

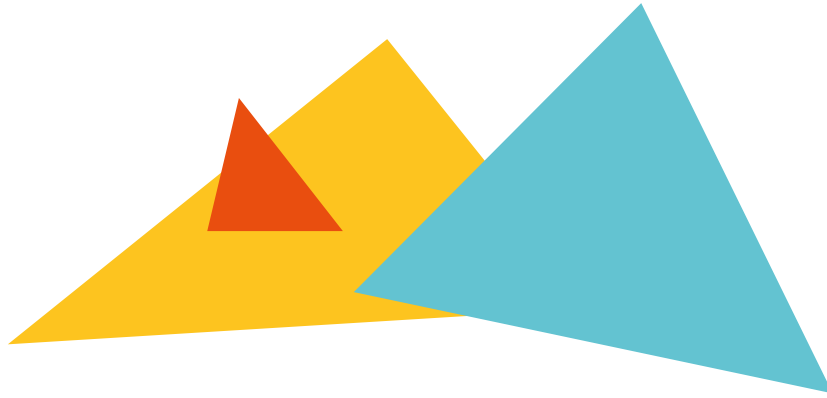
Marchnad Lafur Cymraeg

Summary report highlighting relevant outputs and key recommendations from the Marchnad Lafur Cymraeg project

September 2020



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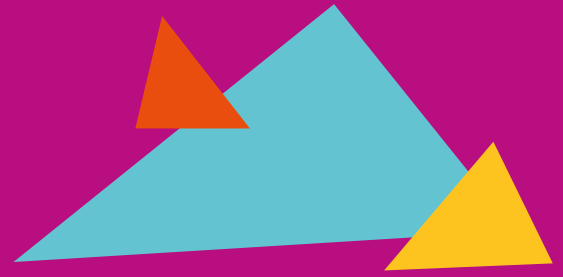
1.1 Background

This paper developed in partnership with Four Cymru and the independent evaluators Wavehill, is a follow-up to the Marchnad Lafur Cymraeg project. The aim was to develop the outputs of the clusters which were created and to expand on the substantial research completed during the project's duration. As part of the project numerous discussions were held with stakeholders and institutions to discuss the relationship between the economy and the Welsh language. However, confusion was frequently noted while discussing the relationship. The link between language, work and young people was often raised during our discussions but with no clear solution how to improve the situation. The project's work naturally developed to concentrate on the communal and foundational economy as it was seen to be a tangible output for the pilot. This raised further questions about the effect of outward-migration and inward migration on communities and the relationship this has with the economy and the language.

With the research completed, it became obvious that there is a disparity between examples of grassroots good practice and the research available to verify this. Numerous examples were had of businesses or organisations having a positive influence on linguistic forecasts in the wake of their linguistic requirements e.g. Gwynedd Council's language policy. But it was not possible to fully gauge this without robust research. In order to be able to expand, the recommendations of the Marchnad Lafur Cymraeg's new research needs to be looked in a way which could influence strategy and structural policy by using research and current statistics which can demonstrate means of improving the situation of the Welsh language in our rural communities.

Further research in this field will contribute towards verifying work already completed by the Marchnad Lafur Cymraeg project and attempt to analyse the real effect economic changes will have on revitalising the Welsh language.

1.2 Policy context



'Cymraeg 2050' is the Welsh Government's current strategy for promoting and facilitating the use of the Welsh language. Part of this strategy emphasises the role the economy plays in the sustainability of the Welsh language, together with the emphasis on the need for good jobs, and more¹ to encourage young Welsh speakers to remain in Welsh language communities. In addition to this national strategy, specific promotional plans have been developed by local authorities.

On a wider scale, organisations such as the Welsh Language Commissioner are responsible for promoting and facilitating the use of the language in addition to promoting its use in the business sector, while the Arfor project and pilot programmes such as Marchnad Lafur Cymraeg attempt to develop innovative interventions to promote economic development which is of benefit to the Welsh language.

In the meantime, the main weakness in the research, as stated by the Revitalise² research team, is that the emphasis tends to be on the relationship between the language and the economy. That is, the focus is on the use of Welsh within businesses, on the benefit of the language to individuals within the labour market or on businesses while trading – the language within the economy (language>economy). There are very few discussions on how economic processes may have an effect on the language – (economy>language). These conclusions echo a review of evidence recently conducted on behalf of the Welsh Government³, and also in the Arfor strategy compiling report⁴. As stated by the Revitalise research team, drawing on research seminars;

'Although there is strong and widespread acceptance of the importance of a viable economy to revitalize a language, there was a lack of comprehensive and detailed research in order to try and understand how and when the processes or economic variables will have an either positive or a negative effect on levels of linguistic vitality⁵.'

Indeed, one of the valuable contributions of the Marchnad Lafur Cymraeg project was the preparatory research in the wake of the shortcomings of the literature available. However, the need for further research into the relationship between the economy and the language was noted;

'Recommendation 2 – New Research – Research on the relationship between the language and the economy is very sparse. Further research could strengthen the subject value as a means of expanding the use of Welsh in our communities. More academic intelligence is required in order to influence policy rather than analysing former research which is no longer relevant. Comprehensive research on the influence of the language and the economy in Wales will enable the creation of more favourable conditions for the language in the business sector and Wales will be a world leader in the relationship between minority languages and the economy.'

(Recommendations of the Final Marchnad Lafur Cymraeg Report, 2020)

In turn, this, it is anticipated, will contribute towards the additional aim of the work of Marchnad Lafur Cymraeg to raise the profile of the value of the economy to the viability of the language.

¹ Although there is reference to 'more than jobs', the strategy does not elaborate on this

² <http://revitalise.aber.ac.uk/en/>

³ Thomas, H. Duggan, B. Glover A. and Glyn, E. (2020) *The Welsh language and the economy: a review of evidence and methods*. Cardiff: Welsh Government

⁴ To be published

⁵ Royles, E., (2019). *Adroddiad Briffio Gweithdy 3: Adfywio iaith a thrawsnewid economaidd*, Aberystwyth University [Online] p.9-10 Available at: <http://revitalise.aber.ac.uk/en/media/non-au/revitalise/Adfywio---Adroddiad-Gweithdy-3---TERFYNOL.pdf>

1.3 The post-Covid 19 situation and the broader linguistic reality

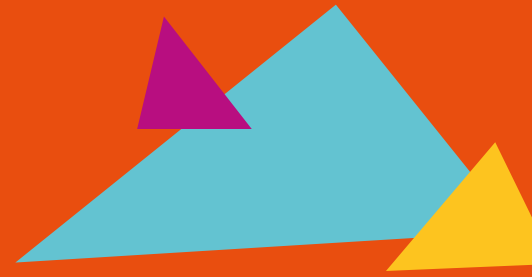
While developing the research conclusions, the economic interventions which attempt to strengthen the language must try to avoid focusing on language>economy interventions. Organisations such as the Welsh Language Commissioner have the responsibility, capacity, experience and expertise in that field, and there is a risk of duplicating interventions. It is necessary to continue to develop projects such as Marchnad Lafur Cymraeg, which fall into the second category of interventions economy>language. There are a number of challenges and some opportunities in attempting to develop economic interventions which are beneficial to the Welsh language. The research team believes that the following key factors should be considered:

1. **Lack of data and evidence of what works.** As stated, there is a general consensus about the influence economic processes have upon the usage patterns and numbers of Welsh speakers. However, the research which analyses and elaborates on the effect of variables and economic patterns or processes on the level of linguistic vitality or sustainability is sparse. There is very little data and evaluation available regarding economic processes and their linguistic effect i.e. there is no data regarding which kind of variables are of benefit to the language. Projects such as Marchnad Lafur Cymraeg, Arfor and Revitalise together with a recent review of the literature offer guidance and recommendations for further research.
2. **The need to challenge basic assumptions.** A familiar and frequent theory among academics, policymakers and stakeholders is that migration patterns are the main factor which have an adverse effect on the Welsh language's situation. The 'problem', is that young individuals leave the area to try and obtain better employment and jobs outside Wales and outside the traditional 'strongholds'. The out-migration leads to a constant drop in the numbers and the percentages of Welsh speakers, and a decline in the viability, vitality and sustainability of the language in those areas. However, data and up to date research suggest that the 'problem' is more complicated and contrasting, and broader solutions should be considered. The broader academic literature on rural depopulation also it suggests that aspiring to a better job is but one reason for leaving an area, and for some, cultural and identity issues are of key importance. Although evidence supports the suggestion that a high number of young people leave Welsh speaking areas, the nature and logic of this out-migration needs to be challenged; consider the effect these individuals have in other areas (i.e. the effect of migration to Cardiff for example); consider broader migration patterns, and acknowledge the large numbers of young and older people who migrate to Welsh speaking areas. The point may be put in a simpler way by asking, 'if we understand the problem correctly and develop the correct interventions; why does the problem persist'?

1.3 The post-Covid 19 situation and the broader linguistic reality

3. **The need to build a body of data and evidence, as a basis for interventions.** The lack of research and evidence on the effect of economic processes on the language over the last decades has limited what can be recommended with certainty, such as interventions or effective grass-roots support. As academic, political and social attention address the issue, there is an opportunity to begin the process of building a body of data and evidence which will be a basis for possible future interventions.
4. **The nature of the economy of rural Wales.** The migration patterns are one of a number of economic structural weaknesses of Welsh rural areas. The economy of the areas are inclined towards lower base value sectors, and weaker growth forecasts. Some specific sectors such as agriculture are also likely to face structural changes following the UK's departure from the EU. In order to develop the economy of the areas, it may be argued that there should be broader involvement than only with lower base value and growth sectors which are traditionally key in the areas e.g. the food and agriculture sectors. It is likely that the economic solutions and interventions required will have to focus on developing economic diversity and supporting those sectors which are likely to witness higher value and wages.
5. **Technological development, multiplied by Covid-19 crisis.** The technological and digital infrastructure in Wales is developing to a point where 'traditional' reasons (it is assumed) for moving from the areas are disappearing. Although there is a danger of over-emphasising changes in working patterns as a result of technological changes, the Covid-19 crisis has offered a direct experience of reliance on digital infrastructure. The Covid-19 crisis emphasises the infrastructure developments which have already been secured, and the possibilities for individuals to live and work in alternative sectors, at least partially, in rural areas. There is scope for research which focuses on understanding the advantages of these developments for the work culture in Wales.

1.4 International good practice and examples to consider



Wales is one of a number of countries and regions across the world which has attempted to develop economic interventions to support efforts to revitalise a minority language. The experiences of other regions and countries offer Wales important learning opportunities. However, it's important not to ignore the unique contexts of other regions and countries, and the need for further research into the validity of such interventions in Wales.

Below outlines a few examples of many that could be considered as possible comparisons:

New Brunswick (Canada) – Efforts to reduce out-migration, mainly to Western Canada, and corresponding efforts to welcome immigration in ways which are sensitive to the language⁶⁷.

Catalonia (Spain) – A programme of welcoming international students and immersing them in the culture and language of Catalonia. There is a strong link with the heritage sector here.

⁶ Edwards, C, W., (2020). 'Community versus Commodity in Francophone Canada: A Multilevel Approach to the Neoliberalization of Immigration', *Canadian Journal of Political Science* Vol 53 Issue 1 pp39-60

⁷ New Brunswick. (no date) Department of Post-Secondary Education, Training and Labour. 2013. New Brunswick's Labour Force and Skills Development Strategy 2013–2016. Fredericton, New Brunswick

1.5 The Marchnad Lafur Cymraeg project

Following work on the Marchnad Lafur Cymraeg project, findings were compiled and a range of policy recommendations and further work in the field were presented. Most of the recommendations focus on change of policy, it was decided that the project's best operational step will be to concentrate on **recommendation 2 – New research** which will be able to lead us to the best way to influence policy.

Lessons from the project and further recommendations

The aim of the Marchnad Lafur Cymraeg project was to create engagement between sectors and companies which have the potential to develop services and products which build on Welsh linguistic skills. The project's aim was to look to develop the Welsh language as an economic catalyst which would be a vehicle to develop and revitalise rural Wales. As a result, it would be possible to recognise opportunities and the demand for Welsh language services, or the opportunity to expand Welsh language services.

In general, information about the use of Welsh by businesses and the value of Welsh for businesses has been the focus of the work in the field so far. As mentioned earlier it was observed that not enough research existed into the relationship between language and innovation in business.

The concept of Marchnad Lafur Cymraeg has been in existence for a number of years with a number of organisations and individuals viewing it as a means of preventing the demise of Welsh as an everyday language.

One aspect which was regularly mentioned while working on the project was the possible effect of Brexit on the rural economy and communities of Wales. Its side effects is out of our control at present but the same challenges and opportunities will be present for the language and the economy whatever happens and therefore we should not wait for these changes to emerge before taking action.

However, during the project warnings were noted by academics citing the experience of the Irish (Gaelic) language in the wake of cuts experienced during the 2008 financial crisis in Ireland stating that the same fate could await the Welsh language as a result of Brexit⁸.

One of the main challenges in rural areas of Wales is ensuring sustainable jobs throughout the year, this is a concern for western counties which have the lowest GVA in the United Kingdom⁹. It is expected that these areas will be dependent on the public and agriculture sectors and tourism which traditionally have low wages or offer seasonal employment. This would lead to people probably leaving in search of work, which has a further effect on the Welsh language and communities.

⁸ Royles, E., (2019). *Adroddiad Briffio Gweithdy 3: Adfywio iaith a thrawsnewid economaidd*, Aberystwyth University [Online] t.12 Available at: <http://revitalise.aber.ac.uk/en/media/non-au/revitalise/Adfywio---Adroddiad-Gweithdy-3---TERFYNOL.pdf>

⁹ Dickins, S., (2018), *Wales remains bottom of UK nation and region economy table*, BBC [Online] Available at: <https://www.bbc.co.uk/news/uk-wales-46522457>

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The challenge facing the continuation of the Welsh language as a community language is ensuring that the younger generation remain in their communities to live and work. By now, 22.9% of full-time students studying in Wales can speak Welsh and they need to remain in Wales to have the opportunity to be part of the Welsh language workforce¹⁰. Despite this, figures show that young people still leave areas to study and decide not to return.

Another aspect which is common between the rural economy and the Welsh language is that some of the poorest GVA areas in Wales are the areas with the highest percentage of Welsh speakers. According to GVA employability figures per person, the wage in rural areas is £17,000 per annum compared to £22,000 in urban areas which suggests a shortfall in sustainable jobs in rural areas in Wales¹¹.

Following meetings with a number of project stakeholders one point which became evident was that eventually it is state policy which can drive economic change in reality. This implies that it is politicians who have the power to make the final decision and not research data. As a result, it is important to ensure that there is dialogue between politicians when discussing and attempting to demonstrate the importance of the economy language as a means of increasing the use of the language and strengthening communities.

Summary of the Recommendations

Recommendation 1 – Raising the profile of the economy’s value to the viability of the language – More understanding is required within governments of the economy’s value to the viability of the language when forming linguistic strategy. Awareness should be raised about the difference between the definition of the language and the economy and language economy in order to ensure that we mainstream economy as the basis for linguistic strategies in Wales and that the Welsh language is included in every aspect of policy.

Recommendation 2 – New research – Research into the relationship between the language and the economy is very sparse. Further research could strengthen the subject’s value as a means of broadening the use of Welsh in our communities. More academic understanding is needed in order to be able to influence policy rather than analysing former research which is no longer relevant. Comprehensive research into the influence of the language and the economy in Wales would be able to create more favourable conditions for the language in the business sector and Wales would be a world leader in the relationship between minority languages and the economy.

¹⁰ Office for National Statistics, 2018 <https://cy.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/bulletins/2011censusquickstatisticsforwales/2013-01-30#sgiliau-iaith-gymraeg>

¹¹ Potton et al ‘Debate Pack: Future of the rural economy in Wales’ 2017 p.2

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Recommendation 3 – Arfor Councils to follow Gwynedd Council’s example – Carmarthen, Ceredigion and Isle of Anglesey councils should follow Gwynedd Council’s example by making Welsh the council’s administrative language. Gwynedd Council’s decision to introduce this policy in the early 1980s is one of the main reasons why Gwynedd is the main stronghold of the Welsh language today. The county councils should aim to emulate this policy as a part of the Arfor scheme. By operating in Welsh the councils create a workforce which use the Welsh language and are able to influence the language of other businesses by procurement schemes and good practice.

Despite this, looking at the general state of the Welsh economy, the concern is that there is over-dependence on the public sector which makes it difficult to create further economic prosperity. Research will look at the over-dependence and its relationship with the Welsh language because of the drive to mainstream Welsh in the private sector. During our discussions with a number of stakeholders it became evident that the problem of lack of economic venture has now infiltrated into a number of communities although an historic culture of enterprise exists. It would be of great benefit where possible to look at the reasons for this as community ‘entrepreneurship’ is still alive and well in our communities but that it is not so evident from a business venture perspective.

Recommendation 4 – Encourage more Welsh medium entrepreneurship – Research which has been completed in this project shows that we need to find new ways of encouraging people to be enterprising when developing a business. Although there are supporting structures available there is not enough enterprise blossoming in our rural areas. We should consider how to change the culture which would lead to more entrepreneurial opportunities which use or see value in the Welsh language.

Part of the project considered establishing three pilot clusters in three different sectors which could demonstrate how the Marchnad Lafur Cymraeg could be developed. A number of various sectors were considered and their true potential assessed as a pilot cluster for this project. In addition to this, it was possible to see that there were ways to develop clusters in other fields were it possible to further expand the project.

Recommendation 5 – Develop a sustainable Elderly Care Cluster – One of the basic sectors which is under the greatest strain is the elderly care service. It is imperative that the service is able to operate through the medium of Welsh but the format of the service is becoming dated. Creating a more sustainable service which works with our communities to ensure more effective procurement should be explored. There are already specific examples of this community service and work in communities in Wales but a model which works across the whole country should be developed.

1.5 The Marchnad Lafur Cymraeg project

Recommendation 6 – Developing more competence – Were it possible to invest more time looking to develop new services, enterprise could offer more jobs and services to the community. A number of language agencies were interested in establishing a nursery but without the qualifications to further develop the idea, offering permanent assistance to language agencies to broaden their services should be considered.

Recommendation 7 – Developing a Community Enterprise network – Following the establishment of a Community Enterprise Cluster working group it was clear that it was beneficial to establish a permanent network which will look at protecting the sector's interests and be a voice for the enterprises. After completing further research into the cluster, a number of enterprises have shown an interest in establishing a network. The structure of the network should be decided upon but it's important that it remains transparent by sharing good practice and showing the value of operating through the medium of Welsh.

Recommendation 8 – Welsh mentoring scheme – The objective would be to collaborate with other stakeholders in offering a Welsh mentoring scheme which will help establish new enterprises as well as helping community enterprises expand. The scheme would use the experience and expertise of community venture leaders in order to help enterprises which will eventually create new opportunities and services in our communities. What will make this scheme unique is Welsh mentoring which will really understand the needs of communities.

Recommendation 9 – Community venture models – The possibility of using successful community venture models should be considered in order to emulate them in other communities. Welsh examples which have succeeded in revitalising the economy of their communities by communal work should be used to find other communities that are interested in establishing similar community enterprises in their areas.

Recommendation 10 – Community Facilitating Officers – A Community Facilitators pilot would look for unique economic opportunities which exist as a result of the Welsh language. There is huge potential when considering creating a Welsh medium labour market. The facilitators will be situated in various communities helping with competence as economic schemes develop such as drawing up grant applications or / and fine tuning business plans. This work will be a local catalyst in creating a new community venture and providing essential local services.

Recommendation 11 – Airbnb ownership – One problem raised in the context of the Community Enterprise Cluster was the increase in Airbnb accommodation holdings available in the communities of the Arfor councils. This was a concern for the cluster due to so many properties being bought by people from outside the area and having an effect on the implications of housing for local inhabitants. The issue should be considered further, working with all tiers of government, in order to ensuring the tourism industry is maintained whilst also protecting the interests of local residents.

1.6 Next operational steps to support the above recommendations and begin to implement them

- 1) **Case studies** to scrutinise the linguistic and economic effect a range of economy>language interventions. The most obvious and most useful being: Yr Egin (Carmarthen) as well as a number of city regions.
- 2) **Economic statistics and language ‘Deep-dive’.** Wavehill research in relation to the Arfor project found that there is no positive relationship between economic development and an increase in the number of Welsh speakers in every case. In fact, available data suggests there is an adverse relationship between them in some cases i.e. as the economy strengthens, the language declines. There is scope for further statistical work to be done regarding every local authority.
- 3) **Specific case studies.** A series of interviews and questionnaires, as well as studies of the economic and linguistic data within specific areas. Anecdotal data suggests an increase in the number of Welsh speakers in Cardiff over the past 15 years, as well as in areas of Caernarfon. Areas such as Beaumaris meanwhile have seen a decline (anecdotal) in the viability of the language despite economic growth and prosperity in the area.
- 4) **Focus groups and interviews with out-migrants.** Recent research has challenged the presumption that young people are leaving Welsh speaking areas for employment reasons only. In fact, the presumption tends to be at odds with worldwide studies of rural out-migration over the last century. Holding focus groups and/or interviews will strengthen the understanding of reasons and motives of young people for leaving rural Welsh speaking areas.
- 5) **Focus groups and interviews with in-migrants.** Example(s) of work which corresponds to point 4 examining the motives of those who come to the area, including those returning to the area of their birth.
- 6) **Business Panel.** A panel of individuals working in/running a business responding to a quarterly questionnaire. The questionnaire will examine the effect of their businesses on the use of the language, in addition to the nature of the use of the language within the business. By continuously collecting data, the output (one report every quarter) could develop into a key publication and reference point within the field. Over time it would be possible to develop a range of additional/alternative questions regarding specific issues e.g. the effect of Covid-19 on the language. Due to its character, the questionnaire will relate to language>economy issues as well as economy>language issues.