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Connecting with the Consumer

This year marks the 300th anniversary of the Act of Union – not that between Wales and England, which was several centuries earlier in 1536 – but between England and Scotland. And in some ways it could go down as one that will be almost as momentous. In the elections to the Scottish Parliament in May, the Scottish National Party took power for the first time, and even more surprisingly, after a relatively poor showing, Labour, the party that has for a long time seemed the natural party of government in Wales, has been obliged to take Plaid Cymru, the Welsh nationalist party as its coalition partner.¹ All this against a background of attempts by Britain's new Scottish prime minister, Gordon Brown to renew the sense of Britishness among all the peoples of the United Kingdom².

As in Scotland, a more distinctive Wales has begun to emerge since devolution, coupled with more distinctively pro-Welsh feelings.³ The Assembly is not universally popular but in polls in

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1. "Labour agrees historic coalition", BBC Wales July 6, 2007. <http://news.bbc.co.uk/1/hi/wales/6275036.stm>
2. *Gordon Brown, Bard of Britishness*. By Tom Nairn *et al.* Institute of Welsh Affairs (IWA). Cardiff. October 2006.
3. Research from the Economic and Social Science Research Council last year revealed that some 21 per cent of a survey sample saw themselves as just Welsh,

advance of the 2007 Assembly elections, 30 per cent of a sample⁴ said things were better for them since it came into being, against 15 per cent who thought they were worse. The rest could see no difference. When presented with a range of options, twice as many (40 per cent) favoured full law-making powers – one of the key policies the new coalition has agreed should be put in due course to a referendum – as wanted the Assembly to be abolished and, by implication, a return to be made to the *status quo ante* of rule from Westminster and Whitehall.

Policies have begun to diverge too. In education the previous Labour administration has drawn praise and criticism for choosing to move away from the target-driven approach in England, for abandoning tests for younger pupils and introducing its own Baccalaureate qualification, a move England is now following. More recently, it has announced a move to a more Continental approach for early years schooling where learning will be through play rather than formal lessons. In health, partly for geographical reasons, Labour rejected the choice agenda being followed in England, arguing that giving patients the right to choose hospitals is unrealistic when there may be only one hospital within scores of miles and when patients prefer to be guided on hospital choice by their medical practitioners anyway. It has also placed greater emphasis on health promotion.

In a further demonstration of its wish to separate itself from well-established policies across the border in England, the new Labour/Plaid Cymru coalition has agreed not to use private capital in National Health Service hospitals (the Private Finance Initiative), and to end the use of private hospitals by the NHS.

No less surprisingly, the Conservatives have embraced devolution, despite campaigning ten years ago against the very existence of the Assembly. One of their leading thinkers, a former adviser to Lady Thatcher, Lord Morris of Fforestfach, told the party that it was

up from 17 per cent in 1997. Around 27 per cent see themselves as more Welsh than British, 29 per cent feel equally Welsh and British and 17 per cent feel either more British than Welsh or completely British. Significantly, it was among the youngest people that the largest mainly Welsh answers were found. *Devolution and Constitutional Change Programme*. ESRC London. November 13, 2006. www.devolution.ac.uk

4. “Wales gives a big Yes to Welsh powers”, *The Western Mail*, Cardiff. March 10, 2006.

vital it had a national appeal in Wales – and that meant a commitment to being thoroughly Welsh⁵. Before Labour and Plaid reached agreement (in late July 2007), the Conservatives had reached a potential coalition agreement with Plaid and the Liberal Democrats, including a number of nation-building initiatives that would have proved anathema to earlier generations of their party.

Interesting, too, at least from the perspective of constitutional theorists, is the way in which since devolution the territory of Wales has acquired a political and legal dimension as opposed to what has historically been a mainly emotional one. The Wales Spatial Plan drawn up by the Assembly in 2003⁶ refers to “the space that is Wales” and later to “the management of resources and territory”. Within this framework efforts have been made to counteract some of the significant cultural and environmental differences between north and south Wales and also socio-economic differences between east and west, in order to eliminate the apparent disjuncture between Wales as a functional or physical space and Wales as a political arena.

Business – at least in the shape of the voluntary and representational sector – has re-organised itself too to reflect new Welsh territorial realities, and there have been some small additions to consular representation in Wales. The US embassy, while still only offering a virtual presence in Cardiff, does now have a Welsh interests section – and a message is sent every year by President Bush to the people of Wales reflecting on shared inheritance.

There has also been a rush to develop new national institutions since 1997, mirroring the late 19th century development of Wales’s national museum and library, its university and sporting teams. Apart from the new Senedd or Parliament building, a new Welsh national concert and opera venue – the Wales Millennium Centre, home to Welsh National Opera, Europe’s biggest touring opera company – and the rebuilt Millennium Stadium, Wales like the other UK nations

5. “Welshness is a winner says Tory”, *The Western Mail*, September 17, 2004. See also *Building Self-Reliance. Why Welsh Conservatives should support the Richard Commission case for legislative powers for the National Assembly*. Lord Griffiths of Fforestfach. IWA, Cardiff. October 2004.

6. *People, Places, Futures. The Wales Spatial Plan*, Welsh Assembly Government (WAG). November 10, 2004. <http://wales.gov.uk/about/strategy/spatial/sppublications/walesspatial/lang=en>

now has its own National Botanic Gardens, and there is talk of a Welsh national art gallery, or museum of modern art.

Similarly, Wales now has a full hand of international artistic prizes and several new festivals, all brought into being over the past ten years or so. These include BBC Cardiff Singer of the World, a Dylan Thomas literary Prize, and Artes Mundi for works of art, plus the Brecon Jazz Festival and the Faenol Music Festival in north Wales. Existing institutions have been strengthened. There has been substantial investment in Wales's national museums, including a new industrial and maritime museum for Wales in Swansea. In sport we have seen the creation of a Welsh football league (though the three top sides play in English competitions) and the rugby side has been re-organised on the Irish provincial model to create regions that can compete effectively in European competition as standard-bearers for Wales.

Yet, although there are a number of signs of a strengthening national identity, which have perhaps gone some way towards creating a new Welsh image and several new Welsh brands, there is something missing that stunts this ongoing effort – the weak Welsh presence in modern commercial fields, and particularly those closest to the consumer. Too much of Wales's image is based on (usually subsidised) artistic, cultural and heritage icons and / or its industrial and sporting past. In a world where the brand you create for yourself is all-important, Wales has only half a brand – and one that says come and visit us and look at what we used to do, or come and see what a show we put on. We have too little to show that we are and can continue to be competitors in a modern commercial world.

If you ask people to name a product that instantly says 'Welsh' and 'excellent', you are likely to get blank stares. With some prompting they might think of Welsh National Opera and, during the *annus mirabilis* of 2005, the Welsh rugby team – both of them businesses of a sort but not in the conventional sense. They might also mention the Welsh countryside or coast, or the environment generally. When it comes to outstanding Welsh businesses or commercial products they would be stumped. You would not expect people to be able to name industrial products but what about food, clothing, gadgets and gizmos and the other consumer products found in the shops, or

indeed service sector businesses? Here, too, it would be hard for most people to name a single Welsh product. The reason is that few of these companies exist and those that do are small. Only three Welsh companies have a significant market capitalisation – that is the value of those companies as measured by the stock market – and indeed only a handful are listed on the world's exchanges.

If you ask the same of Scotland, most people can name a handful of Scotch whiskies, and a range of other Scottish food products. Scotland also has strong service sector companies that are known well beyond its borders. Two of Britain's big four banks are effectively Anglo-Scottish companies – Royal Bank of Scotland (now the owners of National Westminster Bank) and Halifax Bank of Scotland are present on every important High Street in Britain as well as in many centres overseas. Both of these have substantial Edinburgh operations, matched by a strong UK life insurance presence in Glasgow. Wales's indigenous financial institutions are by comparison tiny.

Two of the UK's big transport companies, First Group (which runs the railway services between London and Wales) and UK-wide bus and train operator Stagecoach, are based in Scotland. Scottish Media Group controls a range of media outlets not just in Scotland but also throughout the UK. Other strong icons helping to promote a strong image of Scotland are football sides Celtic and Rangers (both regular participants in European football finals), four or five Championship golf courses, novelists Irvine Welsh and Ian Rankin, and Dolly the Sheep.

For Ireland the same would be true. Guinness, though owned by British group Diageo, is inextricably associated with Ireland because it is marketed heavily as the country's best-known and most popular drink. The Irish have also managed to establish over recent years a successful new spirit-based drink – Baileys – and a new brand of cider, Magners, both of which help to project an image of Ireland around the world, as do the many Irish bars to be found in cities on all five Continents. Major Irish food brands are also familiar in Britain and elsewhere. In the financial world individuals such as John Magnier (racing and property), Sir Michael Smurfit (paper) and Sir Tony O'Reilly (publishing) are well known. Ryanair may

not be the world's favourite airline but it projects an image of a successful country with business operators able to compete in the toughest markets. Indeed, Ireland, a largely agrarian country only 50 years ago, now has three companies in the world's top 500 by market capitalisation.⁷

It is puzzling that in Wales we have failed over the course of time to establish even a major dairy products based industry – despite our large milk output and proximity to the English market – when other milk producers such as the Irish, the Scots and the Danes have done so. When dairies and creameries come under threat in Wales they are invariably rescued (or not, as the case may be) from beyond Wales's borders. We have had some success in this area – Rachel's Dairy was one of the first true organic brands in Britain – but it is one of a small number of similarly successful firms.

Why has Wales failed to develop a strong indigenous business sector comparable in its size and significance with those of its somewhat larger but still relatively small Celtic neighbours, Scotland and Ireland, and in an age where globalisation is carrying all before it, does it matter? Can we expect a strong business sector to emerge as Wales grows in confidence in its nationhood?

Many of the reasons are to be found deep in the history of industrial development in Wales and in inherited and deep-rooted attitudes towards business and towards making money. Wales's industrial strength was built on minerals either directly exported, such as coal, or semi-processed into steel for incorporation into products elsewhere in the wider UK and world manufacturing economies. These two major sectors were both nationalised in the immediate post-war period, removing control from Wales and stifling the growth of an entrepreneurial class that might have explored other downstream opportunities to develop Welsh products. When these industries went into serious decline, Government policy targeted overseas investors, offering the lure of low unit labour costs⁸. As a result, Wales's manufacturing effort is very largely externally owned

7. FT Global 500. June 10, 2006. Financial Times, London.

8. "Welsh Unit Labour Costs Lowest in UK", *Investor Wales*, Summer 1995. Welsh Development Agency (WDA). Cardiff.

and the Welsh economy continues to have a strong bias towards intermediate products that are incorporated into other downstream goods.

Other reasons for the slow emergence of entrepreneurial attitudes in Wales lie deep within the Welsh psyche, including entrenched political and social attitudes towards business ownership and, perhaps historically, the old British fault writ large in the case of Wales of regarding work in the service sector as not proper work, as opposed to coalmining or steel making or other heavy manufacturing.

The previous Welsh Assembly Government argued quite rightly that unemployment in Wales was low and the rate of job creation over recent years has been strong⁹, even if much of it had been in the public sector. Indeed, there are now more people in work in Wales than ever before. Wales still manages to have a reasonably large manufacturing sector – by UK standards – contributing to a range of products put together and sold around the world by big industrial groups based elsewhere. Ford makes several million engines every year in Bridgend and these go into Ford cars built in the Americas, Europe and Asia. Airbus could not fly without its Welsh wings made in Flintshire and EADS, the Franco-German aerospace group has a strong presence in Wales. Wales also has its share of high technology companies and university spin-outs and prominent businesses in new business areas such as opto-electronics.

There are also, of course, Welsh headquartered businesses. Cardiff has seen a growth in its financial services sector over recent years and, amid the various UK owned companies providing largely back-office or call centre services from the city, there is one substantial group, Admiral Insurance, which was started in the Welsh capital some ten years ago by an American, Henry Engelhardt, and has become highly successful. Floated on the stock exchange in 2004, it accounts for a substantial part of the capitalisation of Welsh companies – but is still small by UK standards. Another financial services company, Moneysupermarket.com, based in north Wales,

9. “Wales can do it, says First Minister”, Welsh Assembly Government internet site press archive, September 20, 2006. <http://wales.gov.uk/news/archivepress/officefirstminspress/firstminpress2006/1088107/?lang=en>

has recently floated on the London Stock Exchange and achieved a high valuation.

One of Britain's biggest legal groups outside London, Eversheds, has its regional headquarters in Cardiff, as does retail chain Peacocks. North Wales also has two significant house builders, Redrow and David McLean. There are also a number of prominent Welsh entrepreneurs operating internationally such as Sir Terry Matthews in electronics (in Canada and Wales), Sir Howard Stringer, the chief executive of Sony worldwide, and in biotechnology Sir Chris Evans, the founder of Merlin Biosciences. Sir Lindsay Owen-Jones, the recently retired chief executive of L'Oréal, one of France's (and Europe's) biggest companies, was also Welsh. Because they operate largely outside Wales, however, Welsh people can only feel a sense of vicarious satisfaction in their success.

We have also developed some useful brands over recent years but these tend to be concentrated in the food sector, a highly specialised niche, and known only to those who make a special point of finding out about things Welsh – Penderyn Welsh whiskey¹⁰, Rachel's Dairy, Halen Mon, Snowdonia Cheese and, in mineral waters, Ty Nant, Radnor Hills, Princes Gate, Decantae, and Brecon are a few examples. Extensive promotion of Welsh lamb and beef, including the meat from Welsh black cattle, has also been successful in bringing Welsh meats to the attention of chefs and other buyers in France and Italy¹¹. As in other countries, the universities are also the source of many new businesses, particularly Cardiff, which has recently done a deal with a specialist finance house to commercialise its intellectual property.

Wales needs many more similar companies, and needs them to grow into sizeable businesses. However valuable it is to have big multinational companies in Wales making largely intermediate products, they only project an image of Wales or of Welsh quality

10. The company, established in the late 1990s, is hoping to increase exports from 20 per cent at present to 50 per cent of output by 2010 and to raise output to 250,000 bottles a year.

11. Welsh lamb, for instance, is marketed as a quality product (through the Monoprix chain of stores in France, namely) thanks to its *Protected Geographical Status in Europe* label.

at the margins. While each of these businesses creates significant employment in Wales, none of them places any aspect of Welshness at the core of its message although this could be a way of helping deliver branding benefits to Wales. And, as the nation has found increasingly over recent years, their lack of local roots makes them much more likely to leave Wales to take advantage of lower labour costs or other incentives in other parts of the world.

Moreover, because they are not rooted in Wales and do not have Welshness at their core, they will be less likely to require locally the full range of professional services they need to draw on to carry on their business, and will choose instead to use firms close to their headquarters, wherever that might be. As such, they play a much smaller role than locally owned businesses would in developing these other sectors. This has stunted the growth of marketing and other professional services in Wales. Though Cardiff is home to a large number of public relations companies, a significant proportion of their output is for the public sector, and the skills needed for working in consumer fields have not developed to the same extent. There is, as a result, a lack of marketing skills that the private sector in Wales could use, and a seriously under-developed advertising services sector.

The absence of strong Welsh-based brands also makes it much more difficult to adapt and survive in a world where globalisation is leading to the concentration of production in the lowest-cost centres. China and India, given the virtually unlimited pools of labour to which they will have access for generations to come, are going to dominate world manufacturing for the foreseeable future. Yet, while advanced economies may not be able to compete as manufacturers with low cost producers any economy with ambition does need to be involved in organising the design, manufacture, distribution and sale of products, if it is to share in the benefits of globalisation and not always be its victim. These higher added-value areas are where the jobs are increasingly being created in the western world.

Headquarters companies, including branded goods companies, have recognised this and moved some production overseas. Such companies, however, continue to base their headquarters functions in their country of origin while deriving all the benefits, such as greater competitiveness in international markets – which access to

really cheap labour offers. If you lack the brand in the first place, you are not in a position to outsource your production. Companies in Wales – such as Burberry which has moved manufacturing from Wales to China – depart and leave no trace behind because they have their headquarters elsewhere and will organise their production in overseas countries from that location.

Strong companies and strong brands also play another very important role in modern society as the equivalent of mediaeval patrons. Scotland's and Ireland's big companies (not to mention England's) support and enhance the image of their respective countries and their own businesses through support for charities, sports teams or the arts. In Wales there are two organisations that are called on repeatedly to fulfil this role – Brains, the brewers, and Principality Building Society. UK national companies (with a few honourable exceptions, such as Coutts in the case of Welsh National Opera, Coca Cola in sport and BT in a number of fields) rarely see it as to their advantage or part of their marketing strategy to support essentially Welsh causes.

At its most basic level, therefore, brands have become a key component in economic success but the absence of business and products that can readily be identified as Welsh has another effect. Being the country that owns top quality products such as Guinness, Scotch Whisky, the Maersk shipping line (Denmark), Hamleys and House of Fraser (Iceland) or Nokia (Finland) feeds the self-esteem of the inhabitants of these basically small countries, even if only subconsciously, leaving them with the underlying feeling that they belong to a nation which has something to offer the world that is better than anybody else's product in the same field.

This native commercial success – and the iconography associated with it – is important for countries and regions¹². It conveys an image of a country where businesses and individuals succeed and this in itself can be helpful in persuading other businesses to invest there. Our lack of these potent modern commercial symbols can make it dangerously easy for people in Wales to live in the past reflecting constantly on former glories, or dependent on a narrow range of

12. "Welsh by Design", David Lea-Wilson. *Agenda*, the journal of the IWA, IWA, Cardiff, Winter 2003-4.

talented individuals (Bryn Terfel, Katherine Jenkins, Ioan Gruffudd, Tom Jones, Anthony Hopkins, Shirley Bassey, Catherine Zeta Jones, Julien MacDonald and Ryan Giggs) as a source of our pride that we are special and distinctive. We also load excessive expectations on to any new star that emerges, such as Connie Fisher (star of the London musical *Sound of Music*) or James Hook in rugby. It leaves us heavily dependent on our most visible area of sporting achievement (rugby), where we have consistently been in the world's top eight but where we believe our rightful place to be in the world's top three or higher, and on heritage images as a form of validation.

Wales must make the transition from externally owned business and small scale brands into creating an economy that more closely resembles its Celtic neighbours, where strong locally-owned companies help to project positive images to the world. Policy has not sufficiently identified this weakness to date, however, and there must be doubt whether the current armoury of policies - unless significantly changed by the incoming coalition administration – will bring about the changes needed.

Many of the policies that have emerged from the Assembly, such as *Wales a Vibrant Economy*¹³, over recent years have focused heavily – and in a way quite rightly – on improving skills and encouraging people to enter into business on their own account. These strategies are crucially important but even if they work they will only do so over the very long term and may merely add to the already very large number of micro businesses in Wales. There have also been attempts to identify growth businesses that are worth special support through the Knowledge Bank for Business initiative.¹⁴ There appears little evidence, however, of any recognition of the need to develop a Welsh presence in certain key areas of the modern consumer economy – and not necessarily those requiring large amounts of capital investment.

How could this be done? Firstly, there is a need to examine closely whether the new quasi-legislative powers conferred on the

13. *Wales: A Vibrant Economy A Strategic Framework for Economic Development*, Welsh Assembly Government, Cardiff. November 2005.

14. “£14m Knowledge Bank open for business”, Welsh Assembly Government internet site archive, September 27, 2005. <http://wales.gov.uk/news/archivepress>.

National Assembly by the Government of Wales Act 2005 can be usefully employed, or whether even within the powers the Assembly had previously there is scope for re-directing funding to achieve the objectives of a stronger Welsh business sector more closely aligned in character with those of comparable countries.

Wales currently has one of the most heavily supported economies in the Western world¹⁵. Yet, 30 years of Regional Selective Assistance to companies has done little to narrow the gap in Wales's GDP/GVA gap with the rest of the UK. Indeed, it has increased. The economic development budget could, some commentators have suggested, be used instead for a general rebate on corporation tax in areas covered by EU Convergence Funding. This could both stimulate the growth of indigenous profitable companies as well as attracting footloose businesses. Even more importantly, it could perhaps help to crack the problem of persuading large UK or overseas companies to establish headquarters operations in Wales.¹⁶

We also need a cleverer industrial policy in Wales. Trying to pick winning companies is not widely regarded as a skill Government is likely to have. It might be appropriate, however, for the Welsh Assembly Government to pick instead sectors where Wales is weak and where Welsh companies could be encouraged to develop. Basic sectors, such as food and drink, public transport, transport and distribution, retailing (High Street and Internet), hospitality, property and construction, telecoms and energy supply, are key building blocks within economies. Within Wales there are a number of medium-sized companies in these sectors whose growth needs to be supported and their expansion in Wales and beyond facilitated.

There are also sectors where Wales is under-represented, such as the provision of financial services, fund management services, private client wealth services, and the media. The press sector in particular is weak in Wales yet the component parts that could lead

15. "Wales relies more than China on public cash", *The Western Mail*, Cardiff. May 29, 2006.

16. *Time to Deliver. Third Term Policy Options for Wales*, IWA, Cardiff. November 2006.

to the creation of a Welsh media group are in existence. This is one of a number of areas where Welsh companies could be encouraged to co-operate or amalgamate to create stronger groups that can expand outside Wales. One such example is Tinopolis, the small independent television production company, which has not succumbed¹⁷, as often happens, to the aggregating ambitions of other UK companies. Ways have to be found of ensuring that Welsh companies participate in new economic areas, such as new forms of energy, and in providing the goods and services needed to cater for Europe's ageing populations.

Wales also needs to make much more of the opportunities available to create and sell Welsh-branded products to visitors to Wales. Apart from holiday tourists, Wales is now attracting, through the Wales Millennium Centre and the Millennium Stadium, many more sports and music tourists. Few Welsh companies have grasped the possibilities of adding further to visitor experiences by providing goods branded Welsh – but not necessarily made in Wales – or by creating the service sector businesses that could serve these expanding areas. All too often the expertise has to be brought in from outside.

In the outdoor field there is one company that perhaps provides a model – Gelert, which uses a name from one of Wales's best-known folk tales on its country wear. This company is one of the very few that has managed to attach a Welsh brand to an activity – walking, mountain biking or climbing – now intimately associated with the tourist areas of Wales. It is perhaps a sign of Welsh diffidence in commercial areas, however, that many of the tourist shops trading in tourist areas of Wales and selling everything from clothing to gifts are actually owned by a company called Edinburgh Woollen Mills.

Basic manufacturing is likely to become increasingly unviable in Europe but opportunities exist to organize the design, manufacture and distribution of products from the new industrial economies. Government support in Wales needs to address how Welsh companies can become more closely involved in these operations, establishing Welsh companies as end-suppliers of consumer goods. Just as importantly, there needs to be much closer study of how other

17. "Tinopolis makes hostile bid for larger TV rival", *The Western Mail*, Cardiff. November 11, 2005.

similarly-sized economies have projected themselves and nurtured their core businesses.

We have a good and developing brand in Wales – in many of our new activities and in the environment and heritage of the country itself. In many ways also, it has been strengthened and renewed in recent years. Far too much of our branding, however, arises out of Government or quasi-government activity or from the past and we need urgently to ensure that our image in the world in future is based much more firmly on Welsh companies competing in international markets and producing products that are both of high quality and identifiably Welsh.

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