

Understanding skills needs in Wales: Welsh Language

Commissioner's response

Q1: What are the most important current and future skills needs in Wales?

1. Significant policy and legislative developments

The Wales Skills Audit 2012 identified Welsh language skills as one of three key cross-cutting skills. Since then, the policy and legislative landscape has evolved significantly, increasing the importance of Welsh language skills within both the economy and the public sector.

One of the most significant developments has been the introduction of Welsh language standards for public bodies. More than 140 organisations are now subject to the standards, with further organisations expected to come within their scope during the current Senedd term. As a result, demand for individuals who can work bilingually has increased, alongside a greater focus on workforce planning to ensure organisations have the capacity to deliver services in Welsh.

Another important milestone was the publication of *Cymraeg 2050*, which set the ambition of reaching one million Welsh speakers and doubling the daily use of Welsh by 2050. The strategy recognises the workplace not only as a means of delivering Welsh-language services, but also as a crucial environment for maintaining and developing language skills and increasing the use of Welsh in everyday life.

The past decade has also seen significant developments in Welsh-medium education and Welsh language learning. These include the expansion of the role of the Coleg Cymraeg Cenedlaethol, the establishment of Medr and the National Centre for Learning Welsh, and the enactment of the Welsh Language and Education (Wales) Act 2025. Together, these developments are important not only from a linguistic and cultural perspective, but also in ensuring that Wales's skills system is equipped to meet the needs of a bilingual economy and future labour market.

In summary, the Welsh language occupies a far more prominent position in public policy than it did when the 2012 Audit was published. This has significant implications for Wales's skills needs and reinforces the importance of a skills system that can support economic growth, bilingual public services and the long-term ambitions of *Cymraeg 2050*. Ensuring a sufficient supply of workers with Welsh language skills is therefore not only a language policy objective, but an essential component of workforce planning and economic development.

2. The Welsh language as an economic skill for the world of work

The evidence suggests that there is an increasing demand for individuals who can work through the medium of Welsh, and that this demand is increasing faster than supply in a number of key sectors.¹ The Welsh language should therefore be

¹ See for example some of the findings [of the Commissioner's performance reports](#), and also our [5 year report on the situation of the Welsh language](#).

considered as an economic skill that applies to a wide range of sectors and occupations. We believe that it is essential to consider the Welsh language as a cross-sectoral skill and an integral part of meeting skills needs in a wide range of different areas and sectors.

In our response to question 2 below we outline the areas and sectors that need to be prioritised in terms of developing the Welsh language skills of the workforce.

Q2: Where do you see the gaps or lack of a match between skills supply and demand?

As we have noted, Welsh language and bilingual skills should be considered a core component of Wales's current and future skills needs. While these skills are increasingly important across the economy, they are particularly critical in several sectors. These include childcare and early years provision, education, health and social care, public services, and sectors such as sport, the creative industries and the media, where the ability to work through the medium of Welsh is often essential to service delivery, participation and growth.

1. Early years and childcare

The Welsh Government's Cymraeg 2050 strategy emphasises the importance of the childcare and early years sector in facilitating access to Welsh-medium education and giving all children the opportunity to develop into confident Welsh speakers. Developing the Welsh-medium and bilingual capacity of the workforce will be key to expanding provision, particularly in the context of the Government's commitment to extend free childcare and expand Welsh-medium childcare.

As is the case with respect to the wider education sector, the lack of a bilingual workforce is the main barrier to achieving these objectives. In 2024 the Welsh Government published reports on the workforce capacity of the childcare and play sector, and it noted that Welsh-medium provision will need to be significantly expanded to meet local authorities' Welsh-medium education growth targets.² However, difficulties in recruiting and retaining Welsh-speaking staff, coupled with low pay levels and high turnover, are major challenges for the sector.

A solid foundation already exists in terms of expanding the Welsh language skills of the workforce in these sectors, including a Welsh-medium apprenticeship programme, the '*Cam wrth Gam*' training scheme and the '*Camau*' Welsh learning scheme. However, as set out in our [5-year report on the situation of the Welsh language](#), further investment is needed to upskill the workforce and allow for the expansion of Welsh-medium and bilingual provision.

2. Education and training sector

Achieving the Government's vision to reach one million Welsh speakers by 2050 will depend on ensuring that more individuals leave the education and training system as confident Welsh speakers. This will not be achievable unless there is a significant

² [Mapping the childcare and play workforce in Wales | GOV.WALES](#)

increase in the number of teachers, lecturers and education professionals who are able to work and teach through the medium of Welsh. Although the expansion of the Welsh-medium education workforce is central to the success of the Cymraeg 2050 vision, the current evidence highlights that there is a significant gap in Welsh language skills across the education and training sector.

2.1 Statutory sector

The shortage of workers with Welsh language skills is particularly evident in the statutory education sector. The current education workforce does not have the capacity to provide education through the medium of Welsh at the scale required to achieve the objectives of the Welsh Language and Education (Wales) Act 2025.

The Welsh Government's Cymraeg 2050 strategy includes specific targets in terms of the number of teachers that will be needed to achieve the growth targets of Welsh-medium education. As the table below shows, the numbers teaching through the medium of Welsh in the primary sector have remained constant over the last decade. During the same period the numbers teaching in the secondary sector have increased steadily. However, the numbers are significantly lower than the targets that have been set.

Table 1: Numbers teaching through the medium of Welsh in primary and secondary schools. Source: Annual School Census Data at Pupil Level

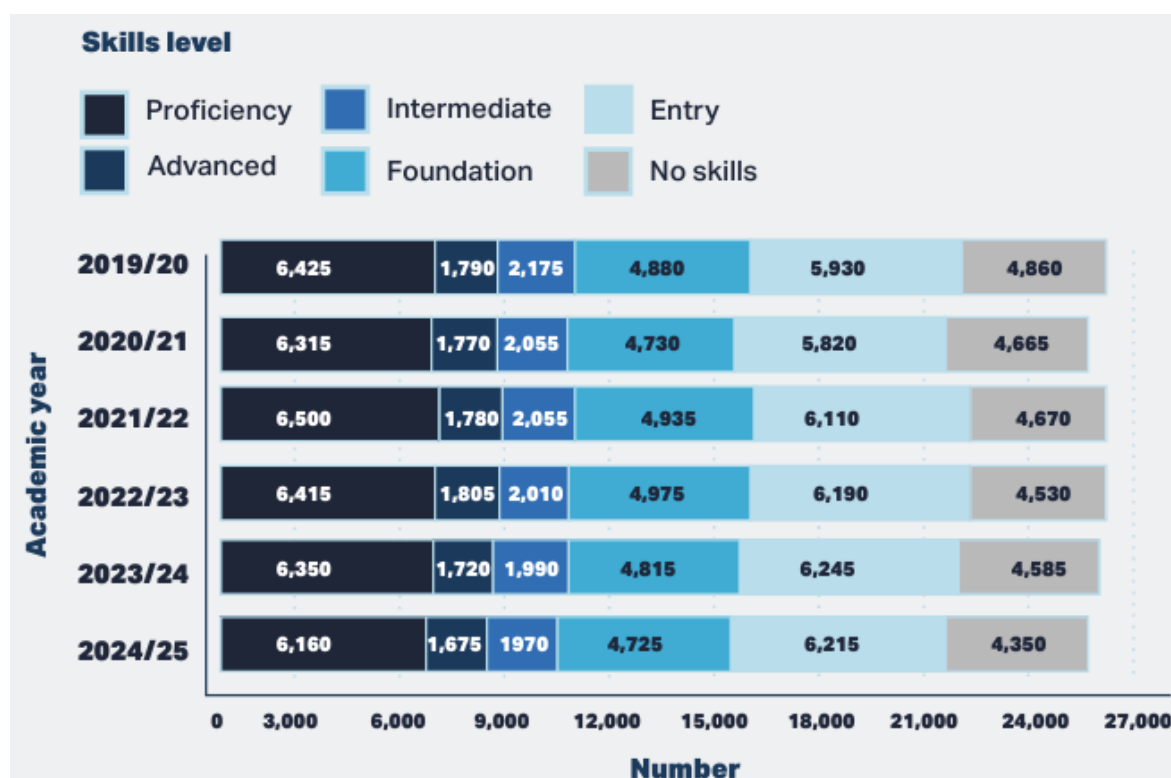
	Baseline 2015/16	2020/21	2021/22	2022/23	2023/24	Targets		
						2021	2031	2050
Primary	2,875	2,871	2,884	2,874	2,792	3,100	3,900	5,200
Secondary	2,292	2,395	2,499	2,555	2,549	2,800	4,100	5,400

According to the Welsh Government's analysis, there is currently a need for around 225 additional secondary teachers each year for those coming through Initial Teacher Education and other recruitment methods.³ For the primary sector an additional 153 teachers are needed each year.

It should also be noted that securing enough teachers for the Welsh-medium sector is only one part of the challenge. Achieving the Welsh language 2050 targets and the vision of the Welsh Language and Education (Wales) Act 2025 will require a significant increase in the number of teachers who can teach bilingually in all schools. However, the Annual Census of the School Workforce shows that the Welsh language skills profile of teachers in Wales has not changed much since 2019/20.

³ [Welsh in education workforce plan | GOV.WALES](#)

Chart 1: Teachers' Welsh language ability. Source: Annual Census of the School Workforce)



The evidence therefore suggests that the current numbers of Welsh-medium teachers are not sufficient to meet current demand or to realise the growth that will be required to achieve the Welsh Government's policy and legislative objectives.

Seeking to recruit and encourage more Welsh speakers into the teaching profession is one part of the solution, but in order to achieve the objectives of the Welsh Language and Education (Wales) Act 2025 it will be necessary to intensify the efforts to develop the Welsh language skills of the future education workforce as a whole. Without significant intervention, the likelihood is that we will see an endless cycle where the shortage of Welsh-medium teachers will be a persistent barrier to ensuring an increase in the number of school leavers being able to speak Welsh. This will be a barrier to developing the bilingual workforces needed across different sectors and occupations in Wales.

2.2 Tertiary education sector

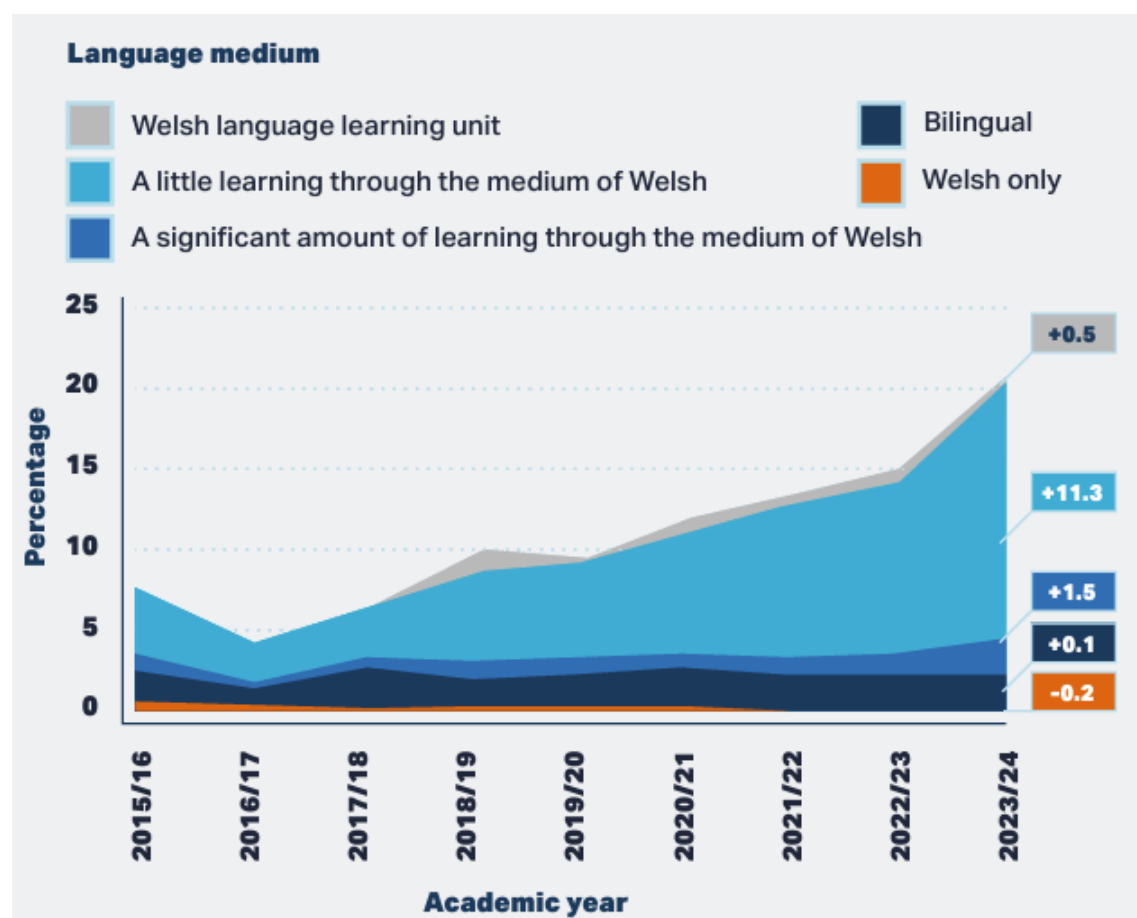
Evidence also suggests significant challenges in terms of the capacity of the statutory education workforce to develop Welsh language skills along the tertiary education and work-based learning continuum.

The results of the 2021 Census show that there is a significant decrease in the percentage of individuals who identify as Welsh speakers after they leave statutory education. This trend suggests that the Welsh skills of a significant proportion of the population decline or are used less frequently after leaving school. This highlights the importance of providing ongoing opportunities to learn, use and develop the Welsh language through tertiary education and training. This is essential to ensure a

long-term supply of bilingual workers in sectors where the demand for Welsh skills is increasing, and to expand employment opportunities for learners.

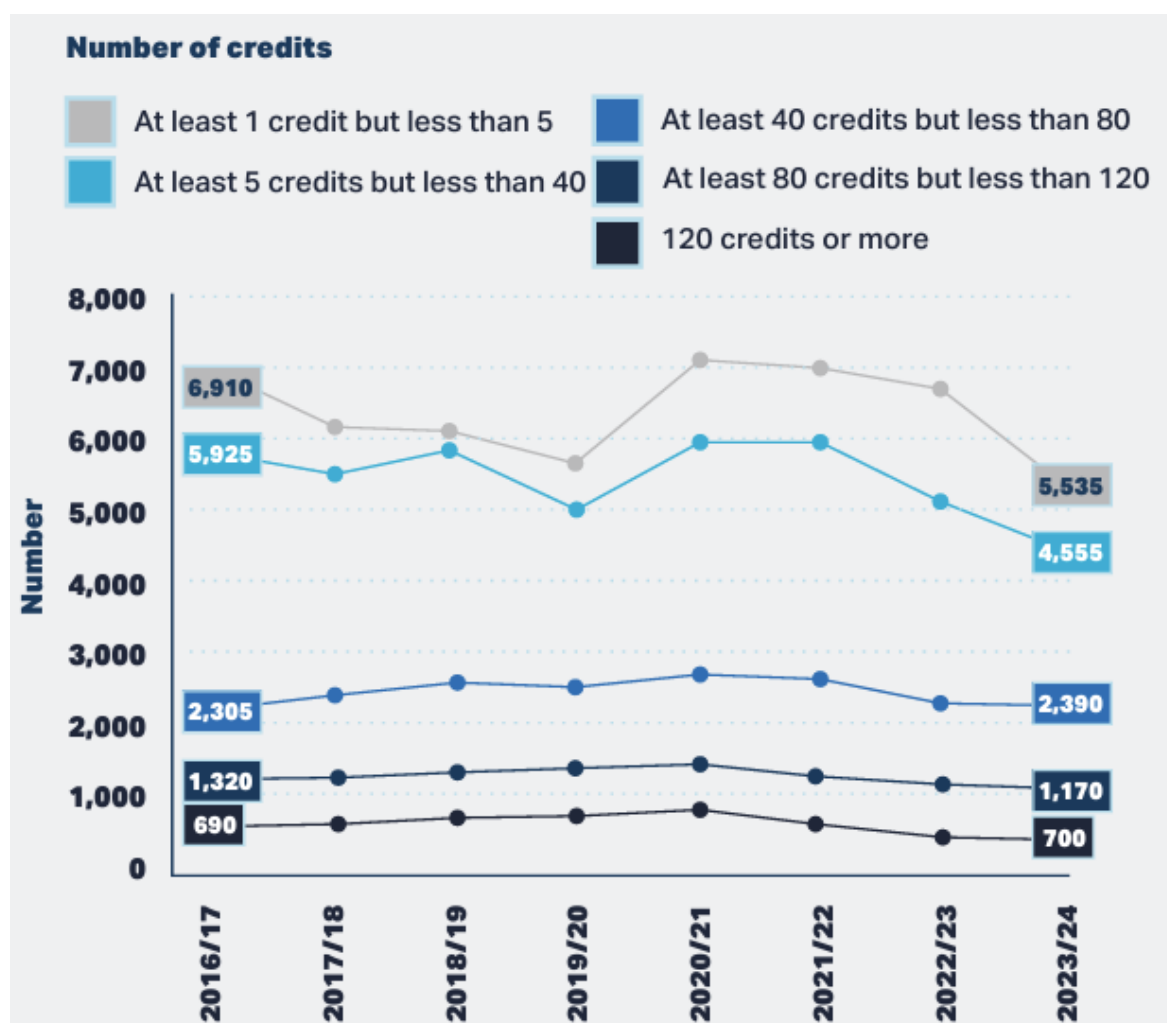
Although the Coleg Cymraeg Cenedlaethol has contributed to a significant increase in Welsh-medium provision in the further and higher education sectors, the increase in the number of students studying through the medium of Welsh or bilingually has been relatively limited.

Chart 2: Welsh-medium or bilingual learning activities in further education, by medium of the language of provision, excluding work-based learning. Source: Lifelong Learning Record Wales



As can be seen in the chart above, the increase in the percentage of pupils undertaking learning activities that are categorised as 'Welsh-medium learning category', 'bilingual learning', and 'a significant proportion of Welsh-medium learning' has been limited. The same is largely true in relation to the higher education sector:

Chart 3: Number of students studying in Welsh at universities in Wales, by number of credits. Source: Higher Education Statistics Agency Student and Staff Records



While a range of factors influence the expansion of Welsh-medium and bilingual provision across the further and higher education sectors, a key challenge is increasing the capacity of staff who can teach through the medium of Welsh or bilingually. Evidence suggests that current workforce capacity is insufficient to meet existing demand, let alone the additional capacity that will be required to deliver the Welsh Government's ambitions for growth in Welsh-medium and bilingual provision across the tertiary education sector.

3. Health and social care

Health and social care is one of the sectors that has the greatest need for skilled workers with Welsh language skills. Being able to use the Welsh language when receiving health and care services is crucial, particularly as individuals will often be in a position of weakness in receiving those services.

Unfortunately, health and care provision in Wales currently does not meet the needs of a bilingual country. For example, our recent survey on 'opportunities to use Welsh'

found that 88% of Welsh speakers consider it important to be able to receive health and care services through the medium of Welsh.⁴ However, only 56% were confident that they can access a service in Welsh when needed. Similarly, the same survey shows that only 35% of Welsh speakers indicated that they used Welsh all the time, or most often, when receiving health and care services. However, 55% indicated that they would prefer to use Welsh when receiving health and care services. This shows clear gaps between the needs and desires of service users and the sector's capacity to provide services in Welsh.

Improving the experiences of Welsh speakers when using health and care services relies heavily on increasing the capacity of the workforce to deliver clinical services through the medium of Welsh. This is essential to enable health boards to comply with Welsh language standards, particularly standard 110, which require them to plan for increasing their capacity to undertake Welsh-language clinical consultations. The health boards' plans, together with evidence from the Regional Skills Partnerships and the 2024 Employer Skills Survey⁵, show that the shortage of workers with Welsh skills is a significant barrier to expanding Welsh-medium clinical provision. This is despite the fact that the demand for these skills continues to increase.

The health boards' five-year plans and the Welsh Government's '*More than just words*' strategy identify several priority areas, including services for children and young people, older people, people with learning disabilities, users of mental health services, people living with dementia, stroke service users, and speech and language therapy services. Developing the Welsh language skills of the workforce in these areas, as well as primary care, will be key.

Significant work is already underway to strengthen workforce capacity, including the implementation of Standard 110 and the '*More than just words*' strategy, the delivery of training programmes through the National Centre for Learning Welsh, and the expansion of Welsh-medium provision in health and social care led by the Coleg Cymraeg Cenedlaethol.

However, there is a need for a greater focus on strategic workforce planning. This includes developing a more comprehensive understanding of current capacity, identifying Welsh language skills requirements across different clinical and service areas, and determining the actions needed to meet demand effectively.

As part of this work, we believe a specific focus should be placed on recruitment, with an increase in the number of posts where Welsh language skills are identified as essential. The introduction of the National Code for describing ability in Welsh provides an important tool for supporting this approach by enabling employers to specify and assess Welsh language skills more consistently (see our response to Question 4 of the consultation for further detail).

⁴ Some of the results of this survey can be found in our [5 year report on the situation of the Welsh language](#)

⁵ [Employer Skills Survey: 2024 | GOV.WALES](#), Welsh Government

4. Sport, the creative industries and the media

Our [5 year report on the situation of the Welsh language](#) emphasises the need to offer many more opportunities for children and young people to use Welsh in the community, and to take part in cultural, community and sporting activities through the medium of Welsh. A key part of the challenge of expanding opportunities for people to use Welsh in these areas will be to ensure a workforce that can offer provision and experiences through the medium of Welsh. As our 5 year report points out, there are currently gaps in Welsh language skills within these sectors, which have an impact on individuals' opportunities to use Welsh in the community.

5. Public services

Welsh language standards have increased demand across the public sector for employees who can work bilingually. Welsh language skills are therefore increasingly important in a wide range of public sector roles. A shortage of employees with these skills is likely to directly affect organisations' ability to provide consistently high-quality bilingual services.

Evidence from the Welsh Language Commissioner demonstrates significant demand for Welsh language services across the public sector.⁶ Surveys show that 93% of Welsh speakers consider services in Welsh from public bodies important, yet only 75% are confident that they can receive such a service. The Commissioner has also found that user experiences vary significantly between services and sectors. Together, this evidence indicates that workforce language capacity does not always meet service users' needs or policy expectations.

Evidence suggests that these pressures are likely to intensify. The Employer Skills Survey 2024 found that 20% of employers believe they would benefit from broader Welsh-medium or bilingual provision, with demand highest in sectors such as education, health and social work.⁷ As demand for Welsh language skills grows, existing workforce gaps are likely to place increasing pressure on public services' ability to meet service users' needs.

Without a greater supply of workers who can work in Welsh, organisations will find it increasingly difficult to fulfil their statutory duties, provide high-quality Welsh language services and meet citizens' needs, particularly in education, health, social care and local services.

The Commissioner has consistently called for a better understanding of the workforce's Welsh language skills to support strategic planning. One intended outcome of the Commissioner's regulatory work is that organisations increase the use of Welsh in the workplace, enabling staff to work in Welsh from day to day. The workplace is therefore a strategic priority for the Commissioner. A more consistent and rigorous focus on both Welsh language skills and their use will help organisations progress along the language continuum, creating more opportunities to use Welsh and increasing demand for these skills across the workforce.

⁶ Some of the results of this survey can be found in our [5 year report on the situation of the Welsh language](#)

⁷ [Employer Skills Survey: 2024 | GOV.WALES](#), Welsh Government

Q3: What impact does current or future gaps, shortages or lack of equivalence have, or are likely to have in the future?

The evidence suggests that gaps and shortages in Welsh language skills are already having an impact on recruitment, service delivery and workforce development in several strategic sectors.

These impacts can be seen not only in terms of recruitment difficulties and workforce capacity, but also in terms of the ability of organisations to consistently deliver Welsh language services and to achieve strategic objectives and statutory duties. Without further action, these impacts are likely to increase over time as the demand for bilingual workers increases.

The impacts extend beyond recruitment issues alone. They can affect the quality and accessibility of services, economic opportunities and community development, the ability of organisations to operate bilingually, and the success of wider efforts to achieve Wales' vision of being a truly bilingual nation.

1. Recruitment and retention

A mismatch between the supply of and demand for Welsh language skills can create significant recruitment challenges in sectors where those skills are essential or increasingly important. This is particularly evident in the education sector, where the Welsh Government has identified the need to recruit hundreds of additional Welsh-medium teachers each year.

2. Service delivery and user experience

The shortage of bilingual workers is affecting the ability of organisations to provide Welsh language services on a consistent basis. The Commissioner's monitoring data shows that telephone services and frontline services remain some of the most challenging areas. While the performance of organisations is improving overall, only 63% of organisations surveyed were able to deal with phone calls in Welsh in 2024/25.

3. The growth of Welsh-medium education and the supply of skills of the future

The shortage of a bilingual education workforce is a direct risk to the education system's ability to produce a bilingual workforce of the future. The current education workforce in Wales does not have the capacity to provide education through the medium of Welsh at the scale required to achieve the objectives of the Welsh Language and Education (Wales) Act 2025. We do not believe that a sufficiently ambitious strategy currently exists for closing this gap.

Not only does this shortage risk undermining the achievement of the Cymraeg 2050 targets in terms of reaching one million Welsh speakers, but it will also limit the

ability of the education system to produce the bilingual workforce that will be needed in various sectors in the future.

4. Economic and social well-being

Welsh language skills contribute not only to the delivery of services but also to the economic, social and cultural well-being of Wales. Sectors such as education, health, social care and early years provision are increasingly reliant on workers with Welsh language skills. Failure to develop the capacity of these workforces can affect the quality and accessibility of services, restrict employment opportunities, and undermine efforts to increase the use of Welsh in communities and workplaces.

The Commissioner's Five-Year Report highlights the workplace as one of the most consistent and natural settings in which people can use Welsh on a daily basis. It also emphasises the important role that workplaces play in enabling individuals to maintain and develop the language skills acquired through the education system. A shortage of bilingual workers therefore not only affects service provision but also reduces opportunities to use Welsh in everyday life, weakening the link between education, employment and the wider social use of the language

5. Achieving statutory requirements and national goals

Gaps between the supply of and demand for Welsh language skills pose a significant risk to the achievement of Wales's strategic and statutory objectives. The success of Cymraeg 2050, the implementation of the Welsh Language and Education (Wales) Act 2025, and the delivery of Welsh language standards and strategies such as '*More than just words*' all depend on the availability of a workforce with the appropriate Welsh language skills.

Without a substantial increase in the number of employees able to use Welsh in the workplace, there is a risk that these ambitions will not be realised at the scale, pace and consistency required. Addressing this skills gap is therefore essential to ensuring that policy commitments are translated into tangible outcomes for Welsh speakers across Wales.

Q4: What do you see as the key trends and drivers in the labour market that are affecting skills needs in Wales?

Policy and legislative direction is the main factor likely to influence skills needs in Wales, as more emphasis is placed on the development and use of the Welsh language. Cymraeg 2050, the Welsh Language and Education (Wales) Act 2025, Welsh language standards and policies such as '*More than just words*' create a growing expectation that more individuals will use the Welsh language in education, public services and the workplace.

In the short term, priority should be given to increasing the number of Welsh speakers recruited into key sectors, strengthening the Welsh language skills of the existing workforce, and creating workplace environments that support and encourage the use of Welsh with confidence.

In the medium to long term, the key determinant of success will be the ability of the education and tertiary education sectors to increase the number of learners leaving education with Welsh language skills that are relevant and transferable to the workplace. Achieving this will be essential to securing a sustainable supply of bilingual workers across the Welsh economy.

Demographic trends, particularly population ageing and the growing demand for health and social care services, are also likely to increase demand for workers with Welsh language skills. At the same time, workplaces will play an increasingly important role in maintaining, developing and normalising the use of Welsh among adults. This will require greater emphasis on workforce planning, the development of bilingual workplaces, and the creation of opportunities to use Welsh naturally and regularly in the course of work.

In summary, demand for Welsh language skills as an economic, professional and vocational asset is likely to grow over the coming decades. Responding effectively to this challenge will require a stronger and more integrated approach linking education, training, workforce planning and skills development, ensuring that the supply of bilingual workers is able to meet future demand and support the delivery of Wales's wider economic, social and linguistic objectives.

Q5: What are the key priorities, opportunities or challenges in your sector or policy area that you would like the findings of this research to inform?

As we have already noted, strengthening Welsh language and bilingual skills as a core component of Wales's future skills needs must be a priority during the next planning period. Our response to Question 2 of the consultation identifies the key sectors and areas that require particular attention, while also highlighting the principal challenges and opportunities associated with meeting those needs.

Alongside these priorities, we believe the skills audit should place greater emphasis on regional workforce planning and on improving the evidence base relating to Welsh language skills. There is a need for more robust data on employers' demand for Welsh language skills, the availability of those skills within the workforce, and the extent to which they are used in the workplace. Strengthening this evidence base will support more effective workforce planning and help ensure that skills provision is aligned with current and future demand.

1. Planning regionally

Skills planning should reflect local labour markets, demographic trends, economic development priorities and the linguistic profile of communities. Skills needs, including Welsh language skills, vary across Wales and these differences must be understood and reflected in planning and investment decisions if they are to be effective.

Evidence from the Commission for Welsh-speaking Communities⁸ highlights the close relationship between economic development, workforce planning and the

⁸ [Commission for Welsh-speaking Communities | GOV.WALES](#)

sustainability of Welsh as a community language. The Welsh Skills Audit should therefore consider not only demand for Welsh language skills within specific sectors, but also the wider impact of economic development on local communities and labour markets, particularly in areas with high concentrations of Welsh speakers.

In counties such as Gwynedd, Anglesey and Ceredigion, major economic developments are likely to generate demand for new skills and occupations. Skills planning should ensure that local education, training and apprenticeship pathways equip local people to take advantage of these opportunities through the medium of Welsh. This can help retain young people within their communities, strengthen local economies and support the long-term vitality of Welsh as a community language.

This is particularly important in the context of initiatives such as ARFOR, as well as the work of the Coleg Cymraeg Cenedlaethol and Medr to develop education and employment pathways that respond to regional and local workforce needs. A stronger alignment between economic development, skills planning and Welsh language objectives will help ensure that the benefits of growth are realised by local communities while also supporting the Welsh Government's wider language ambitions.

2. The need for a better understanding of employer demand and the use of Welsh language skills

To develop an effective skills system, there must be a better understanding of the demand for Welsh language skills across different sectors and regions of Wales. While evidence suggests growing demand for bilingual workers in many parts of the economy, there is currently no comprehensive or consistent picture of where demand is greatest, what levels of language proficiency are required, or where the most significant gaps between supply and demand exist. A key challenge is the lack of systematic data on the Welsh language abilities of the workforce and the extent to which those skills are used in the workplace.

In addition to identifying demand across sectors, the Audit should consider the specific Welsh language competencies required in different occupations and settings. Language ability is not uniform; individuals may possess different strengths across speaking, listening, reading and writing. For example, a person may be confident speaking Welsh but less confident writing it. Equally, the language requirements of employers vary considerably between roles and sectors. Understanding these distinctions is essential to effective workforce planning and skills development.

The development of a Code for describing ability in Welsh, based on the Common European Framework of Reference for Languages (CEFR) which will be developed as part of implementing the Welsh Language and Education (Wales) Act 2025, provides an important opportunity to establish a consistent national framework for measuring, tracking and planning Welsh language skills across education, training and employment. The Code will support a more detailed understanding of the Welsh language capabilities available within different sectors and regions, the language requirements of specific occupations, and the gaps between workforce capacity and employer demand. In turn, this will provide a stronger evidence base for workforce

planning and for monitoring progress towards the objectives of Cymraeg 2050 and the Welsh Language and Education (Wales) Act 2025.

The Commissioner is also developing a standard national questionnaire to measure staff use of Welsh in the workplace. This will help organisations better understand how Welsh is currently used, what opportunities exist to increase its use, the barriers that may prevent staff from using it, and the support required to encourage greater use. Together, the Code and the questionnaire will provide a more complete picture of both Welsh language ability and language use. This will enable organisations to plan their workforce more effectively, identify gaps in skills and provision, and take targeted action to strengthen Welsh-medium services and workplace use of the language.