

Agenda – Culture, Welsh Language and Communications Committee

Meeting Venue:	For further information contact:
Video Conference via Zoom	Rhys Morgan
Meeting date: 18 March 2021	Committee Clerk
Meeting time: 09.30	0300 200 6565
	SeneddCWLC@senedd.wales

Pre-meeting registration

(09.00–09.30)

- 1 Introductions, apologies, substitutions and declarations of interest

- 2 Paper(s) to note
 - 2.1 Correspondence with the Arts Council for Wales regarding live music
(Pages 1 – 6)
 - 2.2 Correspondence with Cardiff Council regarding the Cardiff Music Board
(Pages 7 – 10)
 - 2.3 Letter to the BBC requesting supplementary information
(Pages 11 – 12)
 - 2.4 Letter to the Department for Digital, Culture, Media & Sport regarding licence fees
(Pages 13 – 14)
 - 2.5 Letter to Deputy Minister for Culture regarding UK Government additional funding for culture
(Pages 15 – 16)

- 3 Motion under Standing Order 17.42 to resolve to exclude the public from the meeting for the remainder of the meeting



4 Legacy report of the Fifth Senedd: discussion of draft report

(09.30–10.15)

(Pages 17 – 40)

Turn up the volume: an inquiry into the live music industry

Senedd: Culture, Welsh Language and Communications Committee

A response from the Arts Council of Wales

The Arts Council of Wales welcomes the Committee's inquiry. We recognise the importance of live music to our nation and we want people in Wales to be fully able to make, participate in or experience live music on their own terms. Black Lives Matter, #weshallnotberemoved, economically disadvantaged communities and the inequalities exacerbated by the Covid pandemic have highlighted that this is not the case.

This inquiry focuses on one particular and important area of the music industry. But live music comes in many types and forms and happens in many places. There are voices and activity not represented in this report. And we need to be conscious of this as we move forward.

As an organisation we ourselves are reflecting and acting on how we can address this. Our goal, through our funding and support, is to ensure absolutely that equity and diversity are central to our work. As well as maintaining and building on the assets we already have, we need to look at what is not being supported, who is not benefiting. Better meeting their needs will be fundamental to ensuring an inclusive approach to supporting live music.

We know that our colleagues in the Welsh Government's newly formed Creative Wales team are similarly minded to put diversity at the centre of their work and to give more emphasis to under-platformed and supported music. We'll continue to work closely with them on our mutual investment in music in Wales.

In doing so we'll recognise our respective roles. This means being clear about where each of us can best focus but also understanding how our complementary activities can piece together and where there are areas around which we can specifically collaborate. For example, Creative Wales lead on music venue business support, but venues can also apply to the Arts Council for projects that demonstrate a clear cultural and public benefit. We're mindful that this needs to be done with the widest definition of the sector – industry and musicians – working with them to support their work, rather than being dictated by us. We'll be working to pull these strands of activity into an action plan that is clearly communicated so that opportunities are easier to navigate.

The inquiry report includes recommendations addressed to Arts Council of Wales as a public funder which we respond to below.

Recommendation 4

Public funders should tailor the support they provide to the industry to encourage people to provide some Welsh language music at predominantly English language gigs. Creative Wales should work to bring different language and genre communities together to encourage collaboration.

We're passionate about the development of work in the Welsh language. We want to invest in projects that develop the capability and skills of artists, musicians and professionals wanting to work in Welsh. This ambition underpins the delivery of our strategy and our funding and is included as assessment criteria in our funding programmes.

We expect people to be able to engage with the arts in the language of their choice, whether as audience, participant or artist. We see this realised in funded projects such as Forte, Horizons/Gorwelion and FOCUS Wales. All of these work with artists making music in both languages equitably and interchangeably.

Our "Noson Allan" scheme supports community groups to promote their own shows in their local venues, including Welsh language music. Before the pandemic we were working with PYST and Dydd Miwsig Cymru to encourage use of the scheme by young Welsh language music promoters. We hope to pick this up again when circumstances allow.

The Arts Council's Welsh Language Committee scrutinises the range, impact and effectiveness of our Welsh language activity. It reflects on our work to date and setting priorities for future work. This includes examining our funding data which is published in our Welsh Language Annual Report.

We also recognise that nearly 80% of Welsh speakers live in economically disadvantaged communities. When thinking about supporting access, it's important to acknowledge that many experience additional barriers to accessing music/arts due to poverty.

Recommendation 10

Many buildings – including arts centres – outside of urban areas receive public funding, either from local authorities or agencies such as the Arts Council. Funding-providers should consider attaching conditions to this funding so that, where possible, these spaces are opened up as rehearsal spaces for musicians.

The venues that we fund as part of our revenue-funded Arts Portfolio Wales are more than just buildings. The teams that run them work closely with their communities to ensure their often unique facilities best serve them. We've seen this in action even within the restrictions of the pandemic.

They also need to generate income from their resources, including more commercial room hires. There's a delicate balance to strike. When there's demand from the community for a service and there are no other suitable facilities, we'd encourage the venue to find ways to support this need. However, this needs to be done alongside the needs of other groups within their communities and

within what's financially and practically feasible. There are (sometimes significant) costs attached to opening doors and making space available.

As we support and monitor venues in the Arts Portfolio Wales, we'll continue to ensure that they're fulfilling a progressive and enabling role as a creative hub for their community, of which providing rehearsal space could be part.

Recommendation 11

Support and mentoring for young people in the live music industry – like that previously available through the Forté Project and Young Promoters' Network in south Wales – should be available for the whole of Wales and should include professions such as managers, promoters and agents. The Arts Council of Wales should strongly consider funding such a nationwide organisation during its investment review.

We've regularly supported Forte Project, (and its parent programme, Sonig which includes the Young Promoters Network). This support has been channelled through Rhondda Cynon Taf Borough Council since the project's inception.

We supported the Research & Development costs of looking at a Wales-wide model (Beacons), as have our colleagues in Creative Wales. Our focus has been led by those that run Forte, centring on the artist development and wellbeing and the opportunities and impact this has on the young people involved either directly as an artist or in the artist's team.

In the Autumn we'll be starting our Investment Review process. This is our five-yearly exercise to invite applications from organisations wishing to apply to become revenue-funded members of the Arts Portfolio Wales. It's not appropriate for us to pre-empt that process and its outcome, but equalities, diversity and reach will be central.

It's also worth noting that within the currently funded Portfolio, Community Music Wales, National Youth Arts Wales, Canolfan Gerdd Wiliam Mathias, Ty Cerdd, Live Music Now and Trac support music development opportunities for young people, in specific ways.

Recommendation 12

The Horizons programme should be expanded so that artists receive more career development advice and support to help them take their careers to the next level.

Arts Council of Wales established Horizons with BBC Cymru and have since funded the project annually. This year in particular we've seen the scheme support a record number of black and ethnic minority artists and MOBO genres. We've endeavoured to maintain funding levels when our partner has not been able to match. This year we increased the ring-fenced funding awarded

to Horizons for the “Launchpad” initiative. This included further grants to support emerging music talent and to enable all recipients to attend industry training.

We’re delighted that Creative Wales are also supporting Horizons this year and will be continuing discussions regarding future support, particular focussing on industry connections.

Until this year we’ve also partnered with the Welsh Government in supporting the PRS Foundation Momentum scheme for ‘tipping point’ artists. Whilst Creative Wales have rightly taken lead on this, we’ll continue to explore other ‘pathway’ options that enable us to maintain our work with both partners. Again, we’ll be looking to reflect our priorities of equalities and “reach” in any funding we commit.

As a general response to the other recommendations, such as a web portal for music, we’d like to highlight the work AM. Supported by Welsh Government it’s developing a platform for digital and online arts, including music, that’s building a growing ‘native’ audience. We’d also observe that rather than creating a new platform, we need to support music creators to better utilise platforms that music fans and audiences are already using.

Finally, the Committee will no doubt be aware that as it stands, the post-Brexit UK/EU Trade Deal doesn’t allow for frictionless artist mobility. This will make touring in Europe far more complex and expensive and this will inevitably impact on music talent and the range artists able to perform in music venues in Wales. Our colleagues in Wales Arts International are working closely with the other UK Arts Councils and sector bodies to advocate for change and provide practical information. An important part of this work is the establishment of a visa “Infopoint”.

Arts Council of Wales
January 2021

Nick Capaldi
Arts Council of Wales

08 March 2021

Annwyl Nick,

Thank you for your letter on behalf of the Arts Council of Wales responding to the Committee's report: 'Turn up the volume: an inquiry into the live music industry'. The Committee is very grateful to you for engaging with us in this crucial area of work.

It is important to note that this is the first time that a committee of the Senedd has sought to explore issues relating to the live music industry in Wales. The Committee set out to understand this important sector through an extensive programme of evidence-gathering and engagement which took place over an 18 month period.

The Committee's approach to evidence-gathering included both formal and informal methods encompassing a written consultation, oral evidence sessions, face-to-face stakeholder events, online engagement, and outreach work at an industry event.

The Committee notes your comments regarding the need to ensure a diversity of voices being involved in the evidence-gathering process. While we acknowledge that more can always be done to hear from diverse and harder to reach audiences I would like to assure you that the approach to evidence-gathering was designed with the aim of providing as many people the opportunity to contribute as possible in mind.

We recognise that you will have considerable experience in this area, therefore should you have any specific ideas regarding how the Committee could better engage with diverse audiences in future then we would welcome these. In that regard I would also like to offer that officials supporting the Committee meet with representatives of your organisation to discuss this further and capture any lessons for the future.



Looking ahead, we are now approaching Dissolution and the Senedd elections scheduled for May. I would like to again place on record the Committee's thanks to you for your willingness to engage with our work and hope that this continues with our successor in the Sixth Senedd.

Yours sincerely,

Bethan Sayed.

Bethan Sayed MS

Croesewir gohebiaeth yn Gymraeg neu Saesneg.

We welcome correspondence in Welsh or English.



**SWYDDFA'R ARWEINYDD
OFFICE OF THE LEADER**



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Agenda Item 2.2

Fy Nghyf / My Ref: CM45118

Dyddiad / Date: 27 January 2021

Bethan Sayed MS and Helen Mary Jones MS
Culture, Welsh Language and Communications Committee
Welsh Parliament
Cardiff Bay
CF99 1SN

Email: SeneddCWLC@senedd.wales

Annwyl / Dear Chairs,

This letter is on behalf of the Cardiff Music Board of which I Chair, in response to the Turn Up the Volume - an Inquiry to Live Music Industry report that was published by the Senedd Culture, Welsh Language and Communications committee in December 2020.

I would like to thank you and the committee for undertaking this important inquiry and inviting me to present to the committee and to take part in the wider consultation.

We very much welcome the findings in the report, especially given the challenges that the music sector faces. The Music Board have discussed the report and its recommendations, and there are a number of issues they would like to raise.

In particular, the report does suffer from a lack of consultation with our diverse populations, in particular women, BAME and disabled groups, and it is disappointing that the views these populations are not adequately reflected in the report. The report shows little engagement with musicians, as it primarily focuses on infrastructure, and there is insufficient engagement with professionals and creatives in the sector. The consideration of the impact of Brexit on performers and venues is also noticeable omission given the substantial impact on the sector in Wales.

On the whole we welcome the recommendations in the report, although the large number of recommendations means that some critical issues could be overlooked. The report would therefore benefit from a more focussed and deliverable set of recommendations that recognise the resources partners can leverage. Officers in Cardiff are happy to work with their colleagues in Creative Wales as they consider the recommendations.

GWEITHIO DROS GAERDYDD, GWEITHIO DROSOCH CHI

Mae'r Cyngor yn croesawu gohebiaeth yn Gymraeg, Saesneg neu'n ddwyieithog. Byddwn yn cyfathrebu â chi yn ôl eich dewis, dim ond i chi roi gwybod i ni pa un sydd well gennych. Ni fydd gohebu yn Gymraeg yn arwain at oedi.

WORKING FOR CARDIFF, WORKING FOR YOU

The Council welcomes correspondence in Welsh, English or bilingually. We will ensure that we communicate with you in the language of your choice, as long as you let us know which you prefer. Corresponding in Welsh will not lead to delay.



We look forward to working with Creative Wales colleagues to support the ambitions for the live music industry in Wales, particularly given Cardiff's role as the Capital and delivering our aspirations as a music city and supporting a thriving Industry and live events sector.

Yn gywir,
Yours sincerely,

A handwritten signature in black ink, appearing to read 'Huw Thomas', written in a cursive style.

CYNGHORYDD / COUNCILLOR HUW THOMAS
ARWEINYDD / LEADER
CYNGOR CAERDYDD / CARDIFF COUNCIL

Councillor Huw Thomas

Leader of Cardiff Council and Chair of Cardiff Music Board

08 March 2021

Annwyl Huw,

Thank you for your letter on behalf of the Cardiff Music Board responding to the Committee's report: 'Turn up the volume: an inquiry into the live music industry'. The Committee noted your correspondence at its meeting on 25 February and agreed that I should write to you regarding some of the points raised.

It is important to note that this is the first time that a committee of the Senedd has sought to explore issues relating to the live music industry in Wales. The Committee set out to understand this important sector through an extensive programme of evidence-gathering and engagement which took place over an 18 month period.

The Committee's approach to evidence-gathering included both formal and informal methods encompassing a written consultation, oral evidence sessions, face-to-face stakeholder events, online engagement, and outreach work at an industry event. The Committee were grateful to receive your contribution during oral evidence together with Cardiff Council officials during our stakeholder event in the Tramshed. I would like to assure you the approach to evidence-gathering was designed with the aim of providing as many people the opportunity to contribute as possible in mind.

The Committee is dedicated to continuous improvement and while we acknowledge that more can always be done to hear from diverse and harder to reach audiences we cannot accept that stakeholders, professionals and the public were not provided with many opportunities to shape the Committee's work. We recognise that you will have considerable experience in this area, therefore should you have any specific ideas regarding how the Committee could better engage with diverse audiences in future then we would welcome these. I would also like to suggest that officials supporting the Committee meet with your officials to discuss this and capture any lessons for the future.



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Turning to the recommendations in the report – the large number of recommendations reflect the considerable volume of evidence received during the inquiry. Whilst we note your concerns regarding the risk of some issues being overlooked, ultimately all recommendations should carry equal weight. Furthermore, it will be incumbent on us all to hold the Welsh Government to account for performance regarding implementation of these recommendations.

Looking ahead, we are now approaching Dissolution and the Senedd elections scheduled for May. I would like to again place on record the Committee's thanks to you for your willingness to engage with our work and hope that this continues with our successor in the Sixth Senedd.

Yours sincerely,



Bethan Sayed MS

Croesewir gohebiaeth yn Gymraeg neu Saesneg.

We welcome correspondence in Welsh or English.



Rhodri Talfan Davies
BBC Cymru Wales
3, Central Square
Cardiff
CF10 1FT

Dyddiad | Date: 11 March 2021

Pwnc | Subject: Culture, Welsh Language and Communications annual scrutiny of the BBC

Dear Rhodri,

I wanted to thank you for attending the meeting of the Culture, Welsh Language and Communications meeting on 4 March 2021 to discuss the BBC's annual report and accounts. Committee Members were also pleased to hear from Tim Davie, BBC Director General, I am copying this letter to him for information.

During the meeting you offered to provide the Committee with greater detail on a few points.

Diversity of the BBC workforce

During the meeting you said that the figures for workforce diversity in the annual report are presented for the nations and regions rather than for individual nations and you offered to share the figures for the Welsh workforce with us.

I think it would be helpful if data was publicly available to scrutinise BBC Cymru Wales' performance in this regard. We would be grateful if the BBC could provide us with, and publish on an ongoing basis – either in the BBC Cymru Wales annual Management Review or Annual Report and Accounts – the current data on diversity on and off-screen. Please can you also provide targets for improving representation on and off-screen and any specific diversity targets relating to senior teams at BBC Cymru Wales.

Accessing BBC content on demand

We discussed the figures for accessing BBC content on iPlayer. Given the popularity of online consumption of video content the Committee would like to be able to scrutinise the data in more depth. It would be helpful if the BBC would publish – either in the BBC Cymru Wales Management Review or Annual Report and Accounts – a variety of data to enable this performance to be independently assessed, including:



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- Year-on-year comparisons in key areas of online performance;
- Appropriate industry benchmarks to enable the performance of the BBC in these areas to be independently assessed.

BBC spend in Wales

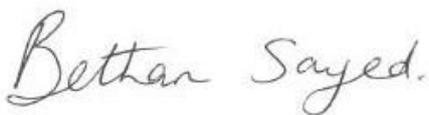
In response to a question about the fact that figures shown in the Annual Report and Accounts show that in 2019-20 the BBC spent almost 70% more on English language local content in Scotland than it did in Wales, you said:

‘We are looking at a commitment in Wales that straddles two languages, whereas in Scotland, the primary investment is all into English language TV. So, it depends how you want to look at it. If you want to look at spend per head, it is certainly the case that the expenditure in Wales is ahead of where we are in Scotland. There are many different ways of cutting it, but in terms of absolute spend, they are broadly comparable, it’s just we are obviously, serving in both languages.’

I am not convinced that assessing spend in Wales in terms of spend per head is the best way of assessing value for money for Welsh audiences. Given that the BBC has to cater for two languages, it is inevitable that resources are stretched further in Wales.

Members are eager to see this disparity reduced, and we will be recommending that a successor committee in the Sixth Senedd follows up on this issue.

Yours sincerely,



Bethan Sayed MS

Chair of the Culture, Welsh Language and Communications Committee



Rt Hon Oliver Dowden CBE MP
Secretary of State for Digital, Culture, Media and Sport

Dyddiad | Date: 11 March 2021

Pwnc | Subject: Licence fee determination

Dear Oliver,

The Culture, Welsh Language and Communications Committee carried out annual scrutiny of BBC Cymru Wales at our meeting on 4 March 2021. After the meeting, Members raised concerns about the process for deciding the licence fee, which I wanted to share with you. I would be grateful if you could consider the following issues during your discussions on the licence fee from 2022:

The value of the next licence fee to the BBC should, at the very least, keep up with inflation. It is not acceptable that the BBC has faced an effective cut of 30% to UK public services over the last decade.

The BBC, and public service broadcasting, has an enhanced role in Wales given the lack of commercial media. As such the committee encourages the UK Government to make a generous agreement with the BBC to enable them to fulfil key roles for the BBC in Wales, including:

- National and local news coverage. The pandemic has highlighted the need for a well-funded media that can accurately report divergent policies across UK nations;
- Reflecting Welsh life to Wales and beyond;
- Stimulating the creative industries in Wales. By supporting the BBC's ability to make this valuable contribution to Wales' economy it would endorse the UK Government's stated desire to "level up" the economy of the UK.

Looking beyond the current licence fee settlement period, it is worth pointing out that the UK, including Wales, has not been served well by the current system, where the UK Government can make decisions about the licence fee with little democratic oversight. The BBC and S4C, who together provide the bulk of broadcast content specifically for Welsh audiences, have seen their funding substantially reduced over the last decade. The Committee is recommending future licence fee decisions should be made by an independent licence fee commission, with distinct Welsh representation.

I note the recent [petition on television licensing](#) in which the petitioner argued that 'the BBC licence fee is outdated and is not fit for today's society, preferring to see a subscription service.' I note that one of the responses given by the Minister for Media and Data, John Wittingdale MP, during the discussion was:

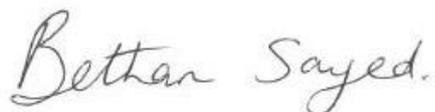


'Before we can consider moving to subscription as an element of the BBC's funding, everybody will need to be capable of receiving video on demand. That, I believe, will come. The roll-out of broadband is very fast, we will reach universal coverage, and there will come a time when it will be possible for us to move towards a full subscription service for everybody, but that time has not yet arrived.'

This is certainly true for Wales which lags behind the rest of the UK when it comes to access to superfast broadband provision. However, I feel there are more fundamental reasons why moving funding to a subscription model for public service broadcasting will disadvantage the people of Wales. A subscription model fails to address the purpose of public service model operated by the BBC and S4C, which is to provide content which we, as a society, deem necessary, but the free market does not provide. Replicating the business models of Netflix and Amazon Prime is no way to fill the gaps in provision that their services leave behind.

I would be grateful if you could consider the issues raised in this letter and reply to me by 2 April in order for Members to consider your response before the end of the Senedd term.

Yours sincerely,



Bethan Sayed MS

Chair of the Culture, Welsh Language and Communications Committee



Dafydd Elis-Thomas
Deputy Minister for Culture, Sport and Tourism
Welsh Government

9 March 2021

Dear Dafydd,

UK Government additional funding for culture

Further to the announcement of the UK Budget, I would like to join you in welcoming the news that additional funding will be provided to the devolved nations in light of the UK Government's investment of £300 million in the Culture Recovery Fund in England.

Could you please confirm what Wales's share of this funding is, whether you are satisfied that this represents a full Barnett consequential and whether the totality of the amount allocated will be committed to the Cultural Recovery Fund in Wales?

We know that this sector suffered a devastating loss of income since the pandemic started almost a year ago. Considering that the full resumption of activity could still be some months away, I would like your assurance that the total sum of monies allocated to Wales will be used to support the cultural sector without delay.

I would also be grateful if you could update the Committee setting out how the Welsh Government will prioritise the additional funding to ensure that our cultural organisations are not forced to close their doors for good or make valued employees redundant.

You have previously explained to the Committee that the funding allocated to the Cultural Recovery Fund is not sufficient to meet the needs of the sector. Are you

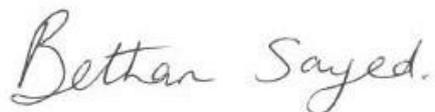


therefore planning on allocating additional resources to the Cultural Recovery Fund, in addition to the latest Barnett consequential?

In closing, I would like to take this opportunity to thank you and your Department on all that you have done throughout this pandemic. I know you will agree that all available funding should be directed to the sector and distributed as soon as possible to those organisations and individuals whose livelihoods are at risk.

I look forward to receiving your response.

Yours sincerely,

A handwritten signature in black ink that reads "Bethan Sayed". The signature is written in a cursive style with a large initial 'B'.

Bethan Sayed

Chair of the Culture, Welsh Language and Communications Committee



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