

Welsh Government delivery Research Briefing

July 2025



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Welsh Government delivery

Research Briefing

July 2025

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Senedd Research

The Committee for the Scrutiny of the First Minister is holding a session on 11 July 2025 with the First Minister, Eluned Morgan MS, to scrutinise the delivery of her priorities and the Programme for Government, as the end of her first year in office approaches.

This briefing sets out relevant background information and some of the key issues the Committee may cover



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1. Introduction

On 11 July 2025, the Committee for the Scrutiny of the First Minister is scrutinising the First Minister, Eluned Morgan MS, on delivery of her priorities and the Programme for Government, as the end of her first year in office approaches.

This briefing sets out relevant background information and some of the key issues the Committee may cover.

There is a Welsh Government-led debate on “Delivering the Government’s Priorities and Legislative Programme” **scheduled in Plenary on Tuesday 15 July**. This debate usually relates to the **annual report on the Programme for Government**, which in previous years the Welsh Government has published around a week before the Plenary debate.

Due to this timeframe, it was not possible to reflect the annual report’s contents in this briefing.

2. The First Minister’s priorities

Eluned Morgan MS **became First Minister on 6 August 2024**. Unlike her predecessor, Vaughan Gething MS, who was appointed following a Welsh Labour leadership contest, Eluned Morgan MS did not have a manifesto. She made a **statement to the Senedd** following her nomination and said:

I hope to be defined by my unwavering commitment to the people of Wales, by my years of public service and my determination to create a fairer, greener and more prosperous nation for us all, a leader focused on delivery and on ambition for our nation, a leader driven by a sense of service and respect for the people I serve.

The First Minister made a **statement in Plenary on 17 September 2024** on Government priorities. She said that the Government “will move forward through the remainder of this Senedd term to drive progress in **four key areas**”. These four areas, as specified in the statement and a **media release** issued the same day, are outlined below:

- **‘Iechyd da’ – A Healthier Wales:** cutting NHS waiting times including for mental health, improving access to social care, and improving services for women’s health;
- **Green jobs and growth:** creating jobs to tackle the climate crisis but also make families better off, and accelerating planning decisions to grow the Welsh economy;

- **Opportunity for every family:** boosting standards in schools and colleges, and providing more homes for social rent; and
- **Connecting communities:** transforming the railways, delivering a better bus network, fixing the roads, and empowering local communities to make choices on 20mph.

Funding

On 5 December 2024, the First Minister **announced £157 million of new funding** to support her priorities in the remainder of financial year 2024-25.

When **presenting the 2025-26 Final Budget in Plenary on 4 March**, the Cabinet Secretary for Finance and Welsh Language said there is £1.6 billion additional funding this year. The Welsh Government **said its 2025-26 budget** has been “guided by the principles embedded in the Well-being of Future Generations Act and **the First Minister’s priorities**”.

Announcing the outcome of the **2025 Spending Review**, the UK Government said the Welsh Government’s revenue budget (which funds ‘day to day’ departmental spending) will increase by an annual average of 0.9% in real terms over 2025-26 to 2028-29.

The **Cabinet Secretary announced on 1 July** that the Welsh Government’s 2026-27 budget will simply increase departmental budgets by inflation, rather than reflecting new policies and priorities, leaving an unallocated pool of funding for the next Welsh Government.

3. Programme for Government

The Welsh Government set out its **Programme for Government for 2021-26** in June 2021, updating it in December 2021 to reflect the (now ended) **Co-operation Agreement** with Plaid Cymru.

The Programme for Government is structured around 10 **‘well-being objectives’**, covering a variety of policy areas. Each well-being objective has a number of **commitments** which are the responsibility of the whole of the Welsh Government Cabinet due to their cross-portfolio nature. There are also a number of **commitments** resting with **individual Cabinet Secretaries / Ministers**.

The **10 well-being objectives** are:

- Provide effective, high quality and sustainable healthcare.
- Continue our long-term programme of education reform, and ensure educational inequalities narrow and standards rise.
- Protect, re-build and develop our services for vulnerable people.
- Celebrate diversity and move to eliminate inequality in all of its forms.
- Build an economy based on the principles of fair work, sustainability and the industries and services of the future.
- Push towards a million Welsh speakers, and enable our tourism, sports and arts industries to thrive.
- Build a stronger, greener economy as we make maximum progress towards decarbonisation.
- Make our cities, towns and villages even better places in which to live and work.
- Embed our response to the climate and nature emergency in everything we do.
- Lead Wales in a national civic conversation about our constitutional future, and give our country the strongest possible presence on the world stage.

Welsh Government annual reports

In this Senedd term, the Welsh Government has published an annual report each July setting out its perspective of progress against the Programme for Government. This includes an **annex giving an update, as of 31 March that year, on the 115 commitments** that sit beneath the 10 well-being objectives.

The **2024 annual report** was published on 9 July 2024. It was debated in Plenary on 16 July 2024.

There is a Welsh Government-led debate on “Delivering the Government’s Priorities and Legislative Programme” scheduled in Plenary on Tuesday 15 July. This debate usually relates to the annual report on the Programme for Government, which in previous years the Welsh Government has published around a week before the Plenary debate.

Due to this timeframe, it was not possible to reflect the annual report’s contents in this briefing.

Senedd Research series, September 2023

In September 2023, Senedd Research published a series of articles using information in the public domain to summarise the Welsh Government’s progress at that time in delivering its Programme for Government.

4. Previous Committee sessions and the First Minister's emphasis on 'delivery'

In the "Wales and the world" themed session with the Committee for the Scrutiny of the First Minister on 13 December 2024, the First Minister emphasised **that her focus is on 'delivery' of existing work and undertakings, rather than writing new strategies or making new commitments**. The clear inference was that Eluned Morgan was referring to the Government's work generally and not only international issues [all bold is Senedd Research's emphasis]:

I've done this across the whole of Government: can we stop the refreshes, **can we just focus on delivery, let's make sure we land what we said we're going to land**. [...]

So, for me, it's all about, 'Let's stop writing strategies; let's make sure it's about delivery of the strategies.' It's actually much, much easier to write a strategy than to deliver one. And so, I'm trying to **shift the focus across the whole of Government** away from writing strategies all the time—**'Just focus on delivery of what we've got now on the table, get that done**. Once we've completed that, we'll look at the next thing.' That's where I'm at, in keeping, ideally, with the full priorities that I set out in September. [...]

So, I'm trying to get to a different place. It's quite difficult to turn the Government machine around, but that's where I'm at. [...]

... I now have a delivery Minister, and **we are going through the entire programme for government to make sure what have we delivered**, where are we short, what is it that we've got left to do.

Referring to the international strategy in particular but inferring the approach was indicative of the Government's programme as a whole, the First Minister added:

There are areas within the strategy that are green, which have been done, they've been delivered. There are bits where it may be red and will continue to be red, and then we need to give you an explanation for why it is red. But there are lots of amber bits in there that we need to say, 'Right, come on, we've got 18 months left; let's get cracking, **let's make sure we deliver on what we said we were going to do**.' So, that is very much the formula that I'm very keen to make sure that you have sight of, where it is we're delivering, and also where you need to hold us to account because we're not.

Asked during the Committee for the Scrutiny of the First Minister's topical scrutiny session on 28 March 2025 if her approach remained to consolidate existing programmes and strategies rather than new initiatives, the First Minister confirmed:

Absolutely, yes. I've been **very clear and focused on the four priorities**.

Within those four priorities, there are very clear things that I'm trying to focus on. (...)

So, I'm really making sure that the things that we said that we would do, we actually deliver on.

5. Relationship between the four priorities and the Programme for Government

As already explained, the **First Minister's four priorities** were announced in September 2024, following a 'listening exercise' she had undertaken after her appointment. In addition, the Welsh Government already had its **Programme for Government** – published in June 2021 and updated in December 2021.

The following sections containing information on each of the First Minister's four priorities list the Programme for Government well-being objectives that appear to be relevant to those priorities, along with the respective research articles from September 2023. **Three of the 10 well-being objectives do not appear to be directly covered by the First Minister's four priorities.** These are:

- **Celebrate diversity and move to eliminate inequality in all of its forms** (Senedd Research article, September 2023: ***Celebrating diversity and eliminating inequality: rhetoric or reality?***)
- **Push towards a million Welsh speakers, and enable our tourism, sports and arts industries to thrive** (Senedd Research article, September 2023: ***Welsh language, tourism, sports and arts: thriving or surviving?***)
- **Lead Wales in a national civic conversation about our constitutional future, and give our country the strongest possible presence on the world stage** (Senedd Research article, September 2023: ***Wales at home and abroad***)

6. 'Iechyd da' - A Healthier Wales

The Welsh Government describes this priority as “**cutting NHS waiting times, including for mental health; improving access to social care and services for women’s health**”.

Relevant Programme for Government well-being objectives:

Provide effective, high quality and sustainable healthcare (Senedd Research article, September 2023: ***Is the Welsh Government on track to deliver its vision of a healthier Wales?***)

Protect, re-build and develop our services for vulnerable people (Senedd Research article, September 2023: ***Supporting ‘vulnerable’ people: what is the Welsh Government delivering?***)

Cutting NHS waiting times, including for mental health

Wales continues to face **some of the longest NHS waiting times among the UK nations, with hundreds of thousands of patients still waiting to begin treatment**.

In her **keynote speech** at the Welsh Labour conference on 28 June 2025, the First Minister highlighted a **60% reduction** in the longest waits between November 2024 and April 2025, along with reported improvements in access to GP appointments. She spoke of a clear vision to “reimagine and redesign” NHS care for the next generation.

On 19 June 2025, the Cabinet Secretary for Health and Social Care, Jeremy Miles MS, had **announced a £120 million investment package** aimed at **accelerating the reduction of waiting times and treatment backlogs**. This funding is designed to help cut the overall waiting list by 200,000 patients, eliminate all two-year waits, and restore diagnostic waiting times to under eight weeks by March 2026.

The Welsh Government’s **Planned Care Recovery Plan** had already set earlier targets, including eliminating **two-year waits by March 2023** and **one-year waits by March 2025** for most specialties – defined as all but seven that had chronic backlogs before the pandemic (including Dermatology, General Surgery, Ophthalmology, Urology, Gynaecology, Orthopaedics, and Ear, Nose and Throat). These goals have not been met.

Current waiting times

As of April 2025, over **789,900 patient pathways** were waiting to start NHS treatment. Among them, **9,600 had been waiting more than two years**, an increase of **429** compared to the previous month. Similarly, **159,500 patient pathways** were still waiting more than a year – well beyond the March 2025 target to eliminate such delays.

Long waits for initial outpatient appointments are also proving difficult to clear. In April, the number of patients waiting over a year for their first appointment rose by **3.6%** to just under **73,200**, although this remains **28.7%** lower than the August 2022 peak. A previous target to eliminate these waits by the end of 2022 has also been missed, though the longer-term trend is beginning to show improvement.

In **cancer services**, 1,956 patients started treatment in April – a small increase from the previous month. However, performance on the **key 62-day target** continues to fall short, with only **60.5%** of patients starting treatment within that timeframe, well below the 75% goal and a drop of **three percentage points** from March. The government has now set a revised **target of 80% by 2026**.

Other benchmarks in the plan – such as **eight-week maximum waits for diagnostic tests** and **14-week limits for therapy services** – were due to be achieved by **Spring 2024**, but these deadlines have also been missed.

While some progress is evident, including reports that **Swansea Bay University Health Board and Powys Teaching Health Boards** now have zero patients waiting over two years, others like **Betsi Cadwaladr University Health Board** continue to struggle with the highest number of long waits in Wales. The Cabinet Secretary Jeremy Miles has argued that seasonal variation accounts for the most recent increases and maintains that the **£120 million funding** will drive further progress, with an emphasis on innovation, streamlined pathways, and a new “patient deal” that aims to improve communication and engagement.

Mental health

The Welsh Government published its mental health and wellbeing strategy for 2025-2035 in April 2025. This includes a focus on ‘timely services’, stating “we will reduce waiting times for services, eradicating long waits, and setting waiting time standards that are clinically meaningful”.

The delivery plan for 2025-2028 which accompanies the mental health strategy

includes an action to improve access to psychological interventions and therapies.

This will include a focus on common mental health conditions such as anxiety and depression as well as supporting people with psychosis, bipolar disorder and conditions arising from trauma and people with long term physical health conditions.

The latest **waiting times figures** (for March 2025) show an improving picture for Local Primary Mental Health Support Services (LPMHSS):

- For under 18s, 90.1% of Local Primary Mental Health Support Services (LPMHSS) assessments were undertaken within 28 days. 80.5% of therapeutic interventions were started within 28 days following an assessment.
- For adults, 76.2% of assessments were undertaken within 28 days. 91.4% of therapeutic interventions were started within 28 days following an assessment.

Mind Cymru has highlighted that people with more severe mental health problems are still experiencing long waits to access specialist psychological therapies in Wales. The charity has also consistently called for improved collection and sharing of waiting times data for mental health services.

Improving access to social care

The previous First Minister, Mark Drakeford MS, had a focus on standards of children's social care, while the current First Minister has specified 'improving access to social care'.

Carers

In evidence to the Local Government and Housing Committee's **hospital discharge inquiry**, stakeholders highlighted a lack of capacity in social care (both for people who need care and support and unpaid carers who need support). The Committee heard that social care services are struggling to meet demand, which leads to waiting lists and delays, partly due to workforce shortages.

For example, **the Welsh Local Government Association (WLGA) reported** that waiting lists have been increasing, for "people waiting for packages of care and for people awaiting assessment and/or equipment and support from occupational therapists".

Age Cymru said that its 2024 survey of over 1,300 older people across Wales found that nearly one in four older people were still waiting more than 30 days for a care assessment and one in six were waiting more than 30 days for care to be in

place in 2024.

ADSS published its rapid review on unpaid carers rights in November 2023. The review concludes:

There are waiting lists for carer's assessments in most areas, which prevents carers having the support they need. Many carers are not being offered assessments. [...] Respite care is the most significant unmet need.

Carers Wales' Track the Act 2024 research concluded that between 0.3% and 0.8% of unpaid carers across Wales received a Carers Needs Assessment in 2023/24. It also found that 63% of carers in the same survey who had tried to obtain support from social care services had experienced long wait times for assessments, reviews or support.

The **Ombudsman Wales did an 'own initiative investigation'** into the administration of Carers' Needs Assessments in 2024, investigating four local authorities. The Ombudsman's report found that only 1.5% of the carer population in the Investigated Authorities had an assessment that led to a support plan.

Workforce

The **latest available workforce report (2023)** found that vacancy rates "remain stable" (and similar to the previous year) with an estimated 5,299 vacancies in the sector. It was reported that 9,499 people started a new role in social care in Wales and 9,503 left the sector during the year. Domiciliary care vacancies make up more than 37.1% of the total vacancies in social care in Wales.

The **2024 Social Care Wales workforce survey** found that 25% of care workers are aiming to leave the sector (the average amount of time they saw themselves staying was 12 months).

In the children's sector there is a particular challenge with vacancies in children's social work. In November 2023, **Social Care Wales told the Children, Young People and Education Committee** that 17.5% of the 2,456 children's services social workers work for an agency.

Social care data

The Local Government and Housing Committee also heard frustrations about current data limitations in social care. There were comments that a lot of social care data is collected but not available in the public domain. For example, data is collected on waiting times for care assessments, care services and on staff

vacancies, but none of this is published and some stakeholders feel there is a gap in transparency.

Improving services for women's health

From her **keynote speech** at the Welsh Labour conference in June 2025, the First Minister reaffirmed her commitment to women's health, stating she is putting it **"front and centre"** of her leadership. She promised to deliver the **Women's Health Plan** in full and to ensure that women's health hubs are established in **every part of Wales** before the next Senedd election.

However, in its **scrutiny of the Welsh Government's 2025-26 draft budget**, the Health and Social Care Committee raised **concerns about the delivery** and sustainability of this ambition. While the Committee welcomed the Women's Health Plan and its aims, it made **two key recommendations** to strengthen its implementation.

First, the Committee called for greater clarity on the role and scope of the **new Women's Health Hubs**. It stressed that the hubs must go beyond a narrow clinical function to tackle a broader range of women's health issues – and play a meaningful role in addressing the gender health gap.

In **response**, the Welsh Government accepted this recommendation and confirmed that the Women's Health Network is currently developing a detailed service specification. The hubs will offer integrated care tailored to women's needs, including reproductive and gynaecological health, mental health support, and chronic disease management. Their purpose is to improve access, promote prevention, and offer coordinated, holistic support for women across their life course. Each health board is expected to establish a **pathfinder hub by March 2026**. While initial services may focus on reproductive health, the Welsh Government emphasised that this reflects the priorities identified in its earlier **Discovery Report**.

The **second recommendation focused on funding**. The Health and Social Care Committee urged the Welsh Government to provide a more comprehensive and sustainable financial commitment to ensure the Women's Health Plan delivers **tangible, long-term results**. The Welsh Government accepted the recommendation in principle, pointing to an allocation of **£3 million** for the development of the hubs. An additional **£3 million** has been invested in the creation of Wales's first **Women's Health Research Centre**, alongside a previously announced **£750,000** for focused research on women's health.

These investments, the Welsh Government stated, are part of a broader commitment within the **£11 billion NHS Wales budget**. Further work is underway to explore commissioning **specialist services** in areas such as endometriosis care and surgical abortion, placing these on a more stable, long-term funding footing.

7. Green jobs and growth

The Welsh Government describes this priority as “**creating green jobs that tackle the climate crisis and restore nature, while making families better off; accelerating planning decisions to grow the Welsh economy**”.

Relevant Programme for Government well-being objectives:

Build an economy based on the principles of fair work, sustainability and the industries and services of the future (Senedd Research article, September 2023: ***Building the economy: Is the Welsh Government delivering on fair work, sustainability and the economy of the future?***)

Build a stronger, greener economy as we make maximum progress towards decarbonisation (Senedd Research article, September 2023: ***Decarbonising Wales’ economy: a spotlight on transport and agriculture***)

Embed our response to the climate and nature emergency in everything we do (Senedd Research article, September 2023: ***Tackling the nature and climate emergencies: Is more progress needed to achieve government commitments?***)

In April 2019, **the previous Welsh Government declared a ‘climate emergency’** to highlight the “magnitude and significance of the latest evidence from the Intergovernmental Panel on Climate Change”.

Annual territorial greenhouse gas emissions data for the UK nations are published by the **UK National Atmospheric Emissions Inventory**, the **latest of which is for 2023**. Up to 2023, Wales’s total emissions have fallen by 38% compared to the baseline (1990 for some gases and 1995 for others).

Part 2 of the Environment (Wales) Act 2016 requires the reduction of greenhouse gas emissions to net zero by 2050, and for the Welsh Ministers to lay out policies for decarbonisation accompanying five-year carbon budgets. The Welsh Government **achieved its first carbon budget (2016-2020) and 2020 interim target** with an average emissions reduction of 27.8%, greater than the 23% goal.

Creating green jobs that tackle climate crisis and restore nature, while making families better off

The Welsh Government's **Economic mission: priorities for a stronger economy**, published in 2023, stated that a just transition and green prosperity was one of its four economic priorities. It said "the Green economy is going to be one of the most important areas of economic development for the next decade".

However, in May 2025 **three renewable sector trade bodies** – RenewableUK Cymru, Marine Energy Wales, and Solar Energy UK – published a report which said that:

Over the past decade, the progress of the renewable energy industry in Wales has been slower than across other UK nations, including England, where a ban on onshore wind activity was in place.

The report called for the Welsh Government to adopt a 'maximising renewables' approach to development; set minimum targets for renewable energy technologies; create an improved regulatory and policy framework; and accelerate progress on a renewable energy sector deal.

On 19 June, **the Crown Estate announced** the preferred bidders to deliver two floating offshore windfarms in the Celtic Sea – Equinor and Gwynt Glas (a joint venture between EDF Renewables and ESB). It will set out details on next steps to deliver a third windfarm in the Celtic Sea in September 2025. **Research commissioned by the Crown Estate** says that this could support up to 5,300 jobs and increase UK Gross Value Added (GVA) by up to £1.4 billion.

Responding to the announcement on 19 June, **the First Minister told the BBC that** "obviously the first thing we'll be doing as a government is picking up the phone to those companies and saying 'right, how do we work together to maximise the number of jobs for Wales?'".

The Crown Estate says preferred bidders have "identified Port Talbot and Bristol ports as the likely locations" for assembly of the wind turbines. The UK Government's **Spending Review 2025** confirmed £80 million funding through the **Floating Offshore Wind Manufacturing Investment Scheme** (FLOWMIS) to support deployment of floating wind infrastructure at the port of Port Talbot, subject to final due diligence. The Cabinet Secretary for Economy, Energy and Planning **has said that**, while she is "delighted" the funding has been confirmed, **she would have** "liked to have had that certainty around the FLOWMIS funding earlier".

On 24 June, the Welsh Government's floating offshore wind task and finish group **published its action plan**. Key recommendations include:

- establishing a forum where key partners work together to maximise the local benefits of new windfarms in the Celtic Sea by autumn 2025;
- streamlining the planning and consenting process, and providing developers with a clear roadmap of requirements to accelerate project timelines and reduce costs;
- implementing targeted support for Welsh businesses to enter the offshore wind supply chain;
- co-ordinating skills development across institutions to address sector-specific skills gaps in areas like wind turbine technology and high-voltage electrical engineering; and
- integrating the steel and concrete sectors with offshore wind development.

The Welsh Government's **response to the Economy, Trade and Rural Affairs (ETRA) Committee's Green Economy report** highlights the role it hopes the forthcoming investment summit in Newport will play in securing investment:

Our Investment Summit will bring to Wales investors in that greener economy, it will present the opportunities that this country has to offer and the energy transition that has already begun.

Accelerating planning decisions to grow the Welsh economy

The ETRA Committee's **Green Economy report** found that, while the Infrastructure Act 2024 had streamlined the infrastructure consenting process, there were "concerns about the lack of capacity in the planning system". These led to delays which **RenewableUK Cymru described as** a "significant risk to our renewable energy and net zero ambitions in Wales – which will inevitably impact related economic opportunities".

On 26 June, the Cabinet Secretary for Economy, Energy and Planning **set out the actions the Welsh Government will take** to try to accelerate planning decisions:

- investing £9 million into planning services provided by Planning and Environment Decisions Wales, Natural Resources Wales, and the Welsh Government planning directorate;
- providing funding for two Senior Planner roles to work on infrastructure applications as part of a shared planning service in north Wales;
- introducing new fee regulations by the end of 2025, with increased fee revenue

being reinvested into planning services; and

- creating a new Town Planning Bursaries scheme to increase the number of qualified planners, with the Welsh Government paying for graduates to obtain a post-graduate planning qualification.

Green skills

During an evidence session at the Welsh Affairs Committee on 12 February 2025, **when questioned about green skills**, the First Minister said part of her concern surrounding skills relates to not wanting to “go too early”:

We can put people in sixth forms through a particular green skills course at the moment and they will come out in two years’ time. But floating offshore wind probably will not be ready in two years’ time. You do not want to build up frustration- to watch those people be skilled up and leave.

During this evidence session, the First Minister also confirmed a task and finish group had been set up using part of £1 million of funding available for skills to map out a timeframe for “who will do what and at what point”.

The ETRA Committee’s **Green Economy report** notes several witnesses were concerned about **skills shortages**. The think tank, Onward, said skills shortages were a particular problem for the green transition in almost every sector. The Federation of Small Businesses Wales noted a “mismatch between the skills in the education system and those that business needs”. They added this may be attributed to “a lack of foresight in anticipating skills requirements and a failure to adequately adapt vocational education and training to address the evolving needs of the labour market.”

In relation to a challenge of retraining and upskilling workers, stakeholders reported a range of issues including further education and higher education providers being uncertain of the demand for such courses and an unclear pipeline of work undermining investment in skills and training.

The ETRA Committee’s Green Economy Report suggests “if the Welsh workforce does not have the skills to perform those [green] jobs, business will look elsewhere and those jobs will be created there”. It goes on to highlight the importance of the Welsh Government understanding the skills of the current workforce, the future need and how it ensures those two elements meet at an appropriate time. Additionally, it says Welsh Government “must work with industry and skills providers to ensure the skills are there to encourage investment in Wales and create well-paid and high-skilled jobs”.

While Welsh Government ‘**accepted in principle**’ the report’s recommendation for a skills audit, data limitations were noted as a particular challenge. In its response, it pointed to a Green Skills Review being underway, which is expected to be completed by September 2025.

8. Opportunity for every family

The Welsh Government describes this priority as “**boosting standards in schools and colleges and providing more homes for social rent, ensuring every family has the chance to succeed**”.

Relevant Programme for Government well-being objectives:

Continue our long-term programme of education reform, and ensure educational inequalities narrow and standards rise (Senedd Research article, September 2023: ***Reforming education: the Welsh Government’s mission to improve standards and tackle inequalities***)

Protect, re-build and develop our services for vulnerable people (Senedd Research article, September 2023: ***Supporting ‘vulnerable’ people: what is the Welsh Government delivering?***)

Make our cities, towns and villages even better places in which to live and work (Senedd Research article, September 2023: ***Cities, towns and villages: things can only get “even better”***)

Boosting standards in schools and colleges

The Welsh Government has had a ‘**national mission**’ to improve standards of **education**, in various forms, ever since the **2009 Programme for International Student Assessment (PISA) results**. The Education Minister at the time described these as a “**wake up call to a complacent system**” and “**evidence of systemic failure**”.

Policies pursued since have included a greater focus on **literacy and numeracy** including through annual tests or ‘**personalised assessments**’ as they became known; more emphasis on **teachers professional learning and leadership** in education; and capital investment in **school and college buildings**. Amidst concerns over local authorities’ education services, their school improvement functions were **pooled into regional consortia**. After over a decade of regional working, these arrangements are **currently being reversed** under the **School Improvement Partnership Programme**.

In March 2023, the Welsh Government published a **‘roadmap’**, giving an updated overview of the Welsh Government’s education priorities. The **Cabinet Secretary for Education’s priorities** are **improving attainment, especially in relation to literacy and numeracy, and improving attendance**.

There have been targeted funding and interventions, aimed at narrowing the attainment gap – between pupils eligible for free schools meals (eFSM) and their peers – including the **Pupil Development Grant (PDG)**. The Welsh Government spends around £130 million per year on the PDG, which supplements schools’ budgets according to their numbers of pupils eFSM (£1,150 per eligible pupil).

Major education reforms

Also central to efforts to raise standards is the **implementation of major education reforms**:

- The **Curriculum for Wales**, established under the **Curriculum and Assessment (Wales) Act 2021**, continues its year by year extension into Year 10 this September.
- The new **Additional Learning Needs (ALN) system**, established under the **Additional Learning Needs and Educational Tribunal (Wales) Act 2018**, completes its phased roll out by the end of this school year.

All learners identified with ALN are entitled to an Individual Development Plan (IDP). This has workload implications for schools, which may explain in part why **fewer pupils are being identified/recognised as having ALN – a 44% decrease since the new system began its introduction three years ago**. This is **despite the definition for ALN remaining the same** as previously for Special Educational Needs (SEN). At the same time as the decrease in recorded ALN numbers, schools and local authorities have reported a **greater number of learners presenting with complex needs**.

A **Senedd Research briefing on a recent petition** gives some further information on ALN reform.

Challenges facing education

The **COVID-19 pandemic disrupted the national mission** to improve standards in education. The Programme for Government commitment to **recruit 1,800 additional staff** to support the educational recovery from the pandemic was

exceeded, although there are other **challenges to teacher recruitment and retention**.

Pupil **attendance continues to cause considerable concern**, having **not returned to pre-pandemic levels**. The **latest fortnightly data** published by the Welsh Government shows that for the 2024/2025 academic year to 20 June, **primary school attendance is 92.7% and secondary school attendance is 88.8%**. Levels have risen from their lowest point in 2022/23 but remain lower than before the pandemic when they were 94.7% and 93.9% respectively (2018/19).

There are also **particular concerns** over levels of persistent absence (defined as a pupil missing more than 10% of school) and the attendance of disadvantaged pupils, as measured by those eligible for free school meals (eFSM).

Addressing **behaviour and discipline** in schools is also high on the policy agenda with the Welsh Government holding a 'round table on violence and safety' and a 'national behaviour summit' in May.

Estyn's observations

The **latest annual report** from Estyn's Chief Inspector (HMCI) found a mixed picture for education and training in Wales, with some strong practice but key areas in need of improvement.

HMCI reports that the quality of teaching and assessment is often not good enough, with over half of **secondary schools** and a third of **primary schools** inspected receiving a recommendation to improve teaching. The report **also highlights** shortcomings in schools' self-evaluation and improvement practices, which are "holding back progress for too many learners".

A **recent Estyn report** has also found that "the quality of teaching of mathematics was too variable and pupils' standards in mathematics were too low".

There has been an increase in numbers of pupils going to further education (FE) colleges, in recent years. However, **HMCI reported** a greater proportion of learners than usual in FE have struggled to adapt to the demands of AS/A level programmes. He also said "the proportion of learners achieving higher grades in graded provision, both on vocational and A level programmes, was too low" and that "colleges recognised the need to improve successful completion rates".

Educational outcomes

Due to the cancellation of exams during the pandemic, qualifications were awarded differently in 2020 and 2021. When exams returned in 2022, there was a **planned gradual transition back to pre-pandemic levels** over three years (to 2024). It has therefore not been possible to compare results over time for some years now.

However, it is possible to look at the relative position of different groups of pupils and how these have changed over time, which is central to the Welsh Government’s Programme for Government objective to narrow educational inequalities. Table 1 below shows that the **attainment gap between pupils eFSM and their peers widened both during the period before the pandemic and in the time since.**

Table 1: GCSE attainment by eligibility for free school meals

% of pupils achieving grades in GCSE			
	A*-A		
	eFSM	Not eFSM	% point gap
2015/16	8.0%	22.6%	14.6
2018/19	6.6%	21.4%	14.8
2023/24	7.4%	22.2%	14.8

% of pupils achieving grades in GCSE			
	A*-C		
	eFSM	Not eFSM	% point gap
2015/16	50.0%	74.9%	24.9
2018/19	40.7%	68.8%	28.1
2023/24	39.6%	68.4%	28.8

% of pupils achieving grades in GCSE			
	A*-G		
	eFSM	Not eFSM	% point gap
2015/16	96.6%	99.2%	2.6
2018/19	92.0%	97.7%	5.7
2023/24	89.7%	97.3%	7.6

Source: Welsh Government, [Examination results: September 2023 to August 2024](#), 5 December 2024, Table 5b

Data released by the Welsh Government in June 2024 on **personalised assessments in reading and numeracy**, taken by pupils in Years 2 to 9, also indicated a decline coinciding with the pandemic. However, the **latest data for 2023/24**, published on 19 June 2025 showed **some improvement on the previous year**.

Wales' **Programme for International Student Assessment (PISA) scores** fell further behind the rest of the UK and the international average in the latest 2022 cycle.

Providing more homes for social rent

The Programme for Government contains a commitment to **build 20,000 new low carbon social homes for rent**.

The latest **affordable housing provision statistics** were published on 11 December 2024, showing that 8,933 homes had been delivered towards the 20,000 target by March 2024.

The Welsh Government's main capital grant supporting the development of social and affordable housing is the Social Housing Grant (SHG). This grant stream includes the Transitional Accommodation Capital Programme (TACP), which was introduced in 2022-23 to support projects that bring housing forward quickly in a flexible way, including through acquisitions, remodelling, and modern methods of construction. Acquisitions may be for permanent or longer-term temporary 'meanwhile' accommodation.

In the current year's budget, the SHG has been increased to £437.25 million, a 32.5% increase on last year's SHG. The Cabinet Secretary for Housing and Local Government, Jayne Bryant MS, said this will **contribute towards the 20,000 target** as well as fund social homes that will be started in 2025-26 and completed in the next Senedd term.

In January 2025 the Local Government and Housing Committee published its **report on social housing supply**, which made recommendations in areas including planning, funding, and strategic land management. The report called on the Welsh Government to adopt an aim of increasing social housing as a proportion of Wales's housing stock, from **the current 16%** to at least 20%. The Welsh Government **accepted all but three recommendations** in full or in principle.

In May 2025 the Welsh Government-appointed Affordable Homes Taskforce, chaired by Lee Waters MS, **published its report** and recommendations. The Welsh Government has committed to evaluate and implement the recommendations **'as quickly as possible'**. A **written statement**, published on 26 June, said that the recommendations have cross-Cabinet support and that an Implementation Group, chaired by the Cabinet Secretary, will be established to oversee progress.

The Welsh Government says that a sufficient supply of social housing is **essential to the success** of the **Homelessness and Social Housing Allocation (Wales) Bill**, currently at Stage 1 scrutiny.

9. Connecting communities

The Welsh Government describes this priority as **“transforming our railways and delivering a better bus network; fixing our roads and empowering local communities to make choices on 20mph”**.

Relevant Programme for Government well-being objectives:

Make our cities, towns and villages even better places in which to live and work (Senedd Research article, September 2023 *Cities, towns and villages: things can only get “even better”*)

Build a stronger, greener economy as we make maximum progress towards decarbonisation (Senedd Research article, September 2023: *Decarbonising Wales’ economy: a spotlight on transport and agriculture*)

Transforming our railways

Transport for Wales Rail (TfW Rail) performance

In April 2023, passenger watchdog Transport Focus **wrote to TfW** regarding poor performance caused by “on-going fleet issues.” It highlighted its **March 2023 rail user survey** which put TfW Rail joint bottom in Great Britain for overall passenger satisfaction although this has improved since.

TfW publishes **data on TfW Rail’s performance** on its website.

The **June 2025 user survey** shows that TfW Rail scores “relatively average” for overall satisfaction – though results are still relatively low in areas like punctuality and reliability.

The most recent Climate Change Environment and Infrastructure (CCEI) Committee **report on Transport for Wales** welcomed the performance improvement. However, it also noted **comments from TfW Chief Executive** James Price during scrutiny in January that delays in new rolling stock coming onstream remain a factor in ongoing performance issues.

TfW’s paper for that meeting indicated that all units will have entered into service “by the end of 2026”. **TfW originally planned** that 95% of journeys would be on new trains by 2023. **Delays have been attributed** to COVID and inflation, as well as **supply chain issues**.

UK Government investment in rail infrastructure

Rail infrastructure (outside the Welsh Government owned Core Valleys Lines) is not devolved. Levels of UK Government investment in infrastructure have been a longstanding source of concern in Wales.

Senedd Research's [**November 2024 article**](#) provides background on this issue.

The [**Wales Governance Centre concluded**](#) that between 2011-12 and 2019-20 Wales would have received an additional £514 million for enhancements (i.e. major projects) via Network Rail had rail infrastructure been devolved as in Scotland.

In June 2023, the [**then Cabinet Secretary for Finance, Constitution and Cabinet Officer wrote to all Members of the Senedd**](#) regarding HS2. She estimated that had HS2 been designated an England only project, and therefore generating a Barnett consequential, additional funding of £350 million would have come to Wales for the years to 2024-25.

[**On 4 June, the Chancellor announced**](#) "£15.6 billion of funding for local transport projects in England's city regions". In the [**11 June Comprehensive Spending Review**](#) (CSR), she promised £445 million over the 10 year lifetime of the proposed Infrastructure Strategy. A subsequent [**Welsh Government statement explained**](#):

£350m will be provided over the spending review period, including £302m to begin to deliver the pipeline of rail enhancement priorities identified by the Wales Rail Board and £48m for enhancements to the Core Valley Lines. Wales will also receive £95m through the 10-year Infrastructure Strategy.

The [**Cabinet Secretary for Finance and Welsh Language said**](#) it "begins to address the historical underfunding of rail investment in Wales".

[**Prof Mark Barry from Cardiff University**](#), drawing attention to the fact that the announcement included around £34 billion in rail enhancement spending in the three year CSR period across Great Britain, concluded "still Wales seems grossly underfunded compared to the rest of the UK".

[**Wales Fiscal Analysis \(WFA\) described**](#) the rail funding as "underwhelming" in the context of the absence of consequentials from HS2. [**WFA estimated**](#) the total loss from HS2 between 2016-17 and 2029-30 (in contrast to the Welsh Government estimate to 2024-25) now stands at £845 million, and "will continue to grow significantly at future Spending Reviews" (note, the Welsh Government estimate above was to 2024-25 not 2029-30).

The Welsh and UK Governments **have been working** with TfW, Network Rail and other stakeholders to develop a pipeline of rail enhancement projects. However, the content of this has not been published. **Media reports indicate** that the Chancellor reportedly told journalists, during a visit to south Wales on 13 June, that she had given the Welsh Government “everything they’d asked for”.

Delivering a better bus network

The **Bus Services (Wales) Bill**, introduced to the Senedd on 31 March, will (if passed) establish a new framework for delivery of bus services, moving from the current deregulated market to a system planned and delivered by the Welsh Ministers and TfW, working with local government and other key stakeholders.

The Welsh Government intends that franchise contracts will be the primary mechanism for delivery of services. The Welsh Government and TfW have **published a Roadmap to Bus Reform** setting out the process that will be followed in delivering franchising.

The CCEI Committee is currently completing stage 1 scrutiny of the Bill. While it has not yet published its report, funding has been a key issue in stakeholder evidence. **On 7 May**, the Cabinet Secretary for Transport and North Wales referred to, “the enormous amount of money that we are already investing in bus services across Wales.” He argued, ““we can achieve savings with the model that we are proposing.”

Stakeholder evidence largely disagrees with this view. Both Bus Users Cymru and Transport Focus were “surprised” by the suggestion. **The WLGA said:**

The question of funding ultimately remains the fundamental one, though. Without additional funding, changing the legislation will not, by itself, deliver on the policy intention and objectives. By introducing gross cost contracts, Welsh Government will have to meet any additional service costs not covered by increased fare box revenue. The more it seeks to expand the network to meet identified needs across Wales, the greater the exposure to this risk becomes.

Fixing our roads

As with other parts of the UK, there is a significant maintenance backlog on Welsh roads.

The Welsh Government’s **January 2023 draft budget scrutiny paper** estimated a £1 billion maintenance backlog on the Strategic Road Network (SRN) which it is responsible for. On 9 May, **a Welsh Government press release** indicated that the

£25 million SRN maintenance programme announced in the Final Budget for 2025-26 was getting underway. It said:

Since 2021 the Welsh Government has spent more than £81m on resurfacing around 321km of roads on the trunk network [ie the SRN] across Wales. Combined with the forecasted spend for 2025-26 this means that by the end of this Senedd term £118m will have been spent to repair more than 500km of roads that connect our communities.

An unpublished 2020 County Surveyors Society report on local authority road conditions estimated a total maintenance backlog on local roads of £1.7 billion at that time.

The **Welsh Government's Final Budget** allocated £6 million in 2025-26 and a further £4 million in 2026-27 funding for a new Highways Management Local Government Borrowing Initiative, to support local authorities to borrow £120 million for highway maintenance.

Empowering local communities to make choices on 20mph

Following a strong public response to the introduction of a default 20mph speed limit on restricted roads, the former Deputy Minister for Climate Change **established a review team** to consider the guidance on 30mph exceptions.

The **review's final report was published** in May **and updated guidance** in July 2024.

The Cabinet Secretary for Transport and North Wales has established a three stage process for local authorities in reviewing implementation. A 'National Listening Programme' was followed by a second phase of refining guidance and identifying roads for speed changes. The **third stage, from September onwards**, was making changes by Traffic Regulation Orders (TROs).

During scrutiny in June 2024 the Cabinet Secretary said "it would be improper to speculate" on the number of local roads moving back to 30mph as it's a local authority matter.

The process of consultation and engagement around the TRO process is still underway, and there is no official collated list of changes. However, **recent media reports** have set out the current position across Wales.

While the First Minister's priority refers to empowering communities, the decision is ultimately for the local authority as the statutory highway authority. Some, such as

Ceredigion Council and **Denbighshire Council**, have confirmed that there will be no changes.

Senedd Research analysis in October 2023, following implementation of the policy, indicated that Denbighshire had the lowest proportion of its network at 30mph. Just 0.6% of its roads were 30mph, compared to a national average for Wales of 2.8%.

10. Interaction with committees

Responding to recommendations

During the Committee for the Scrutiny of the First Minister's session on "Wales and the world" on **13 December 2024**, the First Minister spoke about the number of recommendations the Welsh Government receives from Senedd Committees [all bold is Senedd Research's emphasis]:

And you keep on telling me, 'What are you doing about delivery?' **Every time you ask me to do something else, you're taking it away from what we said we were going to do.** So, I'm just trying to get you to get the same place as I'm trying to get the officials, which is, 'We said we're going to do that. Don't get distracted. Let's carry on', because otherwise you lot will be hauling me in and saying, 'Why haven't you delivered?' And the answer is, 'Because you've been telling me to do other things.' So, I'm trying to be clear in terms of, **'Stick to your priorities, stick to what we said we're going to do'**, because I can just imagine how much work that would take. [...]

So, I'm trying to get really practical, and I'm also trying to get people to say 'no', because we can't do everything. **If you want us to deliver, we're going to have to say 'no' more often.**

I think it's important for me to tell you this, because you're representing the Chairs of the committees here. I know you do great work on the committees, but when we get 100 recommendations, in future, **you're going to get a hell of a lot more noes from us, because every time you ask us to do something, you are distracting us from our core activity.** Now, if there are things that add and help us to deliver the core activity, great. But you'll be getting a lot fewer 'yesses in principle'. I think it's probably more honest for us to say, 'We're not doing it.' But I just want to make that clear today, and I'm making it clear to the commissioners as well—the children's commissioner, the older people's commissioner—**if you come up with 100 priorities for us, we're going to be saying 'no' a lot more often, because it's all about delivery.** And the more you ask us to do, the more you're distracting us from our core purpose. You might not like it, but that's where I'm at, I'm afraid.

When it was put to her that it is the role of Committees to highlight issues to the

Government, the First Minister added:

But I'd be grateful if you, as Chair, would communicate that also to the rest of the committee Chairs. **I will send a letter, following this, just to make that clear**, because I think it's important to manage expectations but also to stop people wasting their time. Gives us 10 things that we can deliver rather than 40 where we won't deliver. We'll struggle to deliver 40. I'd rather deliver 10 that are really important to you that will help us to deliver what we're talking about. I just think, 'Let's get really practical here.'

The **Committee for the Scrutiny of the First Minister asked** the First Minister to copy it into any letter to the Chairs' Forum, although no such letter was sent nor was there any mention of the issue in the **First Minister's response to this Committee** covering other issues.

However, the Welsh Government's response to a recent **Public Accounts and Public Administration Committee report on Public Appointments** suggests it may be taking a revised approach to responding to Committee recommendations. While it provides information regarding the recommendations, the **response does not specify whether the Welsh Government is accepting or rejecting the recommendations**.

Looking ahead to the Seventh Senedd (May 2026 onwards)

The **Future Senedd Committee**, published its report on **parliamentary business in the Seventh Senedd** in May 2025. The Committee set itself the objectives of supporting the current Senedd with its planning, and the Seventh Senedd Business Committee's decision-making on the establishment of committees, in two ways:

- by providing appraised high-level options for the organisation of Senedd business that include time allocations for committee business; and
- by identifying gaps in knowledge about the effectiveness of committees that could be filled before the Seventh Senedd (the Senedd term following the next election in May 2026).

The Committee suggested that further work should be undertaken on the following matters:

- how best to establish arrangements to understand the effect the increase in the size of the Senedd has on the time Members spend preparing for committee work, and whether this leads to better scrutiny outcomes;
- to revisit **Professor Diana Stirbu's report on the Power, Influence and Impact**.

of Senedd Committees to consider the different outcomes delivered by dual-function policy and legislation committees compared to separate policy committees and public Bill committees; and

- to capture and communicate the culture of Senedd committees in the Sixth Senedd to identify norms and practices that are valued by Members, and those that are not.

Much of this work could be undertaken by the **Chairs' Forum**, in consultation with the Business Committee and the Senedd Commission. The Chairs' Forum has launched a **consultation until 12 September 2025** to inform its review of committee effectiveness. The review will be looking at committee culture, the organisation of committee business and stakeholders' interactions with committees, including hybrid working and the ability for witnesses to contribute in their language of choice.

11. How to follow or review the Committee for the Scrutiny of the First Minister's meeting

As set out at the start of this briefing, on **11 July 2025**, the Committee for the Scrutiny of the First Minister is scrutinising the First Minister, Eluned Morgan MS, on delivery of her priorities and the Programme for Government, as the end of her first year in office approaches. This briefing has set out relevant background information and some of the key issues the Committee may cover.

The meeting can be watched live, or afterwards, on **SeneddTV**. A **transcript** will be available a few days after the meeting.

