

The Welsh Government **issued a press release** following the visit, in which it highlighted previous funding to support the construction of a ten-seater solar powered boat, as part of the Wampís Nation’s goal to move to 100% renewable energy. The press release also announced an additional £50,000 had been provided to the Wampís Nation to help fund smaller boats.

## Education

### Modern Foreign Language (MFL) learning

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The British Council's Language Trends Wales is an annual survey of maintained schools and post-16 colleges. The most recent, **Language Trends in Wales 2024 (November 2024) found:**

- Nearly 70% of responding secondary schools reported that none or less than 10% of Year 10 students were taking an International Language for GCSE or other Level 2 qualification.
- Since 2023, entries into French GCSE have increased by 5.5% (a total of 2,126 entries) and entries into German GCSE increased by 23% (a total of 468 entries).
- Nearly half of responding secondary schools do not have post-16 provision in International Languages. In those schools with post-16 provision in International Languages, around 60% have five or fewer learners in Year 12 and in Year 13.
- Five out of the twelve post-16 colleges that offer international languages responded to the survey. All those colleges reported that they had learners of International Languages in Year 12 and in Year 13. In 2023, of those colleges that offer international languages, three colleges reported having no learners of International Languages.
- At A level, in 2024 there were 242 entries in French compared with 248 in 2023; 139 entries in Spanish compared with 171 in 2023; and 62 entries in German compared with 65 in 2023.

In November 2022, the Welsh Government published **Global Futures: A plan to improve and promote international languages in Wales 2022 to 2025** which set out the Welsh Government's three strategic aims in relation to international languages (this refers to languages other than English and Welsh, and can include community languages, modern languages, classical languages and British Sign Language).

In answer to a **Written Question on 14 June 2023**, Jeremy Miles MS, then Minister for Education and the Welsh Language said:

The Curriculum for Wales provides exciting opportunities for language learning: modern foreign languages (MFL) are now mandatory in primary as well as secondary learning. Learners will need to demonstrate progression in an international language as they transition into secondary schools; international languages remain within the Curriculum for Wales guidance until 16.

The decision about which languages are offered rests with individual schools. However, in planning their curriculum schools will not be able to support learners to develop towards the four purposes of the curriculum without offering opportunities for all learners to progress in their language learning.

In answer to a question in **Plenary on 4 December 2024**, Cabinet Secretary for Education, Lynne Neagle MS, said that she had agreed to extend the Global Futures plan for a further year. She highlighted some of the work that is happening in Wales to support international language learning. She also said that she thought that the introduction of international languages at primary school “will make a difference”.

### **Hong Kong B(NO) students in Wales**

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On 18 November 2024, the **Petitions Committee** considered a petition calling for granting BN(O) Hong Kong students home fee status after three years of residence.

People from Hong Kong were able to register as **British Nationals (Overseas)** before 1 July 1997. As a result, they and their family members may be eligible for a **British National (Overseas) visa**, or BN(O) visa, which would allow them to live, work, and study in the UK. Visa holders can apply to stay in the UK for either two years and six months or five years. After they have lived here for five years, BN(O) visa holders can apply for settlement to remain in the UK indefinitely.

In the UK, higher education providers allocate their students a fee status that determines how much they pay for tuition. The Welsh Government determines who pays ‘home’ fees for higher education courses in Wales, set out in Student Support regulations. Higher education providers assess the fee status of their students following these regulations. In Wales, **tuition fees for full time undergraduate courses are capped at £9,535** per year for ‘home students’ for courses beginning on or after 1 August 2025. Fees for ‘international’ (or ‘overseas’) students are determined by providers and vary by course and can often be much higher.

In general, individuals must be resident and ‘settled’ in the UK on ‘the first day of the first academic year’ of their course to be eligible for home fee status and student support. They must also have been ‘ordinarily resident’ in the UK for the three years before that date.

Someone with a BN(O) visa has restrictions on their stay in the UK and are therefore not settled, and so in Wales (and in England and Northern Ireland) they are not eligible for home fee status or publicly funded student support. After they have lived in the UK for five years, they can apply to **live in the UK permanently**, and

so would become eligible for home student status. There are exceptions for some groups of students, such as those who have been granted leave to enter or remain in the UK, for example those under the Ukraine Family Scheme.

In Scotland, from the academic year 2023-24 **those holding BN(O) visas will be eligible for home fee status if they meet the three-year residency criteria.**

In her **response to the Petition**, the Minister for Further and Higher Education, Vikki Howells MS, said:

I am able to inform you that we are reviewing the position with respect to holders of the HKBN(O) visa. This will include a review of eligibility for both tuition fee protections and student support. Our review will take place ahead of the 2026/27 academic year.

The Committee agreed to query with the Minister the timescale of the review.