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The ARFOR 2 programme: Evaluation, Monitoring and Learning Final Report



ARFOR
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Executive Summary

ARFOR 2 was a programme designed to provide innovative ways of supporting the economy in the strongholds of the Welsh language (Gwynedd, Anglesey, Ceredigion and Carmarthenshire). The aim was to help communities flourish through economic interventions.

£11 million was approved to deliver a second phase to the Programme (ARFOR 2), running for two years until the end of March 2025, following delivering 'ARFOR 1' between 2019 and the end of the 2020/21 financial year. The programme had five work-streams:

1. **Llwyddo'n Lleol** – a campaign to encourage putting down roots / returning home through employability, enterprise, business and family support.
2. **Enterprising Communities** – business grants to create good jobs and increase the use of the Welsh language.
3. **Challenge Fund** – funding innovative projects for a wider range of stakeholders in line with the programme's objectives.
4. **Bwrlwm ARFOR** – a communication and marketing programme to increase awareness of the programme, sense of Place etc.
5. **Monitoring, Evaluation and Learning** – to understand the effectiveness of the programme and learn more about wider research.

Assessment of the programme's delivery and design

The evaluation of the ARFOR 2 programme shows that a wide range of activities were delivered by a team of highly committed officers and contractors with evident enthusiasm for their work. Overall, the programme has been largely successful in delivering what was planned, as demonstrated by the outputs achieved and outlined below.

Outputs

Overall, the outcomes and outputs indicate an effective performance. Of the 23 indicators which included a quantitative target, the programme met or exceeded 18 of them (often exceeding to a large extent).

We note that **Enterprising Communities** has achieved its principal aim by providing financial support to 111 businesses across the four counties. It allocated approximately £4 million, with this investment then generating £2.5 million additional investment through match funding from businesses. Thirty projects were funded through the **Challenge Fund** worth approximately £2.1 million following a competitive application process which included 90 applications through four application windows.

Thousands of young people and families received information and support, primarily through activities of the various **Llwyddo'n Lleol** initiatives. While this was mainly a light engagement, approximately 200 individuals received intensive support to establish a business, find a job, or access financial support to settle down in the region.

The primary purpose of the Llwyddo'n Lleol work-stream was to influence perceptions of the area as a place to live through an effective marketing campaign. The programme has delivered a comprehensive marketing campaign through Llwyddo'n Lleol, including over 500 social media messages (mainly positive messages and success stories) together with television and radio campaigns, press releases, podcasts, and advertisements in public spaces.

The marketing model used by Llwyddo'n Lleol appears to be novel and effective, using supported individuals as campaign ambassadors to provide vivid, powerful examples of the opportunities in the region. This marketing campaign was considered by members of the delivery team and some external stakeholders to be among the programme's main successes.

Finally, numerous outputs from **Bwrlwm ARFOR** have also been reported including 715 messages to promote the Welsh language or the region's identity, establishing a forum for the region's businesses, and delivering several other activities.

Overall participant satisfaction

There was a very high level of satisfaction among all types of participants regarding the support received. For individuals, 69% gave the highest satisfaction rating in response to the participant survey, reporting that they were very satisfied with the support and this was consistent across two of Llwyddo'n Lleol's main initiatives (Mentro and Gyrfaol).

Similar levels of satisfaction were expressed among businesses that had received financial support, with 71% choosing the highest rating and saying they were very satisfied with the support.

Enterprising Communities

Three prominent themes were identified in Enterprising Communities beneficiaries' responses:

- Firstly, the programme's ethos was highlighted, namely the focus on investing in the Welsh language and investing in local people and how that fits in with their values.
- Secondly, the flexibility and openness of the grants scheme was referred to as a major strength.
- Thirdly, and linked to the previous point, the accessibility of the scheme (e.g. straightforward processes) was highlighted as a major strength, as well as effective support from programme officers. This made the programme much easier to access for small and new businesses compared with other programmes.

Despite the high satisfaction, some challenges were identified. The main challenge was time constraints, which affected businesses' ability to deliver projects on schedule, e.g. identifying suitable individuals to recruit, source the most appropriate items, or complete construction work within tight timescales. This challenge was sometime exacerbated by delays in approving projects.

Challenge Fund

There was also a high level of satisfaction among Challenge Fund grant recipients. Overall, organisations reported that their Challenge Fund projects were delivered as intended, although several highlighted challenges in undertaking effective monitoring, evaluation and research.

Based on our analysis of the final project reports, we note considerable variation in the quality of research, evaluation and learning produced. Given that the primary purpose of the Challenge Fund was to generate learning, these weaknesses across a significant number of projects are significant.

The core weakness of the Challenge Fund, beyond shortcomings in research and evaluation, was the failure to clearly define the real challenges facing communities in the ARFOR areas that the project aimed to address. As a result, many projects and their outputs were overly dependent on ready-made assumptions about the nature of the relationship between the economy and the Welsh language, rather than questioning and testing those assumptions and strengthening our understanding of this relationship.

Despite this, a number of funded projects should be commended for establishing interesting and innovative schemes that addressed some of the core issues facing Welsh-speaking communities. The relevance of other projects to the programme's objectives was less clear.

Bwrlwm ARFOR

It is important to note that Bwrlwm was a relatively small part of the programme's activity, and only a few participants received intensive support through this initiative. Nevertheless, it appears that the work-stream has offered a good range of projects, with the awards night for 'most Welsh' businesses in particular being highlighted as a success. Several businesses identified benefits from the additional publicity received following the event. The Bwrlwm Forum was another successful element, generating strong engagement with businesses.

Challenges

A recurring theme in consultations with officers and stakeholders was that ARFOR's structure and design seemed somewhat 'fragmented', and its remit overly broad, with ambitions to achieve too much. Spreading resources too thinly risked limiting what could be delivered strategically, and this approach arguably led to duplication and confusion across work-streams, particularly in relation to the various communication campaigns.

It became clear that there was some ambiguity among officers regarding ARFOR's exact role and purpose. While the nature of the challenge was well understood (namely the loss of young Welsh speakers due to a lack of economic opportunities), there was far less clarity about the programme's specific role in addressing such a significant issue. ARFOR would likely have benefited from establishing a clearer and more limited remit. This should be an important lesson for any similar programme in the future.

The short delivery period was a major challenge for the programme and likely contributed significantly to the ambiguity noted above, as there was little time for thorough planning. In regard to implementation, the short delivery period was repeatedly cited, with general consensus that the tight schedule constrained what could realistically be achieved.

Structure and design

Several positive aspects of the programme's structure and design were identified. The delivery team generally felt that ARFOR was well managed. At the regional level, stakeholders noted that information was easy to access and that support was readily available when required. Regular meetings and effective processes for sharing information were also highlighted as particular strengths.

The use of contractors proved effective, with the programme benefiting from their expertise and networks. Participants and stakeholders also praised the officers within these organisations, describing them as active, dedicated, and enthusiastic. There was a relatively young team of officers within the contractor organisations and the local authority teams. Several stakeholders felt this added to the programme's spirit and appeal, emphasising that it was a programme delivered by young people, for young people facing similar challenges.

While the programme was effectively managed at an operational level, there was a lack of resources to collaborate effectively with strategic stakeholders, consolidate efforts where appropriate, and ensure that the programme's resources were prioritised in the most appropriate way.

Assessment of impact

Impact on creating jobs and business growth

The business grants provided led to growth for the vast majority of businesses. Indeed, 83% of grant recipients reported an increase in their turnover since receiving support and, overall, it was noted that the support had made a significant contribution towards this increase. A £3.9m increase in business turnover is estimated as a result of the grants.

The primary aim of the support was to create more economic opportunities, and the scheme appears to have achieved this to some extent, with 73% of grant recipients reporting job creation as a direct result. Overall, there is strong evidence showing that the support has led to the creation of hundreds of new jobs, with estimates ranging from around 250 to 330 or possibly more. However, the additionality of the support can be questioned. A significant risk of displacement is likely, given that a high percentage of beneficiaries' competitors were also located within the region. This creates the risk that the growth experienced by beneficiaries may have had an adverse effect on other businesses in the region, thereby limiting the net economic impact of the programme.

Beyond the hard data, ARFOR officers believed that the support had a more far-reaching impact on some businesses by increasing their growth ambitions. This was supported by evidence from our survey, where 68% of respondents reported that the support had raised their aspirations for business growth. Additionally, there was a noticeable increase in their willingness to invest larger amounts to achieve these ambitions.

Entrepreneurship

Of the individuals who had received help through the Llwyddo'n Lleol Mentro Initiative, 46% had already started their own businesses, while an additional 17% were about to do so. On this basis, we can estimate that almost 60 young people have either already started their own businesses or are about to do so after receiving support from the initiative. The main effect of the support from Mentro was to accelerate this process of starting a business.

New businesses were also established following the support of Enterprising Communities. Based on the evidence from our consultation, we estimate that the scheme has led to 18 new businesses. Combined, it can be estimated that ARFOR led to 78 new businesses.

Impact on business use of the Welsh language

When applying for Enterprising Communities financial support, businesses were required to demonstrate how the investment would have a positive effect on the Welsh language. Some evidence of an increase in the use of Welsh by businesses can be seen in our consultation. Although it is fair to say that most were Welsh-speaking businesses before receiving support, a number of them increased their use of the Welsh language in specific contexts, such as in their processes and formal communication. There was a 48% increase in the number of businesses assessing candidates' Welsh-language skills as part of their recruitment process and a 26% increase in the number who believed it was 'very important' to assess candidates' skills in the language as part of recruitment.

Further evidence of this progress was provided by research conducted by our partner, Etic Lab, who applied their digital research model to assess the linguistic practices of ARFOR beneficiaries and compare them with similar businesses in the region. The findings indicated that businesses supported by ARFOR were 22% more likely to achieve a high Welsh-language score compared to those that had not received ARFOR support.

Impact on migration patterns

A detailed exploration of the programme's impact on participants' motivations and migration decisions was part of our consultation. While the programme had supported young people who were already inclined to remain in the area, many expressed concerns about the availability of suitable jobs—and the potential need to relocate for better opportunities. However, ARFOR's intervention appears to have shifted this dynamic, with 72% indicating that the programme influenced their decision to stay in the region. The main reasons cited were that the programme raised awareness of local career opportunities and gave participants confidence that support was available to them. As a result, 59% reported that the programme had given them confidence they could achieve their aspirations without needing to move away.

While these results are encouraging, it is important to recognise that the impact described relates to individuals who received direct and intensive support, a relatively small group of around 200 people. As such, these outcomes are unlikely to have a significant effect on the programme's overarching objective. Nevertheless, the evidence does demonstrate the impact of these interventions in terms of changing young people's perceptions. The key measure of impact, however, lies in understanding how the programme has changed the perceptions of young people more broadly beyond the immediate participants. Unfortunately, there is currently no evidence available to assess that wider influence.

Learning outcomes

The Challenge Fund was ARFOR's main mechanism to pilot new initiatives and, by doing so, generate learning. When considering the Challenge Fund as a whole, its overall impact on the economy and the Welsh language remains unclear. It is difficult to determine the extent to which the Fund has meaningfully contributed to improving the linguistic landscape or enhancing the economic viability of ARFOR areas. Moving forward, more comprehensive data collection and in-depth analysis will be necessary to assess the impact of these investments on the economy and the Welsh language in the region and to ensure that resources are allocated effectively.

It is worth noting that the projects which included a strong element of research tend to outperform the others, primarily because they created a knowledge base to inform future interventions, and because their influence and potential to extend beyond the life of the project will be significant. The projects demonstrating greatest strength in this regard, and which should be considered for mainstreaming or further development, are as follows:

- 1) **University of Wales Trinity Saint David project:** Workplace Language, Workforce Language: Exploring the use of the Welsh language in workplaces and by the workforce in ARFOR counties
- 2) **Cwmni IAITH:** Developing linguistic assertiveness in the field of childcare
- 3) **Cwmni Bro Aelhaearn:** Antur Aelhaearn housing and language project
- 4) **Bangor University** projects
- 5) **Golwg:** Extending local websites across ARFOR

Several papers and short reports were produced following research carried out by Aberystwyth University as part of the evaluation and learning commission in order to examine the connection between economy and language (as well as other relevant issues). A large number of recommendations were made as part of these papers, and they provide useful learning to inform the linguistic planning, policies, and interventions that will follow the ARFOR 2 programme.

Conclusions and the programme's next steps

Although the evidence indicates that ARFOR 2 interventions produced short-term positive economic outcomes and influenced beneficiaries' migration patterns at an individual level, a programme of this scale cannot directly address the broader structural economic weaknesses that drive rural depopulation. Given this, a programme like ARFOR is likely to have a more significant long-term impact by adopting a more strategic role – one that focuses on influencing, facilitating, and enabling – rather than attempting to directly resolve the region's deep-rooted structural economic challenges. Such an approach would also help to minimise the risk of duplicating existing activities or interventions.

Broad recommendations

We suggest three broad recommendations which offer a way forward for further investment and policy development in this area. Each broad recommendation includes a series of more detailed suggestions.

Recommendation 1: Establish a long-term intervention

A challenge as large and complex as the one discussed in this report requires a long-term, stable intervention in order to make a real difference. Indeed, that was also the conclusion of the Commission for Welsh-speaking Communities when considering the future of ARFOR:

'The Commission recognises [ARFOR 2]'s valuable contribution and is keen to see continuity of work in this vital area. The Commission therefore considers that ARFOR itself, or a similar body, or indeed another body..., should be established on a permanent basis.' (Report by the Commission for Welsh-speaking Communities)

Our recommendation is that a future long-term programme should possibly be smaller with a team of core officers responsible for three main functions:

- **Sharing good practice and providing guidance and strategic coordination.** This would serve to ensure that the efforts in ARFOR to solve youth depopulation and the adverse effect on the Welsh language remain on the political agenda. In addition, the programme would have a key role in coordinating the relevant activity of bodies, programmes and projects, in order to promote effective collaboration and ensure that opportunities are fully exploited by uniting efforts where appropriate.
- **Research, testing and piloting.** The programme could also be responsible for investing in emerging priorities and themes regarding young people and depopulation. This may include research projects or relevant pilot projects e.g. funding the project 'Keeping in Touch with Young People' which is currently the subject of a feasibility study through the Challenge Fund.

- **Marketing and communication.** The body or programme should be responsible for marketing and communication campaigns aimed at changing young people's perception of the region as a place to live and work. This could be a continuation of the Llwyddo'n Lleol campaign and/or other communication platforms of the programme.

Recommendation 2: Use a transition period to plan thoroughly for the long-term intervention

It is our understanding that there may be a possibility of funding for a 'transition period' to avoid a sudden end to programme activities and established procedures, which could otherwise require re-establishing later. The priority during any transition period should be to define a clear purpose and remit for future work, plan for a long-term solution, and sustain, expand, or mainstream ARFOR 2 activities where appropriate. Based on our evaluation of the programme, we recommend that the following elements should be included:

- **Planning for the next phase / long term solution.** The primary aim of the transition period should be to invest in activities that support preparations for long-term solutions. One example is the opportunity to commission experts in behaviour change to explore the most effective types of messages in changing young people's perceptions of the region as an attractive place to live. Insights from this work could help shape future communication and marketing campaigns. It is also important to acknowledge the current 'data gap' – specifically, the limited evidence on the programme's impact to date in changing perceptions among young people beyond direct beneficiaries. Further research to assess the impact at that level would therefore be highly valuable.
- **Continue to deliver the 'Llwyddo'n Lleol' campaign on a smaller scale.** Our consultation identified that this work-stream has already created enough 'content' to maintain the marketing campaign in the future. We therefore recommend that resources should be allocated to uphold this campaign and that there is no need, for the time being, to invest further in direct support for businesses and individuals through the Llwyddo'n Lleol elements (i.e. the focus should be on the marketing campaign itself only).
- **Work to mainstream the successful and innovative elements of the programme.** In addition to the recommendation to continue the Llwyddo'n Lleol campaign, there is an opportunity to invest further in other innovative and successful aspects of the programme. For example, consideration should be given to mainstreaming or further developing some of the most effective projects funded through the Challenge Fund (as referred to above under the 'Learning outcomes' heading). Similarly, attention should also be given to mainstreaming some of the most successful activities and sub-projects of the other work-streams, such as Bwrlwm ARFOR's 'The World's Most Welsh-language Awards' event.

Recommendation 3: Applying the research's main lessons to inform the next steps

Finally, several recommendations were made through evaluation and learning commission's wider research which can help inform linguistic planning, policies, and interventions succeeding the ARFOR 2 programme. Appropriate attention should therefore be given to these findings when planning ahead.

To conclude

Overall, the ARFOR 2 programme has largely delivered on its intended plan and achieved a great deal within a short timeframe. The tight schedule, however, posed challenges—most notably the limited time available for thorough planning, which may have contributed to some ambiguity about the programme's precise role and purpose, resulting in an overly broad remit. Nevertheless, the programme has generated valuable insights and learning that leave an important legacy for policymakers and has made a significant contribution by sustaining discussion and developing ideas for possible solutions to address the core challenges.

ARFOR 2 has again highlighted the scale of the challenge it sought to address, while underlining that it is not realistic to expect transformational change within such a short timescale. Instead, the challenge requires an intensive, long-term, carefully planned response. The findings from this evaluation should therefore be used to inform the development of such long-term solutions.

1. Introduction

Wavehill was commissioned by Cyngor Gwynedd, on behalf of the four local authorities in the region of ARFOR (i.e. Gwynedd, Anglesey, Ceredigion and Carmarthenshire), to provide three services:

1. To create a framework to monitor the work-streams in the four counties.
2. To evaluate ARFOR's impact, its processes and the individual work-streams.
3. To conduct research to learn more about the connection between the Economy and Language and disseminate this learning more widely.

This evaluation report provides a final assessment of the impact and performance of the programme delivery, together with conclusions and recommendations for potential future actions. It follows the delivery of a series of other evaluation outputs, including an Initial and Baseline Report in April 2024 and a series of short interim evaluation reports compiled between September and December 2024. In addition, several additional papers have been produced as part of the wider learning and research initiative of this commission (see point 3 above), and these are presented separately from this report.

1.1 Programme overview

The ARFOR 2 programme aims to provide innovative methods to support the economy in the strongholds of the Welsh language. The programme's purpose is described as follows:

'Supporting our Welsh communities to flourish by developing economic interventions which will also contribute to the prosperity of the Welsh language and also ensure opportunities to increase the visibility and use of the Welsh language as a living language in our communities.'¹

Between 2019 and the end of the 2020/21 financial year, the Welsh Government provided £2 million for the ARFOR 1 programme with Gwynedd Council as lead. Despite the challenges faced due to COVID-19 lockdowns and developing a new programme in a very short timeframe, there was evidence of positive outcomes including the creation of 238 new jobs; 89 part-time jobs and 226 jobs safeguarded within the ARFOR region. In addition, the evaluation highlighted that there is a lack of data or robust evidence regarding the interrelationship between economic prosperity and the prosperity of the Welsh language; the need for further investment was highlighted and strategic collaboration was established among the members and officers of the four counties.

¹ ARFOR Action Plan – Phase II (2022/23 – 2024/25), ARFOR Programme Board Proposals to Vaughan Gething AS, Minister for the Economy, Welsh Government, and Cefin Campbell AS, Plaid Cymru Designated Member, 27 July 2022

As a result, £11 million was approved to deliver a second phase to the programme (ARFOR 2) until March 2025, with four strategic objectives:²

1. Create opportunities for young people and families to stay in or return to their indigenous communities
2. Create enterprising Welsh-speaking communities
3. Maximize the benefit of collaborative activity
4. Strengthen the identity and characteristics of our Welsh communities

In response to these strategic objectives, many types of support and activity were part of the ARFOR 2 delivery model including financial support through subsidy schemes, training through the medium of Welsh and entrepreneurship, career support, marketing and communication campaigns, as well as a wide variety of other initiatives and sub-projects. This was delivered through five work-streams:

1. **Cymunedau Mentrus/Enterprising Communities (£4,500,000)** – business grants to create good jobs and increase the use of the Welsh language.
2. **Llwyddo'n Lleol (£3,000,000)** – a marketing campaign to change perceptions about the economic opportunities available in the region. Four initiatives providing support to individuals were available through Llwyddo'n Lleol, which all fed into the marketing campaign:
 - **Profi Initiative:** resources and employability sessions with school and college students to raise awareness of local job opportunities through the medium of Welsh and to develop employability skills in general.
 - **Mentro Initiative:** financial support and training sessions with business experts to help young people interested in starting a business.
 - **Gyrfaol Initiative:** funding work placements for individuals with local employers in an area of interest to them, together with social opportunities.
 - **Ymgartrefu Initiative:** financial support and advice to help encourage families and young people to return or settle in the region.
3. **Y Gronfa Her/Challenge Fund (£2,600,000)** – funding innovative projects for a wider range of stakeholders in line with the programme's objectives.
4. **Bwrlwm ARFOR (£300,000)** – a communication and marketing programme to increase awareness of the programme, promote local businesses and create 'bwrlwm' (a 'buzz').
5. **Monitoring, Evaluation and Learning (£200,000)** – to understand the effectiveness of the programme and learn more about the wider research.

² Ibid.

1.2 The evaluation

The aim of the evaluation, as described in the Invitation to Tender document, was to:

‘Evaluate the programme and its processes in full, considering: whether the work-streams have responded to the Strategic Objectives; evaluate programme management and processes and the individual work-streams; (and) need to show the impact the work-streams have had on the economy and its connection to the language.’³

The evaluation has been carried out continuously since commissioning Wavehill in July 2023, a few months into the programme’s delivery period. The aim of the initial phase was to establish a Theory of Change for the programme and develop an Evaluation Framework.

The evaluation focused on both process and impact. On the process side, considerable attention was given to understanding the effectiveness of different elements in delivering the programme and to identifying key lessons to inform similar interventions in the future. A deductive research approach was applied to evaluate the programme’s impact and identify the extent to which the outcomes identified in the Theory of Change have been achieved.

1.2.1 Research activities

The research team undertook the following activities between January 2024 and March 2025 to collect data for the evaluation:

- 50 semi-structured interviews with ARFOR officers and external stakeholders
- 119 interviews with businesses and organisations who had received support from ARFOR 2
- 23 interviews with businesses who had received support from ARFOR 1
- Survey of 80 individuals who had received support from the Llwyddo’n Lleol work-stream
- A comprehensive review of the Challenge Fund project reports
- Review of the programme’s monitoring data
- Analysis of the socio-economic data
- Statistical modelling to assess the relationship between the economy and language

³ Invitation to Tender ‘ARFOR Programme: Evaluation, Monitoring and Learning,’ Gwynedd Council’s Economy and Community Department.

1.2.2 Limitations

It is important to acknowledge the limitations to this research. Firstly, the short delivery period makes it impossible to identify changes in the main economic and linguistic datasets. In addition, ARFOR represents only one intervention – and a relatively small one – among many other interventions. Given the scale of the challenge, it is therefore very difficult to isolate the effect of ARFOR within official datasets and to distinguish it from the impact of other interventions.

The timing of the evaluation also introduced certain limitations. First, the nature of many of the interventions (such as long-term changes within businesses) means that their full impact will only become evident after the programme has concluded. Second, our assessment of the programme's impact relies heavily on self-reported data, as there was insufficient time to develop a counterfactual comparison group which would have enabled a more robust evaluation of the programme (e.g. by using official datasets to develop a control group).

Finally, we note that it was only possible in this evaluation to evaluate the impact on immediate beneficiaries of the programme. This means there are gaps in our understanding of its indirect and more far-reaching effects – mainly, the effect of the Llwyddo'n Lleol campaign on changing perceptions about the region and persuading people to stay or settle.

1.2.3 Report structure

This report is structured as follows:

- **Chapter 2** sets out the context for the report and describes the rationale for the programme.
- **Chapter 3** compares the programme's performance against its contractual targets.
- **Chapter 4** assesses the performance of each work-stream individually.
- **Chapter 5** examines how beneficiaries and stakeholders perceive the overall performance of programme delivery.
- **Chapter 6** provides an assessment of the programme's impact.
- **Chapter 7** outlines key conclusions and discusses possible next steps.

2. Setting the context

This section introduces the context for ARFOR 2 and the evaluation. As a starting point, it provides an overview of the region and the economic, social and linguistic challenges it faces. Next, the rationale behind the programme is discussed as a means of addressing these socio-economic and linguistic challenges.

2.1 Summary of the socio-economic and linguistic profile of ARFOR

A comprehensive assessment of ARFOR's socio-economic and linguistic profile was carried out as part of the first phase of the evaluation at the start of 2024. The findings from this assessment are summarised below and provide a baseline for the programme. Overall, the assessment demonstrated:

- Depopulation in the region, among young people in particular. A decrease of 0.9% was seen in the region's population between 2011 and 2021 and the biggest drop was in Gwynedd (3.7%). The main decrease was among the 35-44 age group (a drop of 13.9%) and the 20-34 age group (a drop of 5.4%), while there was a significant increase among the 65+ population (15.2%).
- A decline in the level of Welsh speakers, with a 13% drop in the region between 2001 and 2021 compared to 14% nationally. This varies by county, with a decrease of 21% in Carmarthenshire, 13% in Ceredigion and 7% each in Gwynedd and Anglesey.
- Between 2011 and 2021, 8% of communities in ARFOR where the majority speak Welsh were lost.
- There is a pattern of 'net' out-migration (i.e. more leaving than entering) to Cardiff up until the most recent year. Out-migration to England is more stable and higher (compared to the number leaving for Cardiff) but the immigration figures are also high, leading to constant net immigration (i.e. more entering than leaving).
- When looking at the relationship between net migration and the ability to speak Welsh, there is a negative relationship between net out-migration trends and growth in Welsh-language ability (i.e. the greater the net out-migration to Cardiff and England the smaller the growth in language ability).
- Looking at the economic statistics, it shows that GVA per capita and GDHI per capita are slightly lower than the national level.
- Although ARFOR, on the whole, has a low number of areas that fall under the WIMD's most deprived category, an analysis of the individual zones shows that the region performs poorly in terms of access to services and housing.
- Overall, we see that job opportunities in the ARFOR area are proportional to the trend in Wales, but with more self-employed and dependent on the public sector, while there is a higher proportion of microbusinesses and fewer large businesses.
- It is also seen that salary levels are slightly lower than the national average.

2.2 Programme rationale and aim

The phenomenon that drove the Government, together with Plaid Cymru, to invest in this programme was the linguistic challenge facing the region where, overall, the proportion of Welsh speakers has fallen significantly over the decades. Although the decline is greater in other parts of Wales, the decrease in ARFOR represents a significant loss of Welsh-speaking communities. In other words, the geographical areas which are home to large percentages of Welsh speakers (the ‘strongholds’) remain areas of concern.

What is unique about the ARFOR concept is the focus on the relationship between economy and language. The fundamental assumption central to the programme is that economic weaknesses (i.e. lack of appropriate and sufficient jobs) motivate young people to leave the region in order to find better opportunities. This rationale is clearly highlighted in the programme documentation:

‘Ceredigion, Gwynedd, Carmarthenshire and Anglesey are the counties with the highest percentage of Welsh speakers, but the number has been decreasing... The economic challenges of the four counties – such as low wages, underemployment and a shrinking workforce – are common to many rural and peripheral areas in Wales and beyond; but the impact of these challenges on the Welsh language is unique and far-reaching... The prosperity of the strongholds of the Welsh language is dependent on more than work and pay, but it can be reasoned that the inability of the economy to support residents to fulfil their aspirations – and maintain prosperous places – is detrimental. The out-migration of young people and young families from strongholds of the Welsh language is one reason why the number of speakers continues to decline.’⁴

In general, the research evidence supports these assumptions. The statistics show that until recently there was net out-migration from the ARFOR region to Cardiff and that there was net immigration from England. We also know from our statistical analysis of migration and linguistic patterns in these areas that there is a correlation between fewer Welsh speakers and places where net out-migration occurs.

The evidence suggests that economic factors such as the lack of good jobs contribute towards this (see research findings by Woods and Utz [2022]), although the research also demonstrates that the situation is much more complex and that individuals are influenced by a range of factors. However, it cannot be refuted that the desire for better economic opportunities is an important factor that drives out-migration among young people from the region.

⁴ Tender Opportunity ‘Llwyddo’n Lleol in the ARFOR Region’, Cyngor Gwynedd’s Economy and Community Department

ARFOR was funded as a means of responding to the above challenges. Similarly, there was widespread recognition among a number of stakeholders that it was impossible to ‘solve’ the problem through a short-term programme such as this one when considering the scale of the challenge.

A group of stakeholders expressed the view that ARFOR was in fact a pilot programme, with the second phase building on the first but still a pilot:

“The principle is still the same – to better understand the link between economy and language... The idea is that instead of doing more research – that there is something in place to examine more practically. The other element is to look at how to mainstream the Welsh language into economic elements... ARFOR is a catalyst... (and a) case study for other projects...” (Scoping interview with key stakeholders)

Indeed, the need to strengthen the evidence base was a common theme during the interviews, with the programme being described as “a means to acquire better understanding”. Some stakeholders were of the opinion that these learnings were more important than the more tangible and immediate outcomes.

Despite this, there was a discrepancy between this point of view and the language of the programme’s documentation which suggested that ARFOR’s role would be to address the core challenge directly. It became evident during the evaluation that stakeholders held differing visions and understandings regarding the programme’s exact role and purpose. Whilst there was a clear understanding of the nature of the challenge and the need to focus on creating economic opportunities, the exact role of ARFOR within that was not entirely clear. That is, a group of stakeholders focused on the need to create economic opportunities directly (e.g. by investing in businesses to create jobs). Others argued that the programme had a more strategic, enabling, and learning role. This tension in terms of the exact purpose of ARFOR has been one of the main challenges of the programme. We discuss this further in section 5.2 of the report.

3. Performance against the programme's contractual targets

The first—and, possibly, most fundamental—assessment of ARFOR's performance is to explore the extent to which its contractual outputs and outcomes targets were achieved.

Several key performance indicators (KPI) were agreed as part of the contractual process with the Welsh Government. Table 3.1 (over the page) demonstrates the final outputs and outcomes reported against these targets. These included targets specific to certain work-streams, and others spanning several work-streams. The three key work-streams (Enterprising Communities, Llwyddo'n Lleol, and the Challenge Fund)⁵ contributed to the majority of targets, although the Challenge Fund had a specific set of targets while the other work-streams reported against a small number of targets.

Overall, the outcomes and outputs suggest effective performance. Of the 23 indicators which included a quantitative target, the programme met or exceeded 18 of them (and often exceeded them by a large margin). This included achieving approximately four times the target for the number of young people who had received information and support, and more than three times the target for the number of existing initiatives receiving support. The data also suggests a very strong performance regarding the communication outputs which were a central part of the campaign to change young people's perceptions of the area.

Despite this, the usefulness and design of some of the indicators can be questioned as many seem to overlap and the definitions are not always completely clear. For example, the support provided by Llwyddo'n Lleol, which is responsible for 91% of the outputs for 'young people receiving support', varies greatly. Through this work-stream, only around 200 individuals received intensive support for entrepreneurship, career, or settling in the region. We understand that the Profi Initiative (the employability intervention in schools and colleges) is responsible for the majority of the outputs, but this was a relatively light intervention and therefore the usefulness of combining the figures in this way can be questioned. We also understand that the Profi Initiative is responsible for a large number of the achievements for 'young people receiving information', and therefore there seems to be some overlap between the concepts of providing information and support. Similarly, it is not clear how the programme differentiates outputs between 'young people' and 'young families', raising questions about potential overlap or even duplication among communication outputs.

⁵ These are referred to as the 'key' work-streams due to the level of investment in them compared to the other work-streams.

Table 3.1: Official programme outputs, outcomes and targets

Theme	Output	Target	Total	%
Support for beneficiaries	Young people receiving information	10,000	37,356	374%
	Young people receiving support	2500	10,164	407%
	Young families receiving information	5000	17,022	340%
	Young families receiving support	1500	1,335	89%
	New enterprises receiving support	160	263	164%
	Existing enterprises receiving support	200	678	339%
	Investment generated (Enterprising Communities only)	£2,250,000	£2,464,723.87	110%
	New product/service secured	250	288	115%
	Jobs created	578	327	57%
	Jobs safeguarded	178	295	166%
	Participants in social enterprises	100	52	52%
	Businesses/organisations increasing their use of the Welsh language	200	210	105%
	Number of individuals taking part in activities to improve Welsh language skills	200	141	71%
	Heritage/ culture/ local produce/ sense of place schemes supported	200	71	36%
Challenge Fund	Number of regional and local schemes	40	77	193%
	Value of regional and local schemes	£2,080,000	£2,137,091.17	103%
	ARFOR regional and local events	20	27	135%
	Learning studies and sharing experiences	40	227	568%
	Number of local ARFOR schemes	20	30	150%
	Identify regional and local challenges	No target	224	
Communication outputs	Positive messages cascaded	500	1,346	269%
	Examples of local success identified	150	718	479%
	Number of messages promoting the Welsh language/identity	No target	953	
	Strengthening the relationship and collaboration with Mentrau Iaith	No target	n/a	
Research and learning	Continuous monitoring and evaluation of the ARFOR programme	No target	n/a	
	Create a learning Network during the ARFOR period	4	20	500%
	Create an Engagement Forum	1	11	1,100%
	Create evidence to inform the learning about the connection between Economy and Language	No target	n/a	

Source: Monitoring data shared by the programme, May 2025

3.1 Conclusions

The programme would possibly have benefited from having a simpler set of indicators with clearer definitions. Nevertheless, despite their imperfections, the indicators provide useful insight into the programme's activity. Indeed, the figures are consistent with a common perception identified in the evaluation, namely that the programme has delivered a significant amount of activity in a very short period of time which should be commended.

4. Exploring individual work-streams

It is important to assess the value of each work-stream individually in order to understand which aspects of the programme have been the most successful. This section describes all the activities delivered through the work-streams, and assesses their effectiveness, impact and contribution towards ARFOR's objectives.

4.1 Enterprising Communities

The Enterprising Communities grant fund was administered separately by local authority officers. Although there was some variation in the approach taken, the primary aspects of the scheme remained the same.

Grants between £5,000 and £75,000 were offered which could be used to cover up to 70% of project costs, including both revenue and capital costs. Eligible expenditure covered the employment of Welsh-speaking staff, investment in creating a new product or service, training for the new jobs, working capital that would help create Welsh-speaking spaces (e.g. rent) or other capital costs including small-scale equipment. There was an expectation that any new post would continue beyond the end of the ARFOR programme period in (March) 2025 and that new staff needed to be fluent in Welsh or committed to learning.

Broadly, two types of projects were funded: those aimed at business growth to help them contribute more to the economy and job creation, and those projects aimed at increasing the use of Welsh within businesses, with some projects combining both objectives.

4.1.1 Enterprising Communities application and approval processes

The fund was advertised through Business Wales channels, local authority channels, and social media (which included sharing case studies). This was a fairly effective process and there was a high demand for the support.

The application process required applicants to demonstrate how their projects would contribute towards creating appropriate and good jobs (i.e. offering sufficient income to enable people to realise their aspirations, offered a variety of jobs, and responded to the needs of employers), contribute to the local economy, and demonstrate a benefit to the Welsh language (in terms of creating Welsh spaces, bilingual jobs, and increasing the use of Welsh). In that regard, the grants used a relatively simple mechanism to embed language provision and development in businesses, by requiring applicants to submit plans and score well in relation to the Welsh language and its development within and by the business.

There were differences in the application process of the four counties with some using a two-stage process and others using a simpler process. Advantages and disadvantages to the different methods were noted; for example, the two-step process was an effective way of easily identifying ineligible projects, but the process took longer. There were also differences in how the grants were assessed. The use of a local stakeholder panel was the most common method, but one local authority formed an agreement with Business Wales to support the approval process.

ARFOR officers differed in their opinion regarding these differences. While some welcomed the development of different processes which suited the specific arrangements of the authorities, others argued that harmonisation in structures and use of standardised forms etc. would lead to better effectiveness and efficiency.

Some members of the delivery team suggested that the application process should have been more innovative using a 'Dragon's Den' process asking applicants to present their ideas in front of a panel. It was suggested that this would be a more effective method of examining projects and would also avoid creating a 'box ticking' process. Others suggested that a more competitive application process, rather than the 'first come, first served' system that was implemented, would be better at funding the most appropriate projects.

Beneficiary feedback on the application process was very positive. About half (49%; 26/53) said they were 'very satisfied', and a further 34% were 'satisfied'. Furthermore, 40% reported that the process was relatively clear and easy to complete, while 16% mentioned receiving assistance from officers. Indeed, of those who received support, 88% gave the highest rating when asked about the quality of that support.

The beneficiaries were also very satisfied with the size of the grant, including 75% saying it was sufficient 'to a large extent'. The grant amount generally seems to be higher for small and new businesses than other standard offers, providing them with a better opportunity to accelerate the growth of their businesses.

4.1.2 Enterprising Communities business profiles

Business profiles were explored during our consultation to acquire a deeper understanding of the type of businesses receiving support. The data suggests that around a quarter of the beneficiaries (26%) are social businesses or community groups and around three quarters are other locally-established commercial businesses. Social enterprises were among the scheme's main target groups, but it is our understanding that the team found it difficult to engage with the sector. It is possible that the programme could have used more appropriate communication channels (e.g. sector-specific) to generate more interest. Therefore, this represents a relative weakness in the scheme's promotional activity.

The scheme was also open to businesses located outside the region but who wished to expand or relocate to the region. Engagement with this type of business was low, possibly because the promotional activity did not specifically target them.

It was local and very small businesses which generally received support. Ninety-four per cent reported that they had no offices outside the region, while 80% were micro-businesses and 16% had no employees. This reflects the business profile of the area in general.

Supported businesses came from a wide range of sectors. The main clusters included businesses in the manufacturing industry (many food producers), food and hospitality services, information and communication (digital marketing, media companies, publishers etc.), research and scientific institutions, the arts, business support services and retail. This is in line with one of the main objectives of the scheme, which is to contribute to the variety of jobs available to local people in the area.

In general, the businesses supported can be described as ‘Welsh-language businesses’ (i.e. businesses operating through the medium of Welsh). The vast majority conducted their marketing and engaged with customers and clients through the medium of Welsh, and many undertook informal internal communications through the medium of Welsh. However, 40% stated that formal internal communication, such as written policies, were not conducted in Welsh. Additionally, 31% said they did not assess candidates’ Welsh skills as part of their recruitment processes.

Finally, it is fair to say that ARFOR supported a number of businesses that were already experienced in benefitting from the support infrastructure available in Wales. In total, 72% reported having received support from another programme within the past three years, and 48% stated they had received financial assistance. Business Wales was the most frequently cited source of support.

4.1.3 Enterprising Communities outputs

The data demonstrates that programme officers allocated Enterprising Communities grants effectively with 111 businesses receiving financial support across the four local authorities, from 21 in Ceredigion to 36 in Carmarthenshire. In total, around £4 million was allocated across the region. We saw in Table 3.1 at the start of the previous chapter that the investment leveraged approximately £2.5 million of additional investment in match funding from businesses. This is a significant result, showing that the support encouraged businesses to invest further in growth.

Table 4.1: Analysis of data from Enterprising Communities applications

	Number of businesses	Total grants awarded	Average grants awarded
Anglesey	30	£961,158.29	£32,038.61
Gwynedd	24	£978,562.70	£40,773.45
Ceredigion	21	£1,040,438.10	£49,544.67
Carmarthenshire	36	£1,085,725.21	£30,159.03
Total	111	£4,065,884.30	£36,629.59

Source: Enterprising Communities applications data shared by local authority officers.

The funding supported a variety of growth activities. Most businesses reported spending on new equipment, capital costs, developing new services or products, and creating new employment opportunities (see Table 4.2 below).

Table 4.2: The purpose of the Enterprising Communities / Llwyddo'n Lleol grant

	Enterprising Communities	Llwyddo'n Lleol (Gyrfaol initiative)	All businesses
Capital costs including small scale equipment	86%	22%	67%
Offer new employment	56%	83%	63%
Develop new business opportunities or offer a new service/product	66%	39%	56%
Creating a Welsh-language space (rent, legal costs, decoration costs, fixtures and fittings)	70%	26%	53%
Pay for training	32%	43%	34%
Develop a new business / venture	18%	9%	14%
Safeguard key community resources	14%	17%	14%

Source: Consultation with ARFOR beneficiaries (businesses) (n=50, 23, 70)

4.1.4 Enterprising Communities outcomes

According to the programme's monitoring data, this financial support was responsible for creating or safeguarding 372.5 jobs. This would mean that the programme has created or safeguarded a job for every £10,915.13 allocated in business grants.

There was also evidence in our survey of the scheme's impact on business creation. Eleven beneficiaries of Enterprising Communities who responded to our survey said that the aim of the investment was to develop a new business or venture. Of those, nine said they had launched these businesses while the other two were either about to start a new business or venture or were planning to do so.

The outcomes for businesses are discussed in much more detail in Chapter 6.

4.1.5 Enterprising Communities conclusions

The officers who were directly involved with this stream believed that it had been delivered effectively. The positive outcomes resulting from the projects in terms of creating jobs and growth were noted, as well as the increase in the value of the Welsh language within businesses.

Based on feedback from the wider delivery team and external stakeholders, three main concerns are highlighted. Firstly, it was noted that the funding had been spent quickly, and some believed the process had been rushed, e.g. "you can either spend swiftly or spend effectively" was the comment of one team member.

Secondly, many referred to a lack of clarity and clear requirements and there was concern that there was little to distinguish it from other grant schemes. Some pointed out that there was too much ambiguity regarding the concept of creating Welsh-language spaces. Some believed that a much more direct focus was needed on the linguistic element, but this would possibly go against the programme's main focus (i.e. providing economic interventions for the benefit of the Welsh language rather than providing linguistic interventions).

Thirdly, and on a more fundamental level, some questioned the appropriateness of a grant fund of this type. One stakeholder described this type of support as a "blunt tool" and questioned if this was the best use of resources given that the budget was so small in relation to the size of the challenge. The risk of creating a displacement effect (i.e. taking trade from unsupported businesses) and creating unfair competition was highlighted. There was a certain amount of cynicism about the value of such schemes: "People know what they are doing when it comes to grants, and they are often the same faces". In fairness, there is evidence to support the theory that businesses that are already experienced in accessing public support often received the grants.

Despite these concerns, the officers responsible for delivering this work-stream were satisfied with the portfolio of funded projects, noting diversity in business size, sector and geographic distribution. They cited several good examples where they believed the investment had a significant impact. It appears that the scheme has achieved its main aim in terms of creating jobs and increasing businesses' use of the Welsh language, and the scheme's approach to embedding language provision and development in businesses is an important element that distinguishes it from other schemes. However, questions remain whether Enterprising Communities provided sufficient added value given the availability of other subsidy schemes (e.g. the Levelling Up Fund). One might also question if the scheme was innovative enough to provide new lessons, one of the programme's main aims.

4.2 Llwyddo'n Lleol

Llwyddo'n Lleol was originally a LEADER-funded pilot held in Anglesey only. The activity was extended into Gwynedd during ARFOR 1 and throughout the region under ARFOR 2. The latest iteration was delivered through a collaboration between two intermediary bodies, namely Menter Môn (lead body) and Mentera.

Llwyddo'n Lleol was a marketing campaign designed to convince young people and young families, both in the region and those who had already left, that they are able to fulfil their aspirations with a good job in an exciting field by staying or returning to their indigenous communities. The purpose was to establish a positive conversation around young people staying in the area and starting businesses and developing successful careers, and those who have decided to return.

Support was provided to young people through four main initiatives (Profi, Mentro, Gyrfaol, and Ymgartrefu) which all focused on providing skills, knowledge, or incentives to encourage them to develop careers or businesses locally, or return to the area. Although this was a means of creating immediate outcomes for those individuals, the main aim was to document their journeys and use the content as part of the marketing campaign. Indeed, this was part of the 'deal' when individuals applied for support from the above initiatives, as they were required to be ambassadors for the programme and document their journeys through various media.

4.2.1 Mentro Initiative

The Mentro initiative offered support to young people who were mainly interested in starting a business. The scheme was structured into 15 different cohorts together with some sub-projects, with 176 young people directly receiving support.

The main intervention, the Business Training Programme, provided intensive weekly sessions to individuals with business experts focusing on aspects such as marketing, managing finance and attracting customers; opportunities to network with peers; and financial support of £1,000 to develop their business ideas. Following six weeks of training, Taro'r Nodyn/Pitch Perfect events were held where the participants presented their innovative business ideas to a panel of judges with the successful participant receiving an additional £1,000. In total 59 individuals received this support through five geographically divided cohorts (partly to maximize networking opportunities). In addition 21 Aberystwyth University students received similar support from the University through two further cohorts, while four additional individuals received similar support but through a cohort which focused specifically on creating an outdoor business. In total therefore, 84 individuals received this intensive package of support.

Several other types of programmes with comparable features were trialled as part of this initiative. Six-week training programmes on journalism and creating social events were delivered to 18 individuals. These included more specific training than the general business training above, but financial support was not provided.

The decision to provide this specific training was made following the identification of these areas of interest when engaging with young people. The aim was to deliver a more purposeful offer which responded to specific challenges. In this case, the journalism programme responded to the perception that it was necessary to leave in order to find good opportunities while the social event creation programme was responding to the challenge and the common perception among young people that 'there is nothing good to do here'. Beneficiaries' stories can be seen on the [Llwyddo'n Lleol](#) website, and some examples are given below:

“I decided to join this programme for the opportunity to learn various journalistic skills and get to know new people. I have always been interested in journalism and the media, so this scheme is a wonderful opportunity!” (Journalism training programme Participant)

“Caryl is a comedian who wants to host a regular Comedy Night which will give individuals who are new to comedy a chance to give it a go, and for those who are more experienced to experiment with new material. Caryl Burke applied to be part of the Social Events programme in order to organise more events.” (Social events training programme Participant)

Several sub-projects were also delivered. One example was a support package for eight rugby clubs in Ceredigion to host social events for the benefit of the community and as additional income to support the clubs. Another project focused on supporting young farmers’ clubs, and there were several examples of dedicated cohorts and sub-projects such as these. Specific officers were responsible for engaging with young people and identifying opportunities to provide bespoke elements to complement the general business training offer.

This collection of activities and methods demonstrates how the initiative was delivered in a very flexible and streamlined way, underlining the scheme’s innovation and differentiating it from mainstream entrepreneurship services. While these different and purposeful activities were not a success every time (e.g. there was not much response to the element that focused on outdoor activities), learning about the failures is equally valuable in any innovative process.

Overall, there was a very high level of satisfaction among beneficiaries with this support. Indeed, 73% gave the highest possible rating stating that they were ‘very satisfied’. There was a high level of satisfaction with the application process and the support given by officers during the process as well.

When asked about the most important aspects of the support, the training elements and the financial support were considered almost equally important (but with the former slightly higher). The weekly training sessions were rated as ‘very useful’ (the highest rating) by 83% and there was also a very positive response to the Taro’r Nodyn/Pitch Perfect event with 82% reporting that it was a useful experience ‘to a large extent’ (the highest rating). It was noted by 90% that the amount of financial support was sufficient at least ‘to some extent’. The financial support was used to invest in various elements, including new equipment (56%), developing new products or services (48%), marketing and additional training (32% each).

Networking opportunities were another important element in the scheme. Indeed, 93% confirmed that they had networked with others – mainly through the training sessions, but the majority (63%) also networked outside the sessions through digital platforms such as WhatsApp. Many referred to these opportunities when discussing their perceptions of the programme’s main strengths, as one participant noted:

“There were plenty of opportunities to meet enthusiastic individuals who were in a similar situation. The programme provided good strategies and ideas to help set up a successful business and to introduce enterprising and successful businesses and have the opportunity to chat with them.”
(Mentro beneficiary)

Regular networking opportunities with peers are likely to be of great benefit to beneficiaries, increasing the likelihood of future success and building strong and collaborative business communities, which are important for the development of local economies and the entrepreneurship sector. Staff members noted that this was something that developed organically to a certain extent with the beneficiaries developing a close relationship with each other, learning from each other and giving each other confidence.

It was also noted that there was good follow-up for the beneficiaries, with officers continuing to maintain the relationship beyond the period of the formal intervention and that the networks and the relationship between beneficiaries also continued very often. However, some beneficiaries felt that there was not enough follow-up after receiving the support which suggests that this occurred on an ad hoc basis. It is possible that this initiative would have benefited from ensuring clear expectations in terms of progression in order to increase consistency in its provision.

Following the support from the Mentro Initiative, 46% of participants (19/41) reported that they had already started a new business at the time they responded to our survey. A further 41% were either about to start a new business (17%) or were still planning to (24%). On this basis, we can conclude that the scheme has succeeded in terms of its objective of turning ideas into full businesses.

It is also important to consider a counterfactual scenario to understand the real impact of the scheme. That is, to what extent would these individuals have started their businesses anyway? Although all respondents believed they would have started their businesses eventually, 77% (10/13) felt the process would have taken longer without the scheme. It can be deduced therefore that the scheme has accelerated entrepreneurship which is important in terms of promoting economic growth, creating jobs, and driving innovation.

Most of the businesses created operate primarily in Welsh, with 63% (12/19) stating that the business mainly uses Welsh and 32% said they put equal emphasis on Welsh and English. This is important as it suggests that any additional jobs created through the businesses will require Welsh language skills and therefore give local Welsh speakers further opportunities to stay in the region.

4.2.2 Gyrfaol initiative

This initiative offered support to local businesses to employ young people, contributing up to £12,000 for salary and training costs. In total, 83 individuals received work placements through this initiative and, once again, satisfaction was high: 58% chose the highest rating 'very satisfied' and a further 39% saying they were 'satisfied'. A very similar percentage expressed satisfaction with different elements of the support, including the work experience itself and the application process. The vast majority also reported that they received effective support during the application process.

Originally, the Llwyddo'n Lleol team was keen to provide social opportunities for beneficiaries alongside professional ones, recognising that various factors drive motivations for migration, including social factors. The intention was to organise social activities on behalf of the beneficiaries, but beneficiaries showed little interest in socialising this way. According to officers, the lesson taken from the experience was the need to focus on organic social activities rather than 'fake and artificial' ones (e.g. by funding associations to organise their own events as was done through the Mentro Initiative).

Feedback on the appropriateness of the jobs funded and the individuals recruited was mixed. On the positive side, jobs were funded in work fields or sectors that were of great interest to the individuals. This is an important finding because the challenge for young people is often not the lack of availability of jobs, but the lack of available jobs that interest them. This finding suggested that the programme had succeeded in creating appropriate jobs through the Gyrfaol initiative.

At the same time, salary levels varied significantly, with a considerable proportion of jobs offering low pay (e.g. 33% of positions paid less than £18,000). Furthermore, the added value of some of these jobs can be questioned, given that 58% of the individuals (according to our survey) were already employed by the businesses. Often, this investment served to upskill and support the progress of existing individuals or to safeguard their roles, while there were also instances where funding was provided for freelance work. Examples of this are given below (the names of businesses and individuals have been anonymised):⁶

⁶ These examples were received by the Llwyddo'n Lleol team.

[COMPANY NAME] is a very small company with two members of staff, and it took a financial risk by accepting [INDIVIDUAL'S NAME] as an apprentice in engineering before Llwyddo'n Lleol funding. There weren't many opportunities for a young person to receive an apprenticeship in this field, so Llwyddo'n Lleol assisted [INDIVIDUAL'S NAME] in securing a robust basis for his apprenticeship and also giving him financial support to get equipment to support the apprenticeship period and keep the equipment for the next stages of his career.

[INDIVIDUAL'S NAME] was working on a maternity contract with [COMPANY NAME], developing his skills as a junior website developer, and, before this contract ended, the company was looking for ways to keep him on. Llwyddo'n Lleol support came at the perfect time for [INDIVIDUAL'S NAME], enabling him to continue working for the company and develop his skills while working.

[INDIVIDUAL'S NAME] was working as a waitress with [COMPANY NAME] before this opportunity. Through Llwyddo'n Lleol support, and the company's faith and confidence in her ability, she has been promoted to her new position as Wedding Planner and Coordinator, at the company's new wedding venue. She has benefited through receiving equipment to do her job, as well as some specific training and received a salary.

Among those who had completed their work placement when surveyed, only 47% (7/15) remained employed with the same company. This again shows very mixed results in terms of creating good and sustainable jobs through this initiative. At the same time, 75% of all respondents (24/32) indicated that they either were still working with the same company or hoping to do so, or in the same field but with a different company. We can deduce that the intervention provided relevant and useful work experience, aligning with the programme's core aims of demonstrating employment opportunities to local people.

4.2.3 Profi Initiative

The Profi initiative extended a scheme that began in 2016 when a pilot was launched at the request of Coleg Sir Gâr and local schools to compensate for cuts to Careers Wales' budget to support the Work Experience programme and learners. As a result of ARFOR's investment, the plan was extended across Carmarthenshire and Ceredigion led by Menter Gorllewin Sir Gâr, and in Gwynedd and Anglesey led by Menter Môn.

The scheme includes visits to schools and colleges to provide employability support through workshops and one-to-one face-to-face support, together with a series of resources on the profi.cymru website. Over 100 sessions were delivered between September 2023 and the end of 2024, with thousands of young people supported.

The young people and school and college staff were very satisfied with the support. Of the ten education institutions responding to our survey, seven reported that the support was ‘excellent’ and the other three that it was ‘good’. Seven also said that the scheme had achieved what they hoped for ‘to a large extent’.

Many of the delivery team and external stakeholders emphasised the importance of reaching young people early, before negative attitudes about local opportunities have a chance to form, and the importance of continuously sharing positive messages about the region. It was suggested that the Profi scheme was an effective mechanism to start spreading the message from a young age. This emphasis was also evident in the response from education institutions as ‘promoting the importance of the Welsh language’ was the second most frequent response when asked for their observations about the main focus of the provision.

There is some concern about overlap between this initiative and other services (mainly Careers Wales). However, Profi fills certain gaps in the provision of Careers Wales (e.g. supporting work experiences) and focuses on encouraging young people to make the most of their Welsh-language skills and to see value in those skills. There was also more focus on promoting local job opportunities within Profi.

In general, the schools and colleges believed that Profi had an important role within the employability provision they offered. Although the majority (7/10) also used the Careers Wales service and provided some employability education themselves (8/10), 8 out of 10 indicated that the Profi scheme was important or very important within the career and employability support provision their pupils received. In addition, when asked their motivation for engaging with the service, one of the main responses (4 comments) was that this would fill gaps left by Careers Wales.

4.2.4 Ymgartrefu Initiative

This initiative was designed to specifically focus on small groups of families and young people who lived outside the area and to explore methods to encourage them to return to the region. The original plan was to offer free residential weekends in the area to give families a taste of the lifestyle as well as discuss practical aspects such as childcare. The idea failed due to a lack of interest among young families, but the value of the learning gained from that was emphasised:

“What has worked very well with the Ymgartrefu initiative are the lessons learned. In terms of engaging with families we have learned what works and what doesn’t. The Ymgartrefu initiative is still evolving. We collect real life cases and get valuable data e.g. one of the main obstacles we have learned is the cost of moving all their furniture and stuff back to North Wales and this could be a way of targeting the funding in the future.”
(Delivery team)

The initiative saw a change of course in September 2024 by launching a £5,000 grant scheme to encourage young families to move back to the area. Many were of the opinion that the change in course should have been happened much sooner, while some stakeholders questioned the appropriateness of providing such support. Time constraints once again posed a major challenge for this work-stream, but especially for the Ymgartrefu initiative as the timing is crucial, i.e. the need to reach people at the right time when they are in a position to be able to move house. In terms of the appropriateness of the support, some stakeholders were sceptical that the £5,000 incentive was likely to make a difference to families' decision to move. That is, they were of the opinion that the only families likely to be interested were those who had already decided to move, and if they had not decided this offer was unlikely to be sufficient to persuade.

Nevertheless, seven families 'moved home' to the region from other areas in Wales and beyond after receiving support. We also note that the programme commissioned a booklet called 'Ymgartrefu yn ARFOR' (establishing a home in ARFOR) which assists people to take the next steps in moving back to ARFOR areas. It does so by providing information, advice and guidance regarding some important considerations (housing, jobs and work opportunities, education and childcare, health and care, social events and the Welsh language).

Overall, this initiative has been a very innovative one which has produced important learning following the trial of a number of different activities. It has drawn attention to the campaign encouraging people to settle in the region, even if some publicity regarding the grant offer was negative.

4.2.5 Llwyddo'n Lleol marketing campaign

The marketing model for Llwyddo'n Lleol appears to be novel and effective, using supported individuals as ambassadors for the campaign to provide vivid and compelling examples of the opportunities in the region. In fact, the beneficiaries are required to agree to be involved in the marketing campaign as part of the agreement when receiving support, and they played a prominent role in the campaign. Furthermore, recruiting relevant individuals and businesses was important and there was a clear consensus that the work-stream had succeeded in doing so.

The table below reveals the statistics for the key metrics used to assess progression and reach on online media. It shows that the scheme has reached thousands of people through these various media channels.

Table 4.3: Analysis of Llwyddo'n Lleol social media accounts up to the end of 2024

	Followers	Reach	Videos	Impressions	Users
Facebook	2,405	27.3K			
Instagram	3,686	18.4K			
Youtube			116	3.7k	
X (Twitter)	1,643				
LinkedIn	449				
Website					2.4k

Source: Monitoring data shared by the programme, February 2025

Further information shared by Llwyddo'n Lleol officers indicates that 535 social media messages were posted between July 2023 and January 2025 with these mainly focused on cascading positive messages and sharing successful examples. The programme invested in two advertisements on S4C and ITV Cymru along with visual campaigns across the counties on fuel pumps, in train stations, on the back of buses, on digital vans and so forth. The marketing activity also included several radio items, press releases, and podcasts, while face-to-face marketing through various events (Eisteddfodau, Tafwyl, Gŵyl Canol Dre and more) were further opportunities to promote the campaign.

Overall, this marketing campaign was considered by the delivery team members and some external stakeholders to be one of the programme's primary successes, noting that ARFOR had developed a strong brand and delivered an effective campaign. Reference was made to the use of different media to share messages. Social media was identified as both the principal and the most effective medium in terms of sharing messages, while many also referred to the importance of attending events and the television campaigns.

4.2.6 Conclusions on Llwyddo'n Lleol

The primary objective of Llwyddo'n Lleol was to showcase the professional opportunities and good quality of life that exist in the region in order to challenge and change some of the negative perceptions, and officers were confident that they had largely succeeded in doing this. Some members of the delivery team and external stakeholders were of the opinion that Llwyddo'n Lleol was the most important and effective work-stream for the reasons mentioned above, i.e. the strength of the marketing campaign and its role in addressing the central issue.

Despite the great emphasis in the campaign on professional opportunities and changing negative perceptions about current economic opportunities, a number of activities were funded to draw attention to social opportunities as well. The primary approach to achieving this was through funding events, social clubs, and individuals who were interested in creating enterprises which offered social opportunities. The question arises whether it is the role of a programme like this to fund organisations and activities such as these considering that there are bodies such as the Mentrau Iaith already responsible for this type of activity. Two main reasons were given to justify this. First, it was emphasised that cuts to other bodies' budgets meant that it was necessary to 'fill a gap'. Second, it was highlighted that this was part of the brief for creating content for the marketing campaign and drawing attention to the opportunities available in the region (and that this includes social opportunities as well as economic ones).

With regard to the different initiatives, it was noted that each offered distinct benefits and had been valuable in its own way. The Mentro and Gyrfaol initiatives were frequently identified as the strongest and most significant initiatives in terms of generating content for the marketing campaign. They were recognised for providing valuable opportunities for young people, meeting strong demand for the support, and – particularly in the case of Mentro Initiative – responding effectively to the specific challenges of the region.

The Ymgartrefu initiative was also seen as highly valuable, offering an opportunity to trial different approaches and generate significant learning, whilst also providing incentives for eight families to return to the region. In total, approximately 200 individuals and families received intensive support through these three initiatives, each delivering meaningful outcomes at an individual level.

The Profi Initiative was different, as it contributed differently to the marketing campaign because the participants were school pupils and the intervention was much less intense. However, it was argued that this initiative made a significant contribution to the overall offering given the amount of engagement (i.e. reaching thousands directly compared to a few hundred through the other initiatives) and the focus on the younger age.

Although there was likely to be duplication within the different initiatives, it is important to note that the initiatives' primary function was to support the marketing campaign. Indeed, the team commented that they could have invested the entire budget on the marketing campaign directly which would have fulfilled the brief, but the support was a way to create more effective content.

“It is important to come back to the brief and the agreement, which is to create a campaign to bring attention to the opportunities in ARFOR. That message is realised in many different ways, including funding events and providing practical support.” (Delivery team)

The evidence we have assessed as part of this evaluation suggests that Llwyddo'n Lleol has largely achieved its objective by delivering an effective marketing campaign which has reached thousands of people. However, the campaign's impact on achieving ARFOR's core aim, namely to convince more people to stay and settle in the region, remains unclear. Nevertheless, it seems that this work-stream is possibly the strongest element of the programme.

4.3 Challenge Fund

The aim of the ARFOR Challenge Fund was to generate learning and support developing projects that contributed to ARFOR's core objective of strengthening the connection between the Welsh language and the economy. Funding was provided to businesses and organisations to test new ideas that addressed identified economic challenges and offered solutions in support of the Welsh language. The programme was administered on ARFOR's behalf through a joint arrangement between Mentera and Menter Môn, with the former acting as lead body.

4.3.1 Challenge Fund's structure and aims

There were two streams to the Challenge Fund, the Small Challenge Fund and the Large Challenge Fund. The Small Challenge Fund provided awards of up to £30,000 to support smaller scale research and development projects within a limited timeframe. The intention was to allow various ideas to be tested quickly, which in turn could be further developed and expanded through applications to the Large Challenge Fund.

The Large Challenge Fund was a flexible fund providing financial support of up to £100,000. Applicants were expected to submit joint applications with enterprises, businesses and other organisations, as encouraging collaboration and partnerships was an integral part of the ARFOR programme.

The nature of the challenges faced was based on the definitions provided by applicants when applying. Specific objectives were not set by the scheme to target specific challenges or sectors. Instead, prospective applicants were expected to identify, define and suggest solutions to the challenges they perceived to be relevant to the programme in their individual sectors. This demonstrates the very open nature of the fund, its broad direction outlined that the projects needed to 'explore solutions that strengthen the relationship between the Welsh language and the economy' and to test one of the following:

1. Using the Welsh language boosts the economy
2. Using the Welsh language provides new employment opportunities for employers and staff
3. Using the Welsh language can help create a brand and an attraction for businesses
4. Using the Welsh language can foster a sense of pride, including feeling a sense of belonging to a community and be able to speak to other Welsh-speakers.⁷

⁷ <https://www.rhaglenarfor.cymru/index.en.html>

We can therefore conclude that the main direction of the Fund was to test some specific assumptions about the relationship between the economy and the Welsh language, with the primary intention of generating learning. However, as discussed below, it is reasonable to question the extent to which the projects have meaningfully and impactfully addressed this core question. It should also be noted that some of the objectives stated above (e.g. fostering a sense of pride) are inherently difficult to define and measure. This, in turn, makes it difficult to evaluate and draw clear lessons, despite being a central aim of the scheme.

4.3.2 Challenge Fund application and approval processes

Applications were considered within specific funding windows of approximately six weeks. Grant recipients were generally satisfied with the application process, with 27% stating that they were ‘very satisfied’ and a further 47% reporting that they were ‘satisfied’.

However, it should be noted that the timetable was particularly tight for developing a work programme – from the initial idea to a fully formed project – especially given the expectation for sophisticated proposals capable of addressing the above requirements and producing useful learning. It could be argued that these tight constraints limited applicants’ ability to develop their programmes in a meaningful way, and similarly affected the awarding panel’s capacity to make well-informed funding decisions. These challenges were, in part, a direct consequence of the overall programme’s limited timeframe.

The application process was relatively interactive, requiring applicants to express interest and discuss the application with an ARFOR development officer before attending a series of workshops on completing applications. It was clear that the work-stream officers provided useful support as the organisations developed their ideas and helped them adjust their ideas to ensure eligibility and meet fund requirements. The workshops were reported to be beneficial in providing help to develop ideas and the majority noted they had made changes following the sessions.

The awarding panel was formed from various ARFOR participants and contractors as well as wider stakeholder representation. The application and procurement process therefore had a strong element of collaboration between ARFOR applicants and organisers, allowing applications to be further developed and refined collaboratively.

4.3.3 Challenge Fund outputs

In total, 30 projects were funded through the ARFOR Challenge Fund. These were delivered predominantly by private businesses (16), but also by third-sector organisations (5), membership organisations and public bodies (5), and universities (3).⁸ The data shows that the Challenge Fund’s primary focus was on organisations within the professional services, arts and entertainment, and communications sectors, suggesting that the campaign was largely driven by specialist and cultural service providers.

⁸ Data was shared for 29 projects only.

Based on the initial priority objectives, participating projects were asked to report on specific outputs that could be measured quantitatively. The table below presents the numbers of projects that successfully met those objectives:

Table 4.4: Number of projects supporting the Challenge Fund objectives

Aim	Number	Percentage
Facilitate work opportunities for young people, helping them to stay or return to the area	15	52%
Increase use of the Welsh language	27	93%
Strengthening community relations	9	31%
Support local people to stay in their community	13	45%
Create networks between businesses	5	17%

Source: Monitoring data shared by the programme, February 2025

In general, the data shows that there were strong efforts to promote economic, cultural and community activity, with the greatest emphasis on supporting young people and protecting the Welsh language.

As part of our detailed review of the projects, typology groups were developed to categorise the different types of projects that received funding. For the purpose of analysis, these were classified into four specific categories:

- **Category 1: Normalisation (10 projects).** Projects in this category tended to have a particular emphasis on normalising the Welsh language within workplaces and the community by focusing on increasing the visibility of the Welsh language, improving the infrastructure within the organisation to facilitate use of the language, creating more Welsh-speaking content and a focus on education, training and skills.
- **Category 2: Economic projects and business support (12 projects).** Projects in this category had an emphasis on research purposefully designed to provide support to businesses and to promote economic development. This included a focus on education, providing training and skills to assist local workforces in addition to interventions aimed at creating and protecting local job opportunities.
- **Category 3: A combination of the above (4 projects).** Projects in this category combined the priorities of the other categories. They focused on jobs and recruitment support, improving the infrastructure for the Welsh language within organisations and creating more Welsh content. There was also an emphasis in this group on supporting businesses and promoting economic development, and to increase the use of Welsh within businesses by normalising and making it more visible. Several projects in this category included cultural projects.
- **Category 4: Research only (3 projects).** Projects in this category focused specifically on research and feasibility. This included projects looking at responses to additional challenges, such as the availability of housing within ARFOR areas and childcare provision. Projects in this category also looked at improving infrastructure for the Welsh language and creating more Welsh-language content.

By investing in normalisation, the projects sought to establish the Welsh language as a language which is visible and familiar in society, helping people to use it naturally on a daily basis. This is essential in order to maintain the viability of the Welsh language over time and to establish a relationship between the use of the Welsh language and the economy.

Similarly, the focus on economic projects and business support explored how supporting local businesses to use the Welsh language can contribute to sustainable economic development, whilst ensuring that the language is used in work and commercial environments. This can increase the value of the language as an economic resource, making it relevant to businesses and opening up job opportunities for Welsh speakers.

The focus of the research projects was key in gathering robust data and insights to inform strategic decision-making. This is particularly important for ensuring that initiatives and investments in the Welsh language are evidence-based, enhancing their effectiveness and relevance in a changing society.

4.3.4 Stakeholder satisfaction with the Challenge Fund

Similar to the other work-streams, there was a very positive response from beneficiaries about their experience participating in the scheme, with 65% of beneficiaries stating they were 'very satisfied' with their participation.

The programme's management team and other stakeholders also responded positively when asked about the role and performance of the Challenge Fund's delivery. It was noted that a good team of officers had delivered the Fund effectively – developing sensible processes, administering finances promptly and identifying projects quickly. They also emphasised the Fund's role in supporting ARFOR's core aims, particularly in creating opportunities for innovation and in exploring the relationship between the economy and the Welsh language. It was considered that the Fund's projects might represent the most significant legacy, generating learning that could inform future linguistic planning.

At the same time, some of the main challenges affecting the delivery of the Challenge Fund – and the programme more broadly – were highlighted. Chief among these were the limited time available for delivery and a lack of clarity or a clear brief regarding the type of research projects that should be funded.

It is clear from the consultation that the idea of establishing two separate funds had not worked, with the lack of time being a major contributing factor. The delivery period was too short to implement the original concept – where projects could be piloted on a smaller scale through the Small Challenge Fund before allowing the most promising ones to develop further through the Large Challenge Fund.

More generally, it was noted that the process of designing the Fund had to be rushed. As a result, and combined with the fairly vague brief provided, the project requirements were open to broad interpretation.

Some members of the delivery team noted that they had tried to respond to the brief as best they could, for example by focusing on specific qualities when scoring applications. This included projects that were cross-border, collaborative, and innovative, or those that offered strong insights into the relationship between the Welsh language and the economy. At the same time, both the officers and the wider team felt that a narrower, more clearly defined scope would have been preferable.

4.3.5 Challenge Fund outcomes

Overall, organisations reported that their Challenge Fund projects were delivered as intended, although several highlighted challenges in carrying out effective monitoring, evaluation and research. Indeed, based on our analysis of the final project reports, we note a considerable difference in the quality of research, evaluation and the learning produced. Given that the primary purpose of the Challenge Fund was to generate learning, these weaknesses across a significant number of projects are particularly noteworthy.

The core weakness of the Challenge Fund, beyond the research and evaluation shortcomings, was the failure to clearly define the real challenges facing communities in the ARFOR areas that the project aimed to address. As a result, many of the projects and their outputs are overly dependent on ready-made assumptions about the nature of the relationship between the economy and the Welsh language, rather than questioning and testing those assumptions and strengthening our understanding of this relationship.

It is fair to say that the breadth and variety of projects ultimately supported reflects the scope and ambiguity of the initial call. It could be argued that this delivery method represents the programme's strength to the extent that it allows for 'bottom-up' solutions for community challenges by grassroots participants. On the other hand, it could be construed as a weakness, and a case could be made that the scope and variety of the projects supported represent a lack of core focus and vision, which has led to the funding of some projects whose connection to the programme's core objectives is unclear.

The connection between promoting the language and strengthening the economy remains uncertain, and it is difficult to say whether the Challenge Fund has confirmed the existence or strengthened a specific interpretation of the type of relationship that exists between them. This is partly due to the fact that those objectives listed in the first place are relatively vague and difficult to measure. The fact that the monitoring process is dependent on evidence prepared by the projects themselves also makes it difficult to undertake any unbiased assessment.

Despite this, a number of the funded projects should be commended for establishing interesting and innovative plans which have addressed some of the core issues facing Welsh-speaking communities. Others are less clear in their relevance to the programme's aims.

4.3.6 Challenge Fund conclusions

Overall, the Challenge Fund has produced a number of important outcomes including the development of new partnerships, direct benefits to project participants, and opportunities to pilot projects, generate learning, and build on this in the future. The Fund has offered a different focus compared to other programmes or schemes related to the economy and the Welsh language, and it responds directly to the programme objectives. At the same time, our detailed review of the projects has highlighted several areas for potential improvements in any future programme of this kind. These include establishing more concrete challenges and inviting projects to address those specifically. In addition, setting broad targets for the types and number of interventions to be funded – based on the specific challenge theme – would also be beneficial.

4.4 Bwrlwm ARFOR

The original aim of Bwrlwm ARFOR was to promote the Welsh language and raise awareness of ARFOR's work through a public marketing campaign. The intention was to support the wider work of ARFOR by leading a communication programme seeking to increase the use of the Welsh language and encourage a sense of local pride among stakeholders. It also aimed to improve awareness of the unique socio-linguistic conditions of the ARFOR area and the economic factors influencing its linguistic situation. The company Lafan was commissioned to lead this work.

Two main functions can be identified within the work remit: the communication campaign and a set of projects aimed at fostering a sense of pride. Significant changes occurred in the specific activities and projects during the delivery period, with the work-stream being implemented in a highly flexible manner, adapting as the context evolved.

4.4.1 Communication campaign

It became apparent early on that there was a risk of duplication between the Bwrlwm and Llwyddo'n Lleol marketing campaigns. Llwyddo'n Lleol's primary aim was to deliver a marketing campaign and its objectives overlapped significantly with those of Bwrlwm, in particular, drawing attention to local opportunities and success stories. Llwyddo'n Lleol was a longer-term initiative, whereas Bwrlwm was launched several months after the other work-streams, making it harder to establish its role clearly within the wider programme. It is fair to say that the overlap in remit was one of the programme's weaknesses. The use of multiple brands (e.g. ARFOR, Llwyddo'n Lleol, Bwrlwm, Profi) also contributed to confusion and this was likely to be unclear to the public.

It was reported that Bwrlwm eventually succeeded in addressing the challenges outlined above by focusing specifically on promoting the region's business community (alongside the broader aims of programme) while allowing Llwyddo'n Lleol to concentrate on individual success stories. Valuable collaboration also took place with Enterprising Communities, who effectively led the marketing for the work-stream, as local authority officers lacked the resources to do so. Case studies were developed to showcase the stories of the businesses that had received financial support, and these were published on the [Bwrlwm website](#). Additionally, a decision was made to omit the use of the 'Bwrlwm' name in all external communication, using only 'ARFOR' to ensure more consistent branding.

According to the monitoring data, 715 messages were seen promoting the Welsh language as a result of the Bwrlwm campaign. The management team was of the opinion that they had delivered a good campaign which had consistently shared positive stories from the area through press releases in particular, although it was recognised that there was no easy way to measure this success.

4.4.2 Sub-projects

Several sub-projects were developed as part of the Bwrlwm work-stream. This was a dynamic element where it was agreed to divert funding and change some original ideas as it became clear that they were not appropriate, and new ideas and projects were developed during the delivery period.

One element which remained unchanged was the idea of developing a forum for businesses, individuals, and other organisations interested in the future of the region's Welsh communities to discuss their experiences, what was happening on the ground in their communities and to learn more about ARFOR's activity. The Forum was held virtually with six different sessions from March 2024 until March 2025. Forty organisations attended the sessions which included 18 businesses from the region and 10 external bodies (e.g. universities, mentrau iaith etc.) as well as government representatives and the bodies involved in delivering various elements in the programme.⁹

Two notable events were developed to draw attention to businesses and individuals working through the medium of Welsh. This included the 'World's Most Welsh-language Awards' which celebrated contributions by individuals and businesses to the Welsh language socially and commercially. Businesses, organisations and individuals could nominate themselves or others for one of seven awards, namely: the most Welsh-language brand, product, social media, staff, space, business or individual. An award ceremony was held in Aberystwyth in July 2024 to celebrate the success of the winners.

⁹ These numbers are based on data shared by officers in February 2025 before the last session was held.

Secondly, the ARFOR 2024 Summit was held in November 2024. Similar to the previous event, its main focus was to draw attention to the commercial successes of businesses and individuals operating through the medium of Welsh and who had benefited from the programme. Speakers from all work-streams shared their experiences, together with a guest speaker from Castle Howell, who discussed the Welsh nature of their service and some of the key challenges as one of the largest employers in the region.

A number of officials, stakeholders and businesses noted that the ‘World’s Most Welsh-language’ Awards event was particularly successful, attracting beneficial publicity for the winners and generating a “fantastic response” from the public, according to the delivery team.

Bwrlwm played a key role in fulfilling one of the ‘special conditions’¹⁰ outlined in ARFOR’s agreement with the Welsh Government, namely the creation of ‘Welsh-language spaces’. This built on the work of ARFOR 1, aiming to establish environments that encourage people to use and enjoy the Welsh language whilst working and in their everyday lives. As part of this effort, Bwrlwm launched a public campaign to develop a map of Welsh-language spaces, inviting individuals and organisations to identify and share details of such spaces. This map was made available on [Bwrlwm’s website](#) and the spaces promoted to the public. It was noted that the resulting resource could serve as a directory to promote Welsh language activities and events in the future.

There were three other projects/activities in the Bwrlwm package. Firstly, the ‘Hac Iaith’ scheme offering support to four businesses to solve a specific challenge in terms of providing a Welsh language service. Secondly, a series of ‘C’mon Cymraeg’ podcasts were commissioned to explore the attitudes of ARFOR businesses and communities towards the Welsh language. Finally, ‘Bocs ARFOR’ was a community engagement scheme in which businesses and members of the public were filmed discussing their use of the Welsh language and its importance to them.

4.4.3 Bwrlwm conclusions

Overall, Bwrlwm has fulfilled its original aims to some extent, namely delivering a communication campaign and supporting projects that promote the Welsh language and raise awareness of ARFOR’s work. However, it is important to note that Bwrlwm represented a relatively small part of the overall programme, and few participants received intensive support through this initiative. As a result, identifying and measuring its impact is therefore challenging.

¹⁰ Three special conditions were agreed, namely: 1) sharing lessons and coordinating good practice in regard to housing regionally (e.g. the effect of second homes); 2) creating Welsh-language spaces; 3) strengthening the identity of Welsh-speaking communities in an inclusive way i.e. try to widen access to the Welsh language for excluded groups.

Questions have been raised about the necessity of running separate communication campaigns through Bwrlwm and Llwyddo'n Lleol, despite efforts to differentiate them. Nonetheless, valuable learning has emerged from the sub-projects, and some trials (such as the World's Most Welsh-Language Awards and the Bwrlwm Forum) were considered particularly successful in promoting businesses and facilitating knowledge sharing. It is worth reiterating that piloting new activities at the intersection of economy and language was one of ARFOR's core aims, and the diversity of projects delivered through Bwrlwm has contributed to that objective.

5. Exploring key findings from programme delivery

Following exploring the individual work-streams, we now turn in this chapter to assessing at programme level, taking into account the overall perceptions of beneficiaries, programme officers, and stakeholders regarding the design and performance of programme delivery. We examine their satisfaction with the programme in general before considering key strengths, weaknesses, structure and design of the programme.

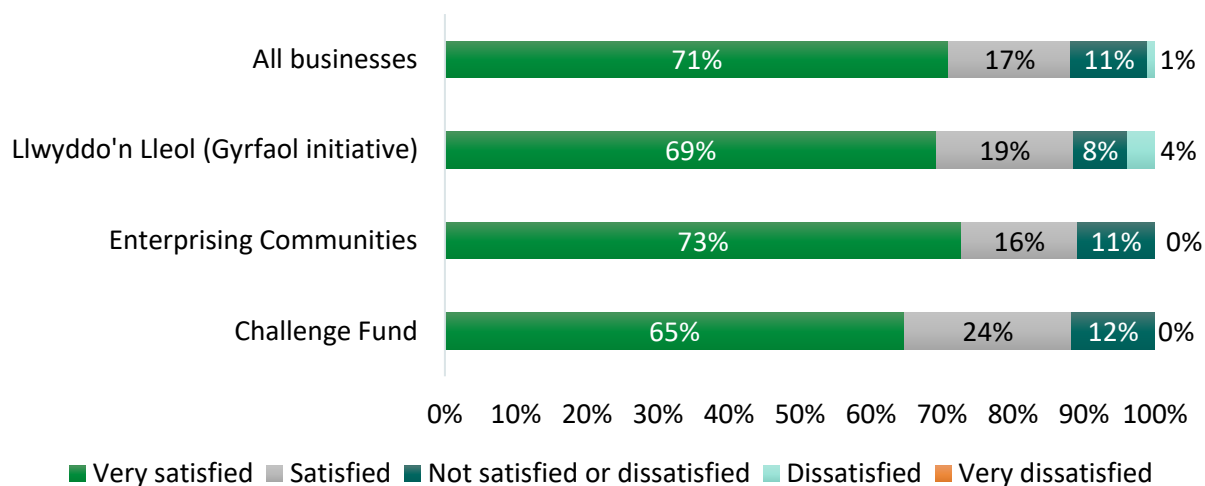
5.1 Beneficiaries' satisfaction with the programme

It is evident from the earlier chapters that a high volume of activity was delivered by ARFOR within a short timeframe. Alongside this, a strong level of satisfaction with the support was also reported by beneficiaries.

5.1.1 Experiences of businesses and organisations

With regard to the viewpoint of businesses and organisations, the high level of satisfaction in all relevant work-streams is shown in Figure 5.1 with the vast majority (71% overall) stating that they were 'very satisfied'.

Figure 5.1: Overall, how satisfied are you with the support you have received so far? (businesses and organisations)



Source: Consultation with ARFOR beneficiaries (businesses and organisations) (n=87, 24, 50, 17)

Three main themes emerged as beneficiaries explained the reasons behind their satisfaction. Firstly, the most commonly cited was the ethos of the programme. Several businesses noted that the programme's aims (particularly its focus on the Welsh language and on providing jobs for local people) aligned closely with their own values. This alignment allowed them to invest in their business objectives with greater confidence. It also contributed to a stronger sense that they could submit a successful funding application (especially when compared to more generic subsidy schemes).

Secondly, attention was drawn to the flexibility and openness of the support. While subsidy schemes are often prescriptive in nature, ARFOR's financial support allowed beneficiaries to invest in their own ideas and priorities. Revenue or capital investments were possible, and there were no restrictions regarding eligible expenditure as is often the case with similar business support.

The third main factor identified by beneficiaries was the accessibility of the scheme as well as effective support from officers. Processes were described as not being overly laborious and respondents noted that there was a good team of local officers with relevant information who worked closely with them to ensure that the process was as straightforward as possible. The combination of factors here meant that the programme was more accessible to small and new businesses in particular, which generally fit in with the profile of businesses in the area.

These themes were consistent across the relevant work-streams.

"The paperwork for ARFOR is much easier to manage than other similar grants. I like ARFOR's focus on helping Welsh-speaking rural businesses to grow and the emphasis on supporting and promoting the Welsh language. I also like that the administrative staff are based locally and therefore have a good understanding of the issues facing local businesses." (Enterprising Communities)

"It is very flexible compared to the usual grants we apply for in terms of the type of project and the willingness to fund a pilot project. The qualifying criteria are also great as we are a very new business and wouldn't usually qualify for this level of grant. Another strength is that ARFOR encourages you to make links with other businesses throughout the process." (Challenge Fund)

Beneficiaries were also asked about the main shortcomings of the support. Encouragingly enough, one of the leading responses (22% of the respondents) was that there was no obvious weakness. Beyond that, the significant responses were related to the time constraints.

Around a quarter noted the tight timetable and the challenge of having to spend all the funding by the end of December 2024. Given that the majority did not receive the financial support until 2024, and a significant proportion until the second quarter of 2024 and beyond, it was very challenging for many to carry out the recruitment process and/or procure the correct items and undertake any planned building work in time.

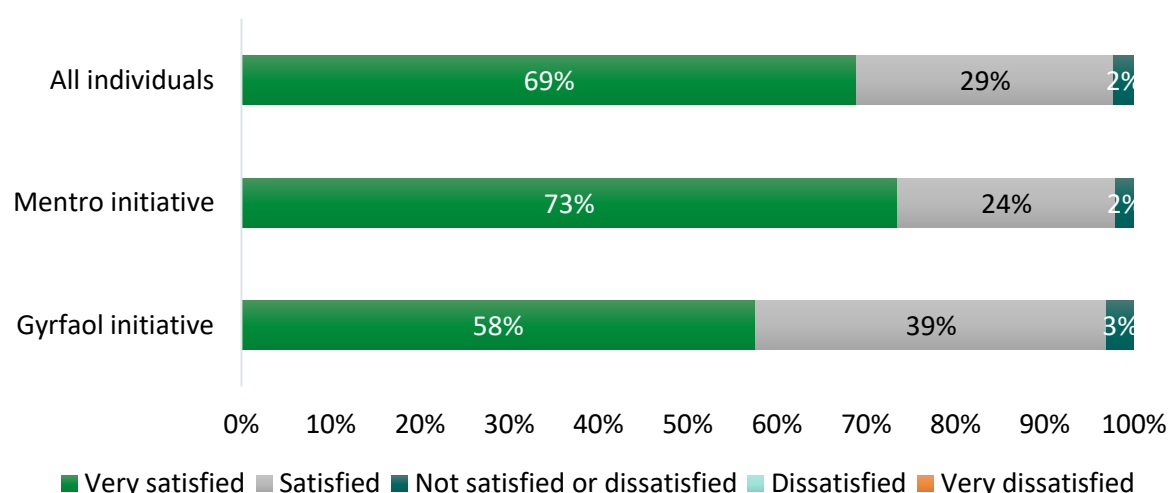
“The schedule is problematic. The programme is trying to achieve something huge (and it’s) great that the money is here, but it doesn’t leave room or time for us to be strategic with it.” (Enterprising Communities)

A fairly similar percentage reported that another weakness was the delay before approving projects. This is related to the first point; that is, given the already tight schedule, delays in the approval process created even greater challenges.

5.1.2 Experience of individuals

A similar response was received from the individuals who had benefited from Llwyddo’n Lleol support, with the vast majority once again declaring that they were very satisfied with the support (69% reporting this). We see that the cohort receiving help from the Mentro Initiative was particularly positive.

Figure 5.2: Overall, how satisfied are you with the support you have received so far? (individuals)



Source: Consultation with ARFOR beneficiaries (individuals) (n=87, 49, 33)

The feedback from the Profi Initiative beneficiaries is also very positive. All our sample from schools and colleges who received help from Profi (10 members of staff) said that their experience of it was excellent or good. Menter Gorllewin Sir Gâr (the main provider for the service) carried out its own survey (sample of 455) which showed that 92% of users of the Profi website rated it as 'great' (42%) or 'good' (51%).

Overall, the evidence suggests a very high satisfaction with the support.

5.2 ARFOR's purpose and design

5.2.1 ARFOR's purpose

As discussed in Chapter 2, it became clear that there was some ambiguity among officers regarding the exact purpose and role of ARFOR. While the nature of the challenge was well understood (namely the loss of young Welsh speakers due to a lack of economic opportunities), there was much less clarity about the programme's specific role in addressing such a significant issue. Was the aim to change perceptions of the region, or to directly address the underlying structural economic conditions?

The programme was inherently very flexible and provided an opportunity for innovation through the Challenge Fund and Bwrlwm ARFOR projects. Llwyddo'n Lleol was a continuation of an innovative project established under the LEADER programme, piloted on a large scale through ARFOR 1 and on an even larger scale through ARFOR 2. This follows the path of several successful initiatives which require constant development over several iterations before seeing a real effect, and therefore the funding given by ARFOR to support the development and evolution of this initiative should be commended.

However, a number of elements were identified that were fairly similar to mainstream activities such as business subsidy schemes, entrepreneurship support and employability. A high percentage of ARFOR's budget was allocated to business grants as a means of creating economic opportunities for retaining young people in the region.

It therefore shows that there is a wide variety in regard to innovation within the activities and the extent to which they attempted to respond to the challenge directly. Some stakeholders and staff were of the opinion that this represented a good balance and an effective package, but for others it reflected confusion and ambiguity regarding ARFOR's role, purpose and remit.

5.2.2 Remit

A recurring theme in consultations with officers and stakeholders was that ARFOR's structure and design seemed to be somewhat 'fragmented', and its remit overly broad, with an ambition to achieve far too much. Spreading resources too thinly risked limiting what could be delivered strategically. Rather than focusing resources on a smaller set of priorities, they were divided across multiple activities and objectives which diluted their achievement. This approach arguably led to duplication and confusion across work-streams, particularly regarding the various communication campaigns. Several officers and stakeholders suggested that the ARFOR's structure was overly complex.

There was also confusion between delivering interventions with an economy>language focus (i.e. the programme's attempt to positively influence the viability of the Welsh language through economic interventions) and language>economy (i.e. interventions related to linguistic improvements to drive economic benefit). The first was the programme's main aim according to original documentation, but several examples of the second were also seen. For example, several Enterprising Communities and Bwrlwm projects focused on increasing language use directly rather than creating benefits for the Welsh language through economic intervention.

"We had to ensure that the projects met ARFOR's strategic objectives but sometimes the brief was difficult to understand in terms of – was the economy supposed to support the Welsh language or was the Welsh language supposed to be supporting the economy?" (Programme officer)

Some officers acknowledged that they may have been overly eager to respond to different needs, and that the other side of the coin of having such a flexible programme is the risk of drifting away from its original mission.

"There was definitely a tendency for people to come to us for anything related to ARFOR and ask 'can you do this'. It was seen as a 'one-stop shop' to support living opportunities / returning (to the area). It was hard to say 'no, we can't support it'. Our nature is to collaborate with people, but sometimes we lost sight of the main message." (Programme officer)

It was noted that a number of activities funded by Llwyddo'n Lleol and other work-streams focused on social aspects, and the link with economic factors was weak at times. On the one hand, a more holistic focus would be welcomed, recognising that numerous factors influence individuals' motivations to migrate. On the other hand, this is further evidence of a departure from the original remit and a loss of focus from the core aim.

“We need to consider whether (the programme) needs to be made clearer and more ‘clean cut’. It goes in a lot of different directions. I feel like we need to focus on a smaller, more ‘focused’ package.” (Programme officer)

ARFOR funded a number of activities historically delivered by other organisations. Examples include work experience opportunities provided through Profi and the social elements funded through Llwyddo’n Lleol (e.g. comedy nights, gigs etc.). The justification given for this was that budget cuts to other bodies had led to these gaps, but this raises the question: is ARFOR’s role to fill gaps or invest in new things?

5.2.3 Conclusions about ARFOR’s purpose and design

Overall, it was clear that the exact role and purpose of the programme had not been defined clearly enough, and this ambiguity was seen seeping into the work-streams. The programme would probably have benefited from establishing a clearer and more limited remit. This should be an important lesson for any similar programme in the future.

5.3 Time constraints

The short delivery period was a major challenge for the programme, as highlighted in the beneficiaries’ feedback. This was the primary observation also made by officers and other stakeholders when discussing programme challenges. It likely explains the ambiguity and shortcomings related to the programme’s purpose and design referred to above, as there was insufficient time for thorough planning. In terms of implementation, frequent reference was made to the short delivery period, with a consensus that the tight timetable limited what could be accomplished.

“It feels as if some elements have been rushed. My feeling is that there are a lot of small pots available that are not going to have a big long-term effect.” (External stakeholder)

Indeed, the time constraints affected every aspect of programme delivery. The process for allocating grants was rushed, increasing the risk of resources being spent on less effective activities, while beneficiaries also had to complete their projects quickly. Llwyddo’n Lleol officers reported having to launch and promote several different initiatives simultaneously, which likely caused some confusion among the public, while it was noted that the short delivery period also limited the potential impact of the marketing campaign:

“The challenge was that the period was so short. We tried to promote one initiative after another, and that was confusing for the public... In reality, it needed five years to have time to take root, see a legacy, and use the contents.” (Programme officer)

5.4 Marketing, promoting and establishing the ARFOR brand

The marketing and promotion work was considered a major strength overall. Indeed, this was the main response when officers and stakeholders were asked about the programme’s main successes. The delivery team felt that a strong brand had been established, that effective marketing was taking place and that there was high awareness of the programme.

Officers tended to refer to the effectiveness of the marketing work for Llwyddo’n Lleol. It was noted that using live examples was an effective and powerful method of highlighting the opportunities in the region to try to change any negative impressions. The social media campaign and all the marketing work during events such as the National Eisteddfod were particularly effective, while some also referred to the television campaigns.

Attention was also drawn to the weaknesses of the marketing campaign and, above all, the use of different brands. The main brands were ‘ARFOR’ and ‘Llwyddo’n Lleol’, and differing views were expressed regarding their value. Some believed that Llwyddo’n Lleol was an effective brand and offered a clearer message, while others argued that there was a need to streamline and focus on using only the ARFOR brand. Others were unsure about the effectiveness of ARFOR as a brand at all, suggesting that more familiar geographical concepts should be used:

“ARFOR, as a geographical term, is not something people are very familiar with. It hasn’t really been used as a geographical term beyond government circles and the programme.” (External stakeholder)

This once again emphasised the need for more thorough planning over a longer period of time. Ideally, time should have been spent examining the strength of the different brands, the most effective messages, and the most appropriate target audience before launching the campaign as these are the basics of any successful marketing brand. However, the general consensus was that the Llwyddo’n Lleol campaign was effective and had created a strong foundation to encourage young Welsh speakers to stay or settle in the region.

5.5 Management and governance processes

A number of positive aspects regarding ARFOR's structure and design were identified. Overall, the delivery team believed that the programme had been well managed. At a regional level, it was said that it was easy to access information and that help was available whenever needed. The regular meetings were highlighted in addition to good processes for sharing information.

The use of contractors was generally effective with the programme taking advantage of their expertise and networks, whilst participants and stakeholders greatly commended the active, dedicated and enthusiastic officers within these bodies. Officers within the contractor bodies and the local authority teams were fairly young, and several stakeholders were of the opinion that this contributed to the programme's spirit and appeal, i.e. that it is a programme delivered by young people to help young people who were facing similar challenges. There was also good collaboration between the contractors in general as well as between the local authorities. This built on the relationships developed through ARFOR 1 allowing strategic discussions along a north-south axis.

It was clear from the consultation that officers were very satisfied with the role of the Project Manager, but it was also noted that there was not enough resource to coordinate the programme centrally. It was outlined that this represented a risk of being overly dependent on an individual for the active coordination work.

The main weakness was arguably the lack of resources to coordinate the programme at a strategic level. Whilst the programme was effectively managed at an operational level, there was a lack of resources to collaborate effectively with strategic stakeholders, to consolidate efforts where appropriate, and to ensure that the programme's resources were prioritised effectively.

6. Assessing ARFOR's impact

This chapter explores the impact of ARFOR 2 in creating economic opportunities and increasing Welsh-language use in businesses, as well as discussing evidence of the impact on influencing migration patterns (the programme's key aim). The chapter concludes by exploring some of the more strategic impacts, including key lessons learned and the potential to mainstream the programme's most successful elements.

6.1 The programme's economic outcomes

Several economic outcomes for the supported businesses were highlighted earlier in the report. According to official monitoring data submitted to the Welsh Government (see Chapter 3), ARFOR created 327 new jobs, safeguarded 295 existing roles, developed 288 new products or services, and leveraged nearly £2.5 million of investment from businesses. The economic impact on businesses was explored further during our consultation with beneficiaries, with the main findings outlined below.

6.1.1 Business growth

Firstly, we examine the impact of the programme in creating growth within existing businesses, evaluating the impact on jobs, turnover, and soft outcomes in terms of increasing businesses' aspirations to grow.

New jobs

Beyond the monitoring data collected by the programme, there was a detailed examination of ARFOR's impact on the grant beneficiaries within Enterprising Communities and the Career element of Llwyddo'n Lleol during our consultation with businesses (77 respondents). It was found that 73% of grant recipients created jobs as a result of the support. These businesses created an average of two jobs each. Using these averages, we can estimate that the programme has created 311 jobs in total (230 through Enterprising Communities and 81 through the Llwyddo'n Lleol Gyrfaol initiative). This is fairly consistent with the official figures but suggests a slightly better performance as the Challenge Fund was responsible for 74 of the new jobs according to the monitoring data (and Enterprising Communities was only responsible for 205 jobs and Llwyddo'n Lleol for 48 jobs).

Whilst the majority of these new jobs were full-time (63%), a fairly high percentage were part-time (30%) and seasonal (8%) as well. If we therefore look at the number of full-time equivalent (FTE) jobs created through the Enterprising Communities grant schemes and the Gyrfaol initiative of Llwyddo'n Lleol, we estimate that the programme has created 245 new FTE jobs.

We also asked about the potential longer-term impact on employment, acknowledging that business investments often take time to translate into growth. Indeed, the majority of grant recipients (62%) anticipated creating additional jobs within 12 months of the interview as a result of the support, estimating an average of two new jobs each.

The impact of the programme on jobs was also explored by asking businesses for employment figures before and after receiving support. Overall, 62% of businesses reported that they employed more people since receiving ARFOR's support. The average employment change is shown by business size category in Table 6.1 below. We can see a positive effect especially among businesses which had no staff before receiving support, with this cohort employing around four staff members (FTE) following the intervention.

Table 6.1: Average employment growth (FTE) of grant recipients, by business size category

Business size before receiving support ¹¹	Number of cases	Average before receiving support	Average after receiving support	Change
None	8	0.0	3.6	3.6
1 to 4	35	1.9	3.0	1.1
5 to 9	9	6.8	8.8	2.0
10 to 24	8	14.6	14.5	-0.1
25 to 49	4	34.6	44.0	9.4
50+	2	137.8	123.3	-14.5
All businesses	66	9.9	11.4	1.4

Source: Consultation with businesses receiving grants from Enterprising Communities and Llwyddo'n Lleol

A significant difference could be seen between the two work-streams, with Enterprising Communities beneficiaries reporting an average of 2.2 new members of staff compared to 0.2 among the beneficiaries of the Gyrfaol initiative of Llwyddo'n Lleol. This is consistent with our previous findings that the Gyrfaol initiative invested in a number of existing jobs, but led to upskilling and supporting the progress of individuals within the workforce, or safeguarding individuals' work. Using these averages for the two work-streams, it is estimated that the programme has created 254 jobs (243 through Enterprising Communities and 11 through the Gyrfaol initiative of Llwyddo'n Lleol).

Overall therefore, there is strong evidence that the support has created hundreds of new jobs, with the estimates ranging from around 250 to 330 or possibly even more given the impact of other work-streams as well. These were also jobs which businesses reported could be attributed to the programme's intervention. However, the additionality of these jobs can be questioned, and a high risk of displacement is likely. This is discussed further later in this chapter.

It is also important to consider the appropriateness of the jobs created. Research shows that the 'problem' is not necessarily a lack of sufficient jobs, but a lack of appealing jobs which match the career aspirations of young people in the area. In general, the programme seems to have responded to this specific challenge by creating jobs in a wide variety of sectors and in areas of interest to the individuals.

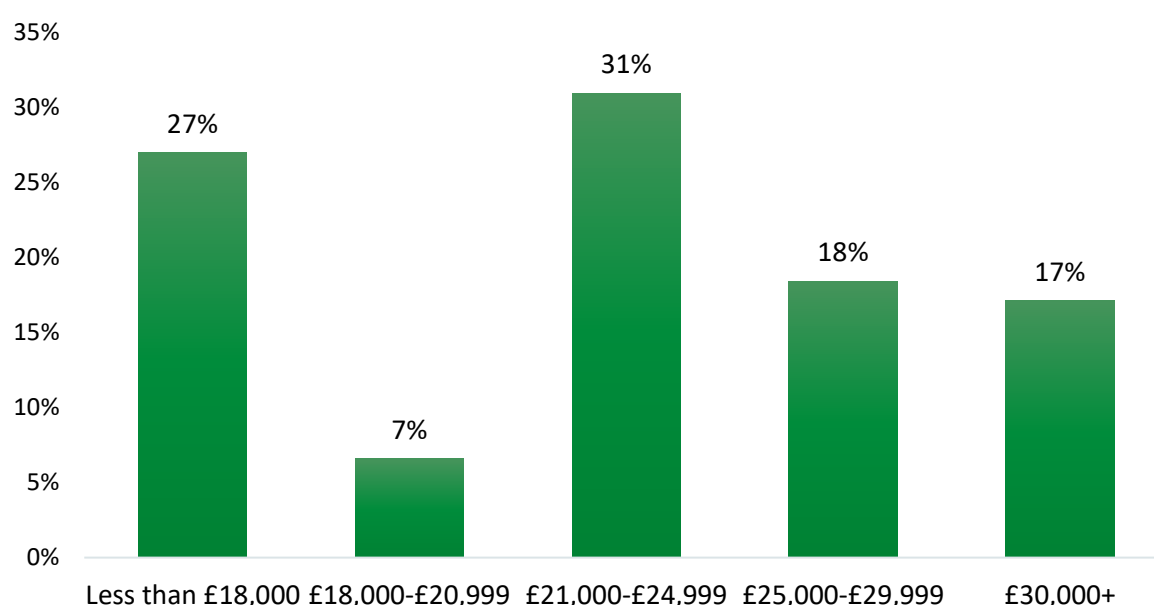
¹¹ These figures refer to the number of employees before receiving support.

Looking specifically at the individuals who received job opportunities through the Gyrfaol initiative of Llwyddo'n Lleol, three quarters indicated their intention to work in the same field, with many either still in their role with the same company or hoping to do so. This shows that the support has been valuable in giving individuals relevant experience to develop a career in their chosen field.

We also know that 94% of the jobs were taken by local people¹² and 81% were fluent Welsh speakers whilst 18% spoke Welsh to an intermediate level (9%) or entry level (8%).¹³ Two thirds (66%) were confident that the jobs would continue beyond the ARFOR programme period in March 2025 'to a large extent' with a further 16% choosing 'to some extent'.

The main weakness regarding job quality was likely the salary level, which varied significantly, as shown in Figure 6.1 below.

Figure 6.1: Salary level of the jobs created as a result of the subsidy schemes



Source: Consultation with ARFOR beneficiaries (businesses) (data for the reported 152 jobs reported by 77 beneficiaries who received a grant from Enterprising Communities or the Careers element of Llwyddo'n Lleol)

On the whole, the jobs that have been created are appropriate but possibly with a little too much emphasis on low paid jobs. Examples are given below of the comments made by businesses about the type of job opportunities they have created.

“ARFOR funding helped to create three new jobs including a chef and front of house staff. The grant enabled us to renovate the pub’s kitchen which is owned by the community.” (Enterprising Communities beneficiary)

¹² This is defined as people living within 10 miles from the workplace.

¹³ Only 1% had no Welsh skills at all.

“The ARFOR grant helped to create the position of Project Researcher. They had returned from university and had not been able to find another job in the county. This position was full time and linked to their degree.” (Llwyddo’n Lleol beneficiary)

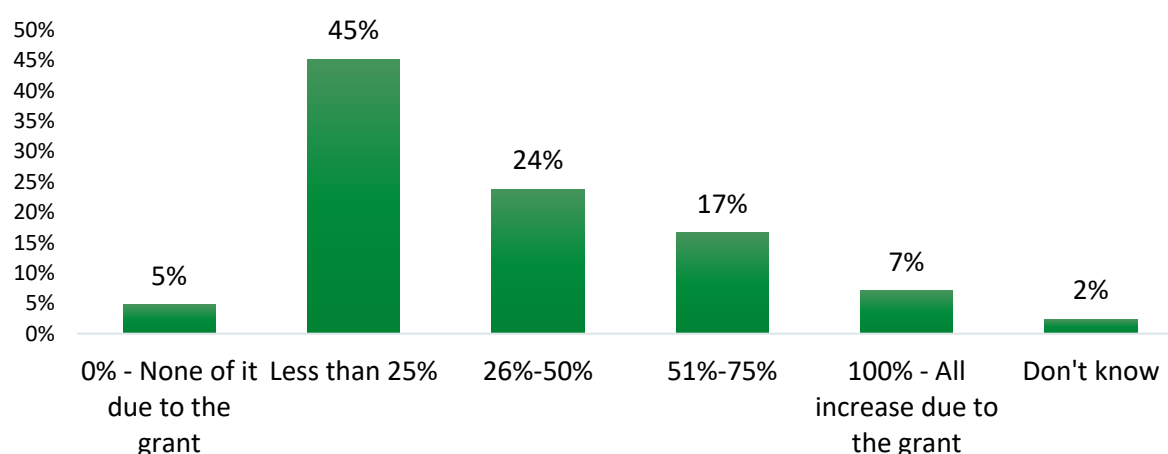
“The ARFOR grant helped us to recruit a local young person to work as a full-time chartered surveyor. She had grown up in the region and wanted to come back after qualifying and ARFOR helped her do that by supporting us with just under half of her £28,000 annual salary.” (Llwyddo’n Lleol beneficiary)

Turnover

The impact of the subsidy schemes on increasing business turnover was also measured. According to 75% of grant recipients, the financial support had a positive effect on their turnover. This was mainly due to the creation of new products and services (78%) following receiving financial support, while almost half (48%) said the improved Welsh offering had helped attract new customers.

The impact on business turnover was further tested by asking for the figures before and after receiving support and then asking them to estimate how much of any increase could be attributed to the support, although we note that fewer respondents were willing to share this data. Of those who responded, 81% said their turnover had increased since receiving the support. The exact increase varied greatly and depended on the initial size of the businesses. There was also great variation in the extent to which it was identified that ARFOR was responsible for this change, as we see in Figure 6.2 below. The main response can be divided between a cohort stating that ARFOR was responsible for a relatively small percentage of their increase in turnover (45% stating this) and a similar cohort (48%) stating that ARFOR was responsible for at least 25% of their growth.

Figure 6.2: (If turnover had increased) What proportion of the change in turnover can be attributed solely to the grant received?



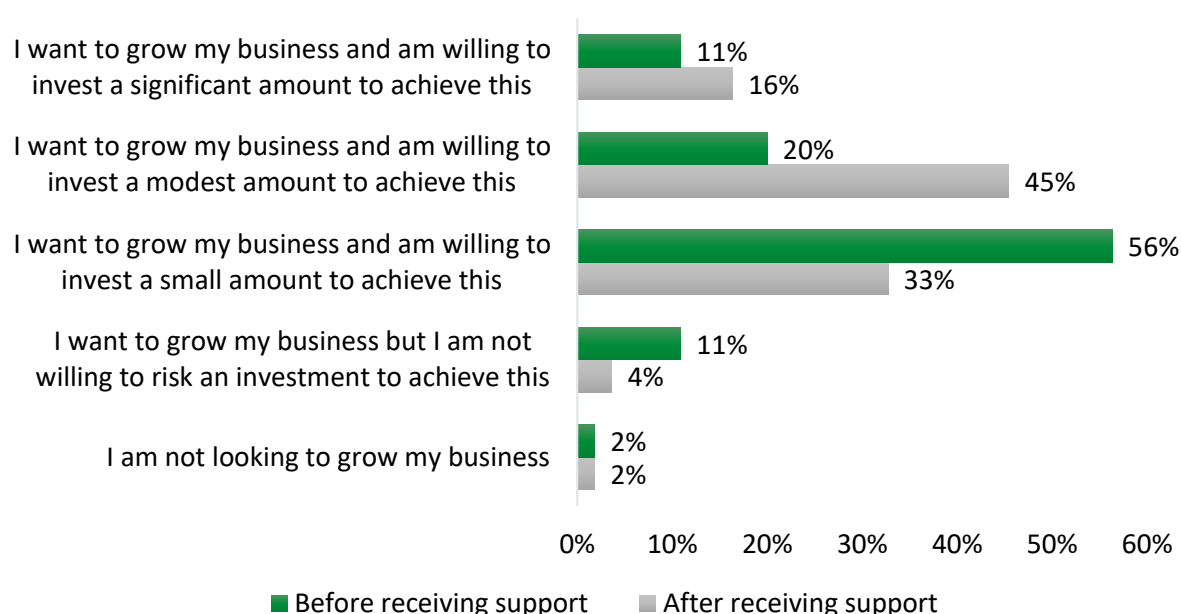
Source: Consultation with ARFOR beneficiaries (businesses) (n=42)

Using this data, we estimate that the support has contributed to an average growth of just over £23,000 in turnover per grant recipient, equivalent to an overall impact of £3.9 million. These findings should be interpreted with caution, as they are based on broad assumptions and a relatively small sample (42 businesses, representing 26% of the total). However, the outcomes provide a useful indication of the potential scale of the effect. The figure is very similar to the grant size allocated of around £4.1 million, suggesting only modest economic gains. Nevertheless, the intervention is likely to generate longer-term benefits for the supported businesses through the products, services, and other improvements in which they have invested.

Beyond the quantitative data, ARFOR officers believed the support had a more far-reaching effect on some businesses by raising their growth ambitions. It was often noted that owners for years had managed businesses that provided for them and their families, but that the experience of recruiting employees following ARFOR's investment had changed their perception of their businesses and increased their desire to grow. As one officer put it: *"It feels like we've ignited something in them."*

This shift was also evident in our consultation with businesses, where several questions explored potential changes in attitudes, aspirations and business culture. When asked directly, 68% of respondents reported that the support had increased their growth aspirations. There was also a slight increase in willingness to make larger investments in business development, as illustrated in Figure 6.3 below.

Figure 6.3: Attitudes towards investment and growth before and after receiving support



Source: Consultation with ARFOR beneficiaries (businesses) (n=55)

Finally, 80% reported plans for making further investments over the next two years. This suggests that the programme has had some effect on increasing businesses' appetite for growth and that further positive economic benefits can therefore be expected in the future.

Additionality

There was mixed evidence regarding additionality¹⁴ —the effect in terms of increasing both employment and turnover among beneficiaries. On the one hand, 78% of businesses reported that they would not have been able to fund the investment without the grant and 82% stated that the funding was necessary to reduce the business risk of making the investment. On the other hand, only 31% indicated that they would not have proceeded with their investment at all without the grant. Most businesses reported a degree of partial additionality, with 43% noting that the grant had enabled them to increase the scale of their investment and 24% indicating that the intervention had accelerated their investment plans. While this shows that the interventions helped to speed up and strengthen investments that were better or more appropriate, it also suggests that some of the reported outcomes may have occurred even in the absence of support.

It is also important to consider whether the businesses could have accessed similar support through other organisations. Only 55% agreed with the statement ‘I was unable to obtain a loan or funding for this investment through other means,’ and just 36% reported that they had sought assistance from other programmes or services to finance the project. Furthermore, 50% indicated that they had already received financial support from another programme or service within the past three years. The additional value of some of these investments can therefore be questioned, although many businesses considered the support to have been essential in enabling them to deliver the investment at the scale and within the timescale achieved.

“I have a small, new business and couldn’t afford to build the new gym and equip it without the funding. I had looked at loans, but they would have crippled the business with repayments. I had applied for other grants but they weren’t suitable for a small business like mine and was turned down.” (Enterprising Communities beneficiary)

Finally, it should be noted that there is a significant risk of displacement, given that a high proportion of beneficiaries’ competitors are located within the region. Indeed, evidence from our consultations indicates that, on average, 48% of beneficiaries’ main competitors are local. This presents a risk that the growth achieved by beneficiaries may have had an adverse effect on other businesses in the region, thereby limiting the ‘net’ economic impact.

Overall, there is limited evidence to suggest that the grant schemes represent good value for money when assessed against basic financial metrics.

¹⁴ Additionality is the extent to which activity occurs, either taking place at all, on a larger scale, faster or within a specific designated target area or group, as a result of the intervention.

6.1.2 Entrepreneurship

Following support from the Mentro Initiative, 46% of individuals had already started their own businesses while an additional 17% were about to do so¹⁵. If we generalize these findings to the wider population that received support, we can estimate that almost 60 young people have either already started their own businesses or are about to do so. The main effect of ARFOR's support was to speed up this process of starting a business, with 77% (10 out of the 13 in our sample) who had already started a business of the opinion that they would have started a business anyway without the support, but that it would have taken longer. In all, 95% of these new businesses said they mainly operated through the medium of Welsh (63%) or gave equal emphasis to Welsh and English.

New businesses were also established following the support of Enterprising Communities. Of the 11 who responded to our survey stating that their objective was to develop a new business or venture, 9 of them said they had already launched these businesses. On this basis, we estimate that the scheme has led to 18 new businesses.

Several sub-projects and other ARFOR elements also contributed to fostering entrepreneurship. One example is the support provided to rugby clubs through the Mentro Initiative, which helped them host social events. According to programme officers, this support strengthened the sustainability of the organisations by building their confidence to independently organise future events and generating valuable income as a result.

6.2 Businesses' language use outcomes

The requirement for any support to benefit the Welsh language was embedded within the contractual and application processes of the Enterprising Communities business grant schemes. As a result, two broad types of projects were funded: those directly aimed at increasing the use of Welsh, and those focused on creating employment opportunities for Welsh speakers (or a combination of the two). Overall, 53% of grant recipients reported using the funding (at least in part) to create more Welsh language spaces, which was also a central objective of the Challenge Fund.

The impact on the creation of such spaces was clear. Businesses reported that the visibility and use of Welsh within their workplaces had increased, while projects supported by the Challenge Fund had established a variety of Welsh language spaces across different contexts. Some illustrative examples are provided below.

“This will be the first Welsh language e-sports tournament. It will increase the amount of content created online in Welsh. We are creating 4 venues in the region which are all completely bilingual. There is an online portal

¹⁵ This statement is based on the findings of our survey of the individuals who received support from the Mentro element of Llwyddo'n Lleol (a sample of 41)

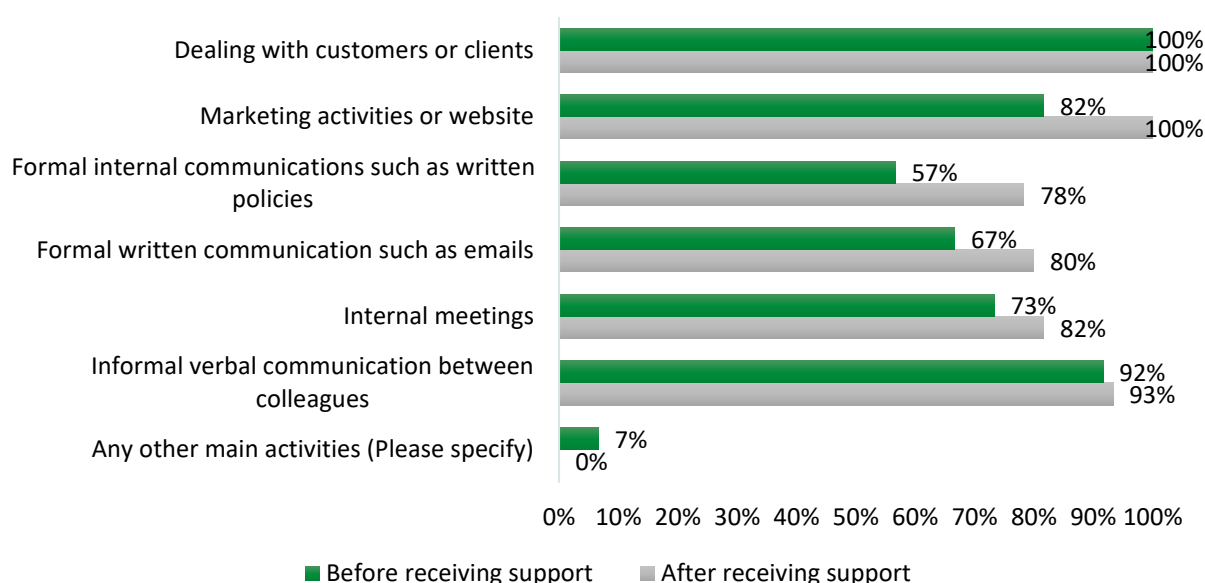
for all of the e-sports players to talk in Welsh.” (Challenge Fund beneficiary)

“All of our staff were Welsh speaking before the ARFOR support. However the ARFOR support has meant we have been able to have all of our signage, marketing and branding be bilingual for the first time. This encourages more of our customers to talk to us in Welsh.” (Enterprising Communities beneficiary)

“Everything in the cafe / bar is bilingual with Welsh first including branding, marketing menus and signage. All staff are Welsh speaking and have Welsh speaker badges. We play Welsh music in the cafe. Have Welsh-language story and poetry events and gigs. We have also hosted Give Welsh a Go events.” (Enterprising Communities beneficiary)

Several questions were asked to assess changes in businesses’ use of the Welsh language across different contexts following receipt of support. It is fair to conclude that Welsh-speaking businesses were supported by ARFOR to some degree. As shown in Figure 6.4 below, all reported providing services to customers through the medium of Welsh prior to receiving support, and almost all indicated that colleagues spoke Welsh in informal communication with each other. Indeed, the majority reported using Welsh in each of the scenarios outlined below. At the same time, significant progress was observed within three specific metrics: the proportion indicating using Welsh in their internal formal and written communication as well as in their marketing activities.

Figure 6.4: Staff use of Welsh in the workplace before and after receiving support



Source: Consultation with ARFOR beneficiaries (businesses) (n=60)

There was also an increase in the proportion of businesses assessing candidates' Welsh language skills as part of their recruitment process (rising from 66% before receiving support to 98% afterwards). Similarly, the proportion of businesses reporting that it was 'very important' to have staff with Welsh-language skills in their workplace increased from 69% prior to support to 87% afterwards.

6.2.1 Etic Lab assessment

Further evidence of this progress was provided through research undertaken by our partner, Etic Lab. For this project, Etic Lab collected a range of data, including a composite variable or score on the use of the Welsh language in businesses. This variable is a composite score of the use of Welsh on businesses' websites, acting as a proxy for their overall use of Welsh. It is calculated by working out the percentage of the company's website that is either written in Welsh or translated. A score between zero and one was assigned to reflect how 'Welsh' a company's website was, with one indicating that the entire website was available in Welsh and zero indicating no Welsh content.

This data was used to compare businesses that had received support from ARFOR with those that had not, in order to assess the impact of the intervention. This statistical analysis showed that companies receiving support from ARFOR were 22% more likely to achieve a high Welsh score than those that did not receive support. These results were statistically significant and reinforced the qualitative feedback from businesses, i.e. that the intervention led to an increase in their use of the Welsh language.

6.3 Impact on migration patterns

Beyond its direct effects, ARFOR's main contribution is through its indirect influence on the region's image and the economic opportunities it offers. Indeed, Llwyddo'n Lleol's central aim through its marketing campaign was to shift mindsets and attitudes towards the region. Furthermore, several members of the delivery team also felt that the programme had succeeded in raising awareness of the brand and had begun the process of changing perceptions.

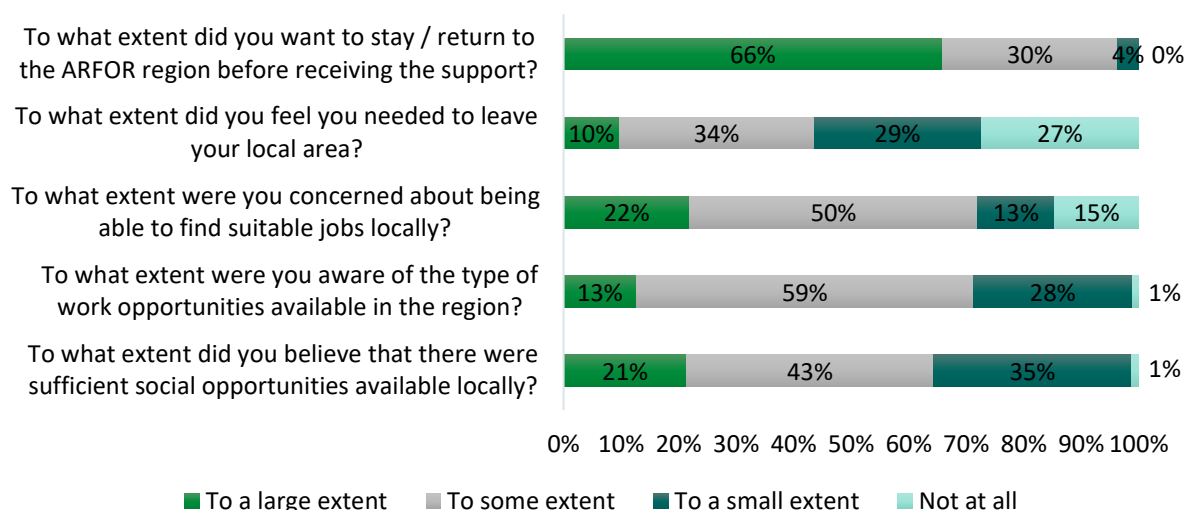
"We have started to challenge that stereotype that you only move back to the Welsh countryside when you are looking to retire." (Delivery team)

6.3.1 Impact on the beneficiaries of Llwyddo'n Lleol

There is strong evidence that the programme had an impact on the young people who were directly supported, particularly in relation to their attitudes and motivations to stay or return to the area. This was explored through a series of questions during our consultation, which is the survey of 80 individuals who had received help from the Llwyddo'n Lleol work-stream.

To begin with, we assessed the baseline attitudes of individuals who had received support, focusing on their attitudes towards opportunities in the region and their desire to stay or return prior to receiving support. As shown in Figure 6.5 below, there was a strong desire to stay or return, however a large proportion (73%) also reported feeling that they needed to leave at least to a 'small extent'. The main reasons given for this was needing to find better jobs or opportunities (71%).

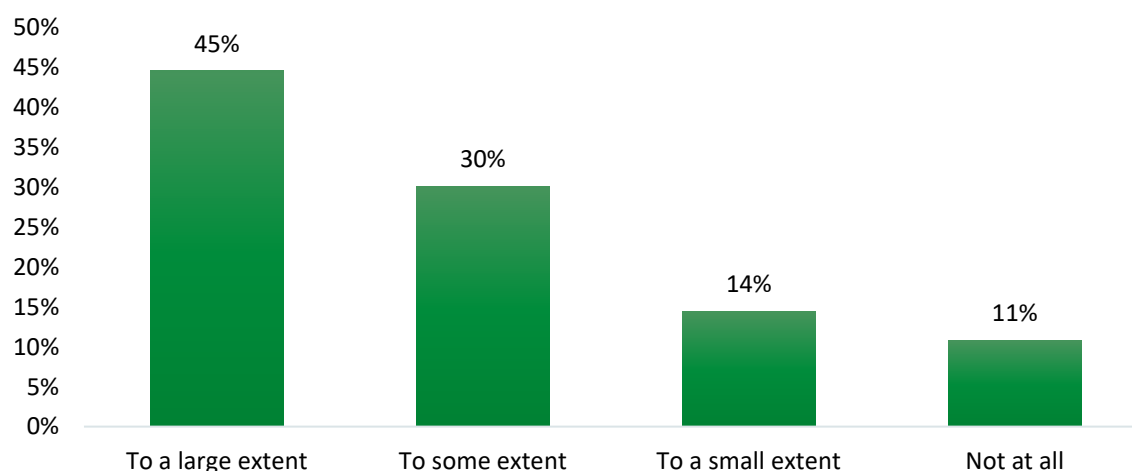
Figure 6.5: Baseline attitudes of Llwyddo'n Lleol beneficiaries (individuals)



Source: Online survey of ARFOR beneficiaries (individuals) (n=82, 62, 82, 87, 84)

Following receipt of support, 99% (83 out of 84) of survey respondents who had been living in the region prior to receiving aid reported that they had remained. The key finding is that 72% reported that the programme had influenced their decision to stay, with 45% selecting the highest rating of 'to a large extent'.

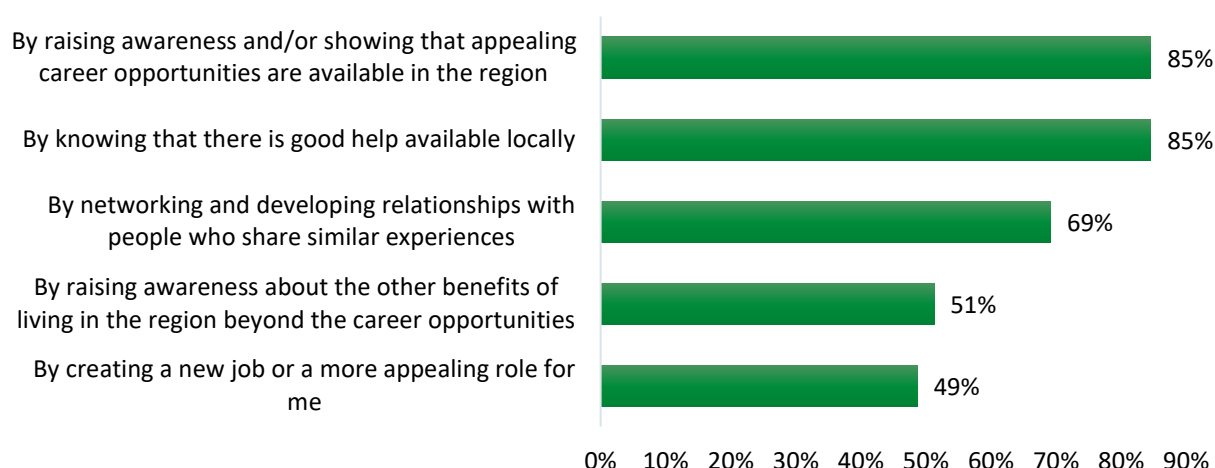
Figure 6.6: To what extent has the support from ARFOR influenced your decision to stay / return to the area?



Source: Online survey of ARFOR beneficiaries (individuals) (n=83)

The reasons for this positive response are presented in Figure 6.7. Most notably, the vast majority reported that the intervention raised their awareness and highlighted the availability of appealing career opportunities – the main objective of the Llwyddo'n Lleol campaign. Nearly half pointed to a more direct effect, namely securing a more appealing job or role through the intervention, which in turn increased their willingness to remain in the region. This aligns with other findings from the survey, where 56% indicated in response to a separate question that they had obtained a better job following the support.

Figure 6.7: How has ARFOR impacted your decision to remain in or move back to the area?



Source: Online survey of ARFOR beneficiaries (individuals) (n=39)

The campaign's impact and direct intervention are demonstrated further in Figure 6.8 below in relation to increasing individuals' confidence and attitudes on the opportunities available locally and the possibility of achieving their aspirations by remaining in the region.

Figure 6.8: Outcomes of Llwyddo'n Lleol support



Source: Online survey of ARFOR beneficiaries (individuals) (n=80)

6.3.2 Conclusions on migration patterns

Llwyddo'n Lleol has clearly achieved its intended impact on those directly supported, not only by providing better opportunities but also by reshaping how they perceive the opportunities available in the region and by fostering more positive attitudes. As a result, almost all direct beneficiaries have chosen to stay. We can therefore conclude that ARFOR has had a positive influence on the migration patterns of its direct beneficiaries. The key question that remains, however, is to what extent has the programme's campaign influenced migration patterns more broadly – by changing young people's perceptions in a more far-reaching manner (i.e. beyond the immediate beneficiaries) regarding the opportunities available in the region? Answering this is challenging and would require more extensive research, including measuring wider youth attitudes within the wider population and the identification of changes over time.

6.4 Learning lessons and mainstreaming

ARFOR has generated significant learning, which was one of its primary objectives. Research was commissioned to explore the relationship between the economy and language, through both this evaluation and wider learning study and the Challenge Fund projects. The evaluation report highlights several valuable lessons that can inform further developments and opportunities for mainstreaming. The remainder of this chapter discusses these issues.

6.4.1 Aberystwyth University research findings

Several papers and short reports were produced following research carried out by Aberystwyth University as part of this study in order to examine the connection between economy and language (as well as other relevant issues).

The **Briefing Report 'ARFOR, out-migration and the Welsh language'** was published in January 2024¹⁶ which discussed lessons from contemporary research in the study of migration. The focus was on attitudes of young Welsh speakers towards life in rural Wales, the factors that encourage them to leave, and the factors that influence their return. The research highlighted that out-migration and return migration are shaped by different drivers, and therefore require different approaches. It also pointed to the usefulness of typologies of young people's attitudes in Wales to migration in order to address the challenge for different groups, as well as the value of life course models in interpreting migration trends. These insights should be carefully considered when developing policies or interventions to address the depopulation of young people from rural Wales.

¹⁶ Dr Huw Lewis and Dr Lowri Cunningham-Wynn from Aberystwyth University, Briefing Report 'ARFOR, out-migration and the Welsh language: Findings from recent research on out-migration to inform the work of the ARFOR II programme', January 2024.

The briefing report **Adroddiad Briffio ‘Tu Hwnt i ARFOR: strategaethau datblygu economaidd a’r Gymraeg’**, published in February 2025,¹⁷ examined the extent to which the Welsh language has been integrated into the process of shaping key Welsh economic development initiatives. The analysis found a clear difference between the level of consideration given to the language in the Welsh Government’s economic strategies compared with the documents published by Ambition North Wales, Growing Mid Wales and Swansea Bay City Region. The findings indicated a gradual improvement in the extent to which the Welsh language was integrated into the Welsh Government’s economic development strategies between 2002 and 2021 (but this seems to be reversed with the publication of its latest strategy in 2023). By contrast, the findings suggest that the Welsh language has remained a marginal consideration in the development of the regional growth deals.

Six recommendations were made on the basis of the study’s findings to encourage better policy coherence between different economic development strategies and interventions. In relation to the future of ARFOR (or any programme/body with similar objectives), it was noted that more consideration to its relationship with other regional economic structures, particularly the three growth and municipal deals, was essential. The study highlighted that ARFOR’s capacity to deliver economic interventions benefiting the Welsh language is likely to be undermined if larger, longer-term initiatives continue to treat such objectives as marginal considerations. It was therefore concluded that the goals for any future programme or body must be clearly understood and reinforced within the wider framework of other economic development structures.

The briefing report **Adroddiad Briffio ‘ARFOR, gweithleoedd a’r Gymraeg’**, published in May 2025,¹⁸ identifies good practice in linking the economy, language and the workplace, drawing on learning from the Basque Country as well as research conducted in Wales. Thirteen recommendations were made, presenting various ideas to increase the use of Welsh in the workplace. These included: strengthening recognition of the significance of workplaces in language planning; developing an initiative to share good practice; embedding language management within organisations that promote higher management standards; and several proposals highlighting the role of social enterprises in increasing linguistic considerations in the workplace.

This collection of papers developed by Aberystwyth University provides useful learning to help inform language planning, policies, and interventions that will follow the ARFOR 2 programme.

¹⁷ Dr Huw Lewis from Aberystwyth University, Briefing Report ‘Tu Hwnt i ARFOR: strategaethau datblygu economaidd a’r Gymraeg’ (‘Beyond ARFOR: economic development strategies and the Welsh language’), February 2025.

¹⁸ Dr Elin Royles from Aberystwyth University, Briefing Report ‘ARFOR, gweithleoedd a’r Gymraeg: Gwersi arfer da o ran effaith gweithleoedd ar ieithoedd rhanbarthol neu leiafrifol i gefnogi gwaith rhaglen ARFOR II’ (‘ARFOR, workplaces and the Welsh language: good practice lessons on the impact of workplaces on regional or minority languages to support the work of the ARFOR II programme’), May 2025.

6.4.2 Key lessons from Challenge Fund projects

The Challenge Fund was ARFOR's main mechanism to pilot new initiatives and, by doing so, generate learning. When considering the Challenge Fund as a whole, its overall impact on the economy and the Welsh language remains unclear. It is difficult to determine the extent to which the Fund has contributed to strengthening the language or enhancing the economic viability of the ARFOR areas. In order to fully assess the impact of these investments on the economy and the Welsh language in the region, more comprehensive data and in-depth analysis will be required in the future. This will also help ensure that resources are allocated effectively going forward.

It is worth noting that the predominant projects funded are those which include a strong element of research. This is because they have created a knowledge base to be used to plan interventions in the future and that their influence and their potential to extend beyond the life of the project are strong.

The strongest projects in this regard, suitable for mainstreaming or further development, include:

- 1) **University of Wales Trinity Saint David's project:** Workplace Language, Workforce Language: Exploring the use of the Welsh language in workplaces and by the workforce in ARFOR counties
- 2) **Cwmni IAITH:** Developing linguistic assertiveness in the field of childcare
- 3) **Cwmni Bro Aelhaearn:** Antur Aelhaearn housing and language project
- 4) **Bangor University** projects
- 5) **Golwg:** Extend the local websites across ARFOR

6.4.3 Summarising key lessons from the evaluation

Several findings from this evaluation can inform future interventions and activities. The main implications of the Challenge Fund projects have been discussed above. Regarding the other work-streams, it was found that Enterprising Communities grants were beneficial to the direct beneficiaries. However, questions remain about whether the returns represent good value for money and if this is the best use of funding for a programme of this scale, given the level of investment required to achieve change at a macro level. There is a stronger case for continuing the Llwyddo'n Lleol campaign, as it provides a distinct focus compared to other interventions and has been effectively delivered, despite a gap in understanding its impact (if any) on individuals not directly involved in the programme. Lastly, several strong examples of activities supported through Bwrlwm ARFOR were identified. Notably, the key event was the 'Most Welsh-language Awards in the World', a relatively low-cost event which received praise for successfully attracting attention to the winners and generating the intended buzz.

There are also several important process-related lessons as well. Mainly, the evaluation highlights the need for sufficient planning and delivery timetable to avoid rushed decisions and activities. It also demonstrates the risks of ambiguity regarding the programme's exact role, particularly when addressing a challenge of this scale and complexity. Lastly, it emphasises the value of adequate resources for strategic coordination and alignment with relevant services and wider regional economic structures. Further discussion of these key lessons can be found in the final chapter of the report.

7. Conclusions & recommendations

ARFOR 2 has achieved a great deal in a short timeframe and has received a very positive response from the participating individuals and businesses. ARFOR has also generated valuable insights for addressing the fundamental challenges at the heart of the programme.

At the same time, there is widespread recognition that the scale and complexity of the challenge cannot be resolved through a short-term programme alone. Instead, a long-term, sustained approach is needed. While there is a strong case for continued investment, this evaluation highlights the need for more thorough planning to clearly define the future purpose and remit of the programme.

Economic factors are clearly an important driver which contributes to the challenge of the outmigration of young people from rural Wales (and this, in turn, has a detrimental effect on the Welsh language). However, it is also evident that the reasons young people leave are broader than just economic concerns. There is a strong argument for moving beyond focusing solely on the relationship between the economy and the Welsh language, as this can artificially separate interlinked issues. Any future programme or body should instead focus on the wider challenge: the outmigration of young Welsh speakers from the region.

Although the evidence indicates that ARFOR 2 interventions produced short-term positive economic outcomes and influenced individual beneficiaries' migration patterns, a programme of this scale cannot directly resolve the problem. Given this, a programme like ARFOR is likely to have a more significant long-term impact by adopting a more strategic role – one that focuses on influencing, facilitating and enabling – rather than attempting to directly subvert the region's structural economic challenges. This would also help to minimise the risk of duplicating existing activities or interventions.

7.1 Broad recommendations

We suggest three broad recommendations which offer a way forward for further investment and policy development in this area. Each broad recommendation includes a series of more detailed suggestions.

Recommendation 1: Establish a long-term intervention

A challenge as large and complex as the one discussed in this report requires a long-term, stable intervention in order to make a real difference. Indeed, that was also the conclusion of the Commission for Welsh-speaking Communities when considering the future of ARFOR:

'The Commission recognises [ARFOR 2]'s valuable contribution and is keen to see continuity of work in this vital area. The Commission therefore considers that ARFOR itself, or a similar body, or indeed another body..., should be established on a permanent basis.'

(Report by the Commission for Welsh-speaking Communities)

Our recommendation is that a future long-term programme should possibly be smaller with a team of core officers responsible for three main functions:

- **Sharing good practice and providing strategic coordination and guidance.** This would help ensure that efforts to address youth depopulation and its adverse effect on the Welsh language remain on the political agenda. In addition, the programme would have a key role in coordinating the relevant activity of bodies, programmes and projects, in order to promote effective collaboration and ensure that opportunities are fully exploited by uniting efforts where appropriate.
- **Research, testing and piloting.** The programme could also be responsible for investing in emerging priorities and themes regarding young people and depopulation. This may include research projects or relevant pilot projects e.g. funding the project 'Keeping in Touch with Young People' which is currently the subject of a feasibility study through the Challenge Fund.
- **Marketing and communication.** The body or programme should be responsible for marketing and communication campaigns aimed at changing young people's perception of the region as a place to live and work. This could be a continuation of the Llwyddo'n Lleol campaign and/or other communication platforms of the programme.

Recommendation 2: Use a transition period to plan thoroughly for the long-term intervention

It is our understanding that there may be a possibility of funding for a 'transition period' to avoid a sudden end to programme activities and established procedures, which could otherwise require re-establishing later. The priority during any transition period should be to define a clear purpose and remit for future work, plan for a long-term solution, and sustain, expand, or mainstream ARFOR 2 activities where appropriate. Based on our evaluation of the programme, we recommend that the following elements should be included:

- **Planning for the next phase / long term solution.** The primary aim of the transition period should be to invest in activities that support preparations for long-term solutions. One example is the opportunity to commission experts in behaviour change to explore the most effective types of messages in changing young people's perceptions of the region as an attractive place to live. Insights from this work could help shape future communication and marketing campaigns. It is also important to acknowledge the current 'data gap' – specifically, the limited evidence on the programme's impact to date in changing perceptions among young people beyond direct beneficiaries. Further research to assess the impact at that level would therefore be highly valuable.

- **Continue to deliver the ‘Llwyddo’n Lleol’ campaign on a smaller scale.** Our consultation identified that this work-stream has already created enough ‘content’ to maintain the marketing campaign in the future. We therefore recommend that resources should be allocated to uphold this campaign and that there is no need, for the time being, to invest further in direct support for businesses and individuals through the Llwyddo’n Lleol elements (i.e. the focus should be on the marketing campaign itself only).
- **Work to mainstream the successful and innovative elements of the programme.** In addition to the recommendation to continue the Llwyddo’n Lleol campaign, there is an opportunity to invest further in other innovative and successful aspects of the programme. For example, consideration should be given to mainstreaming or further developing some of the most effective projects funded through the Challenge Fund (as referred to in section 6.4.2). Similarly, consideration should also be given to mainstreaming some of the most successful activities and sub-projects of the other work-streams as well, such as Bwrlwm ARFOR’s ‘The World’s Most Welsh-language’ Awards event.

Recommendation 3: Applying the research’s main lessons to inform the next steps

Finally, several recommendations were made through evaluation and learning commission’s wider research which can help inform linguistic planning, policies, and interventions succeeding the ARFOR 2 programme. Appropriate attention should therefore be given to these findings when planning ahead.

7.2 To conclude

Overall, the ARFOR 2 programme has largely delivered on its intended plan and achieved a great deal in a short timeframe. The tight schedule, however, posed challenges—most notably the limited time available for thorough planning, which may have contributed to some ambiguity about the programme’s precise role and purpose, resulting in an overly broad remit. Nevertheless, the programme has generated valuable insights and learning that leave an important legacy for policymakers and has made a significant contribution by sustaining discussion and developing ideas for possible solutions to address the core challenges.

ARFOR 2 has again highlighted the scale of the challenge it sought to address, while underlining that it is not realistic to expect transformational change within such a short timeframe. Instead, the challenge requires an intensive, long-term, carefully planned response. The findings from this evaluation should therefore be used to inform the development of such long-term solutions.

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