



Monthly Labour Market Report

Welcome

The Monthly Labour Market Report from the Learning and Skills Observatory Wales (LSO) aims to provide the main headlines on the Welsh labour market and is based on the latest data available.

This month's issue puts the spotlight on **Language Skills and the Labour Market**.

This report was produced by the Centre for Economic and Social Inclusion (known as *Inclusion*), commissioned by Welsh Government to blend Wales's available labour market information (LMI) (from the various sources) and produce a monthly analysis. Whilst the report is owned by Welsh Government it is not validated in terms of its specific content or interpretation.

Inclusion has an unrivalled understanding of the labour market based on over 28 years of experience of working with the range of stakeholders involved in delivering employment and skills services. We collect and analyse both national and local labour market data through our well developed Local Labour Market Information System, conduct research on employment and skills issues at the local level, run events that bring together policymakers and providers in the skills and employment sector, and produce weekly e-briefings that summarise what is new in employment and skills for our subscribers.

We currently supply monthly employment and skills data to the Greater London Authority, as well as providing labour market tools and analysis for Greater Manchester.

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Latest labour market trends

Employment

Employment data from the Labour Force Survey (LFS) – estimates obtained from a large sample quarterly rolling survey of households – show that Wales outperformed most though not all the other UK nations and regions in the rolling quarter September to November 2013.

The (seasonally adjusted) Labour Force Survey estimate of the number of people aged 16 and over in employment in Wales increased by 21,000 (+1.5%) compared to the previous quarter (June-August 2013) to a total of 1.395 million. Women account for almost the entire quarterly increase. Male employment increased marginally (+0.0%) and female employment increased by 21,000 (+3.2%).

The total quarterly increase in employment in Wales compares to a corresponding increase in total UK employment of 280,000 (+0.9%). In addition to the increase in Wales employment increased by 244,000 (+1.0%) in England, by 10,000 (+0.4%) in Scotland, and by 6,000 (+0.7%) in Northern Ireland. The net increase in England comprised an increase in employment in the North East (22,000, +1.9%), the North West (23,000, 0.7%), Yorkshire and Humberside (+28,000, +1.1%), the East Midlands (+49,000, +2.3%), the West Midlands (57,000, 2.3%), the East of England (+15,000, +0.5%), London (+54,000, +1.4%) and the South East (+11,000, +0.3%) and a decrease in employment in the South West (-15,000, -0.6%).

The working age employment rate for Wales (i.e. the proportion of the population aged 16-64 in employment) increased in the quarter by 1.3 percentage points to 71.1%, compared with an increase of 0.5 percentage points in England, an increase of 0.7 percentage points in Northern Ireland and a decrease 0.1 percentage points in Scotland. The employment rate in Wales is 1 percentage point lower than the UK average (72.1%) and lower than the employment rate in both England (72.3%) and Scotland (72.7%) but higher than the rate in Northern Ireland (67.4%).

The employment rate gap between the UK average and Wales narrowed in the year to November 2013, during which period the employment rate in Wales increased by 2.5 percentage points, treble the 0.7 percentage point increase in the average UK employment rate. The annual increase in the employment rate was larger in Wales than in any other UK nation or region, followed by Scotland (2.0 percentage points) and London (1.5 percentage points). However, within the UK only Northern Ireland, North East England (67.6%), the North West (68.8%) and the West Midlands (69.9%) have a lower employment rate than Wales. The South East (76.1%) has the highest employment rate in the UK.

Unemployment and economic inactivity

The number of people in Wales who are unemployed on the International Labour Organisation (ILO) Labour Force Survey definition fell by 12,000 to 108,000 between the quarters June-August 2013 and September-November 2013. Total unemployment fell by 130,000 in England and by 25,000 in Scotland but increased by 1,000 in Northern Ireland.

The quarterly fall in unemployment in Wales was smaller than the corresponding 21,000 increase in the number of people in employment because of an offsetting increase of 8,000 in the number of people active in the labour market. The number of unemployed men decreased by 3,000 (-4.3%) to 62,000 the number of unemployed women decreased by 10,000 (+17.2%) to 46,000.

The ILO unemployment rate in Wales fell by 0.9 percentage points in the quarter to 7.2%. The UK average rate of ILO unemployment fell by 0.5 percentage points to 7.1%. The ILO unemployment rate in Wales is now equal to that in England (7.2%), higher than in Scotland (6.4%) but lower than in Northern Ireland (7.3%). Within England, the North East (10.3%), the West Midlands (8.1%), Yorkshire and Humberside (8.4%), the North West (7.9%) and London (8.1%) had a higher unemployment rate than Wales. South East England (5.3%) and South West England (6.8%) had the lowest unemployment rates.

The administrative count of people unemployed and claiming Jobseeker's Allowance (JSA) is somewhat lower (65,500 in Wales in December 2013, a JSA claimant count rate of 4.5%) than ILO unemployment because non-JSA claimant jobseekers are excluded. The number of JSA claimants in Wales decreased by 1,100 between November and December. However care should be taken in interpreting change in the claimant count since this can be influenced by changes to the benefit system as well as underlying change in the labour market.

The number of economically inactive people of working age in Wales fell by 16,000 (-3.5%) between June-August 2013 and September-November 2013. As the LMI scorecard shows the working age rate of economic inactivity in Wales (23.2%) is 1 percentage point higher than the UK average (22.2%). The gap between the UK average economic inactivity rate and the economic inactivity rate in Wales narrowed substantially in the year to September-November 2013, the inactivity rate in Wales falling by 1.7 percentage point and the average UK inactivity rate falling by 0.2 percentage points.

Within the UK regions and nations Northern Ireland (27.2%), the North West (25.1%), the North East (24.5%) and the West Midlands (23.7%) have higher inactivity rates. The lowest inactivity rates are in the South East (19.5%) and the East of England (19.9%).

LMI scorecard

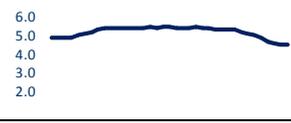
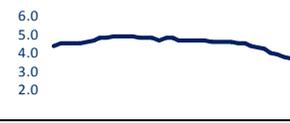
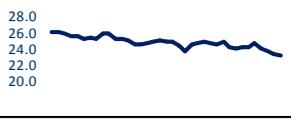
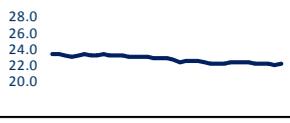
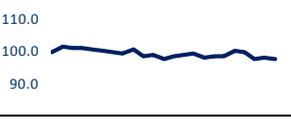
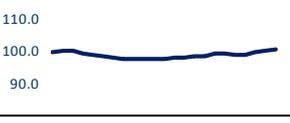
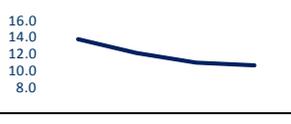
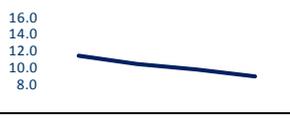
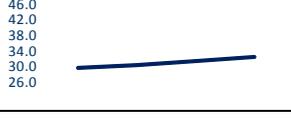
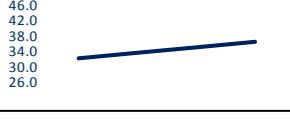
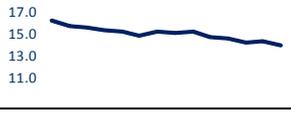
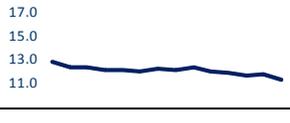
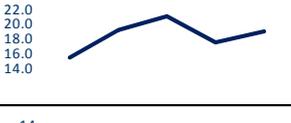
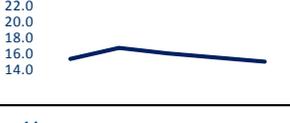
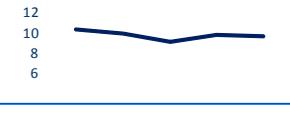
The scorecard presents recent trends and figures for a number of core labour market indicators, using a variety of different sources:

	Source
Working age employment rate	1
Working age male employment rate	1
Working age female employment rate	1
ILO unemployment rate 16+	1
Claimant count as a proportion of the working age population	2
Working age economic inactivity	1
Index of workforce jobs	3
Proportion of the working age population with no qualifications	4
Proportion of the working age population qualified to NQF4+	4
Proportion of the working age population who claim out of work benefits	5
Children living in workless households	6
Proportion of 16–18 year olds who are not in employment, education or training	7

- 1 LFS, ONS: subject to sampling variability and should be used with caution
- 2 Claimant count seasonally adjusted, NOMIS: trends can be affected by changes to benefit rules
- 3 Employer surveys, household surveys and administrative sources, ONS
- 4 Annual Population Survey/Annual Local LFS, ONS. Data is subject to sampling variability and should be used with caution.
- 5 Department for Work and Pensions, NOMIS
- 6 Household LFS, ONS: subject to sampling variability and should be used with caution
- 7 Source: ONS, Higher Education Statistics Agency, Welsh Government Lifelong Learning Wales Record, Pupil Level Annual School Census, Annual Population Survey.

LMI Scorecard

January 2014

		Wales		Difference between Wales and National (latest figures): Better Worse	NATIONAL (UK or GB depending on indicator)	
		Trend (Three to four years)	Latest result & trend		Latest result & trend	Trend (Three to four years)
Supply of Labour	Working age employment rate (%)		71.1% ↑	-1.0 Charts cover: Sep-Nov 10 to Sep-Nov 13	72.1% ↑	
	Working age male employment rate (%)		74.8% ↑	-2.3 Charts cover: Sep-Nov 10 to Sep-Nov 13	77.2% ↑	
	Working age female employment rate (%)		67.4% ↑	0.3 Charts cover: Sep-Nov 10 to Sep-Nov 13	67.1% ↑	
	ILO Unemployment rate 16+ (%)		7.2% ↓	0.0 Charts cover: Sep-Nov 10 to Sep-Nov 13	7.1% ↓	
	Claimant Count as a proportion of the working age population, seasonally adjusted (%)		4.5% ↓	0.8 Charts cover: Dec 10 to Dec 13	3.7% ↓	
	Working age economic inactivity (%)		23.2% ↓	1.1 Charts cover: Sep-Nov 10 to Sep-Nov 13	22.2% ↓	
Demand	Index of workforce jobs. 2008 Q1=100		97.7% →	-3.1 Charts cover: 2008 Q1 to 2013 Q3	100.8% →	
Skill gaps	Proportion of the working age population with no qualifications (%)		10.6% ↓	1.6 Charts cover: Year to Dec 09 to year to Dec 12	9.0% ↓	
	Proportion of the working age population qualified to NQF4+ (%)		32.6% ↑	-4.1 Charts cover: Year to Dec 09 to year to Dec 12	36.7% ↑	
Worklessness & NEETS	Proportion of the working age population who claim out of work benefits		14.0% ↓	2.8 Charts cover: Feb 10 to May 13	11.2% ↓	
	Children living in workless households (%)		19.1% ↑	4.1 Charts cover: Apr-Jun 2008 to 2012	15.0% ↓	
	Proportion of 16-18 year olds who are NEET (%)		10% ↓	1 Charts cover: 2008 to 2012	10% England →	

Language Skills and the Labour Market

Introduction

The Welsh Government has stated:

'Learning a language is a skill for life. Across all settings, languages contribute to learners' awareness of themselves as part of a global society and promote understanding of others. In the world of work, knowledge of languages helps economic growth and business competitiveness through improved understanding of the business environment and intercultural understanding.'

(source: Making Languages Count, 2010)

However, there has been some recent media coverage suggesting that the take up of foreign languages has fallen significantly in recent years¹, a trend that threatens to damage the economy²

This month's report focuses on research into employer demand for foreign language skills, the state of language skills provision and recent trends in the take up of languages in Welsh schools and college and in Welsh residents who go on to higher education.

Employer Demand for Language Skills

Research conducted by the CBI and Pearson UK in early 2013 highlighted the importance of language skills to economic competitiveness through their sixth annual education and skills survey. The 2013 survey covered 294 employers across the UK who collectively employ around 1.24 million people. With regard to language skills the research found that:

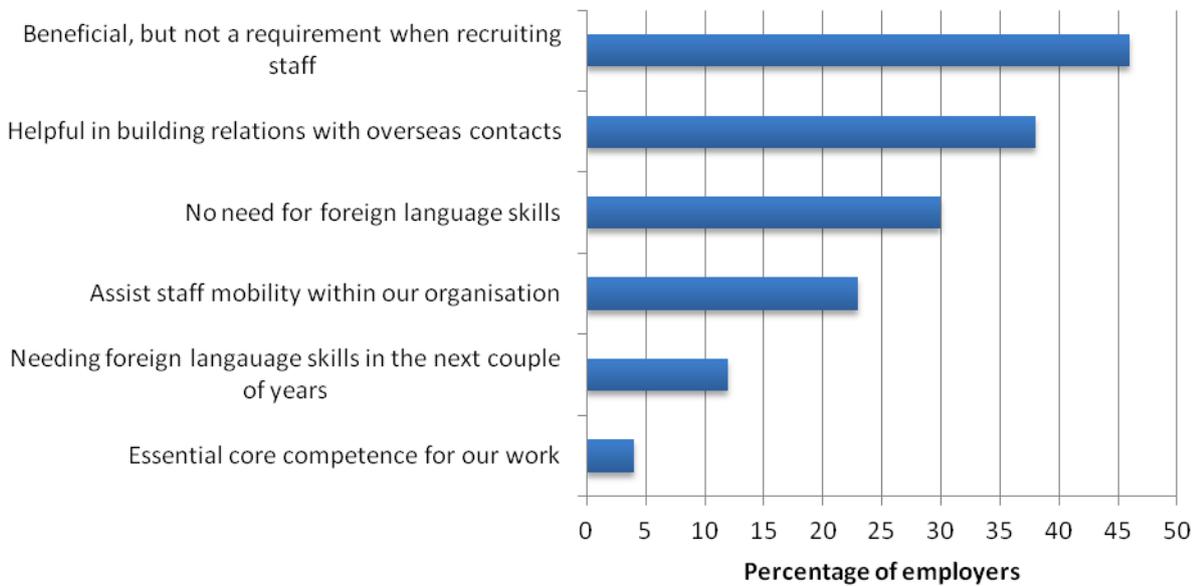
'If the UK is to achieve an export-oriented economic recovery, we need to break into and succeed in high growth markets. Effective communication with potential suppliers, customers and those regulating markets is an essential part of achieving that. The UK has the worst foreign language skills in Europe, and there is a strong argument that limited-language abilities and cultural awareness are acting in effect as a tax on UK trade.'

While recognising the inherent advantages to the UK of English being the international language of business, the research goes on to assert that 'there can be great advantages for British businesses if they have employees in key roles with the skills to communicate competently in the local language. Overall, 70% of employers value foreign language skills among their employees, particularly in helping build relationships with clients, customers and suppliers (38% - see Figure 1), while nearly a quarter say it assists staff mobility within the organisation, facilitating international working.

Language skills are more important for sectors involved in exports. 62% of manufacturing employers see languages as helpful in building client relations, while 44% said they assist with staff mobility.

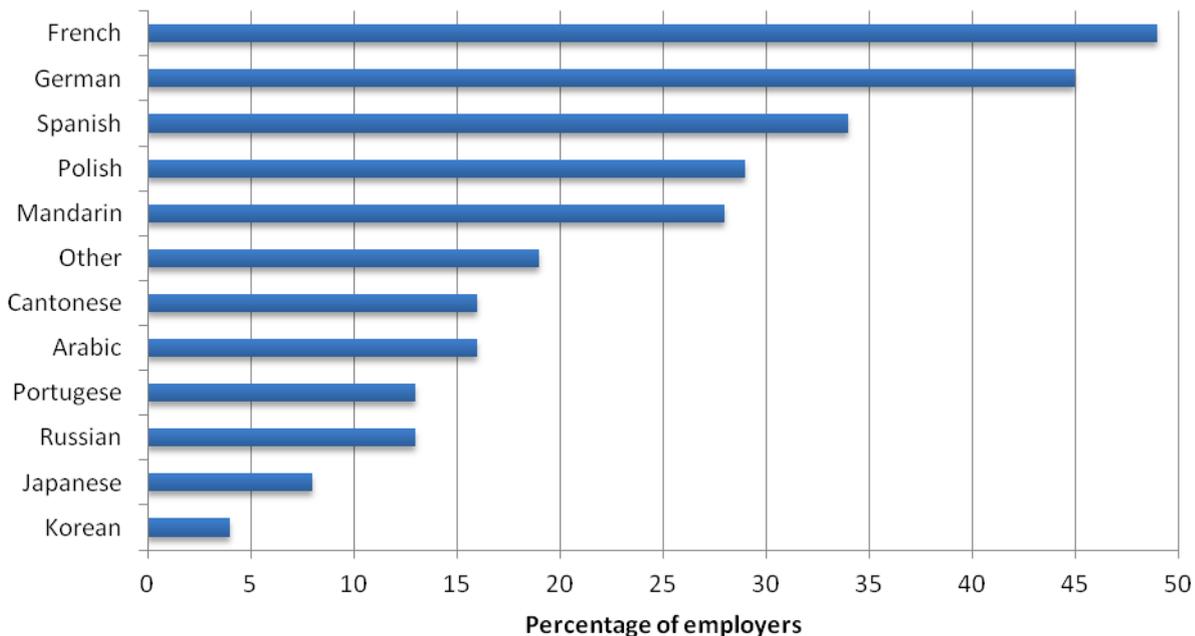
¹ <http://www.walesonline.co.uk/news/wales-news/foreign-language-study-falls-half-6439462>

² <http://www.walesonline.co.uk/news/wales-news/lack-foreign-language-skills-puts-1851898>

Figure 1: Need for employees who can speak foreign languages

Source: CBI / Pearson, 2013

European languages - particularly French (49%) and German (45%) - are those most in demand (Figure 2), but those geared to business in China feature increasingly prominently (of those valuing foreign language skills, 28% valued Mandarin and 16% Cantonese).

Figure 2: Foreign languages rated as useful to the organisation

Source: CBI / Pearson, 2013

There was also a general lack of satisfaction among employers regarding young people's leavers foreign language skills. Regarding school / college leavers, no employers were very satisfied with their foreign

language skills, while almost two thirds (64%) were dissatisfied. Satisfaction was also low with regard to graduates, where just 2% of employers were very satisfied, and 55% were not satisfied. 6% of employers stated that foreign language skills should be a priority action area in 14-19 education.

Another piece of research from 2013 was commissioned by the British Academy to establish baseline data on the current demand and supply of language skills in the UK. The key questions posed by this research were:

- Are enough people learning languages in the UK today to meet our current and future needs?
- Does supply match demand when it comes to the range of languages offered in our schools and universities?
- How well are we equipping people with languages, alongside other crucial employment skills?
- Are we providing a broad enough spectrum of the population with language skills?

The key findings from their report include:

There is strong evidence that the UK is suffering from a growing deficit in foreign language skills at a time when global demand for language skills is expanding. Approximately half of the demand identified as key to future economic growth is in languages which are difficult or impossible to study within the UK education system. Learning languages is rarely combined with the acquisition of other workplace skills.

The range and nature of languages being taught is insufficient to meet current and future demand. It is encouraging that at present there is clearly correlation between the languages taught and the languages most used in working contexts. However things are rapidly changing. Business and public sector organisations are already using a much wider range of languages in their operations.

Language skills are needed at all levels in the workforce, and not simply by an internationally mobile elite. Comparisons of recent National Employer Skills Surveys indicate that 17% (2009) and 27% (2011) of vacancies in administrative and clerical roles went unfilled due to shortages of foreign language skills.

A weak supply of language skills is pushing down demand and creating a vicious circle of monolingualism. Case studies of organisations interviewed for this report show that, in the absence of a strong supply of language skills in the labour market, large organisations may train existing staff rather than narrowing the field at the recruitment stage by advertising for linguists. Despite these important signals of demand, employers tend to obscure these deficits in the UK workforce by hiring native speakers, or eliminating language requirements from job adverts, or focusing their business strategy solely on regions where English is the dominant language.

Developing language skills alongside others is rare. This state of affairs is exacerbated by the fact that it is very uncommon for university students to take degrees combining languages with vocational or STEM subjects. This in turn limits the UK's ability to transfer domestic innovation or enterprise into international markets. While we are increasingly seeing new and innovative ways in which Higher Education Institutions are developing languages as core skills, there is very little policy development UK-wide that has attempted to combine language tuition with vocational or work-based skills.

Engagement with languages across gender and socio-economic groups is unbalanced. Studying a language to GCSE is more associated with advantage than not studying a language is with disadvantage. Nearly a third of linguists in Higher Education come from independent schools (while only 18% of the post 16 school

population attend these schools), and in state schools just 14% of children eligible for free school meals obtained a good GCSE in a foreign language compared to 31% of other state school pupils.

The spread of language learning within and between the four UK territories is uneven. In Wales, foreign languages have never been compulsory in secondary schools and uptake of language GCSEs is the lowest in the UK, representing just 3% of all GCSE subject entries in 2013.

Wales Policy Context regarding foreign language study

Higher Education

- 2008 Languages designated a Subject of Broader Importance to Wales by HEFCW. Additional funding available through the Routes into Languages Programme
- 2012–13 Intake Welsh students only pay in effect £3,465 p/a

Secondary Education

- Foreign languages have never been compulsory post-14
- Numbers taking languages post-14 have always been lower than the UK average, but have been dropping over recent years. A contributing factor might be the introduction in recent years of 14–19 Learning Pathways which brought greater curriculum choice
- 2010 'Making Languages Count' 14 supported the development of alternative language qualifications to GCSE level, business-education links involving languages and a language component within the new Welsh Baccalaureate

Primary Education

- Successful pilot projects have been held over recent years
- 2012 Welsh Conservative party and Plaid Cymru are both committed to making languages compulsory

Source: Languages: State of the Nation, 2013

'State of the Nation' identified a mismatch between demand and supply of language skills in three key areas:

- Around half the demand identified as key to future economic growth involves languages which are difficult or impossible to study within the UK education system. Although the languages most commonly taught in schools and universities account for a large proportion of demand, at least half the demand identified as key to future economic growth is in languages which are either not available to study formally, or have only a weak presence in UK universities. Turkish, Farsi, and Polish are notable examples.
- Learning languages is rarely combined with the acquisition of other workplace skills. The need for languages in a wide range of employment sectors contrasts strongly with the low incidence of languages being studied alongside workplace skills, STEM subjects or vocational courses. HESA statistics have revealed that a mere 320 students are studying degrees which combine languages with Maths, only 171 combine languages with Marketing and just 8 are recorded as studying languages alongside molecular biology, biophysics or biochemistry. Yet employers say their biggest obstacle to recruiting staff with language skills is finding the right mix of languages and other transferable skills.

- Language courses are seldom thought relevant to learners with lower academic attainment. The provision of language courses in formal education has typically been based on the assumption that it is only the academically able who are likely to use languages in their work. However this is not borne out by the evidence. Instead, there is a need for language skills at all levels in the workforce. Some of the biggest skills gaps are amongst care workers, driving instructors and 'elementary' level staff.

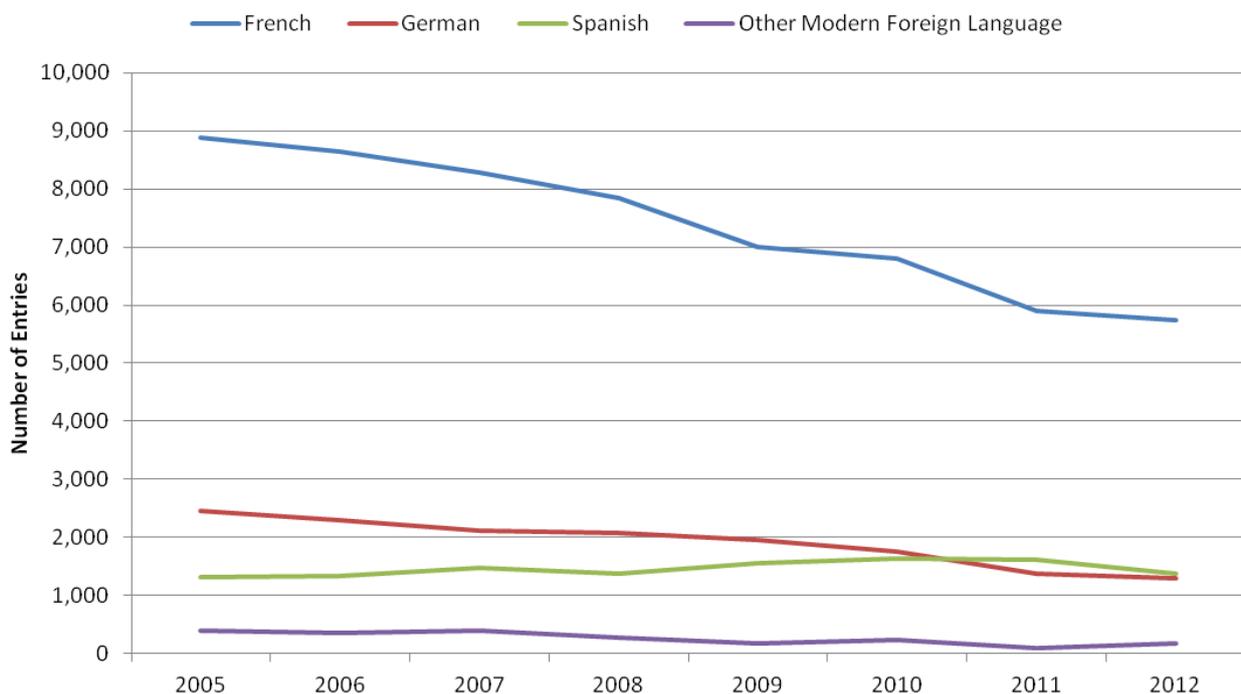
This points very strongly to the need for action at school and college level to achieve a spread of language skills across the full range of educational ability.

Recent trends in take up of foreign languages in Wales

Take up in GCSEs

Figure 3 shows that there has been a significant decline in foreign language entries at GCSE level. Between 2005 and 2012, the total number of entries has fallen from 13,030 to 8,576, a drop of 34%. In terms of the total number of entries, French has seen the biggest fall (over 3,100, 35%), although German and Other Modern Languages³ have seen the largest proportional fall in entries, both down by around 50% in this time. There has been some modest growth in Spanish entries, up by around 4%.

Figure 3: Take up of Foreign Language GCSEs in Welsh schools, 2005 - 2012



Source: Welsh Government, *Schools in Wales: Examination Performance Statistics 2005 - 2012*
<http://wales.gov.uk/statistics-and-research/schools-wales-examination-performance/?lang=en>

Statistics for 2013 show a similar trend, with continuing falls in French, German and Other languages, with growth in Spanish (Table 1).

³ Modern foreign languages are defined in the national curriculum for Wales as European or world languages such as Arabic, French, German, Japanese, Mandarin, Russian, Spanish and Urdu (source: Making Languages Count).

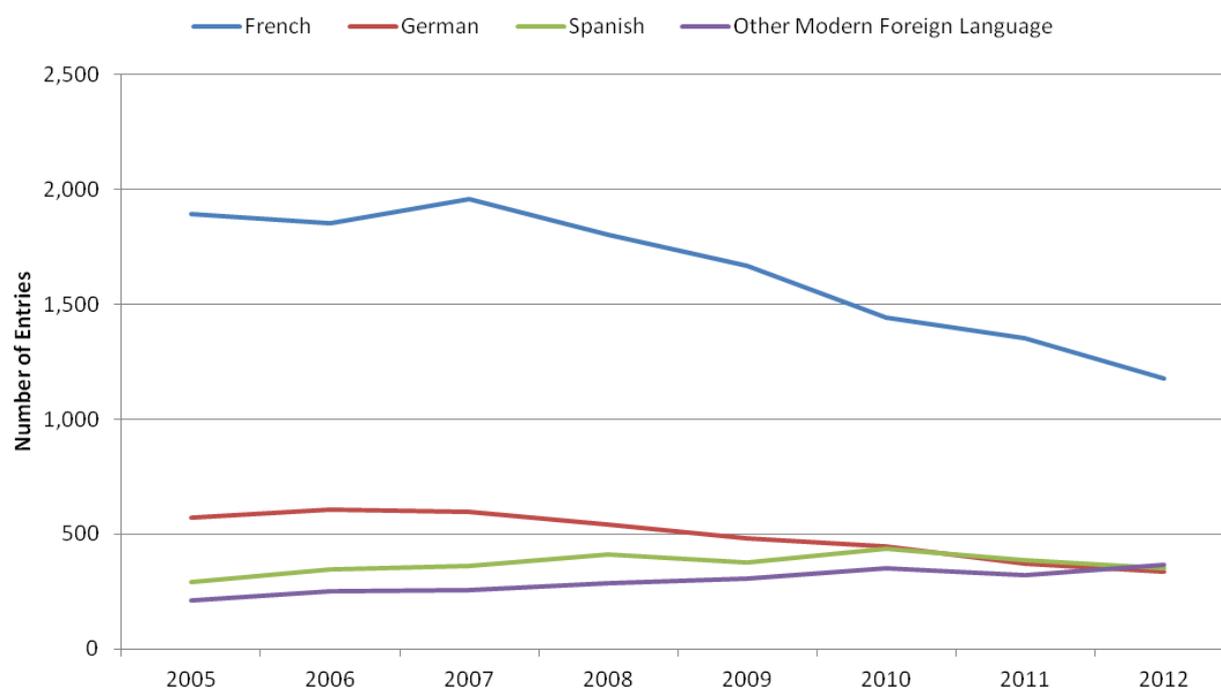
Table 1: Foreign Language GCSEs in Welsh schools, 2012 - 2013

Language	2012	2013	Change	% change
French	5,733	5,677	-56	-1%
German	1,287	1,183	-104	-8%
Spanish	1,371	1,628	257	19%
Other Modern Foreign Language	185	143	-42	-23%
Total	8,576	8,631	55	1%

Source: Welsh Government, Examination Results. <http://wales.gov.uk/statistics-and-research/examination-results/?lang=en>

A and AS Levels

The overall trend of take up of foreign languages at A and AS Level is the same as for GCSEs, with total entries down by 16% between 2005 and 2012 to 2,274. French and German again have seen the biggest falls, while Spanish and Other languages have grown strongly, particularly the latter where entries rose by almost three quarters.

Figure 4: Take up of Foreign Language AS and A Levels in Welsh schools, 2005 - 2012

Source: Welsh Government, Schools in Wales: Examination Performance Statistics 2005 - 2012
<http://wales.gov.uk/statistics-and-research/schools-wales-examination-performance/?lang=en>

Data for 2013 show disappointing figures, with entries falling across all four subject areas (Table 2).

Table 2: Foreign Language A Level Entries* in Welsh schools, 2012 - 2013

Language	2012	2013	Change	% change
French	464	354	-110	-24%
German	143	113	-30	-21%
Spanish	135	132	-3	-2%
Other Modern Foreign Language	84	70	-14	-17%
Total	826	669	-157	-19%

Source: Welsh Government, Examination Results.* Note: No AS Level entry data has been published at the time of writing. <http://wales.gov.uk/statistics-and-research/examination-results/?lang=en>

Higher Education

Given the clear trend of falling numbers of young people in Wales taking foreign languages at GCSE and A Level, we would expect to see a similar trend for numbers of people choosing to study foreign languages at HE level. Statistics from HESA show that the total number of Welsh domiciled learners studying foreign languages has fallen but only since 2009/10 (Table 3). In 2011/12 there were a total of 1,455 Welsh learners studying foreign languages, down by 18% from 2009/10. Learners were heavily concentrated in European languages, reflecting the availability of GCSE and A Level language provision, and accounted for over 90% of all language students.

There were also a handful of students in Chinese and Japanese, and a small but growing number in Middle Eastern studies.

Table 3: Welsh domiciled HE learners studying languages, 2007/08 - 2011/12

Year	Number
2007/08	1,670
2008/09	1,710
2009/10	1,775
2010/11	1,580
2011/12	1,455
Change 2007/08 - 2011/12	-215
% change 2007/08 - 2011/12	-12.9%

Source: HESA Student Record. Note: These figures relate to students in modern foreign languages. They will not match totals on related StatsWales datasets, as they exclude students in subjects related to literature and cultural studies in English speaking countries, and also exclude classical languages.

Summary

Published research and statistics show that there is significant demand from UK employers for foreign language skills (especially in manufacturing firms), and that the majority of employers are dissatisfied with the language skills of school / college leavers and graduates. The CBI strongly argues that the possession of foreign language skills can be a big advantage to businesses engaging in overseas markets, even where English may be spoken.

In Wales, recent trends in the take up of foreign languages are largely negative, where the selection of foreign languages at GCSE level has always been optional. Significant falls in GCSE entries, especially in French and German have knocked on into falling A and AS level entries and in turn have led to fewer Welsh HE learners studying foreign languages.

Both the CBI and the British Academy recommend action, particularly in 14-19 provision. The British Academy research has highlighted the following key priorities for action to improve the situation across the UK:

- Develop a strategic approach to providing a wider range of languages for the workplace, adding to rather than replacing current provision.
- Increase the number and social spread of language learners in schools.
- Provide more courses at all levels which combine languages with the development of other vocational skills, including STEM subjects.
- Stimulate demand and support employers in the effective management of language skills.
- Improve information-gathering for identifying demand for languages in the economy and within specific industries, and the way that this is communicated to learners and course providers.

The British Academy sums up the issue by concluding:

'Our diverse demographics and world-class higher education system provide us with the tools to respond to the challenges and opportunities of the future. Yet, too often, education policies are operating in isolation from demand. The report concludes that without action from government, employment and the education sectors, we will be unable to meet our aspirations for growth and global influence.'

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