
Part 2: Creating Welsh speakers

Shwmae

Helo



In evaluating the position of the Welsh language today **it is inevitable that the focus will be on assessing the progress made in creating more Welsh speakers.** After all, reaching one million Welsh speakers by 2050 is the first and the most prominent strategic theme of the Welsh Government's *Cymraeg 2050* strategy.

On the one hand, our analysis of the census provides the simple answer to the question of whether or not there has been an increase in the number of Welsh speakers over the reporting period. As we have already seen, the results of the 2021 Census report that the number of Welsh speakers has fallen from 562,016 in 2011 to 538,296 in 2021. This is consistent with the findings of other surveys. Although the Annual Population Survey offers very different numbers, it also reports that there are fewer Welsh speakers today than there were five years ago (836,800 in the year ending June 2025 compared to 883,600 in December 2020).

However, behind these bare facts and figures we know that the picture is considerably more complex and we must consider the evidence within a far wider context in order to properly evaluate the position of the Welsh language today. This section is an opportunity to focus in greater detail on some of the policy areas that are central to the efforts of creating more Welsh speakers. It highlights important strategic areas such as language transmission within the family; the key role of childcare and early years education; the significant work taking place within the statutory and tertiary education sectors, and also the increasingly prominent contribution of the Welsh for adults sector.

This report is an opportunity to pause and reflect on whether we have evidence that the policies that are in place are going to lead to the creation of more Welsh speakers in the future. We will do this by considering the progress made in these key areas during the reporting period, before highlighting the priorities and opportunities the Commissioner has identified for the next five years.

1. Language transmission

Alongside education, the transmission of the language from one generation to the next remains the primary means of creating Welsh speakers. Although most children today are likely to learn Welsh at school rather than at home, language transmission continues to be one of the cornerstones of language planning.

The Welsh Government's policy on the transmission of Welsh within families recognises that part of the importance of language transmission is that surveys and research 'clearly show that use of Welsh at home as a child is a determiner of the frequency of use of Welsh in later life'.¹ It is also crucial because we cannot rely on the education system alone to produce Welsh speakers. For the Welsh language to thrive as a community and social language in the long term, it must be passed from one generation to the next and used naturally in everyday life.

1.1 Main developments

Significant steps were taken during the reporting period to strengthen policy and support for Welsh language transmission in the home. The most important of these is the **National policy on Welsh language transmission and use in families** published by the Government in January 2021. The policy sets out a clear and holistic strategic framework, with the overarching aim of increasing the use of Welsh in households where people can already speak the language.

It focuses on:

- inspiring children and young people to speak Welsh to their own children in the future
- reigniting the Welsh language skills of those who may not have used Welsh since their school days, or who lack confidence in their language skills, to speak Welsh with their own children
- supporting and encouraging use of the Welsh language within families where not everybody speaks Welsh
- supporting Welsh-speaking families to speak Welsh with their children.

¹ Welsh Government, [National policy on Welsh language transmission and use in families](#) (January 2021).

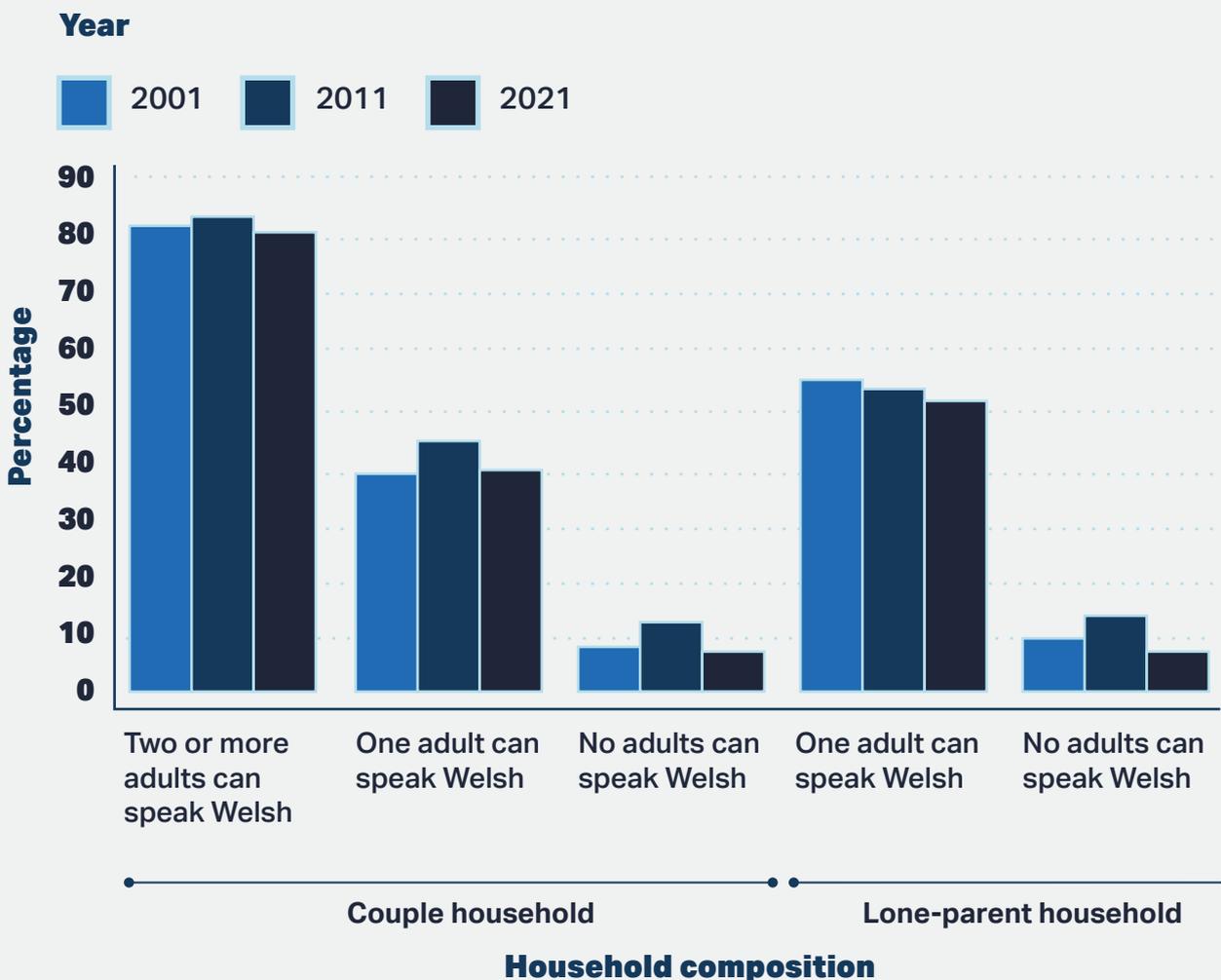
The policy, grounded in the principles of behavioural science, provides the basis for a ten-year work programme that includes a range of interventions designed to achieve these objectives.

These additional interventions build on significant work done in the past as part of the Twf scheme, and more recently, **Cymraeg i Blant (Cymraeg for Kids)** – a scheme that remains a key part of the integrated national policy. Cymraeg i Blant is a national scheme that offers free sessions to parents and their children, with the aim of supporting parents to use Welsh with their children, and to choose Welsh-medium childcare and education for them. In 2023–24, for example, a total of 3,503 virtual and face-to-face sessions were held supporting 26,945 parents and 27,312 children. The National Centre for Learning Welsh also contributes to this field through initiatives such as Welsh at Home and Clwb Cwtsh.

1.2 The evidence

The results of the 2021 Census do not, of course, provide evidence of the impact of the national policy published in the same year, but they do provide valuable insight into trends in Welsh language transmission, and offer important context for ongoing efforts to support language transmission.

Chart 1: Percentage of children aged 3–4 living in one-family households who can speak Welsh in Wales according to the 2001–21 Census, by the linguistic composition of the household



(Source: Office of National Statistics)

A detailed discussion of language transmission in the home can be found in Part 1, Section 8. It is based on an analysis of the number of 3- to 4-year-olds who speak Welsh in relation to the linguistic composition of their household. The assumption is that a 3- to 4-year-old who speaks Welsh is likely to have learned Welsh at home rather than at school.

Chart 1 illustrates that in 2021 80.7% of children aged 3–4, who lived in a couple household where two or more adults can speak Welsh, were able to speak Welsh. This ‘transmission rate’ is broadly consistent with the results of the 2001 and 2011 Census, and remains substantially higher than transmission rates in any other type of household.

The proportion of 3- to 4- year-olds who can speak Welsh is significantly lower in households where only one adult can speak Welsh, whether in a couple household or a lone-parent household. The rate of transmission of Welsh in couple households, where one adult can speak Welsh, fell from 45.4% in 2011 to 40.4% in 2021. The transmission rate in lone-parent households where one adult can speak Welsh remained fairly stable between 2011 (53.3%) and 2021 (52.2%).

Although the transmission rate is relatively high in households where two adults can speak Welsh, these households represent only a small proportion of families in Wales. Of all households with dependent children in Wales, just 10% include adults who can all speak Welsh.² 26% of all households with dependent children include one adult, but not all adults, who can speak Welsh.



10% the percentage of households with dependent children where all adults can speak Welsh

26% the percentage of households with dependent children where one adult, but not all adults, can speak Welsh

In 2022 the Welsh Government established the Commission for Welsh-speaking Communities to make recommendations for strengthening public policy to improve the linguistic sustainability of Welsh-speaking communities. In 2024 the Commission published its first report,³ which also included an in-depth analysis of the 2021 Census results. The Commission collaborated with Prosiect BRO⁴ to develop the analysis which focused specifically on the four local authorities in Wales with the highest density of Welsh speakers: Gwynedd, Anglesey, Ceredigion and Carmarthenshire.

² Prosiect BRO Compendium of Census 2021 Language Statistics.

³ Commission for Welsh-speaking Communities, *Empowering Communities, strengthening the Welsh language* (August 2024).

⁴ BRO: A Comprehensive Sociolinguistic Survey of Contemporary Welsh-speaking Communities | University of Wales Trinity Saint David.

The analysis focuses on some of the most important trends in the four local authorities at the Lower Layer Super Output Areas (small areas) level, which is a small geographical area comprising between 1,000 and 3,000 people and between 400 and 1,200 households. This analysis shows that the stability of the Welsh language in communities with a high density of speakers is under threat, and that this also has implications in terms of the potential and likelihood of language transmission in the home. For example:

- In the four local authorities in question, **there were a total of 268 small areas. 194 of these small areas had over 40% Welsh speakers.**
- Data on **Welsh-speaking households** in local authorities also show the higher capacity in these areas for the transmission of Welsh in the home. The percentage of households where **all adults can speak Welsh** was **63%** in Gwynedd, **48%** in Anglesey, **36%** in Ceredigion and **23%** in Carmarthenshire. **The figure for the whole of Wales is 10%, and stands at only 5% when these four local authorities are excluded.**
- Of the 268 small areas across the four local authorities, **252 saw a decline of between 1 and 21 percentage points** in the proportion of Welsh speakers between 2011 and 2021.

Table 1 provides a more long-term comparison of trends in the percentage of speakers in these four local authorities with the highest density of Welsh speakers.

Table 1: Comparison of percentages of people who can speak Welsh by local authority, 1981–2021

	1981	1991	2001	2011	2021
Anglesey	61.0	62.0	60.1	57.2	55.8
Gwynedd	73.8	72.1	69.0	65.4	64.4
Ceredigion	63.2	59.1	52.0	47.3	45.3
Carmarthenshire	59.0	54.8	50.3	43.9	39.9

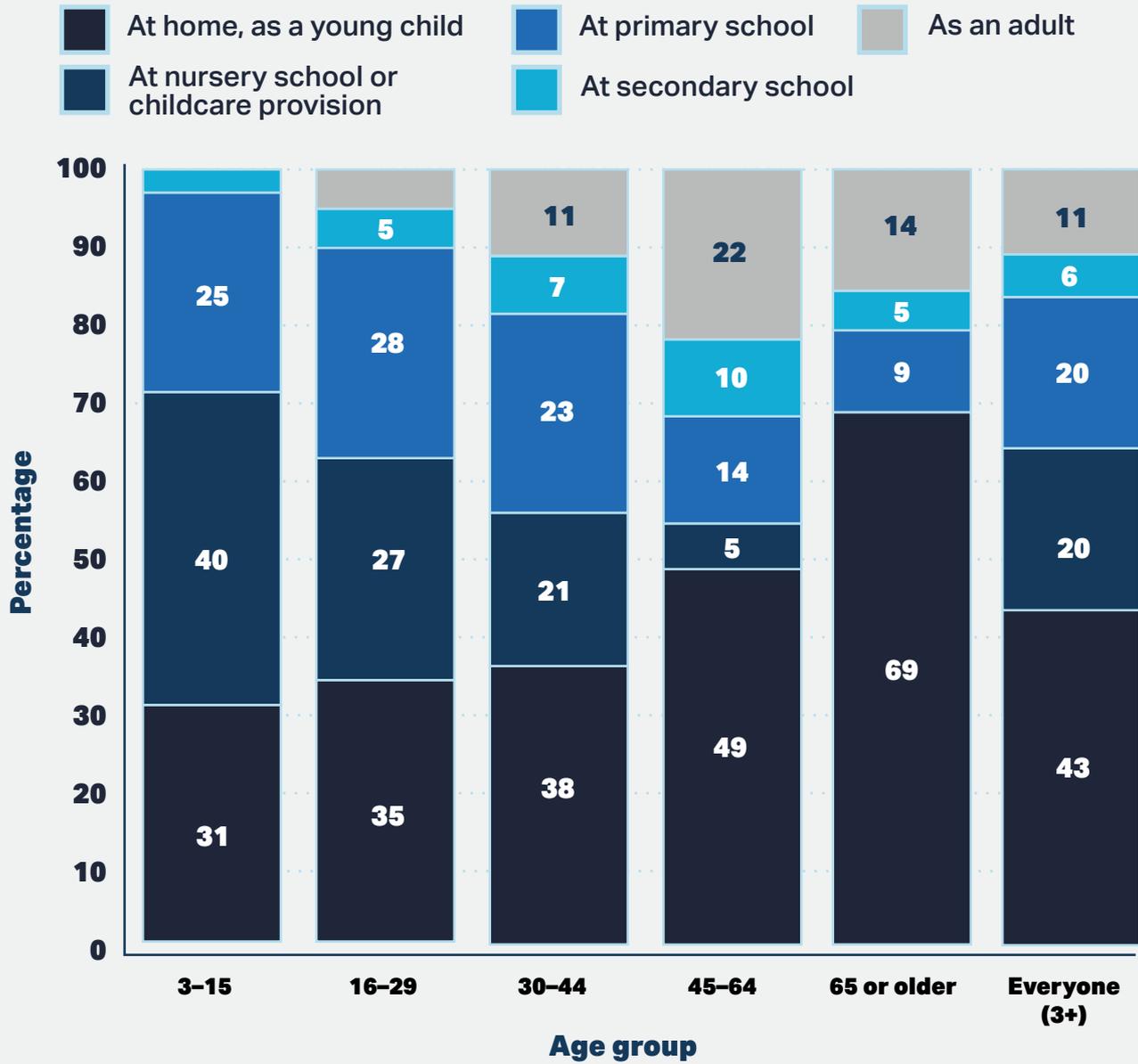
(Source: Office of National Statistics)

The statistics in the table highlight the importance of these areas in transmitting the language from one generation to the next. At the same time, the statistics also show that the percentage – or density – of Welsh speakers in these areas is decreasing. This is likely to mean fewer households where all adults speak Welsh, reducing the potential and likelihood that Welsh will be transmitted in the home.

The results of the 2021 Language Use Survey also provide useful information about language transmission.⁵

⁵ Welsh Government, [Welsh language use in Wales \(initial findings\): July 2019 to March 2020](#) (First published September 2021).

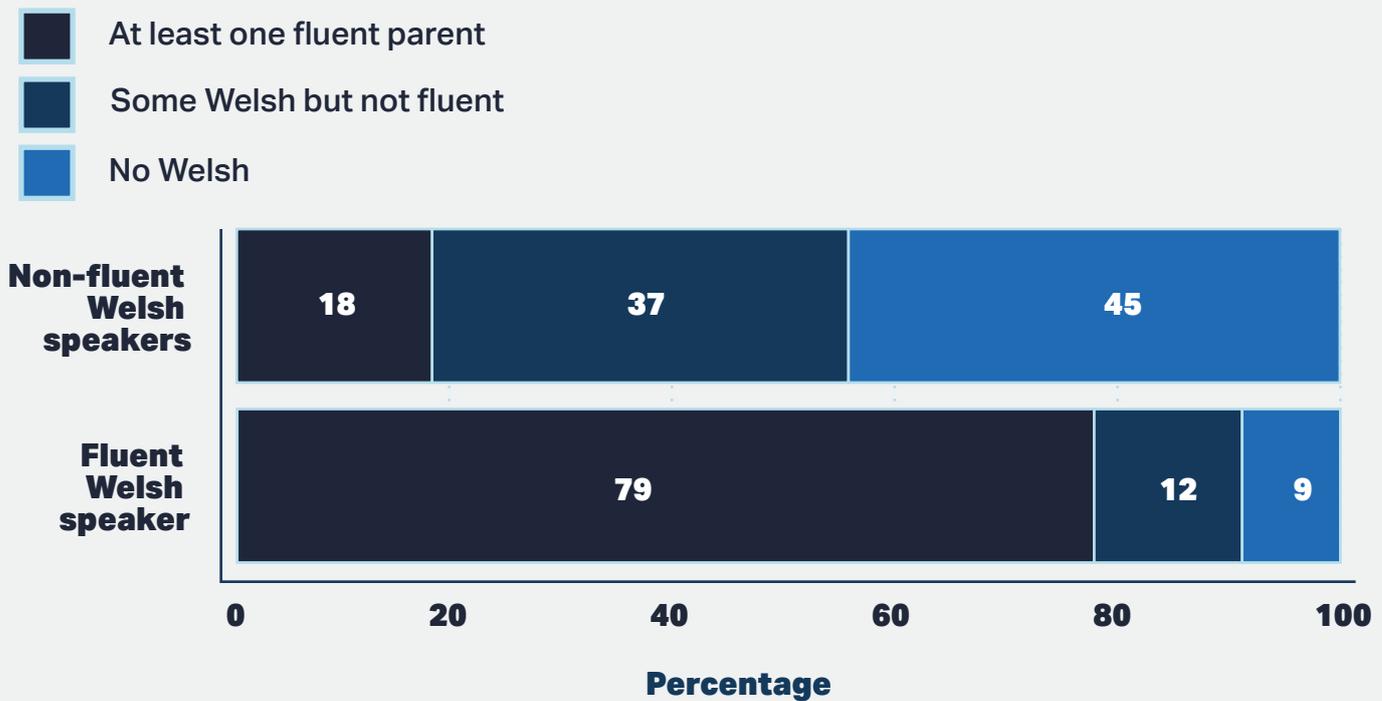
Chart 2: Where and when Welsh speakers started learning to speak the language, by age



(Source: Welsh Language Use Survey 2019–20)

The Language Use Survey data reinforces the census findings, **highlighting that young Welsh speakers are far more likely to have learned Welsh within the education system.** While almost 70% of Welsh speakers aged 65 and over have learnt Welsh at home, only around 30% of Welsh speakers aged 3–15 have learnt their Welsh there. This demonstrates a significant decline over the past half-century in the proportion of people acquiring Welsh in the home. The survey also provides valuable evidence on the relationship between the linguistic composition of the home and fluency in Welsh. As Chart 3 shows, **almost 80% of individuals who considered themselves fluent Welsh speakers had at least one Welsh-speaking parent.** Conversely, only 18% of people who had at least one parent who could speak Welsh fluently reported that they themselves weren't fluent.

Chart 3: Fluency of Welsh speakers according to their parents' fluency



(Source: Welsh Language Use Survey 2019–20)

1.3 Priorities and opportunities to strengthen the position of the Welsh language over the next five years

Overall, the latest evidence reinforces what we already know about language transmission. Further evidence was seen during the reporting period of the importance of Welsh language transmission as a key element of language planning, particularly in relation to the desire to create fluent Welsh speakers who are likely to use the language regularly. The statistics also show that transmission rates have remained broadly unchanged over the past twenty years. However, the **results of the 2021 Census highlight worrying trends regarding the position of the Welsh language in the areas with the highest density of speakers, and the potential implications of this for future language transmission.**

The lack of progress in Welsh language transmission rates over recent decades confirm that this is a **complex policy area and that efforts to support language transmission are up against powerful social and demographic forces.** Nevertheless, the **publication of the national policy on Welsh language transmission represents an important step forward,** laying a stronger foundation for future interventions in this key policy area.

National policy is already focused on the main challenges highlighted by the evidence. There is a clear opportunity to stimulate an **increase in transmission rates in families where one adult speaks Welsh.** Currently, a very significant percentage (around 60%) of 3- to 4-year-olds are unable to speak Welsh despite living in households where one adult can speak the language. If the rate could be increased in this type of household there is clear potential to create many more Welsh speakers in the future, who are more likely to have the confidence to use Welsh naturally in all aspects of life. Organisations such as Mudiad Meithrin, the mentrau iaith and the National Centre for Learning Welsh have a crucial role in this respect.

Although not directly related to language transmission, **influencing parental decisions about the language medium of education, and, in time, trying to influence these young people themselves in terms of their future language use,** is essential to improving transmission rates in the long term. It is therefore encouraging that national policy also places a strong focus on the next generation.

Despite the importance of the national policy and its focus on supporting Welsh-speaking families to speak Welsh with their children, it is also essential to recognise the significance and influence of wider policy areas on rates of Welsh language transmission at home. **Policies in areas such as education, the workplace and the economy can ultimately have a greater impact** on Welsh-language transmission than interventions aimed solely at language transmission itself. This is particularly true in areas with a high density of Welsh speakers. Census evidence shows that the Welsh language is under increasing pressure in those areas where language transmission has been relatively healthy to date. Supporting language transmission therefore requires ensuring that these **communities have thriving local economies, that young people stay or return, that high-quality jobs are available locally, and that more young people are able to raise their families within their communities.**

Priority



The rates of Welsh language transmission from one generation to the next must be improved. Achieving this requires strengthening the position of the language in areas with a high density of Welsh speakers, where transmission remains relatively robust. The recommendation of the Commission for Welsh-speaking Communities to establish areas of higher linguistic significance must be implemented, and additional investment should be provided to Mudiad Meithrin, the mentrau iaith and others in the field to enable them to target interventions more effectively and at greater scale.

In line with some of the other recommendations of this report, we believe that the **promotion standards and promotion strategies** required of local authorities could further contribute to the implementing the national policy and provide a clearer framework for more strategic planning in language transmission.

2. Early years

If the Welsh language is not transmitted in the home, immersing children in the language as early as possible in the childcare and education system is the most likely means of creating fluent speakers. The *Cymraeg 2050* strategy identifies the early years sector as a crucial entry point to Welsh-medium immersion education. This is the principal method for ensuring that children can develop their Welsh language skills, and for creating new speakers.⁶ Expanding the provision of Welsh-medium childcare and early years education is therefore essential to achieving the goal of reaching one million Welsh speakers.

2.1 Main developments

One of the most significant developments over the past five years stemmed from the Co-operation Agreement published by the Welsh Government and Plaid Cymru in 2021.⁷ As part of this agreement, the Government committed to **expanding free childcare to all two-year-olds with a particular focus on providing and strengthening Welsh-medium childcare**. The scheme is being rolled out gradually through the Flying Start programme, with the Government intending to work with partners to expand Welsh-medium provision and develop the workforce.⁸ The Government reported in 2024 that over 1,000 children received Welsh-medium childcare through the Flying Start expansion programme.⁹

There have been other important developments in the early years sector in relation to the Welsh language. The **Welsh in Education Strategic Plans (Wales) Regulations 2019** came into force on 1 January 2020. Following this, local authorities' commitments were published in their new Welsh in Education Strategic Plans (WESPs) for 2022–32.¹⁰ These plans set out the response to the duty now placed on all local authorities to meet Outcome 1: More nursery/three-year-old learners receive their education through the medium of Welsh.

The Welsh Language and Education (Wales) Act 2025, which received royal assent on 7 July 2025, represents a major development that will have a far-reaching impact on the early years sector. The Act places a duty on the Welsh Ministers to draw up a National Framework for Welsh Language Education and Learning Welsh. The framework must outline the steps that Welsh Ministers will take to provide **opportunities to learn Welsh through childcare for those under**

⁶ Welsh Government, *Cymraeg 2050: A Million Welsh Speakers* (July 2017).

⁷ Welsh Government, *The Co-operation Agreement* (December 2021).

⁸ Welsh Government, *Phased expansion of early years provision* | GOV. WALES (Updated December 2024).

⁹ Welsh Government, *Cymraeg 2050: A million Welsh speakers. Annual report 2023-24* (November 2024).

¹⁰ *Welsh in Education Strategic Plans 2022 to 2032* [HTML] | GOV.WALES.

compulsory school age as well as through nursery education. Maintained nursery schools are required to produce a plan for the delivery of Welsh-medium education, detailing the amount of Welsh-medium nursery education provided by the nursery school and proposals for maintaining and increasing that amount, as well as proposals for promoting the use of the Welsh language in the nursery school.

This underlines the importance of the pre-statutory phase to the Government's strategy to increase the number of people learning and using Welsh. Mudiad Meithrin has stressed that the statutory education sector should not be viewed in isolation from the childcare and early years education sector.¹¹ The **Commission for Welsh-speaking Communities has reinforced this position by calling for greater consistency in language policy in the early years sector and statutory primary education in areas of higher density linguistic significance.** In its report *Empowering communities, strengthening the Welsh language*, it recommends that all non-maintained playgroups and nursery settings in those areas should adhere to a policy of Welsh-medium provision and that there should be an investment in the workforce to achieve this.¹²

In 2019 the **Welsh Government announced a new, coherent approach to planning and delivering education and care for children under the age of five**, known as Early Childhood Education and Care. This approach has since evolved into Early Childhood Play, Learning and Care (ECPLC). The **Early Childhood Play, Learning and Care Plan**, published in 2024, sets out the central importance of Welsh-medium childcare and nursery education provision in increasing the uptake of Welsh-medium education and supporting language transmission in the home. It states that the expansion of Flying Start childcare provision supports this. The Plan outlines the Government's intention to grow the Welsh-speaking workforce and expand provision, including through Mudiad Meithrin's Set up and Succeed scheme and the work of the Cwlwm consortium.¹³

2.2 The evidence

Expanding Welsh-medium provision

Mudiad Meithrin continues to expand Welsh-medium provision, opening new cylchoedd meithrin (nursery groups) through the Set up and Succeed programme. The *Cymraeg 2050* strategy, published in 2017, set a target to expand the Welsh medium provision in early years by establishing a further 150 cylch meithrin within a decade. By the end of 2025 it was reported that **a further 100 cylch meithrin had been opened or had expended their provision with the support of the scheme since 2017, with a further 12 projects under way.**¹⁴

Chart 4 shows that the overall number of cylchoedd meithrin and settings has remained relatively stable since 2015/16. **Between 2015/16 and 2024/25 the number of cylchoedd meithrin fell from 467 to 399, while the number of settings increased slightly from 358 to 359.** It is important to note, however, that these changes may reflect shifts in the type of provision offered – for example, moving from sessional to fullday care – or the consolidation of several smaller cylchoedd into a single larger cylch. In such cases, the level of provision would not be reduced.

¹¹ Mudiad Meithrin's response to the Children, Young People and Education Committee's inquiry into the general principles of the [Welsh Language and Education \(Wales\) Bill](#).

¹² Commission for Welsh-speaking Communities, [Empowering Communities, strengthening the Welsh language](#) (August 2024).

¹³ A consortium comprising Early Years Cymru, Clybiau Plant Cymru Kids' Clubs, Mudiad Meithrin, National Day Nurseries Association (NDNA Cymru) and PACEY Cymru.

¹⁴ Data provided directly by Mudiad Meithrin.

Chart 4: Number of cylchoedd meithrin and number of cylch meithrin settings

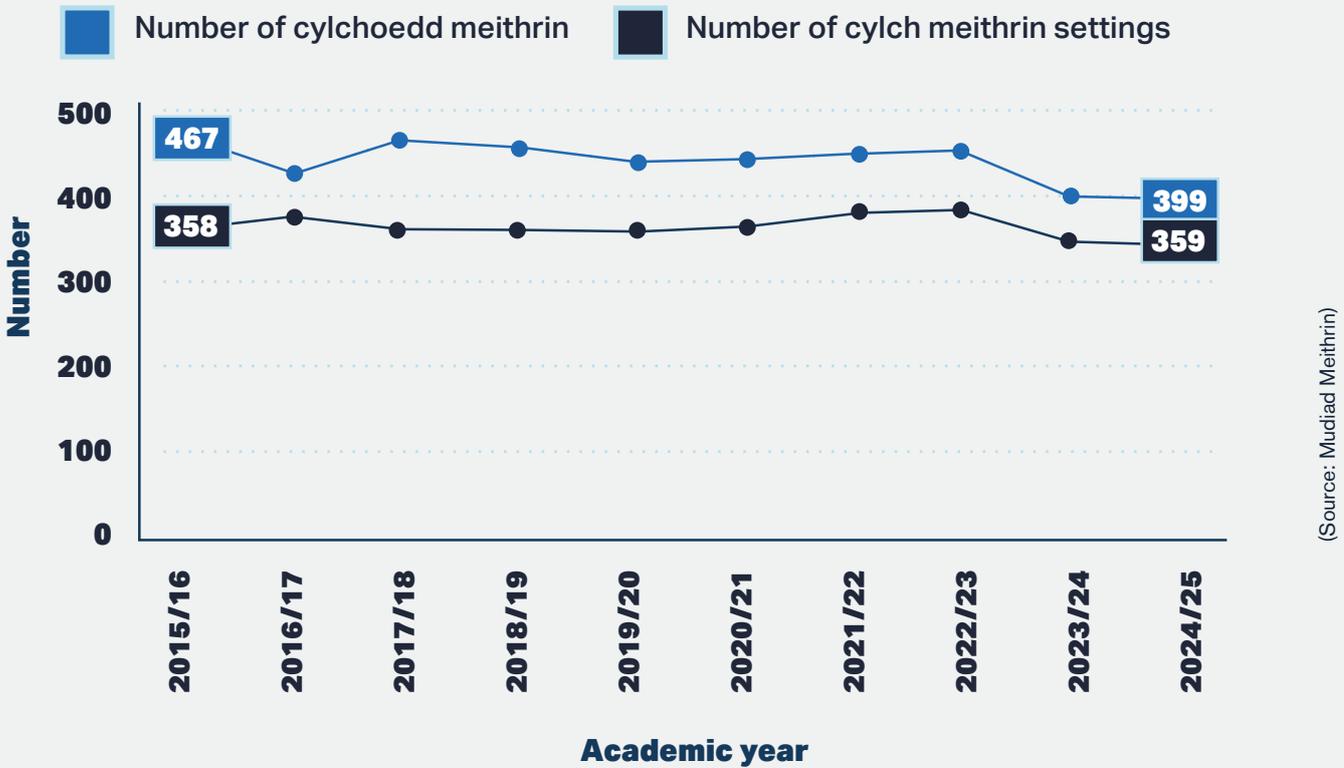
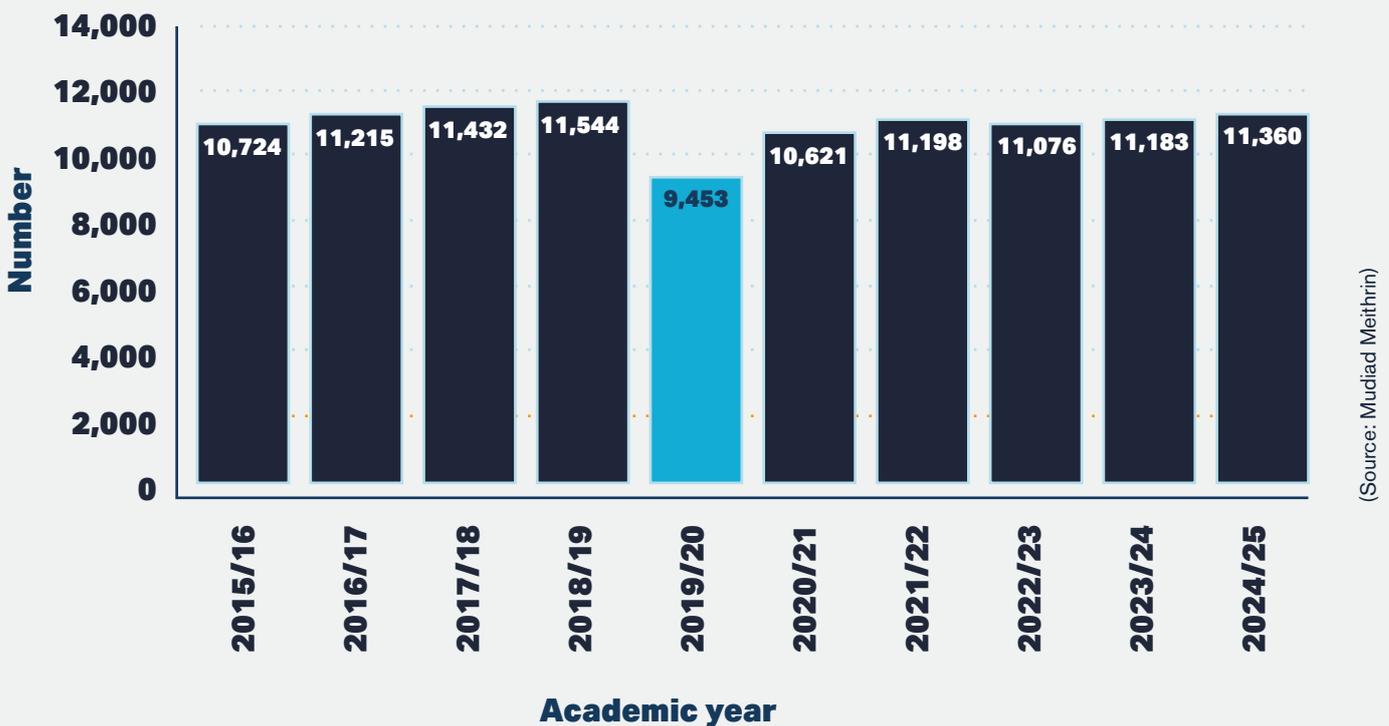


Chart 5 shows an increase in the number of children attending cylchoedd meithrin during the same period, from 10,724 in 2015/16 to 11,360 in 2024/25.¹⁵

Chart 5: Number of children attending cylchoedd meithrin, per year



¹⁵ It should be noted that settings closed during part of the 2019/20 academic year due to the COVID-19 pandemic and there was a marked drop in attendance at cylchoedd. It should also be noted that the population of children aged 0–4 declined during the same period. For example, in 2015 Welsh Government projections stated that there were 174,270 children aged 0–4 in Wales. The corresponding figure for 2023 was 150,196.

Mudiad Meithrin provided 9,276 hours of weekly childcare in 2024/25, an increase of 1,679 hours of care since 2019/20.¹⁶ According to its Strategic Plan for 2025–30, 77.5% of children attending Mudiad Meithrin provision come from families where English is the language of the home.¹⁷ With **88.8% of children progressing from cylch meithrin to Welsh-medium education in 2024/25,**¹⁸ these figures highlight the importance of the Welsh-medium early years sector in creating new Welsh speakers.

Mudiad Meithrin also continued to lead the **Cam wrth Gam training scheme** during the reporting period. The scheme offers valuable opportunities for workers in the sector to gain childcare qualifications through the medium of Welsh. Level 3 or 5 courses are offered in further education colleges, and Mudiad Meithrin also leads a Cam wrth Gam Scheme in secondary schools. The Urdd, Coleg Cymraeg Cenedlaethol and Mudiad Meithrin continue to provide a **Welsh-medium apprenticeship scheme** for the childcare and early years sector, and the National Centre for Learning Welsh provide Welsh language training for the childcare and early years sector through the Camau scheme. Around 700 individuals from the sector learn Welsh each year through this scheme, supported by a network of Cwlwm officers.

Mudiad Meithrin is also **extending its influence through the Plethu** scheme, established in 2022 following discussions with Early Years Wales. Having started by working with members of Early Years Wales and expanding to include other childcare providers, the scheme supports **English-medium or bilingual settings to transition into Welsh immersion settings.** Increasing the number of such settings is a key objective of Mudiad Meithrin's Strategic Plan.

The position of the Welsh language across the early years sector

A positive vision for the Welsh language is evident across the whole sector. Cwlwm partners have issued a joint statement calling for a clear pathway that enables every child to become a Welsh speaker.¹⁹ To support this, they are working collaboratively to upskill the early years workforce. **Since 2021 more than 2,300 early years practitioners have undertaken Welsh language training at various levels** and Cwlwm has provided over 500 resources to support them. Cwlwm also operates a Welsh Promise scheme, through which it has **worked with over 170 childcare settings** to assess how they use the Welsh language and develop an action plan to **move settings along the language continuum towards offering genuinely bilingual or Welsh language provision.** This work lays an important foundation for the implementation of the Welsh Language and Education Act, which will require engagement from the whole education sector – not only the Welsh-medium sector – in order to succeed.

¹⁶ Data provided directly by Mudiad Meithrin.

¹⁷ Mudiad Meithrin, **Meithrin iaith: Strategic Plan 2025-30.**

¹⁸ Data provided directly by Mudiad Meithrin.

¹⁹ **Cwlwm partners call for a pathway that enables every child to grow as a Welsh speaker** | cwlwm (Accessed December 2025).

Despite the importance of these developments in the early years sector, several recent reports highlight persistent challenges in Welsh-medium childcare. For example:

- The ***Independent Review of Childminding*** notes that the overall availability of Welsh-medium childcare provision has increased in recent years, mainly due to an increase in children’s day care capacity. However, the availability of Welsh-speaking childminders has decreased significantly, which is likely to limit the choice of childcare and reduce access to Welsh language provision for parents in some parts of Wales.
- The ***Evaluation of the Childcare Offer for Wales: Year Five (September 2021 to August 2022)*** points to the challenges of recruiting and retaining staff in Welsh-medium settings.
- The ***Overview of key themes in the 2022 to 2027 Childcare Sufficiency Assessments*** identifies a widespread perception among local authorities regarding the lack of Welsh-medium childcare settings. It is noted that this is a general problem, but that it is particularly acute in the context of childminders, reflecting the findings of the independent review noted above. Another difficulty is inadequate care hours, with Welsh-medium childcare providers generally offering sessional care. And this despite the fact that the number of hours offered by *cylchoedd meithrin* has increased in recent years. Additionally, some local authorities reported insufficient access to Welsh-medium provision for children with Additional Learning Needs.
- The Welsh Government commissioned **childcare and play workforce mapping**, and two reports on the outcomes of the work were published in 2024. According to the Phase 1 Report,²⁰ of the 90% of registered settings in Wales that responded to the Care Inspectorate Wales Service Self-Assessment Statement in 2023, 15% said Welsh was their main language of service delivery, and a further 10% said Welsh and English were their main language. Overall, 21% of the registered childcare and play workforce were fluent in Welsh, with a further 21% able to speak a fair amount of Welsh. The Phase 2 Report ²¹ warns that a substantial increase in the amount of Welsh-medium childcare and play provision will be required for local authorities to meet the Welsh-medium provision targets outlined in their WESPs. Crucially, one of the **main conclusions of the report is that difficulties in recruiting and retaining Welsh-speaking staff are a major obstacle** to achieving these targets. This is particularly true given that **inadequate salaries and pay is a key factor in the high turnover rates** for the sector as a whole.

Some of the steps the Welsh Government has taken to support the workforce are outlined in the ***Childcare, Play and Early Years Workforce Plan: Review and Refresh*** published in 2024. Since the introduction of the original plan in 2017, the government has provided funding to the Cwlwm consortium lead several projects, including working with further education colleges

²⁰ Welsh Government, **Mapping the childcare and play workforce in Wales: phase 1 report** | GOV.WALES (March, 2024).

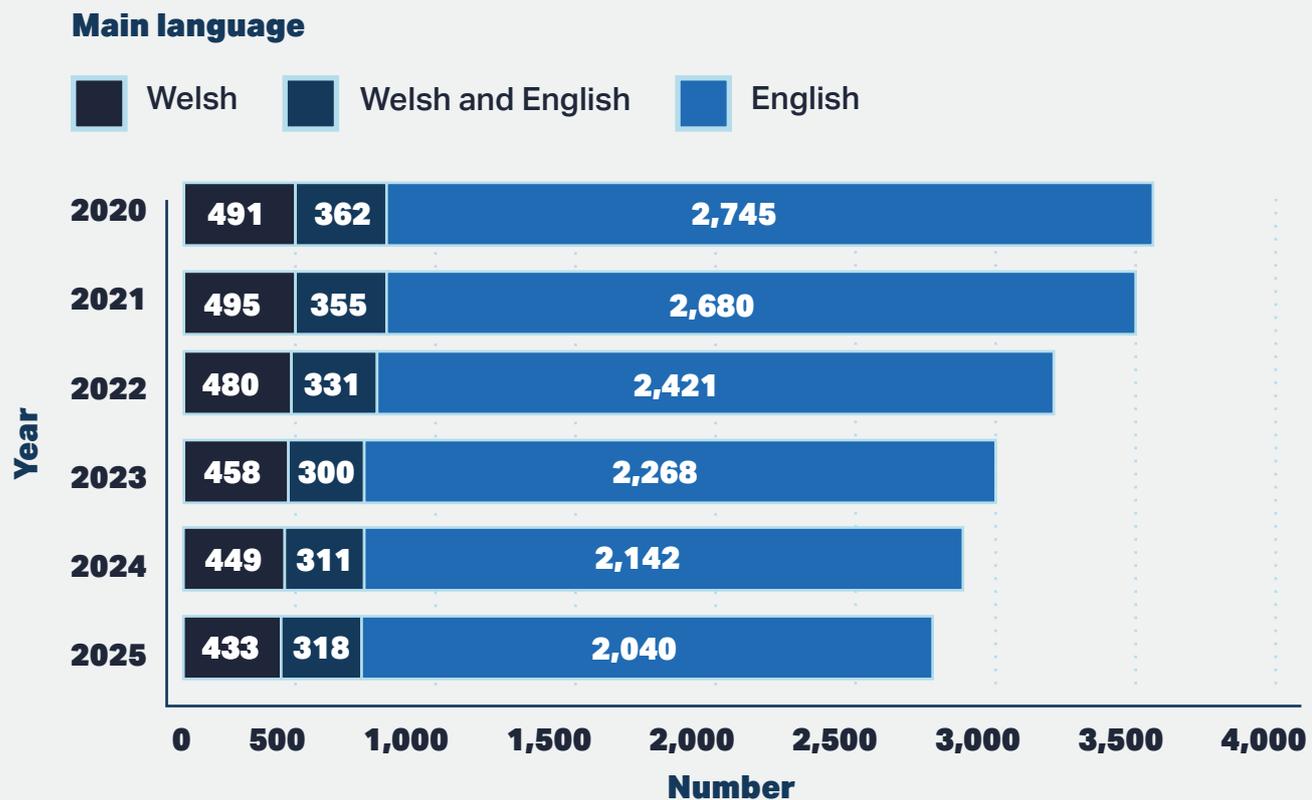
²¹ Welsh Government, **Mapping the childcare and play workforce in Wales: phase 2 report** | GOV.WALES (July, 2024).

and universities to attract more young people into the Welsh-medium childcare workforce, promoting Welsh-medium childcare in ethnic minority communities, and organising Welsh-medium training and support to increase the use of Welsh in early years settings.

Charts 6 and 7 illustrate the number of childcare and play services and the number of childcare and play places according to the main operational language of the service between 2020 and 2025.

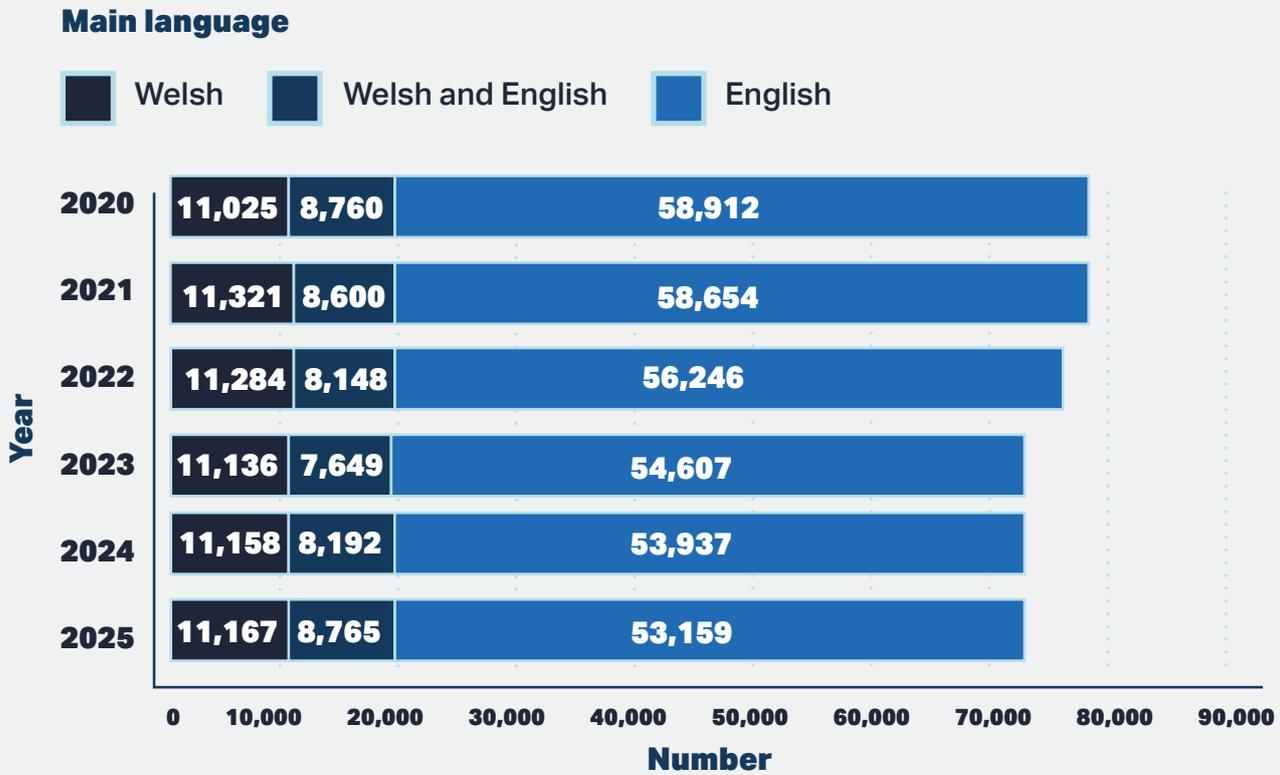
Chart 6 shows a steady decline in the number of childcare and play services over the past five years, and this is also true for Welsh-medium and bilingual services. However, despite the overall reduction in the number of services, the percentage of Welsh-medium services has increased from 13.6% in 2020 to 15.5% in 2025.

Chart 6: Number of childcare and play services by main operational language of the service



As Chart 7 shows, the total number of childcare places has decreased over the past five years. However, **the number of Welsh-medium and bilingual childcare places has risen slightly**. As a proportion of all childcare and play places, Welsh-medium places has increased from 14% to 15.3%.

Chart 7: Number of childcare and play places by main operational language of the service



(Source: Care Inspectorate Wales registration data)

The data clearly shows that there has been very little growth in Welsh-medium or bilingual provision over the past five years, and the majority of childcare and play provision continues to be provided through the medium of English. These figures reinforce the concerns raised in the reports discussed above.

2.3 Priorities and opportunities to strengthen the position of the Welsh language over the next five years

The statistics show that the position of the Welsh language in the early years sector has changed very little, not only during the reporting period, but also in the preceding years. Although there has been some development and progress, **this now needs to be accelerated and expanded significantly to reach the *Cymraeg 2050* targets and achieve the objectives of the Welsh Language and Education Act.** Achieving the growth targets for Welsh-medium education will depend on expanding Welsh-medium childcare and early years provision, ensuring that more children in Wales begin their educational journey through the medium of Welsh.

To achieve this, it will be essential to provide accessible services with sufficient hours of care across the whole of Wales. Consistent, high-quality provision would strengthen **the status of the Welsh language in the early years at a national level, facilitate access to Welsh-medium education, and give every child in Wales a genuine opportunity to develop into a confident Welsh speaker.**

To ensure that the provision of childcare and early education in Wales aligns with the principles of the Welsh Language and Education Act, it will also be necessary to **support and encourage all providers to move along a linguistic continuum.** This will require a comprehensive programme of Welsh-language training to move employees along the continuum of language learning, delivered through flexible and varied models, including intensive learning opportunities. Embedding the Welsh language as a core element of early years provision will be key to ensuring that **every child gets to start their journey to become a Welsh speaker.**

A full programme of Learn Welsh training must therefore be available to the entire workforce, for both trainees and existing staff, building on and extending the current Camau scheme of the National Centre for Learning Welsh in partnership with Mudiad Meithrin.. As in the wider education system, **the main barrier to realising these admirable objectives is the shortage of a bilingual workforce.** As the evidence from the sector shows, staff recruitment and retention is a significant issue, and low wages and the appeal of better-paid work in other sectors, create a particularly challenging context for the sector. These pressures are especially significant given the ambition to expand Welsh-medium provision and support services to move along the linguistic continuum.

Priority



There must be significantly greater investment in developing the Welsh language skills of the early years workforce. This requires expanding the Welsh-language training embedded within the sector's training courses and apprenticeships, and the ongoing professional development available to all workers. To achieve the increase in Welsh-language skills, the recruitment and retention of staff must be facilitated through an overall increase in resources to the sector.

A solid foundation already exists for expanding the Welsh language skills of the workforce, including a Welsh-medium apprenticeship programme, the Cam wrth Gam training scheme and the Camau Welsh language learning scheme. Further **investment in these schemes would strengthen workforce upskilling and enable the expansion of provision** not only within the Welsh-medium sector but also across the English-medium sector, which currently delivers the majority of provision.



A language to
learn and use



16 year-old Yusuf Yassine is a student at Ysgol Gyfun Gymraeg Glantaf. He lives in the Grangetown area of Cardiff and often spends time at the Grange Pavilion there. The Grange Pavilion is a community hub in this multicultural and multilingual corner of Cardiff which provides space for a number of diverse communities and societies and is a popular venue for all kinds of events. Yusuf also attended a Welsh-medium primary school and he thinks that speaking Welsh is very important.



I've been fortunate to have had my education all through Welsh so far, and I feel it has offered me a lot of new opportunities that I wouldn't have had if I wasn't able to speak Welsh. Those opportunities are not only in school, but also outside of school as I socialise and chat with friends and meet new people.

I live in a community where many languages are spoken and when I was younger I learned Arabic, so learning languages and speaking them is something completely natural for me.

If I'm honest, I don't hear a lot of Welsh being spoken where I live, but I definitely feel that people's attitudes towards the language have changed. New Welsh schools have opened in the area, so more people from ethnic backgrounds are having the opportunity to learn the language and taking advantage of that. It feels quite natural now.

After leaving school, I would like to get a job in politics or law. I'd like to stay in Wales if possible, but if I have to move away, I'll make sure I come back to keep my Welsh alive.



3. Statutory education

The majority of young Welsh speakers today are likely to have learnt the language through the education system. It therefore follows that achieving the goal of one million Welsh speakers by 2050 will depend heavily on the success of the education system in creating Welsh speakers over the coming decades.

The trajectory towards a million Welsh speakers is based largely on a substantial increase in the number of people receiving Welsh-medium education, as well as ensuring that a far higher proportion of pupils leave the English-medium and bilingual education system as Welsh speakers. Delivering this ambition will require a significant expansion in the number of teachers who are able to teach through the medium of Welsh.

3.1 Main developments

There is no doubt that the introduction of the **new Curriculum for Wales** was one of the most significant developments in schools over the reporting period. Following the passing of the Curriculum and Assessment (Wales) Act 2021, schools have been busy planning their curricula and preparing for implementation from September 2022. **There is a clear expectation that the Welsh language is a central part of the learning experience of all pupils in Wales**, and one of the key objectives of introducing the new curriculum was to place greater emphasis on the teaching and use of Welsh in English-medium schools. Its introduction is therefore a core element of the effort to ensure that a significantly higher proportion of Welsh pupils leave the education system as fluent Welsh speakers.

Alongside the roll-out of the curriculum in schools, Qualifications Wales and awarding bodies have been responsible for **developing new qualifications**. All new GCSE qualifications and publicly-funded qualifications will be available bilingually. It was also decided to replace the Welsh Second Language qualification with a new Core Cymraeg qualification. The intention is that Core Cymraeg is more challenging and appropriate for learners in the English-medium sector, and will therefore facilitate the movement of pupils and schools along a linguistic continuum by **closing the gap between the Welsh language curriculum in English-medium and Welsh-medium schools**.

An important development to support schools and learners in the context of curriculum development and new qualifications was the establishment of Adnodd in 2022, the body responsible for overseeing and co-ordinating educational resources. The provision of quality bilingual resources will be essential to realise the objectives of the curriculum in terms of developing pupils' Welsh language skills and to enable more schools to move along the linguistic continuum.

Key milestones on the journey towards the Welsh Language and Education Act

2015



Donaldson’s review of the curriculum

Starting the important work of developing a new curriculum for Wales

2017



Publication of the Cymraeg 2050 strategy

Setting a vision and specific targets to expand Welsh-medium education

2019

The Additional Learning Needs and Education Tribunal (Wales) Act 2018

Laying a stronger legislative basis to ensure additional Welsh-medium learning support



2018

The Welsh in Education Strategic Plans Regulations (Wales) 2019

Outcome of a review in 2017 on strengthening the planning framework for Welsh-medium



2021



2021: Curriculum and Assessment (Wales) Act 2021

An Act establishing a statutory framework for the new curriculum for Wales

2021



New guidance on the categorisation of schools by Welsh language provision

Introducing a new system for defining Welsh-medium and bilingual schools

2022

Welsh in Education Strategic Plans in local authorities come into force

Local authority 10-year plans published and implemented



2022

Publication of the Welsh in Education Workforce Plan

10-year plan for developing an increasingly bilingual education workforce

2025



Welsh Language and Education (Wales) Act 2025 receives Royal assent

A historic development that can be considered the culmination of a decade of significant developments in Welsh language and education

As well as dealing with new curriculum development requirements, schools have also had to respond to the significant changes to the Additional Learning Needs (ALN) provision as part of the **implementation of the Additional Learning Needs and Education Tribunal (Wales) Act 2018**. A particularly significant development in this context was the appointment of a national lead for supporting the additional learning provision through the medium of Welsh. Since the appointment of the national lead in 2022 significant steps have been taken to develop more resources and support for ALN through the medium of Welsh.

One of the cornerstones of the Welsh Government's *Cymraeg 2050* strategy is to significantly increase the percentage of pupils in Wales receiving Welsh-medium education. Although the Welsh in Education Strategic Plans (WESPs) framework has been in place for some time, 2019 marked a significant policy shift with the introduction of **the Welsh in Education Strategic Plans (Wales) Regulations 2019**. These regulations ushered in a far more ambitious planning system. The expectation was that local authorities would proactively expand Welsh-medium education, thereby contributing directly to achieving some of the main targets for education in *Cymraeg 2050*. In **2022 the first local authority strategic plans were published under the new system**. This means that all local authorities are now implementing ten-year plans that include firm targets and commitments to expand Welsh-medium education.

Alongside the introduction of the new regulations, the Welsh Government also revised **the guidance on school categorisation according to Welsh-medium provision**. The main aim of this revision was to simplify the linguistic categories, provide greater clarity for parents and pupils, and create a system that facilitated the gradual movement of schools along a linguistic continuum.

There is no doubt that expanding the Welsh-medium education workforce is **one of the most crucial issues in terms of the success of the vision of *Cymraeg 2050***. Our previous 5-year report identified a need to implement a national strategy to develop an increasingly bilingual education workforce. The Government responded positively to those recommendations by publishing the **Welsh in Education Workforce Plan in 2022**. The plan sets out the steps that the Government and its partners will take over ten years to increase the number of teachers and assistants who are able to work through the medium of Welsh and to teach Welsh.

As part of the Co-operation Agreement between Labour and Plaid Cymru in 2021, the Welsh Government committed to introducing a Welsh Language and Education Bill during the lifetime of the Senedd. The passing of the **Welsh Language and Education (Wales) Act 2025** was a hugely significant development and is the culmination of the significant developments that have taken place in terms of the Welsh education planning system over the past decade. The main provisions of the Act include:

- providing a **statutory basis** for *Cymraeg 2050* targets
- **defining the linguistic categories** of schools in regulations

- placing a duty on Welsh Ministers to create a **National Framework for Welsh Language Education and Learning Welsh**.
- Requiring schools to produce and publish **Welsh language education delivery plans**
- establishing a **robust planning and accountability chain** between *Cymraeg 2050* targets, Welsh Ministers' National Framework, strategic plans at local authority level, and school delivery plans
- developing a **code to describe ability in Welsh** as a foundation for defining the linguistic categories of schools, and to support strategic planning at national, local authority, and school level
- **establishing a National Institute for Learning Welsh** to support Welsh learning across the education and lifelong learning system.

Collectively, the provisions of the Act are significant, and address a number of shortcomings within the current planning system. **It is fair to say that the Act marks a historic turning point in the development of the Government's education and Welsh language policy.** For the first time, some of the Government's most important targets and commitments in relation to the Welsh language are set out in legislation.

3.2 The evidence

While there have been significant developments in policy and legislation over the past five years, the statistical evidence does not show comparable progress over the same period.

The main *Cymraeg 2050* education targets are based on the number and percentage of 7-year-olds who are assessed and taught through the medium of Welsh as a first language. As shown in Table 2, the percentage has risen steadily over the past five years, but the increase is far slower than the trajectory anticipated in the *Cymraeg 2050* targets.

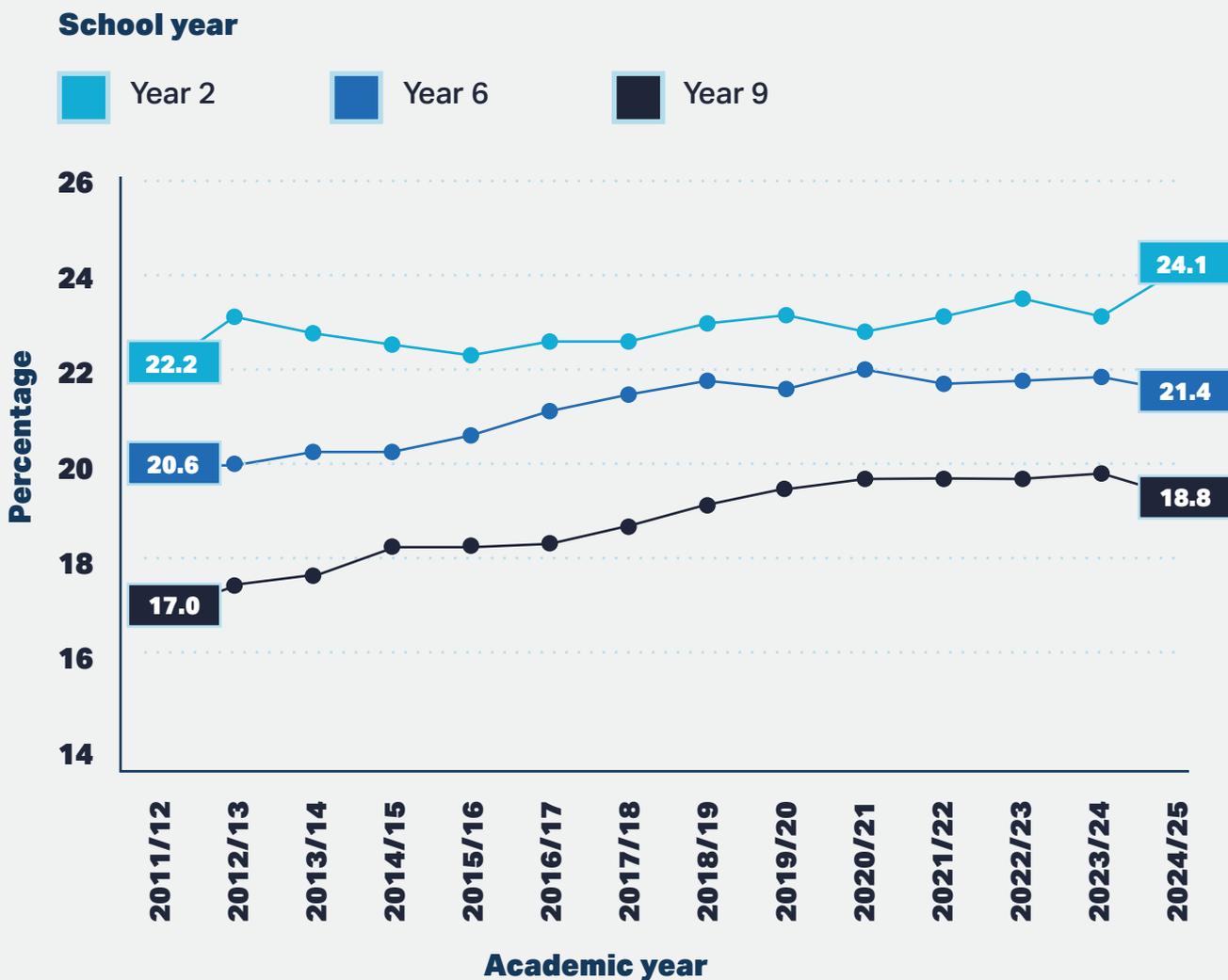
Table 2: The number and percentage of Year 2 pupils (aged 7) assessed in Welsh as a first language or taught Welsh as a first language

	Baseline 2015/16	2020/21	2021/22	2022/23	2023/24	2024/25	Targets		
							2021	2031	2050
Number	7,760	7,700	7,835	7,960	7,660	7,870			
Cohort	34,765	33,750	33,895	33,960	33,090	32,700			
Percentage	22.3%	22.8%	23.1%	23.4%	23.2%	24.1%	24%	30%	40%

Looking at the data over a longer period, we can see an increase of just 1.9 percentage points in the percentage of pupils studying Welsh as a first language in year 2 over the past 15 years.

As shown in Chart 8, the percentage learning Welsh as a first language in year 9 (end of Key Stage 3) is consistently lower than the percentage learning Welsh as a first language in year 6 (end of Key Stage 2) three years earlier.

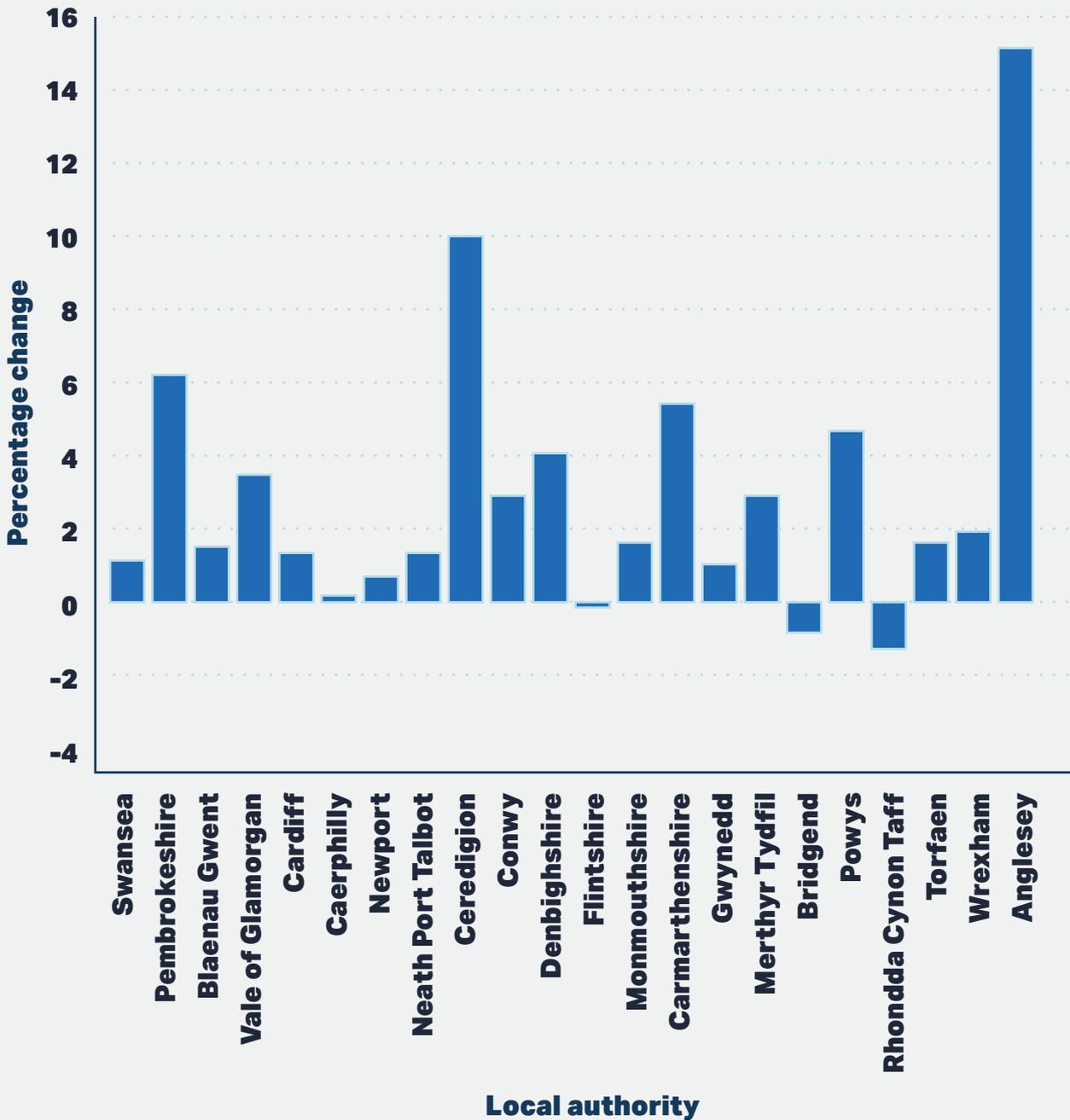
Chart 8: The percentage of pupils in years 2, 6 and 9 assessed or taught in Welsh as a first language



(Source: Pupil Level Annual School Census)

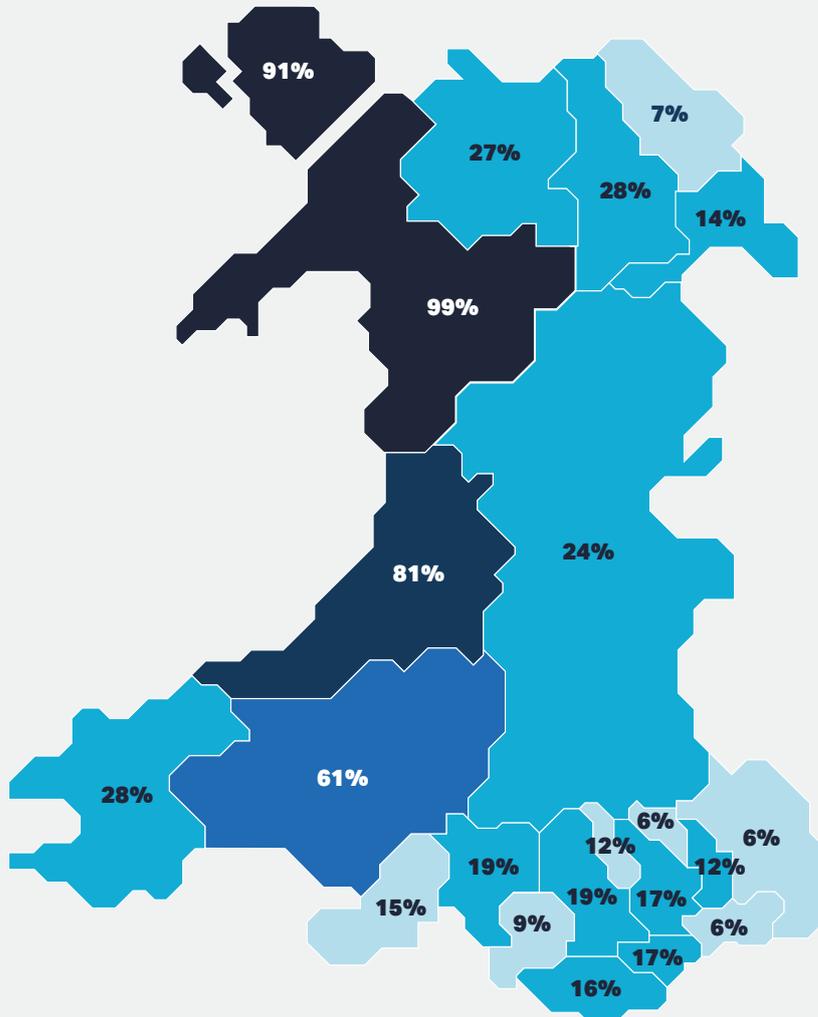
In 2021/22, 21.6% of year 6 pupils were learning Welsh as a first language. Three years later, only 18.8% of the same cohort were studying Welsh as a first language. This highlights the continuing challenge of linguistic progression within Welsh-medium education, particularly as pupils transition from the primary to the secondary sector.

Chart 9: Difference in the percentage of year 2 pupils studying Welsh as a first language between 2011/12 and 2024/25, by local authority



(Source: Pupil Level Annual School Census)

Map 1: The percentage of year 2 pupils studying Welsh as a first language in 2024/25, by local authority



(Source: Pupil Level Annual School Census)

The majority of local authorities in Wales have seen an increase in the percentage of year 2 pupils being assessed through the medium of Welsh. Nevertheless, the increase since 2011/12 is relatively modest in many local authorities, particularly when considered against the level of progress required over the next five years to meet the ambitious *Cymraeg 2050* targets.

In 2023/24, 17.1% of pupils in Wales attended Welsh-medium schools, compared with 16.6% in 2019/20, 15.9% in 2014/15, and 16.3% in 2009/10. In 2023/24, 23.2% of pupils in Wales attended Welsh-medium or bilingual schools.²² This is slightly lower than the figure of 23.4% for 2019/20, and marginally higher than the figure of 22.7% for 2014/15 and 22.5% for 2009/10.

The percentage of pupils studying Welsh first language as a GCSE subject has remained relatively stable over the past five years. Although the percentage of pupils taking Welsh Second Language has increased significantly over the past decade, largely due to the Welsh Government’s decision to abolish the GCSE Welsh Second Language short course from summer 2018 onwards, this percentage has decreased over the past five years. The percentage of Welsh pupils not registering for a GCSE exam in Welsh has risen steadily over the same period, from 13.70% in 2019/20, to 19.60% in 2023/24.

²² This data combines numbers attending primary, middle and secondary schools in Wales. Bilingual schools refer to dual stream and transitional schools in the primary sector, and refer to bilingual category schools AB, BB, CB and CH for middle and secondary schools. It is not possible to compare data for 2024/25 as the schools categorisation system according to Welsh-medium provision has changed.

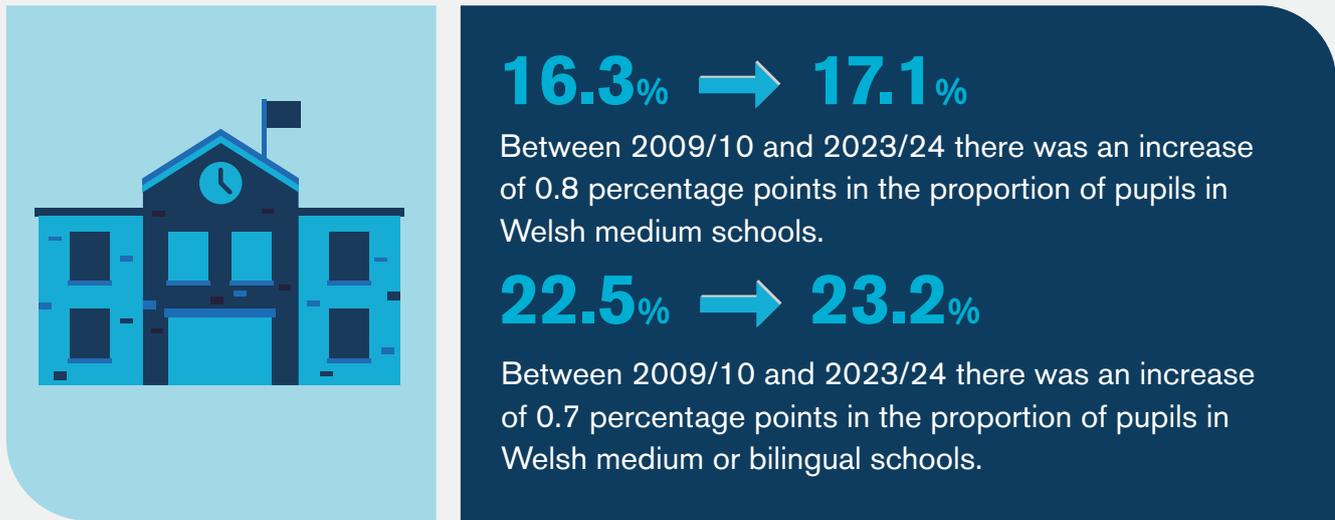
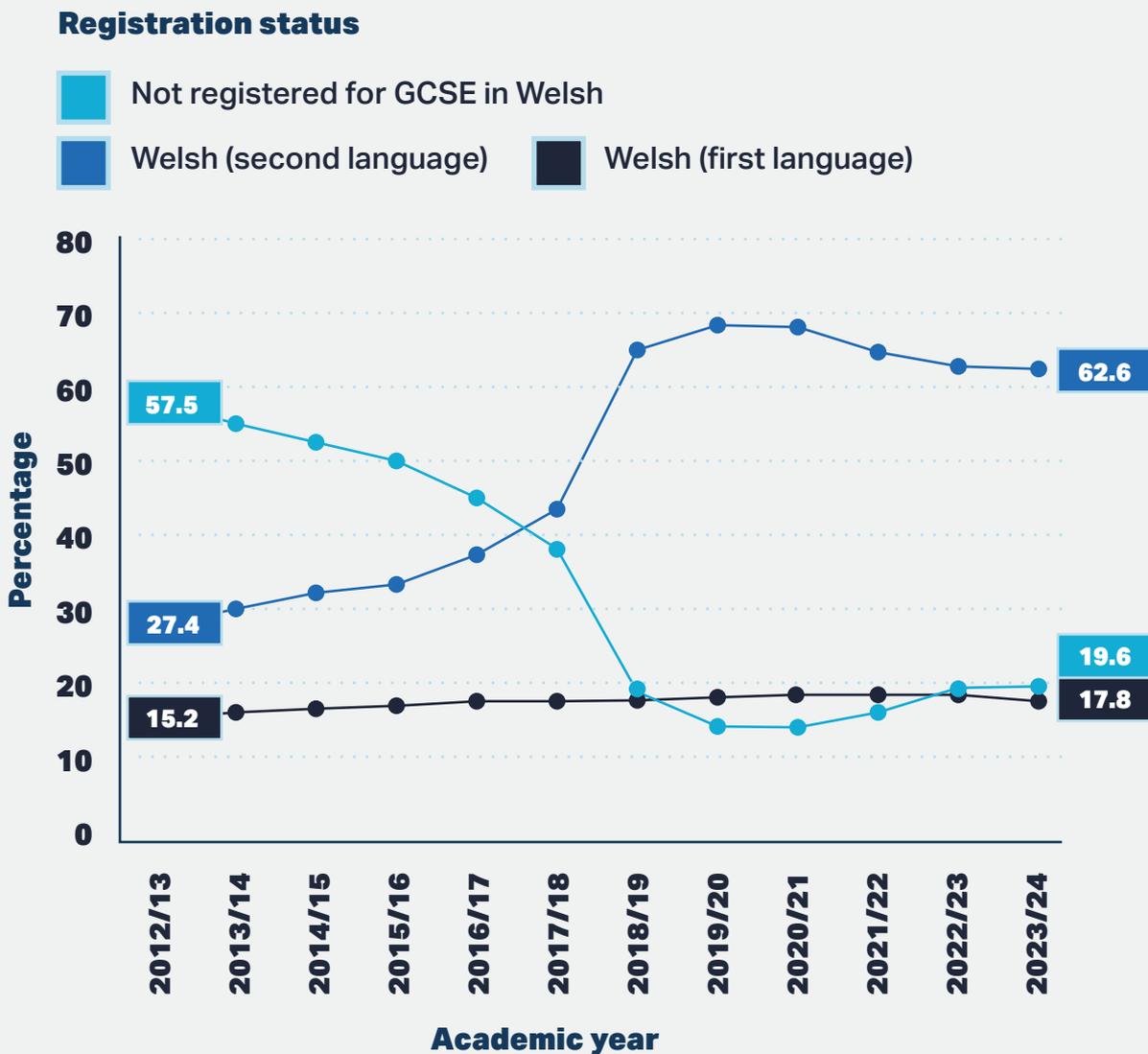


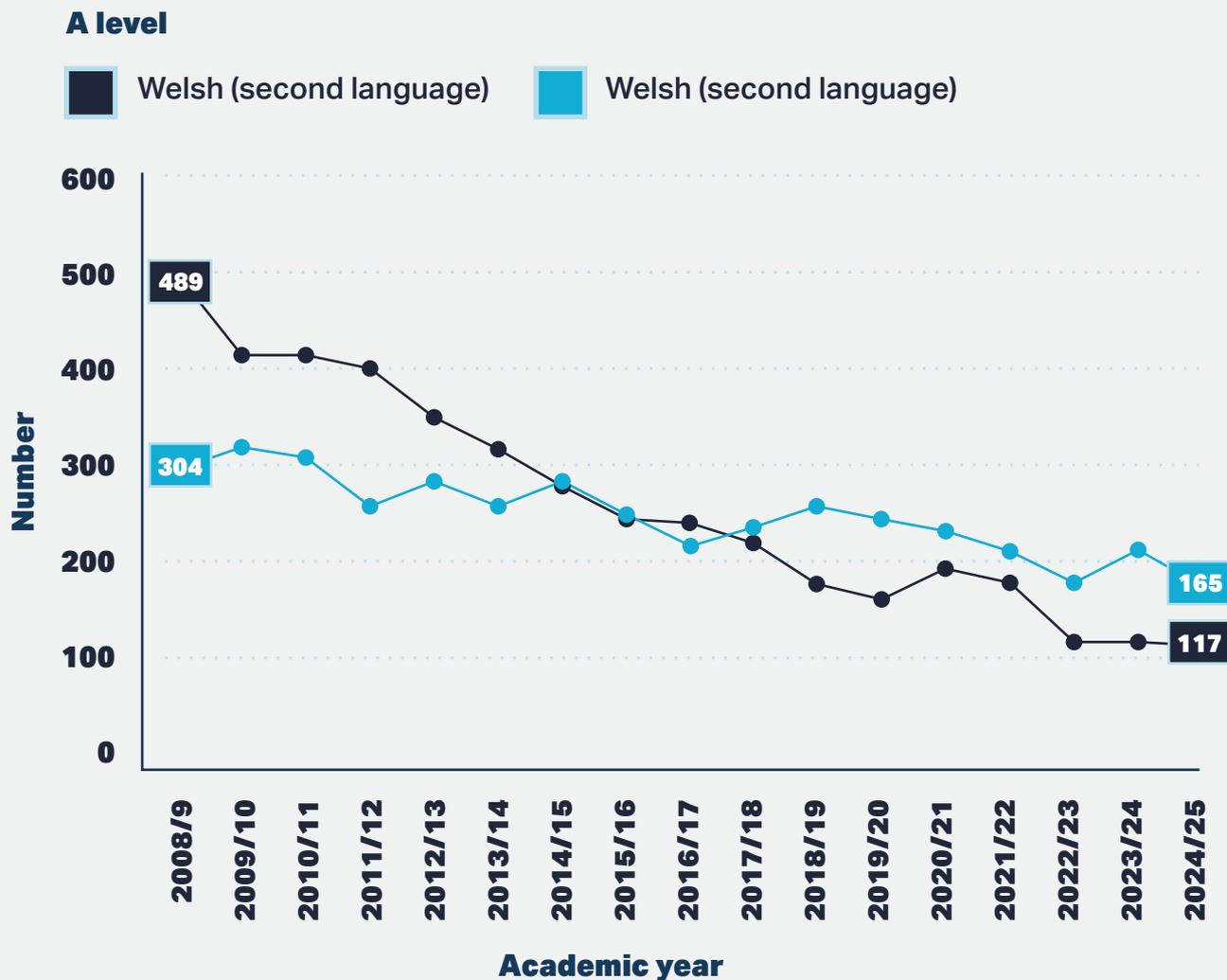
Chart 10: Percentage of year 11 learners registered for GCSE Welsh (first or second language)



(Source: Welsh Examinations Database)

Over the past 15 years there has been a significant reduction in the number of learners choosing to study Welsh A Level and Welsh Second Language A Level.

Chart 11: Number of entries for Welsh A Levels and Welsh Second Language A Levels (17-year-old pupils only)



As Chart 11 shows, in 2008/9 there were 304 learners studying Welsh A Level and 489 studying Welsh A Level Second Language. By 2024/25 the figures had fallen to 165 studying Welsh and 117 studying Welsh Second Language. According to WJEC data, between 2015/16 and 2023/24 the number of centres that registered candidates for Welsh A levels fell from 48 to 45. During the same period, the number of centres that registered candidates for Welsh Second Language A Level fell from 71 to 55.²³

²³ WJEC, [Results Statistics Archive](#) (Accessed December 2025).

One of the most important factors in securing the growth of Welsh-medium education is ensuring that more teachers are able to teach through the medium of Welsh. The *Cymraeg 2050* strategy includes specific targets in terms of the teacher numbers needed for the Welsh-medium sector to achieve the growth targets of Welsh-medium education. As Table 3 demonstrates, the numbers teaching through the medium of Welsh in the primary sector have remained relatively stable over the past decade. During the same period the numbers teaching in the secondary sector have grown steadily. However, the numbers remain significantly below the targets that have been set.

Table 3: Numbers teaching through the medium of Welsh in primary and secondary schools²⁴

	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

(Source: Pupil Level Annual School Census)

As Table 4 shows, the number of students on Initial Teacher Education courses training to teach through the medium of Welsh varies from year to year. However, the numbers training to teach in the primary sector appear to have increased over the reporting period but the numbers training to teach in the secondary sector have not increased significantly.

Since 2020, the Open University has offered new part-time and employment-based Graduate Certificate of Education (PGCE) courses for teaching in primary and secondary schools in certain subjects. In 2023/24, for example, 10 students had registered for the Welsh-medium part-time PGCE, all of whom were preparing to teach in the primary sector. In the same year there were 10 Welsh-medium registrations for the employment-based PGCE in the primary sector, and 20 for the equivalent secondary sector route.

²⁴ The figures for secondary schools include teachers who teach Welsh as a subject as well as teachers who teach other subjects through the medium of Welsh.

Table 4: Number of first-year students on ITE courses in Wales training to teach through the medium of Welsh, by school level and year

	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
Training to teach in Welsh in the primary sector	150	145	110	95	145	190	210
Training to teach in Welsh in the secondary sector	95	90	100	75	90	145	110
Total of those training through the medium of Welsh	245	235	210	175	235	355	325
Total trainees on ITE courses	1,310	1,245	1,200	1,065	1,080	1,680	1,610

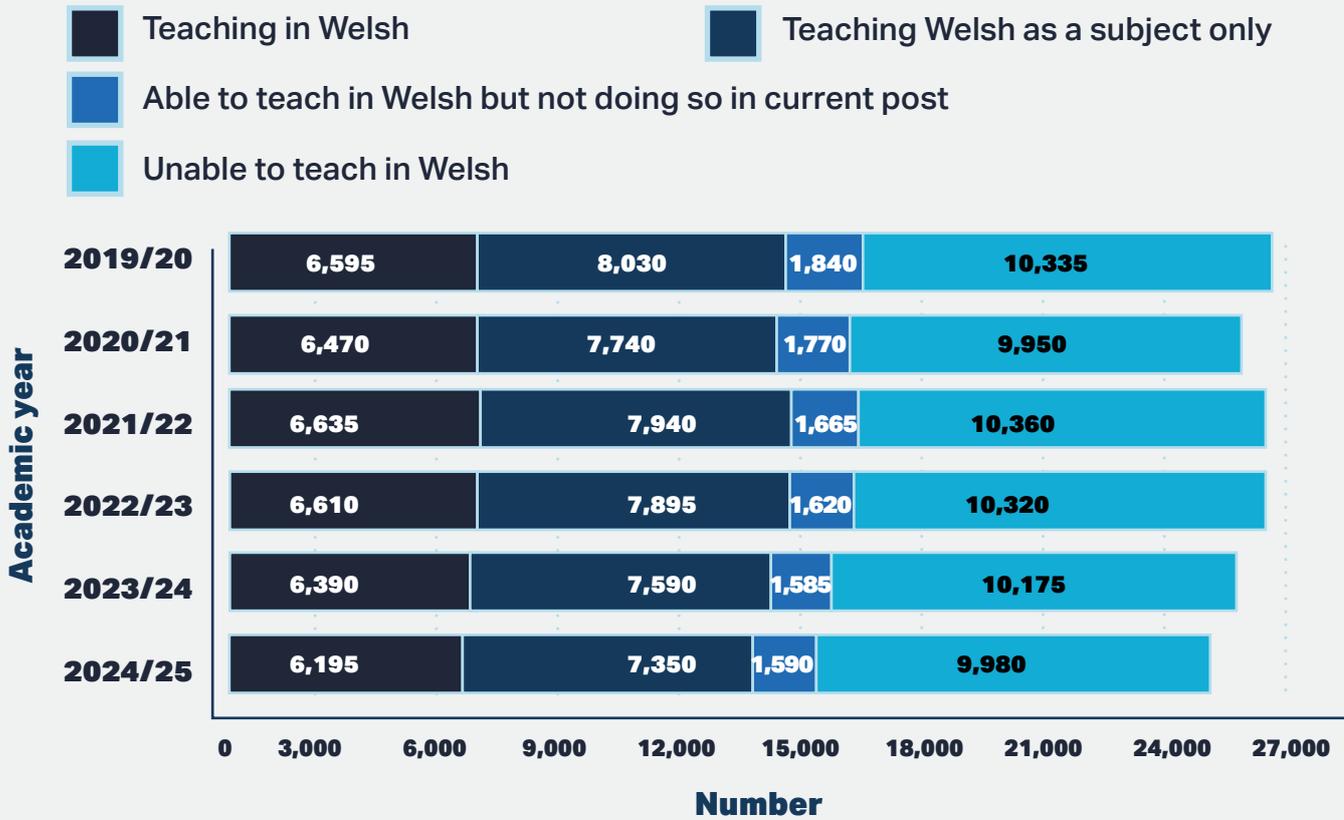
(Source: Higher Education Student Record, Higher Education Statistics Agency)

As part of the implementation of the Welsh in Education Workforce Plan, the Welsh Government has published a detailed data analysis in order to forecast the number of teachers needed to teach Welsh, or teach through the medium of Welsh, to achieve the *Cymraeg 2050* targets.²⁵ The analysis considers a range of factors including numbers currently teaching through the medium of Welsh, numbers of those training to become teachers each year, and the annual numbers of those leaving the profession.

This analysis concludes that **an additional 225 secondary teachers needed each year above those currently recruited through ITE routes and other recruitment methods. For the primary sector an additional 153 teachers are needed annually.** Securing a sufficient number of teachers for the Welsh-medium sector is only one part of the challenge, and achieving the *Cymraeg 2050* targets and the vision of the Welsh Language and Education Act (Wales) 2025 will also require a significant increase in the number of teachers who can teach bilingually in every school. The School Workforce Annual Census shows that the number of teachers reporting that they are able to teach through the medium of Welsh has changed very little since 2019/20.

²⁵ Welsh Government, [Welsh language in education workforce plan: data analysis - 2024 update](#).

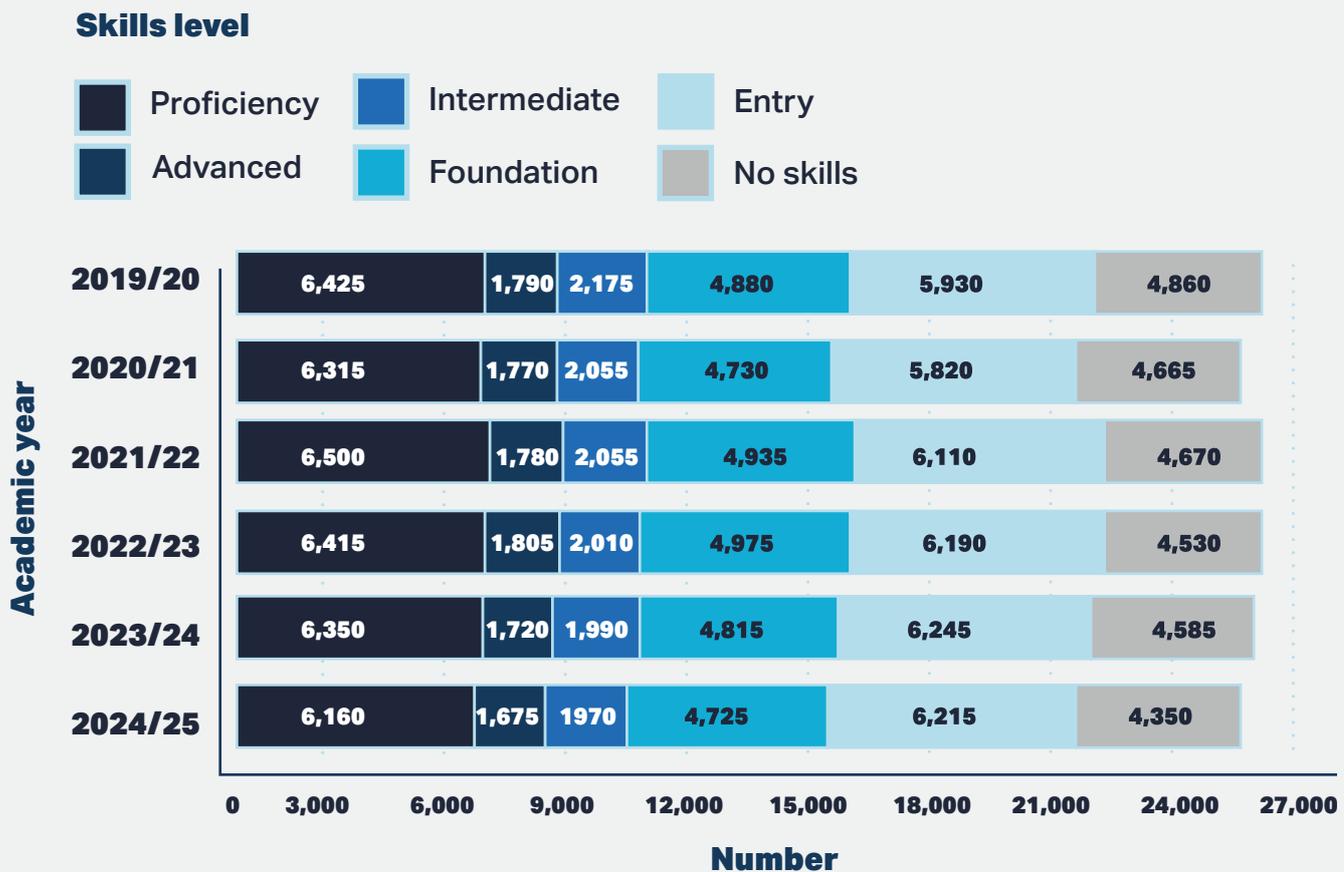
Chart 12: The number of teachers who teach through the medium of Welsh



(Source: School Workforce Annual Census)

The annual census also shows that the Welsh language skills profile of teachers and support staff in Wales has changed very little since 2019/20.

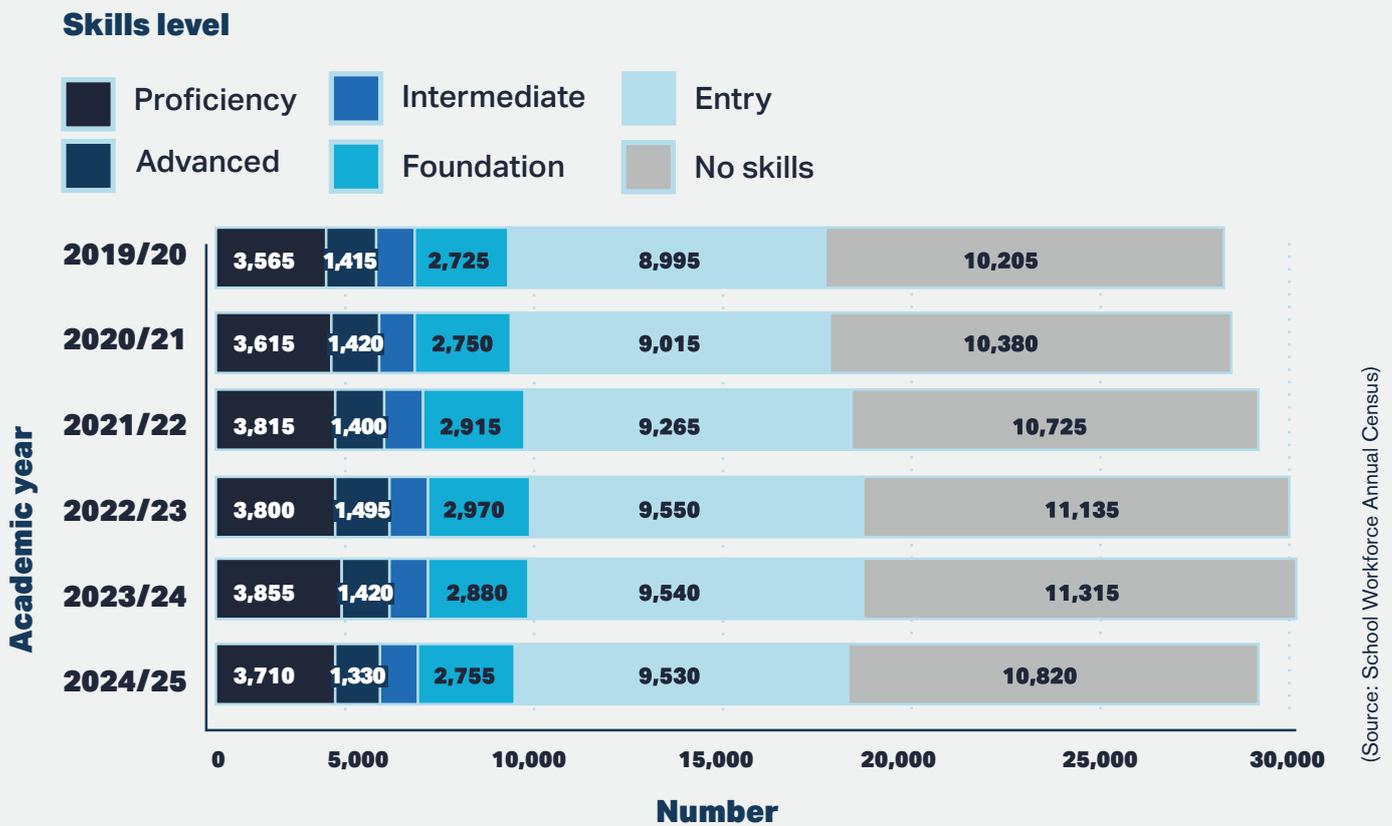
Chart 13: Teachers' Welsh language ability



(Source: School Workforce Annual Census)

One thing that is evident when comparing the language skills profile of teachers and support staff is that a far higher proportion of support staff note that they don't have any Welsh skills; and of those that report having Welsh skills, a greater percentage of those are at the lower levels. For example, in 2024/25, 25% of teachers reported being proficient in Welsh, compared with just 12% for support staff.

Chart 14: Support staff Welsh language ability



3.3 Priorities and opportunities to strengthen the position of the Welsh language over the next five years

An analysis of the statistics over the past five years shows no clear evidence of meaningful progress against the core outcomes of the *Cymraeg 2050* strategy. Although the proportion of learners receiving Welsh-medium education is moving in the right direction, **the increase over the past fifteen years has been slow.**

The statistics regarding the number of learners studying Welsh as an A level subject are a matter of considerable concern, and it is equally clear that **growing the workforce able to teach through the medium of Welsh is a major challenge.**

The message is therefore unambiguous: **significant change is urgently required if we are to ensure that we are on the right track to achieve the long-term targets of *Cymraeg 2050*.**

However, it is important to recognise that the statistical picture from the past five years does not fully reflect the scale of policy development during the same period. The past five years have been a period of significant reform for education in Wales. The Government has introduced a raft of significant policies and legislation to support the Welsh language. By introducing the Welsh Language and Education (Wales) Act 2025 **the Government has set a highly ambitious and coherent vision and direction for the education sector in Wales.** The Act also sets out a clear pathway and robust legislative mechanisms in order to achieve some of the most important targets of the Government's language strategy. From this perspective, the position of the Welsh language today is considerably stronger than it was five years ago.

There is therefore a genuine reason for optimism, and to look at the next five years as a period that could lead to a significant growth in the numbers leaving school as confident Welsh speakers. It is a very exciting period in the history of Welsh education where hugely significant legislation and policy will take root, offering unique opportunities for future pupils and educators. To realise the potential of this innovative programme of policy, it is necessary to ensure that **bold policy and legislation lead to intensive and effective action across the education sector.**

The Welsh Government has set a clear vision and policy direction for the whole sector. There is no doubt that **local authorities and schools, as those with primary responsibility for implementing the Government's vision, will need to respond decisively to the challenge that has been set.** Over the next period all local authorities and schools in Wales will need to take full responsibility for acting in accordance with the vision and principles of the Welsh Language and Education Act.

Of course, the ability of local authorities and schools to act will depend on the support of the education sector as a whole. Adequate funding, suitable qualifications, high-quality resources, and strong support for teachers and support staff will be required. The most important issue of all, however, will be to ensure an increasingly bilingual education workforce. Without this, local authorities and schools will inevitably be unable to implement the Government's vision.

The Welsh Government needs to lead efforts to ensure **a significant increase in the number of teachers able to teach through the medium of Welsh in the future.** The number of current Welsh speakers, and the number of Welsh speakers produced by the current education system, is unlikely to lead to sufficient numbers of teachers and support staff to achieve the objectives of the Welsh Language and Education Act. Without targeted intervention, it is likely that we will see an **endless cycle where a shortage of Welsh-medium teachers will be a continuing barrier to ensuring an increase in the number of individuals leaving school able to speak and use Welsh.**

Priority



The challenge of creating an increasingly bilingual education workforce must be addressed with urgency and ambition. Strong intervention from the Welsh Government is needed to increase the number of learners leaving school as confident Welsh speakers. The Welsh Government should establish a Welsh-language training framework that forms a compulsory part of the training, induction, and professional development of all teachers.

The establishment of Yr Athrofa (The National Institute for Learning Welsh) as part of the implementation of the Welsh Language and Education Act is a crucial development in terms of developing a Welsh-language curriculum and training for teachers. It provides a clear opportunity to build on the **Education Workforce's National Learn Welsh Programme**, currently led by the National Centre for Learning Welsh. This programme already offers diverse and flexible training for teachers and classroom assistants, including sabbatical courses and tutor placement in schools committed to changing language category. To maximise the impact of Yr Athrofa in due course it will be necessary **to embed and expand this training programme so that it is a core part of teacher training and development in Wales.** Achieving this will require a review of the legislation underpinning initial teacher education and the process of qualification and establishment as a teacher, as well as legislation relating to teachers' professional conditions and standards. It will also be necessary to ensure that the National Framework that will be developed as part of the implementation of the Welsh Language and Education Act includes appropriate provisions regarding the development of an increasingly bilingual education workforce, and outlines the key role of local authorities and schools in this context.

Establishing the framework also creates an important opportunity to develop robust monitoring and accountability arrangements, and to provide clarity on the involvement of key partners including ITE providers, local authorities, schools, the Coleg Cymraeg Cenedlaethol, Medr, the Education Workforce Council, Dysgu, and the National Institute of Learning Welsh.

Collectively, these steps are essential to securing an education workforce capable of meeting the needs of a genuinely bilingual education system in Wales.



A language
for education



Bro Hyddgen School in Machynlleth, Powys, is a 3–18 school. Established in 2014, it has traditionally operated as a dualstream school with separate Welsh-medium and English-medium streams, but it is now on the path to becoming a Welsh-medium school.

According to the Headteacher, Dafydd Jones, the decision is a sensible one, although there are challenges to overcome along the way.



One of the main reasons for the change was that we had very small numbers in the English-medium stream, with fewer than 15 children entering the English stream in Year 7 almost every year.

Also, many of the children in the English-medium stream were able to speak Welsh well. An immersion class was established during the former headteacher's tenure, where a group of around 12 pupils received immersion teaching until the end of Year 9. This was a great success, with children from England who had no Welsh at all going on to study GCSEs through the medium of Welsh by Year 11.

A number of practical steps were required along the way, including regular collaboration with the local authority in Powys, developing a consultation plan that allowed everyone to express their views, and promoting the benefits of the change.

There was also a need to correct some inaccurate perceptions, according to Dafydd.





A number of parents were worried that English would not be taught at the school at all, and we needed to emphasise that the idea of bilingualism – and even multilingualism – is an integral part of our vision.

But more importantly, we wanted to promote the benefits that could follow, such as safeguarding secondary education in the area and ensuring viable class sizes, not to mention the advantages for pupils of gaining higher level skills that are valuable when applying for jobs, for example.

Following the introduction of the Welsh Language and Education (Wales) Act 2025, more schools are expected to follow Bro Hyddgen's example. However, Dafydd emphasises the importance of establishing the right infrastructure to ensure success.



The Act is certainly extremely positive and shows a clear direction for education in Wales which will ultimately strengthen the position of the Welsh language. But the vision will not be realised without a dedicated workforce. I have specific examples at Bro Hyddgen of the challenges associated with appointing Welsh-medium teachers, and that can undoubtedly have a significant impact on the aims of the Act. We need to see clear plans for how we can succeed with that, but I am confident that it is possible

Dafydd remains optimistic about the future and is encouraging others to follow a similar path to Bro Hyddgen.



My message to others is very simple – go for it. Through purposeful collaboration and consultation, it is possible to get the job done, and the journey will be worthwhile. As a teacher, nothing gives me more satisfaction than seeing the children succeed, so why wouldn't we give them the best possible foundation to enable them to do that?

4. The tertiary education sector and lifelong Welsh learning

One of the main challenges facing the Welsh language today is ensuring that more young people retain, develop and actively use their Welsh language skills after leaving school. The tertiary education sector and the lifelong Welsh learning sector both have a crucial role to play in addressing this challenge.

The tertiary education sector acts as an essential bridge between statutory education and the world of work and increasing opportunities for learners to maintain and develop their skills while continuing their education or training is vital. Not only does it offer opportunities to build linguistic confidence, it can also shape individuals' perceptions of the importance of the language in the context of the workplace in Wales. This in turn can influence broader patterns of language use.

Increasing the use of the Welsh language in the workplace has been identified as a key priority for strengthening the position of the Welsh language over the next five years. A key part of this will be to ensure that the tertiary education sector creates a workforce with adequate Welsh language skills to meet rising demands, and that this workforce is strategically distributed across and within different organisations. It will also require broadening opportunities for people to begin learning Welsh, as well as supporting those who already have some Welsh to further develop their skills throughout their lives.

4.1 Main developments and evidence

The further education and work-based learning sector

Over the past decade there has been an increasingly strategic focus on developing Welsh language provision in the further education and work-based learning sector. The main driver in this context was the publication of a Review of the Activities of Coleg Cymraeg Cenedlaethol in 2017. Following the publication of the review, **it was decided to extend the Coleg's strategic planning role to further education and work-based learning** as well as the higher education sector. The *Welsh-medium Action Plan for Further Education and Apprenticeships* published in 2019 has been the basis for Coleg Cymraeg Cenedlaethol's work in further education and apprenticeships over the past five years.²⁶

As part of the Co-operation Agreement between Labour and Plaid Cymru in 2021, there was a **commitment to invest further in Coleg Cymraeg Cenedlaethol to increase the proportion of apprenticeships and Welsh-medium further education**. This funding has enabled the Coleg to develop a programme of development grants for FE colleges and apprenticeship providers. The organisations use the grants to expand Welsh-medium provision by funding additional tutors, establishing subject networks, developing resources, and sharing good practice in priority areas such as health and care, early years care, public services and sport and leisure.

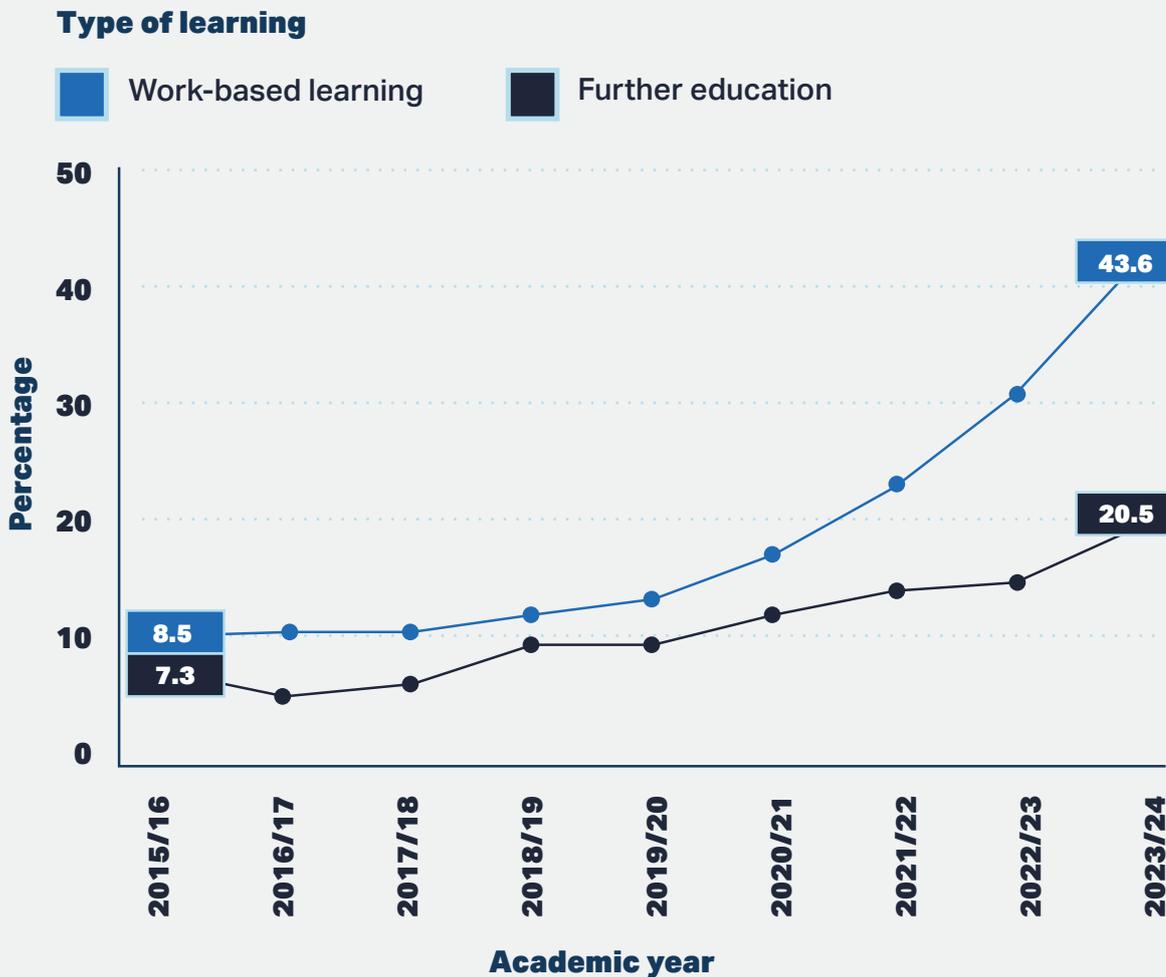
Alongside this, additional investment has been directed to National Centre for Learning Welsh to expand Learn Welsh provision to young people aged 16–25. This has enabled the Centre to develop a programme of free Welsh-language learning opportunities for young people including those in schools, Further and Higher Education colleges, apprenticeships and through extra-curricular activities such as the Duke of Edinburgh Awards, or outdoor courses. It has also supported the integration of Welsh-language learning into tertiary education courses in priority areas such as childcare, health and care and police work.

As well as providing development grants to expand further education provision and apprenticeships, there has also been **additional investment to enable more staff in the sector to receive Welsh language training**. Since 2018, the National Centre for Learning Welsh in partnership with the Coleg Cymraeg Cenedlaethol has been running a Further and Higher Education Welsh learning programme which offers bespoke courses for staff in the sector.

Collectively, these developments have undoubtedly contributed to an increase in the number of learners studying at least part of their courses through the medium of Welsh within the further education and workbased learning sectors

²⁶ Coleg Cymraeg Cenedlaethol, [Towards Cymraeg 2050: A million Welsh speakers. Welsh-medium Action Plan for Further Education and Apprenticeships](#) (Accessed December 2025).

Chart 15: Percentage of learning activities carried out in Welsh or bilingually, by type of learning and academic year

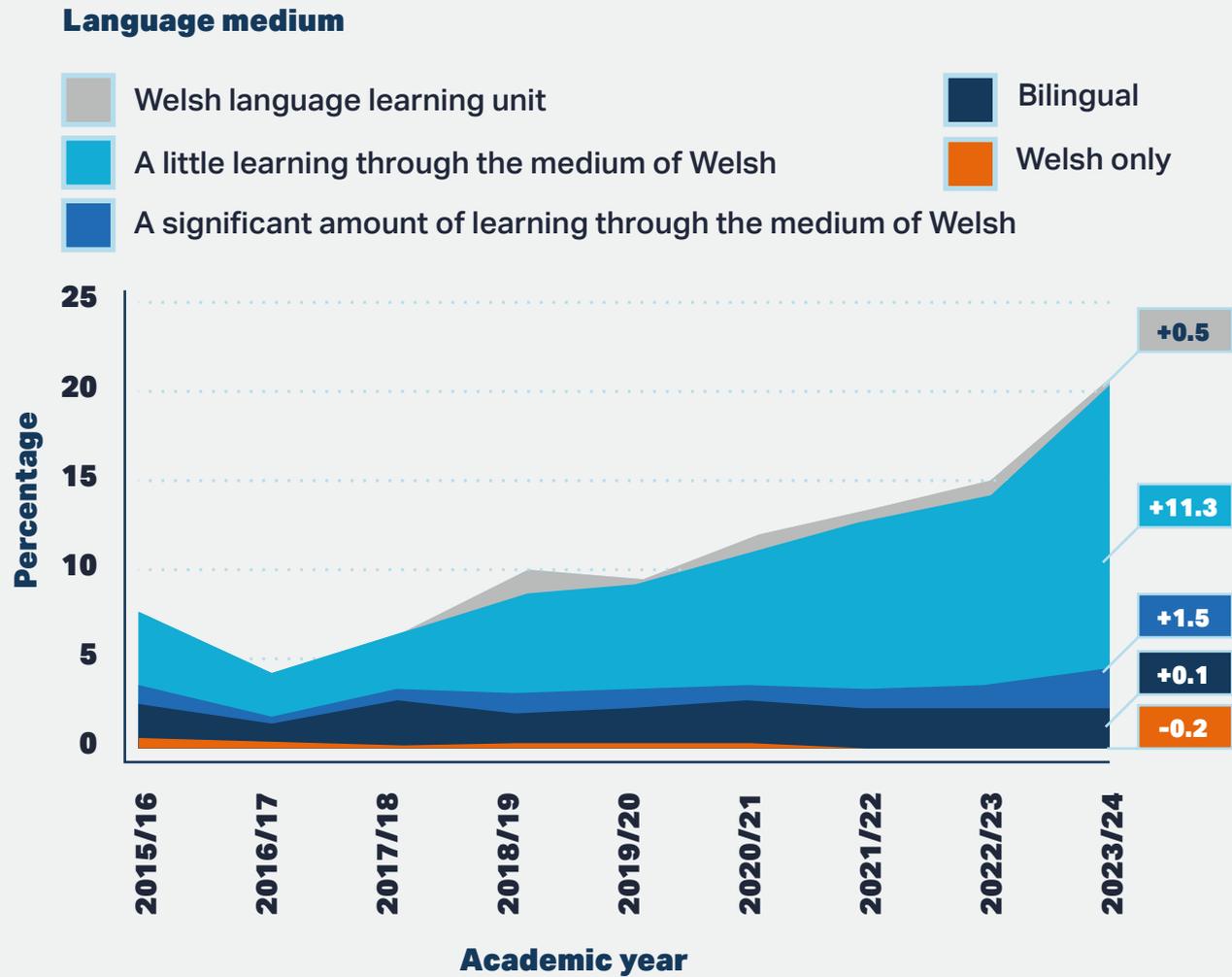


Although there has been a significant increase in the number of learners studying partly in Welsh, it is important to recognise that this growth is driven largely by an increase in teaching activities which include ‘a small amount of Welsh-medium learning’.

As shown in Chart 16, the percentage of learning activities in further education involving ‘a small amount of Welsh-medium learning’ has increased from **3.9% in 2015/16 to 15.2% in 2023/24, an increase of 11.3 percentage points**. This category represents teaching activities where the use of Welsh is restricted to oral communication or to a small component of the learning activity. There was also an increase in the percentage of teaching activities involving ‘a significant amount of Welsh-medium learning’, i.e. an activity where spoken and written Welsh are used in many parts of the learning activity and where the assessment is predominantly in English.

There has been little change over the past decade in the ‘Welsh-medium’ and ‘bilingual’ categories. There was a decrease in the percentage of Welsh-medium learning activities, from **0.3% in 2015/16 to 0.1% in 2023/4**. There was a slight increase in the percentage of bilingual learning activities, from **2.3% in 2015/16 to 2.4% in 2023/24**.

Chart 16: Welsh-medium or bilingual learning activities in further education, by language medium of provision, excluding work-based learning²⁷

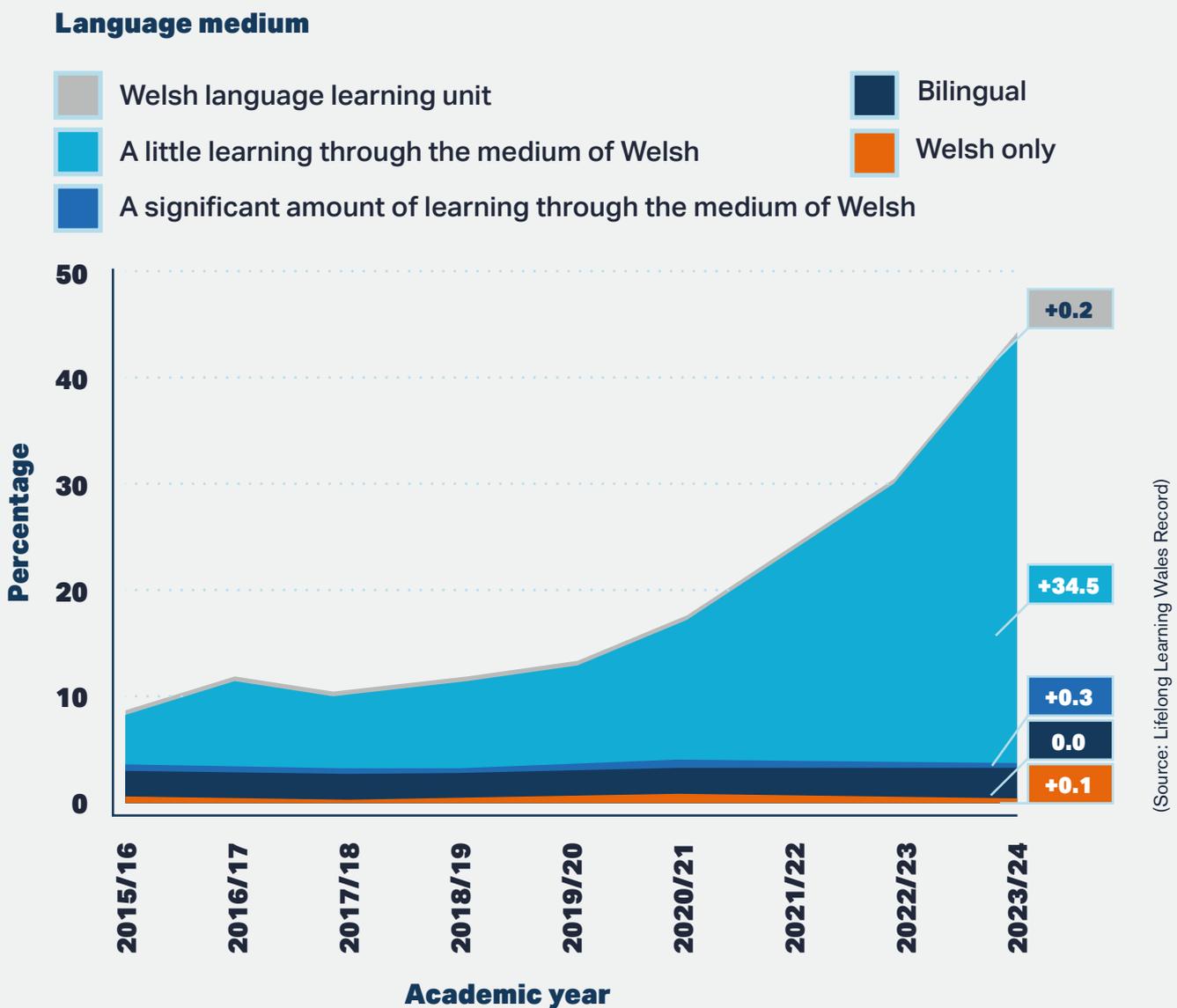


(Source: Lifelong Learning Wales Record)

²⁷ The figures on the right-hand side of the graph show the increase/decrease in the percentage of activities in this category between 2015/16 and 2023/24.

The situation is effectively the same in work-based learning, where there has been little change in the proportion of learning activities categorised as Welsh-medium, bilingual, and a significant amount of Welsh-medium learning. However, there has been a very substantial increase in the percentage of learning activities involving ‘a small amount of Welsh-medium learning’.

Chart 17: Welsh-medium or bilingual learning activities in work-based learning, by language medium of provision²⁸



The data also shows that a very large number of fluent Welsh speakers do not study through the medium of Welsh at all.

As shown in Chart 18, with the exception of learning activities involving ‘a small amount of Welsh-medium learning’, there has been very little change in the proportion of learning activities

²⁸ The figures on the right-hand side of the graph show the increase/decrease in the percentage of activities in this category between 2015/16 and 2023/24.

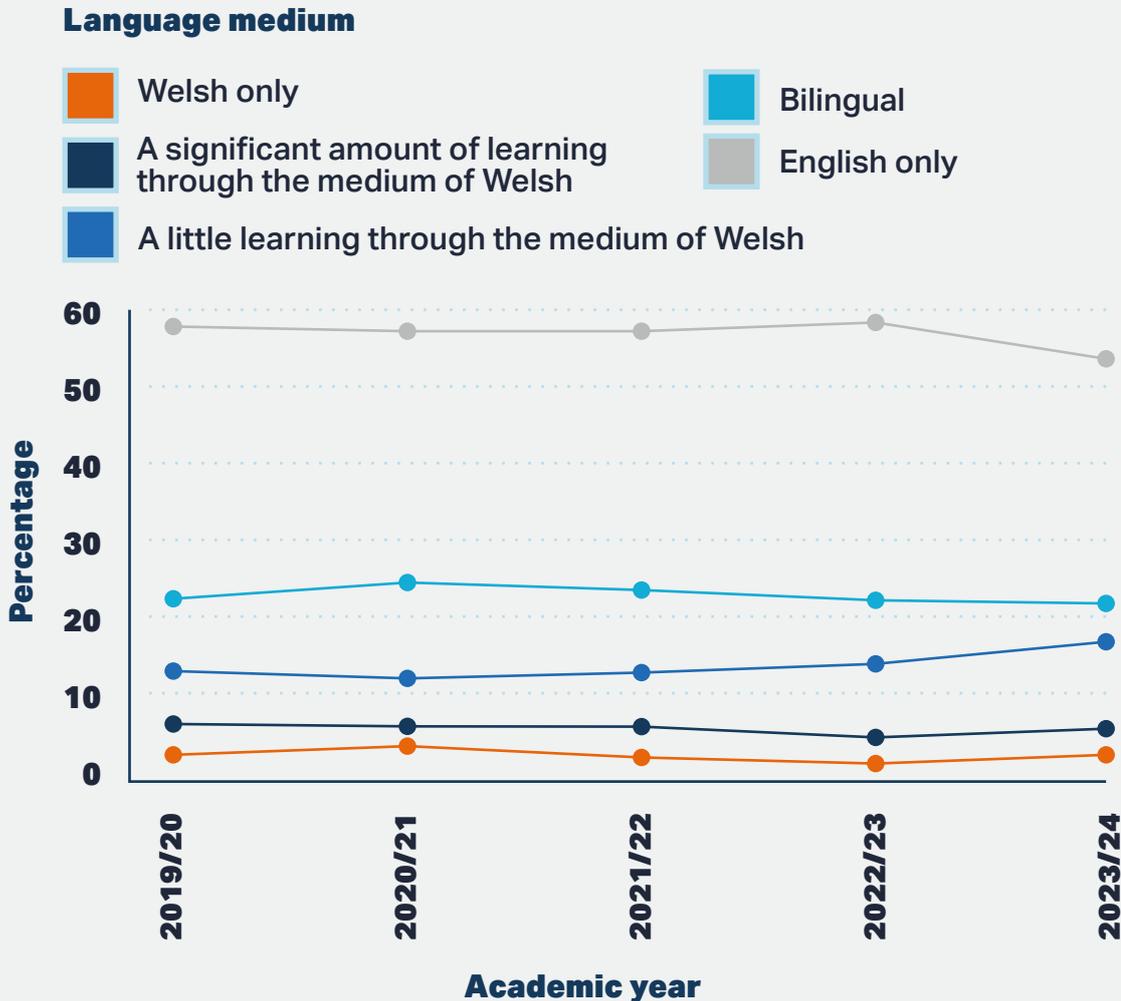


Of the **35,800** fluent Welsh speakers in further education in 2023/24, **20,550** of them were studying through the medium of English. Over half of all fluent Welsh speakers study through the medium of English.

delivered in Welsh or bilingually to fluent Welsh speakers over the past five years.

Chart 18: Percentage of learning activities undertaken by fluent Welsh speakers in further education and work-based learning between 2019/20 and 2023/24, by language medium of learning

While it is difficult to directly compare data from the statutory sector with data from the tertiary education sector, at a general level data from the statutory sector and the tertiary education



(Source: Lifelong Learning Wales Record)

sector highlight the **notable decline in the numbers studying a substantial proportion of their education through the medium of Welsh in the post-16 sector compared to the statutory sector**. For example, in 2021/22 18% of Year 11 pupils in Wales were registered for GCSE Welsh First Language. 71% of these pupils were registered for at least 5 other Level 1 or 2 qualifications through the medium of Welsh.²⁹ Welsh Government statistics on Welsh-medium and bilingual learning activities in post-16 education in 2021/22 show that 5.3% of learning activities were carried out through the medium of Welsh.³⁰ Recent data shared by Medr shows that the percentage of learning activities in post-16 education undertaken through the medium of Welsh fell to 4.4% in 2023/24. The data also indicates that the majority of this Welsh-medium post-16 provision continues to be delivered in the sixth form in schools. In 2021/22 15.2% of Welsh-medium learning activities took place in sixth form in schools, while the figure was 0.2% for further education, and 0.5% for work-based learning.³¹

The data also shows that the **proportion of learners progressing to sixth form in schools has fallen from 42% in 2018/19 to 37% in 2024/25**. The proportion of learners choosing to attend further education colleges has increased from 48% to 56% in the same period.³² Welsh Government data also shows that the numbers attending sixth form in Welsh-medium and bilingual schools have been steadily decreasing over the past decade.³³ This is despite the fact that the number of learners progressing from Year 11 to tertiary education has increased steadily since 2018/19.³⁴ Collectively, these trends mean that fewer learners are continuing in sixth forms, where Welsh-medium provision is strongest, and more are entering the further education sector, where Welsh-medium provision is far more limited.

The higher education sector

Beyond the further education and work-based learning sector, **Coleg Cymraeg Cenedlaethol has continued to support Welsh-medium provision in the higher education sector through a programme of targeted grants**. The Coleg does not fund lecturer posts directly but rather provides subject grants and incentive grants to support universities in developing modules and courses in Welsh.

Coleg Cymraeg Cenedlaethol's undergraduate scholarship scheme continues to offer grants to students studying a proportion of their courses through the medium of Welsh. The Coleg also **funds around 10 research scholarships per year**, enabling postgraduate students to undertake PhDs through the medium of Welsh. These research scholarships have been an important mechanism for **nurturing the next generation of Welsh-medium lecturers**.

Although the number of students studying through the medium of Welsh in the higher education sector has grown significantly since Coleg Cymraeg Cenedlaethol was established in 2011, the

²⁹ Pupil Level Annual School Census – see summary in [Cymraeg 2050 Annual Report, 2022-23](#).

³⁰ Welsh Government, [Ad-hoc statistical requests: 19 to 30 June 2023 | GOV.WALES](#) (July 2023).

³¹ Again it should be stressed that there are differences between the way the data is recorded in schools compared with the further education sector.

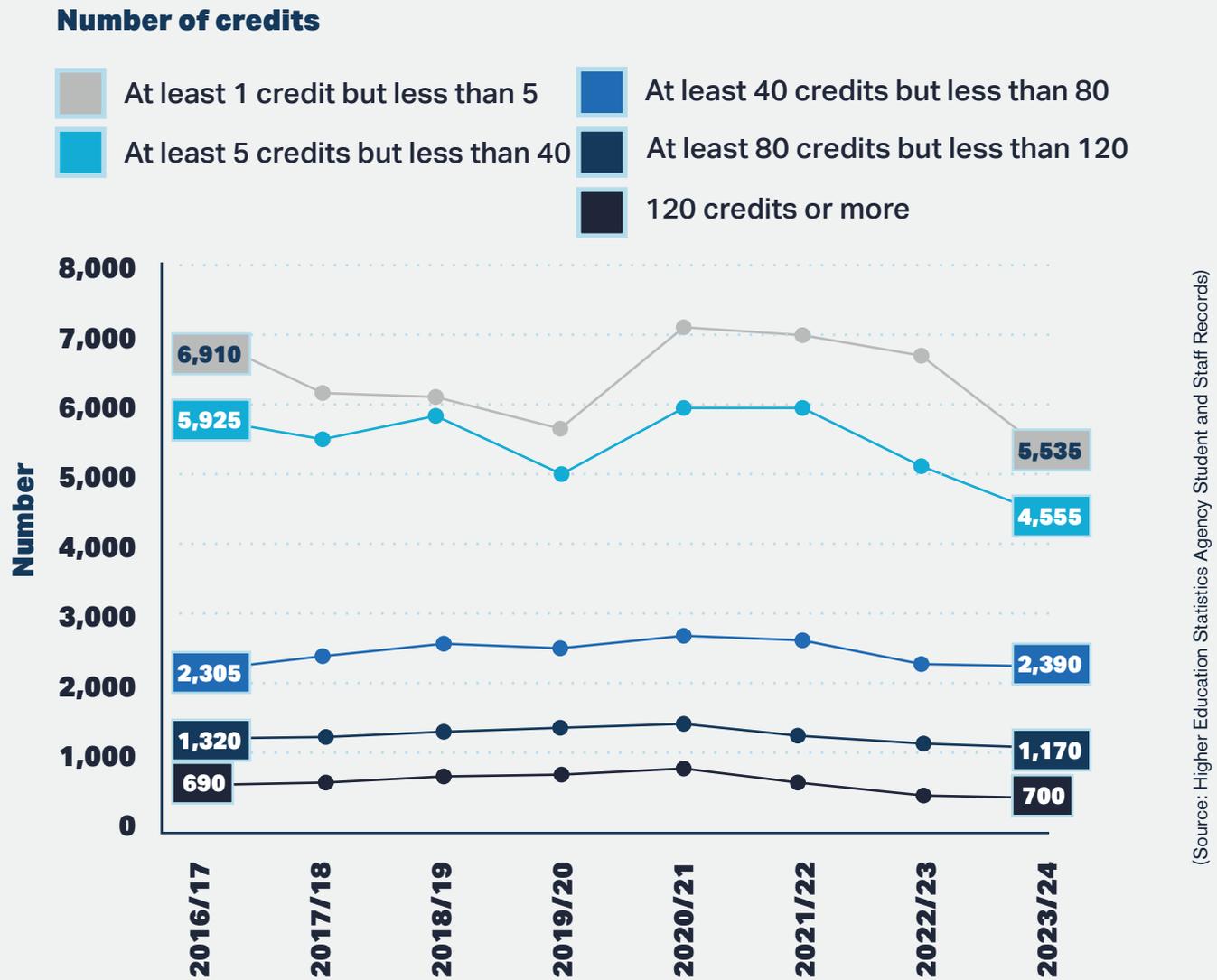
³² Medr, [Progression from Year 11 to tertiary education, August 2017 to January 2025](#) (February 2025).

³³ Welsh Government, [Ad-hoc statistical requests: 11 to 22 August 2025 | GOV.WALES](#) (September 2025).

³⁴ Medr, [Progression from Year 11 to tertiary education, August 2017 to January 2025](#) (February 2025).

situation has remained relatively stable over the past five years, with some decline by 2023/24.

Chart 19: Number of students studying through the medium of Welsh at universities in Wales, by number of credits³⁵



The numbers of students studying through the medium of Welsh has fallen across all categories over the past three years, and this decline is also evident when calculated as a proportion of all students.³⁶ It is worth noting, however, that the percentage of Welsh speakers choosing to study at least 5 credits or at least 40 credits through the medium of Welsh has remained relatively stable over the reporting period.

According to 2023/24 data,³⁷ around 30% of students who were fluent Welsh speakers studied at least 1 credit in Welsh. **This means that there are a significant proportion of fluent**

³⁵ The percentages are based on all enrolments that year.

³⁶ It should be noted that Medr warns that there is potential discrepancy between providers in terms of how they return data on Welsh-medium modules, including how Welsh-medium modules are identified and in terms of how percentages taught through the medium of Welsh are calculated. This may be partly due to changes in the number of credits studied in Welsh. Medr and the Coleg Cymraeg Cenedlaethol are working with providers to improve the consistency of this data.

³⁷ Medr, [Welsh in Higher Education, 2023/24](#) (27 November 2025).

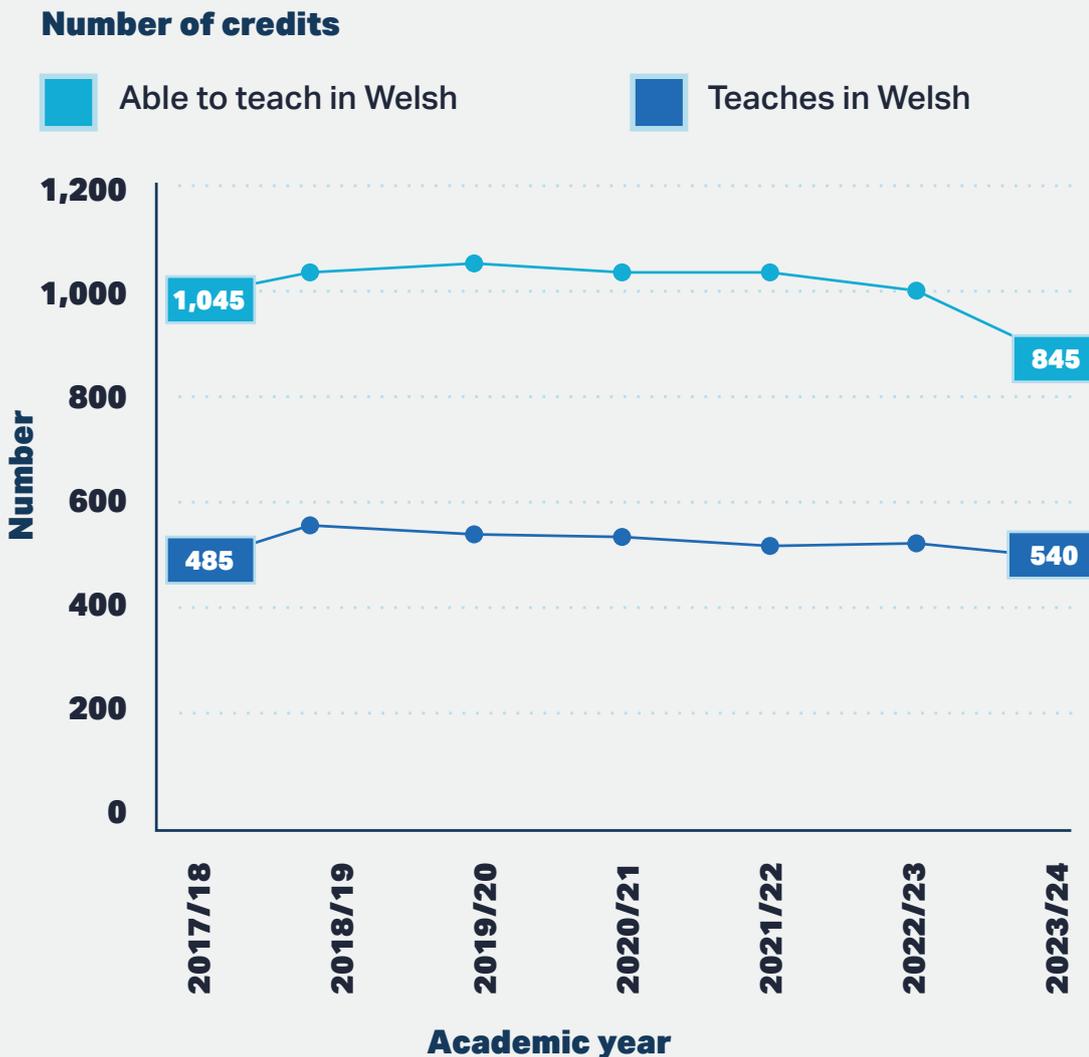
Welsh speakers who did not study any part of their course through the medium of Welsh.

Table 5: Number of credits studied in Welsh by fluent Welsh speakers in 2023/24 in Wales

	At least 1	At least 5	At least 40	At least 80	At least 120	All students
Fluent Welsh speakers	2,735	2,635	1,890	990	610	9,060

(Source: Higher Education Statistics Agency Student and Staff Records)

Chart 20: Academic teaching staff according to whether they were able and/or contracted to teach through the medium of Welsh



(Source: Higher Education Statistics Agency Student and Staff Records)

The number of teaching staff who are able to teach through the medium of Welsh, and who are contracted to do so, has remained relatively stable over the past five years, with a slight decline by 2023/24.

It is striking that a far higher proportion of Welsh students study at universities outside Wales compared with the vast majority of undergraduates from England, Scotland, and Northern Ireland who stay in their home nations to study.³⁸



In 2023/24 **71%** of Welsh students were studying at universities in Wales **28%** were studying in England.

96% of English students were studying in England, **94%** of Scottish students were studying in Scotland, and **78%** of Northern Irish students were studying in Northern Ireland.

According to UCAS statistics, 50% of pupils who had attended Welsh-medium schools and entered university in 2025 had left Wales.³⁹ 49% of them enrolled at universities in England, and 1% in Scotland where there are no opportunities for them to continue studying through the medium of Welsh.

Learning Welsh and developing Welsh skills

Over the reporting period the role and responsibilities of the National Centre for Learning Welsh have expanded significantly. The Centre now plays a central role in the efforts to create more Welsh speakers and to increase the use of Welsh.

Further investment in the National Centre for Learning Welsh was one of the commitments of the Labour and Plaid Cymru 2021 Co-operation Agreement. This additional funding has enabled the Centre to implement the Ymlaen Gyda'r Dysgu scheme which offers free Welsh lessons to 16–25 year olds and to the education workforce. During **2023–24 1,633 young people aged 16 to 25 and 500 from the education sector workforce received free Welsh lessons.**⁴⁰

The Centre has also **continued to expand its Welsh language learning programmes for workplaces. A significant and successful development in this context has been the sectoral courses** where a number of full-time tutors are seen working strategically to increase skills and use of the language in specific sectors ranging from health and care to sport. These workforces can take advantage of courses at all levels – from taster courses to confidence-building provision and intensive residential courses at various levels. This training contributes to enabling organisations to provide better Welsh language services to the public.

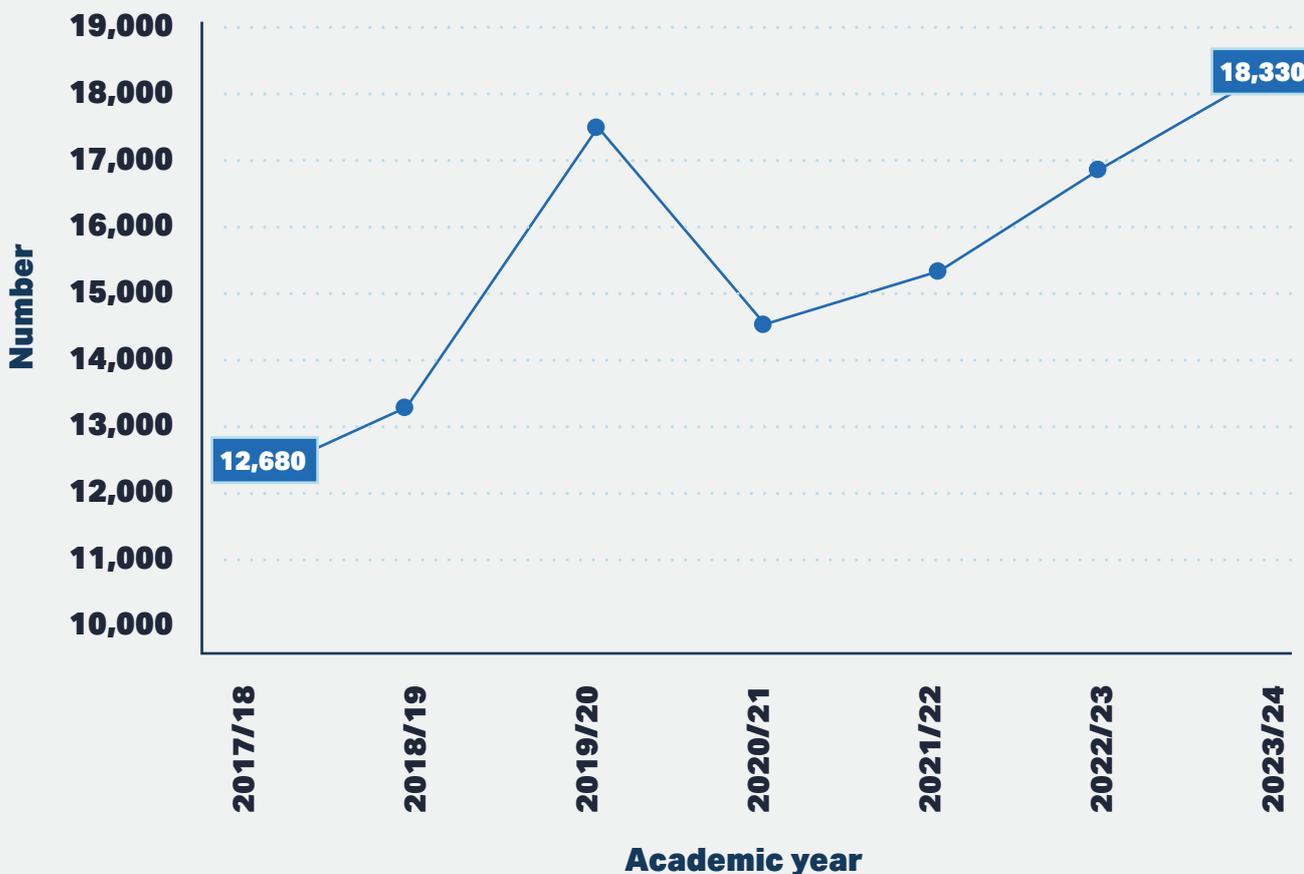
³⁸ Higher Education Student Statistics: UK, 2023/24 - Where students come from and go to study | HESA (20 March 2025).

³⁹ See 'Topic of concern' that 50% of Welsh students have left Wales - BBC Cymru Fyw.

⁴⁰ Welsh Government, *Cymraeg 2050: A million Welsh speakers - annual report 2023 to 2024*.

Since the establishment of the National Centre for Learning Welsh in 2016 there has been a **clear and significant increase in the number of individuals receiving Welsh language training**. Data for 2023/24 shows the highest number of unique learners and learning activities since the Centre began publishing data in 2017. The data shows that the vast majority of all learners (84%) are of working age (16–64 years) and the latest data from 2023/24 shows a significant increase (21%) in the number of young people aged 16–25 learning Welsh.⁴¹

Chart 21: Number of unique learners on National Centre for Learning Welsh courses ⁴²

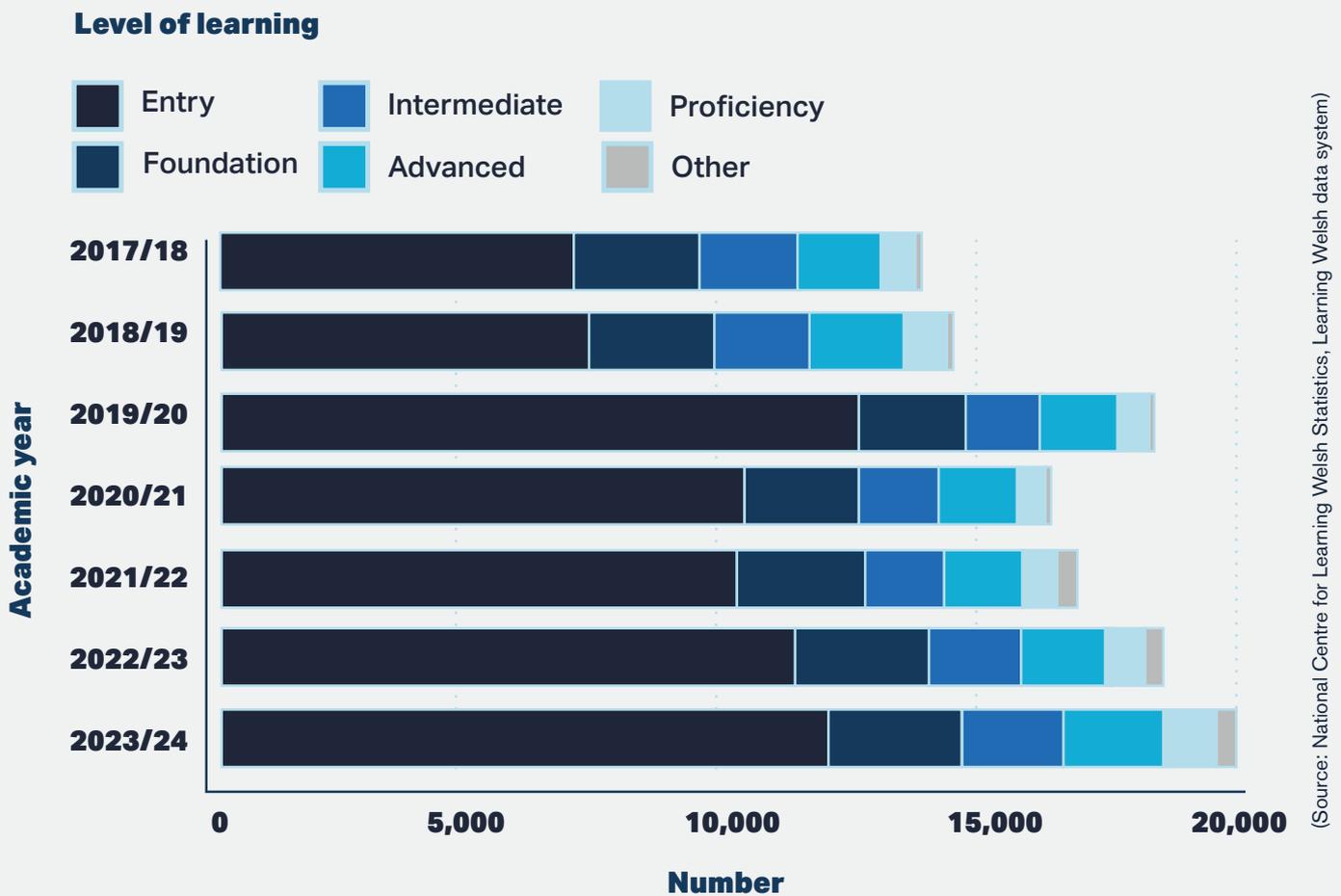


As Chart 22 shows, the overall increase in the number of people learning Welsh is driven largely by growth at entry level. Between 2017/18 and 2023/24 the number of learners has **increased by over 6,000**, of which almost **5,000 are at entry-level**. The chart highlights that far fewer people are studying at foundation level compared to entry level, and overall the numbers continue to decline further up the learning levels. Despite the positive increase in numbers taking Welsh learning courses, it is a matter of concern that so many do not progress to higher-level courses that would enable them to develop into confident Welsh speakers.

⁴¹ Data received directly from the National Centre for Learning Welsh.

⁴² The total numbers of learners do not reflect the numbers of unique learners as learners may take more than one course at different levels during the period in question.

Chart 22: Number of learners by learning level⁴³



In 2023/24 62% of learners were at entry level, 13% at foundation level, 10% at intermediate level, 10% at advanced level, and 5% at proficiency level. In the same year 29% of learners studied in a face-to-face classroom, 41% in a virtual classroom, 23% were self-studying, 3% learned through blended methods, and 3% on residential courses.

The Welsh Language and Education (Wales) Act 2025 and the advent of Medr

The significance of the Welsh Language and Education (Wales) Act 2025 in relation to the statutory education sector has already been outlined, but **the legislation carries equally important implications for the tertiary education sector.** The tertiary education sector is now included within Welsh Ministers’ considerations in developing the National Framework for Welsh Language Education and Learning Welsh, and local authorities must take the sector into account when drawing up local Welsh in Education Strategic Plans. The intention is that the code for describing Welsh-language ability will also be used to facilitate the progression of individuals along the Welsh language lifelong learning continuum.

⁴³ The total numbers of learners do not reflect the numbers of unique learners.

The Act also **establishes the National Institute of Learning Welsh** which will be responsible for providing strategic guidance and direction to Welsh language learning providers throughout the education system. The establishment of the Institute will build on the successes of the National Centre for Learning Welsh, expanding and strengthening its responsibilities and reach.

There is no doubt that the most significant development for the tertiary education sector over the past five years has been the **advent of Medr (Tertiary Education and Research Commission) established by the Tertiary Education and Research (Wales) Act 2022**. The establishment of the Commission brings together responsibility for the strategic planning, oversight and funding of tertiary education. This new structure **creates a more integrated and coherent tertiary system and offers clear opportunities to improve Welsh-medium and bilingual provision** across the post-compulsory sector as a whole.

One of **Medr's strategic duties is to promote encourage demand for, and participation in, Welsh-medium tertiary education**, taking all reasonable steps to ensure that there is sufficient Welsh language provision to meet the demand. Coleg Cymraeg Cenedlaethol has been designated as the body to advise Medr on these duties.

Medr has already published its first strategic plan for 2025–30, and one of the strategic priorities is to promote greater use of the Welsh language and increase the demand for, and participation in, learning and assessment through the medium of Welsh. As part of this, Medr is committed to **developing and implementing a national plan for the Welsh language across the tertiary education sector** as a whole. The **Welsh language will also be one of the conditions for registering and funding tertiary provision in Wales**, which clearly demonstrates Medr's intention to use its regulatory powers in order to achieve its strategic objectives in relation to the Welsh language.

4.2 Priorities and opportunities to strengthen the position of the Welsh language over the next five years

Although some progress has been made in expanding Welsh-medium and bilingual provision over the past five years, there remains considerable work to be done before the tertiary education sector can reliably maintain and develop learners' Welsh-language skills as they continue their education or training.

Over the reporting period there was no meaningful increase in the number of learners studying wholly through the medium of Welsh or completing a substantial proportion of their education or training through the medium of Welsh. In general, there is a **lack of Welsh-medium provision in further education colleges, particularly in vocational subjects.**⁴⁴

The tertiary education sector is starting from a low baseline, which presents a **real opportunity to invest and strategically plan in a way that will bring about transformative change over the next period.** As previously highlighted, this is a critical strategic area, and an essential part of the solution to the challenge of ensuring linguistic progression and creating more favourable conditions to support individuals' language use after leaving statutory education.

While the increase in Welsh-medium and bilingual provision in the tertiary education sector over the reporting period has been modest, there have been major developments in terms of legislation and policy. The existence of the Tertiary Education and Research (Wales) Act 2022 and the Welsh Language and Education (Wales) Act 2025 means that there is a far stronger legislative foundation for the development of Welsh education in the tertiary education sector. **The challenge now is to ensure that these more favourable conditions lead to a significant increase in Welsh-medium provision in the tertiary education sector as a whole.** Medr will have a key role as the body responsible for the regulation and funding of tertiary education in Wales to achieve this and it will be vital that they make the most of their regulatory power to drive change.

In this context, Medr's commitment to creating a national plan for the Welsh language across the tertiary education sector, and their decision to embed the Welsh language as a core element of their regulatory framework is a significant development. However, considerable work will be required to develop the national plan and to ensure that providers proactively expand Welsh language provision and encourage more learners to study through the medium of Welsh and bilingually.

While there are a large number of issues to consider in this context some of the key priorities include:

- **raising learners' awareness of the opportunities available to them to use their Welsh** as they continue their education and training, and **emphasising the importance and value of the Welsh language for their future careers**
- on the basis of the code on describing ability in Welsh that will be developed as a result of the Welsh Language and Education Act, **ensuring a method of measuring learners' Welsh language skills at the start of tertiary education or training** to enable providers to plan appropriately to offer suitable provision to all learners

⁴⁴ Please see the [Welsh Language Commissioner's report on post-compulsory education and the Welsh language](#), and also the recent report of the Children, Young People and Education Committee on [Routes into post-16 education and training](#).

- **prioritising important areas and sectors**, with a particular focus on developing more **Welsh-medium apprenticeships**
- **increasing the capacity of the workforce** that can teach through the medium of Welsh
- **expanding Welsh-medium qualifications**, including vocational qualifications, especially in priority areas
- reforming regional funding and planning systems to incentivise collaboration and strengthen **strategic partnerships between post-16 organisations and schools reinforcing the strong provision that currently exists in schools.**

Over the next five years it will be essential to **capitalise on the huge potential of the tertiary education sector to maintain and develop the Welsh language skills of all learners**, thereby contributing to the creation of individuals who use Welsh in their work and in their communities. Achieving this will require ambitious strategic planning and substantial additional investment in Welsh-medium and bilingual provision over the next period.

The evidence makes clear **that efforts to date have been successful mainly in relation to increasing the numbers who study a relatively small proportion of their studies through the medium of Welsh.** Meeting the Government's broader policy ambitions will require a major uplift in the number of learners who leave the tertiary education sector as confident Welsh speakers.

Linguistic progression also remains a challenge in the lifelong learning sector. The work of the National Centre for Learning Welsh has significantly increased the numbers of people who come into initial contact with the Welsh language and the opportunities to further develop skills in Welsh, working in partnership with a range of organisations in significant sectors.

Several of the other recommendations in this report attest to the importance of building on this work over the next period and channelling resources purposefully to ensure that the lifelong learning Welsh system develops confident, proficient speakers who will meet the needs of the workforce and can provide services in Welsh, particularly in key sectors such as the education sector and the health and care sector. While the growth in entry-level learning and short taster courses is positive, the data clearly shows that **many more of these individuals must progress to higher levels if there is to be a real difference in the numbers acquiring Welsh beyond statutory education. Supporting learners to develop higher-level skills is key to creating confident Welsh speakers who use the language regularly and confidently in our communities and workplaces.**

Priority



There must be an opportunity for all learners to develop their Welsh language skills in the post compulsory education and training sector. To achieve this, appropriate investment is required and greater strategic emphasis must be placed on ensuring that Welsh speaking learners receive a higher proportion of their education and training in Welsh. Increasing the percentage of fluent Welsh speakers who choose to study through the medium of Welsh must be a priority for the sector over the next five years.