

# Agenda – Culture, Communications, Welsh Language, Sport, and International Relations Committee

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Meeting Venue:

Committee Room 2, Senedd

Meeting date: 11 January 2024

Meeting time: 09.30 – 14.15

For further information contact:

Lleu Williams, Committee Clerk

0300 200 6565

[SeneddCulture@senedd.wales](mailto:SeneddCulture@senedd.wales)

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## Pre-meeting registration

(09.15 – 09.30)

### 1 Introductions, apologies, substitutions and declarations of interest

(09.30)

### 2 Welsh Government Draft Budget 2024–25: evidence session with the Minister for Education and Welsh Language

(09.30 – 11.00)

- Jeremy Miles MS, Minister for Education and Welsh Language, Welsh Government
- Owain Lloyd, Director of Education and the Welsh Language, Welsh Government
- Bethan Webb, Deputy Director Cymraeg 2050 Division, Welsh Government

Attached Documents:

- Research Brief: Welsh Government Draft Budget 2024–25: Minister for Education and Welsh Language
- Letter from the Minister for Education and Welsh Language: Welsh Government Draft Budget 2024–25 – 20 December 2023



- Welsh Government: Evidence paper on Draft Budget 2024–25 – Welsh Language budgets within the Education and Welsh Language Main Expenditure Group

**3 Motion under Standing Order 17.42 to resolve to exclude the public from items 4, 5, 6, 7, and 10 of the meeting**

(11.00)

**Break**

(11.00 – 11.05)

**4 Welsh Government Draft Budget 2024–25: consideration of evidence**

(11.05 – 11.20)

**5 Welsh Government Draft Budget 2024–25: scrutiny of the Welsh Government budget for international relations**

(11.20 – 11.45)

(Pages 1 – 18)

Attached Documents:

- Research Brief: Welsh Government Draft Budget 2024–25 – First Minister
- Response from the First Minister: Welsh Government Draft Budget 2024–25 – 20 December 2023

**6 Welsh Government international relations: ways of working proposal regarding overseas visits**

(11.45 – 11.50)

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Attached Documents:

- Briefing note: Overseas visits – proposal on ways of working

## **Lunch**

(11.50 – 12.35)

## **7 Allegations concerning bullying at S4C: evidence session briefing**

(12.35 – 13.00)

(Pages 20 – 24)

Attached Documents:

- Legal advice note: Allegations concerning bullying at S4C

## **8 Allegations concerning bullying at S4C: evidence session with S4C**

(13.00 – 14.00)

(Pages 25 – 51)

- Rhodri Williams, Chairman, S4C
- Chris Jones, Lead Non-Executive Member, S4C

Attached Documents:

- Research brief: Allegations concerning bullying at S4C
- Capital Law report: A Report into the working environment and atmosphere at S4C – 6 December 2023
- Letter to BECTU: Allegations concerning bullying at S4C – 20 December 2023
- Response from BECTU: Allegations concerning bullying at S4C – 5 January 2024

## **9 Papers to note**

(14.00)

## **9.1 Arts Council of Wales: Investment Review**

(Pages 52 – 72)

Attached Documents:

Arts Council of Wales: Investment Review – Making an Appeal

Arts Council of Wales: Investment Review – Appeal form

Arts Council of Wales: Investment Review – Appeals process summary –  
National Theatre Wales

Correspondence from Grass Under Foot: Arts Council of Wales: Investment  
Review – 14 December 2023

Letter from National Theatre Wales: Arts Council of Wales: Investment Review  
– 20 December 2023

## **9.2 Scrutiny of the National Library of Wales**

(Pages 73 – 74)

Attached Documents:

- Letter to the National Library of Wales: General scrutiny of the National  
Library of Wales – 13 December 2023

## **9.3 Scrutiny of Sport Wales**

(Pages 75 – 84)

Attached Documents:

- Letter from Sport Wales: Scrutiny of Sport Wales – 7 December 2023
- Letter to Sport Wales: Annual Scrutiny of Sport Wales – 13 December  
2023
- Response from Sport Wales: Annual Scrutiny of Sport Wales – 3 January  
2024

## **9.4 Scrutiny of the Welsh Language Commissioner**

(Pages 85 – 91)

Attached Documents:

- Letter to the Welsh Language Commissioner: Annual scrutiny follow-up – 5 December 2023
- Response from the Welsh Language Commissioner: Annual scrutiny follow-up – 15 December 2023

## **9.5 British–Irish Council Summit**

(Page 92)

Attached Documents:

- Letter to the Legislation, Justice and Constitution Committee from the First Minister: Inter–Institutional Relations Agreement: British–Irish Council Summit in Dublin – 15 December 2023

## **9.6 Baden–Württemberg: Shared Statement of Cooperation**

(Pages 93 – 94)

Attached Documents:

- Letter to the First Minister: Baden–Württemberg: Shared Statement of Cooperation – 19 December 2023

## **9.7 Culture and the new relationship with the EU**

(Pages 95 – 108)

Attached Documents:

- Entourage Pro: Brexit and Pandemic Impact Report – 'Then & Now' 2019–2023 (Saesneg yn unig)

## 9.8 Welsh Government Draft Budget 2024–25

- Finance Committee Consultation: [Welsh Government Draft Budget 2024–25 – responses pack](#) [PDF 26MB]

## 9.9 HSBC UK Welsh Service Line

(Pages 109 – 121)

Attached Documents:

- Letter from the Welsh Language Commissioner to HSBC UK: HSBC UK Welsh Service Line – 8 November 2023
- Letter to HSBC UK: HSBC UK Welsh Service Line – 11 December 2023
- Response from HSBC UK: HSBC UK Welsh Service Line – 21 December 2023
- Letter to the Minister for Education and Welsh Language: HSBC UK Welsh Service Line – 11 December 2023
- Letter from the Welsh Language Commissioner to HSBC UK: HSBC UK Welsh Service Line – 21 December 2023

## 9.10 UK–EU Governance

(Pages 122 – 123)

Attached Documents:

- Letter from the Legislation, Justice and Constitution Committee: UK–EU Governance – 19 December 2023

## 9.11 Books Council of Wales magazine funding model

(Pages 124 – 131)

Attached Documents:

- Letter to the Books Council of Wales: Books Council of Wales magazine funding model – 13 December 2023

- Response from the Books Council of Wales: Books Council of Wales magazine funding model – 20 December 2023

## **9.12 Welsh Language Commissioner: Post-compulsory education and the Welsh language**

(Pages 132 – 146)

Attached Documents:

- Letter from the Welsh Language Commissioner: Post-compulsory education and the Welsh language: the learners' voice – 17 November 2023
- Welsh Language Commissioner report: Post-compulsory education and the Welsh language: the learners' voice – 17 November 2023
- Letter from the Children, Young People and Education Committee to the Minister for Education and Welsh Language: Post-compulsory education and the Welsh language: the learners' voice – 21 December 2023

## **9.13 Public service broadcasting in Wales**

(Pages 147 – 177)

Attached Documents:

- BBC report: Doctor Who: Economic Impact – November 2023
- Letter to the Department for Culture, Media and Sport: Public service broadcasting in Wales – 8 December 2023
- Letter to ITV: Public service broadcasting in Wales – 11 December 2023
- Letter to the Deputy Minister for Arts, Sport and Tourism: Public service broadcasting in Wales – 15 December 2023
- Response from the Department for Science, Innovation and Technology: Public service broadcasting in Wales – 18 December 2023

### **9.14 Redundancies at Reach**

(Pages 178 – 179)

Attached Documents:

- Correspondence from the National Union of Journalists (NUJ):  
Redundancies at Reach – 12 December 2023

### **9.15 Ukrainian language in Wales**

(Pages 180 – 182)

Attached Documents:

- Response from the Minister for Social Justice and Chief Whip: Ukrainian language in Wales – 13 December 2023

### **9.16 Welsh Government international relations**

(Pages 183 – 186)

Attached Documents:

- Welsh Government report: Supporting Shared Learning – Ireland and Wales – October 2023
- Welsh Government international visits – November 2023

### **9.17 Allegations concerning bullying at S4C**

(Pages 187 – 190)

Attached Documents:

- Correspondence from an individual – 20 October 2023
- Letter from Cwmni Da: Allegations concerning bullying at S4C – 1 December 2023

## **10 Allegations concerning bullying at S4C: consideration of evidence**

(14.00 – 14.15)



Document is Restricted

**Jeremy Miles AS/MS**  
Gweinidog y Gymraeg ac Addysg  
Minister for Education and Welsh Language



Llywodraeth Cymru  
Welsh Government

Our ref: MA/JMEWL/3107/23

Delyth Jewell MS  
Chair Culture, Communications, Welsh Language, Sport, and  
International Relations Committee

20 December 2023

Dear Delyth

Thank you for your letter of 25 October on the scrutiny of the Welsh Government's 2024-25 budget which was published on 19 December.

The enclosed paper provides detail on Welsh Language plans set out in draft budget together with further information on specific areas requested by the Committee.

I look forward to providing an update to the Committee at our oral evidence session on 11 January 2024.

Yours sincerely,

**Jeremy Miles AS/MS**  
Gweinidog y Gymraeg ac Addysg  
Minister for Education and Welsh Language

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Rydym yn croesawu derbyn gohebiaeth yn Gymraeg. Byddwn yn ateb gohebiaeth a dderbynnir yn Gymraeg yn Gymraeg ac ni fydd gohebu yn Gymraeg yn arwain at oedi.

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We welcome receiving correspondence in Welsh. Any correspondence received in Welsh will be answered in Welsh and corresponding in Welsh will not lead to a delay in responding.

## Culture, Communications, Welsh Language, Sport and International Relations Committee

### Evidence paper on Draft Budget 2024-25 – Welsh Language budgets within the Education and Welsh Language Main Expenditure Group

11 January 2024 (9.30-11.00)

This paper provides information to the Culture, Communications, Welsh Language, Sport and International Relations (CCWLSIR) Committee on budget allocations relevant to the Welsh language in the Education and Welsh Language Main Expenditure Group (MEG) proposals outlined in the draft Budget 2024-25, published on 19 December 2023. It also provides an update on specific areas of interest to the Committee.

#### 1. Commentary on Actions and detail of Budget Expenditure Line (BEL) allocations

- 1.1 When we published our 2022 multi-year Welsh Spending Review, we set out ambitious plans for increasing the number of Welsh speakers and doubling daily use of the language. Budgets initially set for the three-year period reflected an increase to Welsh language budgets <sup>1</sup>of £5.8m (15.4%) in 2022-23, with further increases of £3m (6.9%) in 2023-24 and £3.5m (7.5%) in 2024-25 specifically linked to the Co-operation Agreement. In last year's budget we maintained that funding and provided a revenue increase for the Welsh Language Commissioner of £0.15m from 2023-24.
- 1.2 The stark reality of the extraordinary financial circumstances we are facing has necessitated a more fundamental approach. We have re-shaped the indicative spending allocations within our budget to provide extra funding and protection for the services which matter most to people and communities across Wales – the NHS and the core local government settlement, which funds schools, social services and social care and other everyday services. This has resulted in the reprioritisation of just under £103m (5.68%) from the Education and Welsh Language budget.
- 1.3 We have worked hard to limit the impacts on funding for the Welsh language, including maintaining funding linked to the Welsh Language Education Bill, Mudiad Meithrin and the Welsh in Education budget. The impact of the reprioritisation exercise on Welsh language budgets has resulted in the return of £3.668m to reserves. While we are reprioritising £3.5m from funding linked to Coleg Cymraeg Cenedlaethol and the National Centre for Learning Welsh, we are maintaining budgets at 2023-24 levels to cause the least disruption to the Welsh language sector. This funding will be reprofiled and considered in the context of the mechanisms being developed for ongoing financial commitments under the Co-operation Agreement, as set out in chapter 1 of the main draft budget narrative. A cross-government decision has resulted in a 5% budget

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<sup>1</sup> Budgets within the Cymraeg 2050 (LAEG), Welsh in Education, Welsh Language and Welsh Language Commissioner Budget Expenditure Lines (BELs) only.

reduction for the four statutory Commissioners, including £0.168m for the Welsh Language Commissioner (see section 3.2).

1.4 The table below summarises the changes to Welsh language budgets for 2024-25.

Action	£000s					
	BEL	2024-25 Indicative (Final Budget 2023-24 - Feb 2023)	2024-25 Reprioritised Funding	2024-25 Grant Amalgamation	2024-25 Other Changes	2024-25 Draft Budget (Dec 2023)
	£000s					
Pre-16 Education Support via LA's	Cymraeg 2050 (LAEG)	0	0	9,770	0	9,770
<b>Total Pre-16 Education Support via LA's</b>		<b>0</b>	<b>0</b>	<b>9,770</b>	<b>0</b>	<b>9,770</b>
Welsh in Education	Welsh in Education	24,275	-3,500	-2,200	-1,675	16,900
<b>Total Welsh in Education</b>		<b>24,275</b>	<b>-3,500</b>	<b>-2,200</b>	<b>-1,675</b>	<b>16,900</b>
Welsh Language	Welsh Language	22,404	0	-500	1,675	23,579
	Welsh Language Commissioner	3,357	-168	0	0	3,189
	Welsh Language Commissioner - Non Cash	121	0	0	0	121
<b>Total Welsh Language</b>		<b>25,882</b>	<b>-168</b>	<b>-500</b>	<b>1,675</b>	<b>26,889</b>
<b>Total Welsh Language Resource Budgets</b>		<b>50,157</b>	<b>-3,668</b>	<b>7,070</b>	<b>0</b>	<b>53,559</b>
Welsh Language	Welsh Language Commissioner - Non Cash	50	0	0	0	50
<b>Total Welsh Language</b>		<b>50</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>50</b>
<b>Total Welsh Language Capital Budgets</b>		<b>50</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>50</b>
<b>Total Welsh Language Budgets</b>		<b>50,207</b>	<b>-3,668</b>	<b>7,070</b>	<b>0</b>	<b>53,609</b>

1.5 As part of the Programme for Government, we have committed to reducing the administrative burden on local authorities, to allow them to focus on their vitally important work delivering front line services. Therefore, in this budget we propose a new approach for pre-16 education grant funding, to ensure that local authorities and schools are not hampered by unnecessary bureaucracy. From 2024-25, we are proposing to amalgamate local authority and consortia grants, including Welsh language grants, into one grant scheme called the Local Authority Education Grant (LAEG). This grant scheme will be made up of four elements of education funding, including Cymraeg 2050 (others being School Standards, Equity and Reform).

1.6 This funding will be crucial to the delivery of the forthcoming Welsh Language Education Bill. The new Cymraeg 2050 (LAEG) BEL will provide funding of £9.77m through the LAEG, combining funding for the Welsh in Education Grant (School Improvement Grant BEL), Professional Learning (Teacher Development and Support BEL), late immersion provision (Welsh in Education BEL) and the Siarter Iaith (Welsh Language BEL).

- 1.7 Incorporating these changes, the total indicative budget to support the Welsh Language stands at **£53.6m in 2024-25** – £53.559m resource and £0.05m capital (excluding Welsh Medium Education Capital funded via the Education Infrastructure BEL – further information is provided in section 3.3).
- 1.8 As requested by the Committee, a detailed breakdown of 2024-25 draft budget allocations (as relevant to the Welsh language), final outturn for 2022-23, together with forecast outturn for 2023-24, is attached at **Annex A**. This confirms the final outturn for Welsh language budgets (Welsh Language, Welsh in Education and Welsh Language Commissioner BELs) in 2022-23 was £44.937m (£44.695m resource and £0.242m capital) and the forecast outturn (as at period 7) for 2023-24 is £48.643m (£48.593m resource and £0.05m capital).
- 1.9 It is important to note that the aim is to mainstream *Cymraeg 2050* into all Welsh Government portfolio areas and there is already expenditure on the language embedded in delivery within many other ministerial portfolios. However further detail is provided below on the specific Budget Expenditure Lines (BELs) within the Education and Welsh Language MEG that directly support delivery of the Welsh language portfolio.

### **Welsh Language BEL**

- 1.10 The purpose of the Welsh language BEL is to support the delivery of *Cymraeg 2050* in relation to increasing the use of Welsh and securing the right infrastructure. The indicative budget for the Welsh Language BEL is **£23.579m** in 2024-25. This budget reflects the transfer of £0.5m for Siarter Iaith to the *Cymraeg 2050* (LAEG) BEL and the transfer in of £1.675m from the Welsh in Education BEL in respect of funding allocated via the Co-operation Agreement for the National Centre for Learning Welsh.
- 1.11 In 2022-23, an additional £1.2m was allocated to the Urdd as continued support for the rebuilding of their services following the Covid-19 pandemic. The funding was baselined into 2023-24 and the intention is to allocate the same amount for 2024-25. It takes the total funding for the Urdd to over £2.2m per annum. Further detail on this funding is set out under section 3.1.
- 1.12 The National Eisteddfod was allocated a further £0.3m per annum in 2022-23 to support the organisation's post Covid-19 recovery. This funding was also baselined into 2023-24 and we propose the same for 2024-25 resulting in the Eisteddfod Genedlaethol's grant increasing to £1m per annum moving forward.
- 1.13 As part of the [Co-operation Agreement](#), and through existing budgets, we are investing £1m revenue by the end of 2024-25 in Carmarthenshire and the former industrial heartland areas of the Western Valleys. We're doing this in response to the results of the 2021 Census in relation to the Welsh language. It will support us to better understand the results and enable us to pilot interventions in response to those results.

1.14 The remaining budget has been maintained in 2024-25 to support partnership activities including:

- Cymraeg i Blant (Cymraeg for Kids) – to support parents, prospective parents and other family members in using Welsh at home, transmit Welsh to their children, and to support children’s linguistic development in a social and educational context;
- delivering Welsh language training through the National Centre for Learning Welsh;
- the Siarter Iaith which supports and promotes the informal use of Welsh amongst school-age children, with £0.5m of this budget transferring to the LAEG;
- delivering the Welsh Language Technology Action Plan;
- increasing the use of Welsh, through grants to a number of key partners including: the network of Mentrau Iaith, the network of Papurau Bro (Welsh-medium community newspapers); Merched y Wawr; Cymdeithas Eisteddfodau Cymru; Cymdeithas Cyfieithwyr Cymru; and the Young Farmers Clubs Movement;
- the Welsh Language Communities Housing Plan; and
- research, evaluation and marketing in respect of the strategy.

### **Welsh Language Commissioner BEL**

1.15 This budget supports the Welsh Language Commissioner, with further detail on the Commissioner’s budget provided in section 3.2.

### **Welsh in Education BEL**

1.16 The indicative budget for the Welsh in Education BEL is £16.9m in 2024-25. This budget reflects the reprioritisation of Co-operation Agreement funding of £3.5m to reserves (see para 1.3), the transfer out of £1.675m to the Welsh Language BEL for the element of funding relating to the Co-operation Agreement for the National Centre for Learning Welsh, and the transfer out of £2.2m to the Cymraeg 2050 (LAEG) BEL to expand Welsh immersion provision as a result of grant amalgamation.

1.17 As part of our Co-operation Agreement, the remaining funding within the BEL of £2.825m in 2024-25 will support the Coleg Cymraeg Cenedlaethol.

1.18 The Welsh in Education BEL also supports actions related to Welsh-medium and Welsh language education within *Cymraeg 2050*, including:

- funding for Mudiad Meithrin to increase Welsh-medium childcare provision as a pathway into Welsh-medium education;
- continuation of funding for the e-sgol programme of £0.6m per annum following an increase in funding from 2022-23 onwards;

- the implementation of the 10-year Welsh in Education Strategic Plans (WESPs) in line with the Welsh in Education Strategic Plans Regulations 2019, which came into force on 1 January 2020; and
- commissioning of bilingual teaching and learning resources in support of the curriculum and its qualifications, including funding for Adnodd, a Welsh Government subsidiary company which became operational on 1 April 2023.

## **Cymraeg 2050 (LAEG) BEL**

- 1.19 The indicative budget for this new BEL stands at **£9.77m** for 2024-25 (paragraphs 1.5-1.6 refer). The amalgamation of the grants will provide local authorities with a stronger overarching and strategic look of how they can embed Welsh in education policy within their work. This will ensure that local authorities have the autonomy and resources to deliver on their WESPs, and distribute the funding provided to support their own local education and linguistic contexts.
- 1.20 Officials will work closely together to devise specific grant guidelines and requirements for the work associated with the Welsh in education funding. The funding allocations for each local authority will align with pre-existing structures that are in place for delivering, reporting, and monitoring of the local authorities' WESPs. Further alignment between the funding provided to local authorities and the WESPs can only strengthen Welsh-medium provision moving forward.

## **2. Other Information**

### ***Information on how the delivery of the Welsh Language portfolio and associated outcomes are monitored and evaluated to demonstrate value for money.***

- 2.1 In terms of ensuring value for money, clarity over how we use our resources effectively is central to delivering the priorities set out in *Cymraeg 2050: A million Welsh speakers*, the Programme for Government and the Co-operation Agreement. We have well-established processes in place to ensure that resources are used effectively for the purposes intended.
- 2.2 Progress against the [Cymraeg 2050 Work Programme for 2021 to 2026](#) is monitored annually through a process which includes the publication of an annual [Action Plan](#) at the beginning of the financial year, followed by an Annual Report at the year end to report back on the actions detailed in the Action Plan. Regular reviews to monitor expenditure and outcomes are undertaken to ensure that any available resources are reprioritised to deliver the strategy.
- 2.3 The Welsh Language Partnership Council plays a role in advising on progress towards the 2050 targets and the efficacy of our programmes and interventions. The Cymraeg 2050 Programme Board within the Welsh Government is tasked with assessing risks and identifying steps to mitigate them and mainstreams the strategy in each of the Government's policy areas.

- 2.4 We have undertaken a review of the Grant Scheme to Promote and Facilitate the Use of the Welsh Language. The aim of the review was to assess how the current Scheme has been designed and implemented, and inform our planning of a future funding model to support the future use of the Welsh language. We will build our response to the Review's recommendations into a new grants scheme to support *Cymraeg 2050*.
- 2.5 In November 2022 we published a [Research and Evaluation Framework for Cymraeg 2050](#). It provides guidance on collecting evidence and data, assessing progress, and evaluating the impact of the strategy as it continues to be implemented. This Framework will provide a basis for the Welsh Government's programme of research and evaluation in relation to the strategy over the coming years.
- 2.6 Furthermore, our target of increasing Welsh language early years provision by 150 nursery groups by 2028 has the potential to reduce spend on promotion among older age groups, as they help individuals establish robust language practices at an early age. In this respect, Cylchoedd Meithrin contribute to nurturing the conditions which create new Welsh speakers by immersing children in the language and its culture, and by helping to feed Welsh-medium schools. This spend on the early years prepares the ground for further interventions in the shape of, for instance, the Siarter Iaith (which has the aim of encouraging informal Welsh language use among school children from an early age).
- 2.7 Our [Welsh Language Technology Action Plan](#) involves ensuring Welsh language digital components are created and maintained so that they can be freely used and reused under a suitably permissive licence by all. The spread of Welsh language technology is also essential for the normalisation of the Welsh language and enabling people to use it in their day to day lives. We launched the Plan on 23/10/2018 and we're currently preparing to develop the next plan.
- 2.8 We are committed to using the Well-being of Future Generations (Wales) Act 2015 to improve how we make decisions about the social, economic, environmental and cultural well-being of Wales. Our goal is to ensure we reflect the sustainable development principle and our spending plans aim to achieve a balance between short and long-term priorities.

***Information on allocations (and their location) in your portfolio to support Cymraeg 2050 Welsh language strategy, in particular, allocations to achieve the 'milestones' as set out in the Work Programme 2021-2026***

- 2.9 Since launching *Cymraeg 2050*, we have been working towards a series of milestones to achieve our targets of a million Welsh speakers and doubling daily use of Welsh by 2050. We follow a trajectory that was developed based on the 2011 Census. At the outset, we committed to pause once we had the 2021 Census results in order to take stock and review our work plans and the trajectory to reach a million Welsh speakers as necessary. We are now considering the Census data alongside other sources of information for example the Annual Population Survey to ensure that we remain on track with our aim of doubling the



daily use of our language and reaching a million Welsh speakers by 2050. Set out below is our progress against the high level milestones.

**Milestone: maintain language transmission rates in families with the aim of seeing a gradual increase along the way up to 2050**

- 2.10 To support this aim, we will continue to invest in the Cymraeg for Kids programme during 2024-25 with funding of £0.73m being **maintained**. The objectives of the programme are to support parents, prospective parents and other family members in introducing and using Welsh at home and transmitting Welsh to their children, and to support children's linguistic development in a social and educational context. This is achieved through a series of free sessions for parents and their children, a network of officers support families to introduce and use Welsh at home, transmit Welsh to their children, and support children's linguistic, social and educational development. Face-to-face sessions now run alongside virtual sessions introduced during the pandemic.
- 2.11 Cymraeg for Kids supports our [national policy on Welsh language transmission and use in families](#). Encouraging families to choose and use Welsh is an important part of *Cymraeg 2050* and this policy outlines how we plan to make sure parents and carers are given the best possible support and encouragement to choose to use Welsh with their children. Our *Welsh language transmission and use in families* policy works in collaboration with Cymraeg i Blant.

**Milestone: Increasing language use**

- 2.12 Another important target within *Cymraeg 2050* is to empower speakers to use their Welsh with the aim of doubling the percentage of us who use more than a few words of Cymraeg every day by 2050. With this important aim in mind, all of the interventions in the Cymraeg 2050 portfolio, and therefore all corresponding budget allocations, ultimately have the aim of increasing the use of the language, and are evaluated and monitored to ensure that they are fit for this purpose. This is true of both the Welsh Language and Welsh Language Commissioner BELs. Under the Memorandum of Understanding between the Welsh Government and the Welsh Language Commissioner, as well as regulating the standards, the Commissioner has the role of increasing use of the language through working with bodies to improve and increase the use of their Welsh language services.
- 2.13 Supporting the Welsh language as a thriving community language is central to the [Welsh Language Communities Housing Plan](#) (WLCHP). A key theme of the WLCHP is to empower communities to take responsibility for the long term sustainability of the Welsh language. The Perthyn project supports community organisations to set up or expand social enterprises and community led co-operative housing. Perthyn, which is delivered by Cwmpas has two elements – the first provides a bespoke support and advice service to community groups and secondly a small grant to encourage community empowerment and capacity building. A total of £0.465m has been allocated for the WLCHP for 2024-25. In August 2022, we launched the Commission for Welsh-speaking Communities, the Commission will initially concentrate on the future of Welsh as a community language in Welsh-speaking communities. In June 2023, the Commission

published a position paper outlining their initial findings with the final report due to follow during the summer of 2024.

2.14 The Siarter Iaith supports and promotes the informal use of Welsh amongst school-age young people. We have maintained funding of £0.713m for the programme in 2024-25. Of this allocation, £0.5m is transferring to the new Cymraeg 2050 (LAEG) BEL for local authorities to work with schools to deliver the programme and £0.138m will be allocated to the Urdd to deliver other elements of the programme. The remainder funds national activities such as the publication of the Seren a Sbarc books, other resources and funding to support Bardd Plant Cymru (*Welsh-language Children's Laureat*).

**Milestone: Aim to support the expansion of Welsh language early years by 60 new groups by 2026**

2.15 We will maintain funding of £3.031m to Mudiad Meithrin to support its membership of Cylchoedd Meithrin and Cylchoedd Ti a Fi to strengthen and expand its services. The work to develop staff and volunteers at its member settings has continued, with the range of courses available through its 'Academi' expanding and uptake increasing. Funding will also continue to enable Mudiad Meithrin to run the Sefydlu a Symud / Set up and Succeed (SAS) programme which focuses solely on establishing new Welsh-medium early years provision in areas of Wales where there is a current lack of such services as an access point to Welsh-medium education.

2.16 Through this work, 43 new groups were established over the first 3 years of the programme up to 2021. The target of establishing a further 60 groups during the current Senedd term is continuing with additional funding provided during 2022-23 and 2023-24 allowing for Mudiad Meithrin to exceed their annual targets. This budget will be maintained in 2024-25 and Mudiad Meithrin will continue to build early years capacity to provide a path into Welsh-medium education.

2.17 Closely allied to the programme of expanding provision is the Programme for Government and Co-operation Agreement commitment to deliver a phased expansion of early years provision to include all 2 year olds, with a particular emphasis on strengthening Welsh-medium provision. It is expected that the SAS programme and the expansion of Flying Start (funded through the Health and Social Services MEG) will work closely and contribute to each other's targets.

**Milestone: Increase the percentage of year 1 learners taught in Welsh from 23% (2020 to 2021) to 26% in 2026.**

2.18 One of the key aims of *Cymraeg 2050* is to increase the number of learners studying through the medium of Welsh. The most recent PLASC data (2023), published in September shows a small percentage decrease in Year 1 learners studying through the medium of Welsh, decreasing from 23.9% in 2022 to 23.4% in 2023. In the *Cymraeg 2050 Work Programme for 2021-26*, we have committed to increase the percentage of Year 1 learners taught in Welsh to 26% by 2026. Work in this policy areas includes a number of different streams.

- 2.19 We will continue to allocate funding of £0.1m from the Welsh in Education BEL to support central work on the WESPs. All local authorities in Wales implemented their 10-year WESPs in September 2022 and submitted their annual WESP review reports in July 2023 outlining progress made against their targets within the first year of their Plans. The WESP annual review reports have been assessed and feedback has been provided to each local authority. Whilst the increase in the number and percentage of learners varies across Wales, the first annual review reports show us that decisive action has been taken by the majority of local authorities to lay firm foundations for progress during the lifespan of the WESPs.
- 2.20 Our efforts in 2024-25 will concentrate on continuing to support local authorities to implement their 10-year WESPs. This will include:
- providing advice and guidance around communication and promotion of Welsh-medium education;
  - continue to fund the role of a Welsh-medium Champion in South-east Wales to strengthen mechanisms that support Welsh-medium education in the area;
  - on-going support in implementing the new WESPs and attending local authorities' Welsh in education forums; and
  - support local authorities to implement the new arrangements relating to school categorisation according to the provision of Welsh.
- 2.21 Local authorities will continue to use funding from other sources to implement their WESPs, for example through the Sustainable Communities for Learning capital programme, Early Years and Childcare capital grant, and the Revenue Support Grant (RSG). Specific Welsh language funding such as the Welsh-medium Capital grant and Welsh-medium Late Immersion Grant will continue to support and deliver activities directly supporting the implementation of WESPs.
- 2.22 Late immersion continues to play an important part in our work to increase the percentage of learners who attend Welsh-medium education. The *Cymraeg 2050 Work Programme for 2021-26*, and the Programme for Government, include our commitment to expand the Late Immersion Programme to ensure that every newcomer to the language has access to a Welsh-medium education when they need it and wherever they are on their learning journey. Further detail on this funding is set out under section 3.1.
- 2.23 We have made a commitment to introduce a Welsh Education Bill during the term of this Senedd. The purpose of the Bill is to strengthen and increase our Welsh language education provision to meet the challenges set out in *Cymraeg 2050*. The new *Cymraeg 2050 (LAEG) BEL* brings together local authority funding for the Welsh language, supporting delivery of the forthcoming Bill.

**Milestone: support growth in the number of teachers in Wales who can teach Welsh or teach through the medium of Welsh by 2031.**

- 2.24 Funding is available within the Teacher Development and Support BEL to support the implementation of our Welsh in Education Workforce Plan. The total

funding available in 2024-25 is £8.15m with a further £2.57m transferred into the new Cymraeg 2050 (LAEG) BEL.

2.25 Approximately £4.3m will be prioritised to support the aims of the plan and will be mainly targeted at increasing the number of Welsh-medium teachers. Funding will be prioritised for the following activities:

- continuation of the primary to secondary conversion programme;
- continuation of the grants to schools to develop innovative solutions to addressing teacher shortages;
- funding to support the viability of Welsh A Level provision in schools and FE Colleges;
- the second year of the teacher retention bursary; and
- funding for CYDAG to support collaboration across Welsh-medium schools in a number of policy areas.

2.26 The Coleg Cymraeg Cenedlaethol will continue to allocate £0.150m from their grant, which is funded from the Welsh in Education BEL, in 2024-25 to develop two specific projects:

- pilot a financial scholarship and mentoring for undergraduate learners to support them to prepare for ITE through the medium of Welsh; and
- develop networks to engage with Welsh-speaking graduates studying in England and promote opportunities for them to return to Wales to prepare to teach.

2.27 We continue to provide incentives for student teachers from Wales undertaking ITE and have maintained the Iaith Athrawon Yfory incentive of £5,000 for each student who is preparing to teach secondary subjects through the medium of Welsh. This is funded from the ITE budget lines within the Teacher Development and Support BEL.

2.28 Professional learning is a key feature of our approach to strengthening Welsh-medium teaching capacity and supporting practitioners to develop their Welsh language skills in accordance with the Professional Standards for Teaching and Leadership. We are working with regional consortia and local authorities to ensure that practitioners are identified and supported to engage with professional learning in order to improve the teaching of Welsh in English-medium schools and to support all schools to move along a continuum.

2.29 Approximately £3.8m will be allocated within the Teacher Development and Support BEL in 2024-25 to the Sabbatical Scheme to deliver intensive Welsh language and language teaching methodology professional learning for practitioners. Courses are available on a range of levels for teaching assistants and teachers. The majority of this budget funds the supply costs related with releasing practitioners from schools to undertake the courses. This has increased for 2024-25 to account for the higher cost of paying for supply cover to enable practitioners to engage with the courses.

2.30 Funding allocated to the National Centre for Learning Welsh also delivers access to free Welsh language lessons to all education practitioners. A website was

launched in July 2022 to provide information to practitioners about the provision available to them via the Sabbatical Scheme and the National Centre for Learning Welsh [Education Workforce | Learn Welsh](#). During 2024-25, the Centre will be developing new bespoke provision to meet the needs of the sector. For example, a pilot course for secondary teachers in English-medium schools with some Welsh will be developed to be delivered flexibly and a short on-line confidence / 'gloywi' course for those teaching in a range of settings. £0.5m will be allocated from the Teacher Development and Support BEL in 2024-25 to support this work.

2.31 In addition to the Sabbatical Scheme and provision via the National Centre, a total of £2.57m will be allocated to local authorities as part of the amalgamated Cymraeg 2050 strand of the LAEG in 2024-25 to support the delivery of teaching Welsh and through the medium of Welsh. The funding is used collaboratively to support the development of national professional learning resources and provision for example to support practitioners who have completed the sabbatical scheme courses to use their new skills back at school; to support teaching assistants to model language patterns with learners and to support headteachers to plan strategically for the development of Welsh in their schools.

2.32 In addition, £4.5m is allocated to local authorities as part of the Welsh in Education Grant (WEG), which was re-established in 2023-24 following discussions with local authorities. With 30% match funding from local authorities the total value of the WEG is £5.85m. The WEG supports the delivery of local authority Welsh in Education Strategic Plans in three key areas:

- support for latecomer and late immersion centres;
- support for linguistic progression and for Welsh-medium and bilingual schools, and
- support the development of Welsh in English-medium schools.

2.33 The WEG will continue in 2024-25 and will also be allocated as part of an amalgamated Cymraeg 2050 element of the LAEG to local authorities.

### 3. Specific Areas

#### 3.1 Updates on allocations in 2023-24 budget

***Information on the allocation of £3 million in 2023-4 and £1.5million in 2022-23 to the Coleg Cymraeg Cenedlaethol and National Centre for Learning Welsh to increase the amount of Welsh-medium delivery in the apprenticeship and further education sector, and to provide free Welsh language learning for 16 to 25-year-olds and teaching staff.***

3.1.1 The Programme for Government and our Co-operation Agreement with Plaid Cymru includes a commitment to invest in the Coleg, and the National Centre for Learning Welsh to provide free Welsh language learning for 16 to 25-year-olds and teaching staff. This additional funding builds on the existing core budget for the Coleg which supports Welsh-medium and bilingual delivery

across universities, FE colleges and training providers by providing grant funding together with training and mentoring to build teaching capacity.

The 2022-23 budget included an additional £1.5m allocated to the Coleg Cymraeg Cenedlaethol as follows:

- Post-16 education: £1,136,840
- Higher Education: £213,160
- Initial Teacher Training: £150,000

3.1.2 The additional allocation funded a programme of development grants to colleges and apprenticeship providers to develop capacity and provision in priority sectors, including childcare, health and social care, sports and leisure, and agriculture. In addition, the funding supported two specific projects to develop the confidence of students who are able to teach through Welsh, and to attract students back to Wales to teach through the medium of Welsh.

3.1.3 The budget for 2023-24 included a further £3m for the Coleg and the National Centre for Learning Welsh. From the additional £4.5m allocated for 2023-24, £2.825m was allocated to the Coleg and £1.675m for the National Centre.

3.1.4 For 2023-24, the Coleg is using its funding to continue to strengthen and support delivery in the leisure and sport, health and social care, childcare and agriculture sectors; as well as extending provision in the business and creative arts sectors. In the Apprenticeship sector, the Coleg continues to build capacity in health and social care and childcare sectors enabling more learners to speak Welsh and be confident bilingual speakers for the workplace. The funding is also supporting the continuation of two initial teacher education projects.

3.1.5 The £1.675m for the National Centre in 2023-24 is being used to extend provision for 16-25 year olds and the education workforce in order to provide free access to Welsh courses. As part of the offer, eligible learners aged 18 and over are also able to access the mainstream Learn Welsh courses in the community. To date in 2023/24, over 1,300 learners aged 16-25 are benefitting from the offer.

3.1.6 The National Centre began offering free courses for teachers and other workers in the education sector in September 2022 and the additional funding has enabled the Centre to extend this provision for 2023-24. Provisional data from the National Centre shows that 1,200 individuals accessed provision during the 2022/23 academic year, with over 1,000 having registered to date during 2023/24.

3.1.7 The Co-operation Agreement funding is being maintained at £4.5m for 2024-25. The provisional split in the budget for 2024-25 remains at £2.825m for the Coleg and £1.675m for the National Centre. Reprioritising £3.5m funding in this way for 2024-25 will allow us to protect core services that support our ambitions for *Cymraeg 2050*. In particular, we will be able to maintain funding linked to the Welsh Language Education Bill, Mudiad Meithrin and the Welsh in Education budget to support Welsh language delivery.

3.1.8 However, reprioritising funding may lead to the Coleg having to withdraw from some commitments made to FE Colleges and Apprenticeship providers. It may also result in a reduction in the numbers learning Welsh. We will work with the Coleg and the National Centre to explore options to mitigate the impact of this approach and support action to maintain Welsh-medium provision in priority sectors as well the provision of free courses for 16-25 year olds and the education workforce.

***Update on the distribution of £2.2m allocated (per annum) to expand Welsh language immersion provision across Wales and how this funding has been used by local authorities across Wales.***

3.1.9 The Programme for Government includes a commitment to expand the Pupil Immersion Programme. Since the investment of £2.2m in 2021-22 to support Welsh learners to undertake Welsh-medium late immersion in schools, eight local authorities have created new Welsh-medium late immersion provision (Blaenau Gwent, Bridgend, Caerphilly, Torfaen, Merthyr Tydfil, Neath Port Talbot, Powys) and other local authorities have expanded their existing late immersion programmes to meet the growing demand.

3.1.10 The continuation of funding of £2.2m in 2023-24 has ensured local authorities continue to develop their late immersion provision in their area. This has allowed them to:

- continue and develop their existing provision;
- open their first late immersion centres – Blaenau Gwent, Torfaen, Caerphilly and Neath Port Talbot;
- deliver provision such as pilots for ‘pop up’ immersion provision; procurement of specialist training in immersion methodologies and resources; scoping projects to establish latecomer provision based on other LA models and Welsh-medium late immersion resources;
- develop innovative digital technologies to support learning, such as Gwynedd’s Virtual Reality (VR) digital resource project Aberwla consisting of a VR village providing opportunities for learners to use their language skills in different contexts. The funding will support an all-Wales roll out over the coming years.

3.1.11 The funding for 2024-25, which will transfer as part of the amalgamated grant to the Cymraeg 2050 strand of the LAEG, will allow local authorities to continue with their projects ensuring over 60 specialised late immersion teachers / classroom assistants are in post. It will also continue to support the roll out of Gwynedd’s VR project, Aberwla, across Wales over coming years.

***Details on take-up of the Iaith Athrawon Yfory incentive, and any impact evaluation information that could be shared.***

3.1.12 The table below shows the number of Initial Teacher Education students receiving the Iaith Athrawon Yfory incentive for 2018/19 to 2022/23 (as of 13 November 2023).

Academic Year:	2018/19	2019/20	2020/21	2021/22	2022/23
QTS Claims	60	95	130	105	75*
Induction Claims	45	80*	105*	65*	n/a
QTS Deadline	31/08/2020	31/08/2021	31/08/2022	31/08/2023	31/08/2024
Induction Deadline	31/08/2023	31/08/2024	31/08/2025	31/08/2026	31/08/2027
Total Claimants	60	95	130	105	73* STC

*\*This number may rise as the deadline has not yet passed. Numbers are rounded to the nearest 5.*

3.1.13 Only those claiming the first payment (QTS) are eligible for the second payment. Due to the time of year, no claims or payments have yet been made against the 2023-24 Scheme. Claimants that took ITE from 2018/19 to 2022/23 claim this incentive directly from the Welsh Government, as such the above table may not indicate actual levels of Welsh ITE Secondary student teacher recruitment.

3.1.14 Data pertaining to ITE recruitment, including Welsh-medium recruitment across phases and subjects, since academic year 2016/17 can be found in the annual [ITE statistical bulletin](#). Data on academic year 2022/23 will be published in May 2024. We recently updated the [impact assessment](#) for the incentive scheme.

***Update on budget allocations from other parts of the Ministers portfolio, such as the Teacher Development and Support BEL in relation to how it is used to support the development of the Welsh language in the education sector.***

3.1.15 Funding is available within the Teacher Development and Support BEL to support the development of the Welsh language in the education workforce (see paragraphs 2.24-2.29).

3.1.16 Sufficient provision is being maintained as part of the Curriculum and Assessment BEL to continue development of bilingual Curriculum for Wales resources and supporting materials as needs are identified through practitioner engagement (and in advance of Adnodd adopting its commissioning and quality assurance functions). Alongside this, practitioners continue to support the review of all curriculum resources on the Hwb platform, which are now populating a dedicated Curriculum for Wales resources section. As the review has progressed, more and more bilingual resources are appearing in this section so that schools and settings can be assured of their quality and alignment to the Curriculum for Wales.

## 3.2 Welsh Language Commissioner

***Allocations and commentary in respect of the budget allocation for the Welsh Language Commissioner in 2024-25.***



- 3.2.1 As outlined in paragraph 3, a cross-government decision has resulted in a re-shaping of indicative spending allocations to provide extra funding and protection for the services which matter most to people and communities across Wales – the NHS and the core local government settlement, which funds schools, social services and social care and other everyday services. Spending more in some areas means that there is less to spend in other areas. This has led to a 5% budget reduction for all four statutory Commissioners in Wales, including the Welsh Language Commissioner. This takes the Welsh Language Commissioner’s revenue allocation for 2024-25 to £3.189m, a reduction of £0.168m. There are no changes to the Commissioner’s non-cash budget of £0.121m and £0.050m capital for 2024-25.
- 3.2.2 We will work with the Commissioner to manage the impact associated with this reduction. In the budget estimate for 2024-25, the Commissioner’s office highlighted the pressures of funding annual pay deals for staff and requested an additional £0.147m revenue to fund a projected 5% pay deal in 2024-25. Approximately £0.032m is due to an increase in employer contributions to the Civil Service Pension Scheme. The UK Government’s Autumn Statement on 22 November confirmed that additional funding would be provided to cover the estimated costs for pension schemes in Spring 2024. We expect that Wales will receive a consequential "Barnett share" of any additional funding allocated to UK Departments and further information will be provided as part of the First Supplementary Budget 2024-25.

### **3.3 Capital expenditure in relation to the Welsh language**

#### ***Detailed progress on expanding capacity in Welsh-medium schools, the distribution of the Welsh Medium Capital Grant and progress to date across local authorities in Wales.***

- 3.3.1 The Welsh-medium capital budget is funded from the Education Infrastructure BEL of the Education and Welsh Language MEG. Its aim is to increase capacity in Welsh-medium schools, establish new Welsh-medium provision, support late immersion provision as well as support learners of all ages to improve their skills and confidence in Welsh.
- 3.3.2 Initially, £46m of capital investment was approved during the first round of Welsh-medium capital funding in 2018. However, additional projects were approved following the original announcement which increased the approved investment for the first cycle from £46m to £74m.
- 3.3.3 A second tranche of funding totalling £30m was announced in March 2021, to support capital projects dedicated to growing the use of the Welsh language in education according to local WESP needs. This was on top of the existing allocation announced for Band B of the Sustainable Communities for Learning Programme.

- 3.3.4 Of the 51 bids submitted, a total of 11 bids were approved across nine local authority areas with the remaining bids that met the criteria, but could not be supported due to available funds, placed on a reserve list.
- 3.3.5 During October 2022, additional Welsh-medium capital projects were approved. These projects listed at Annex B were on the reserve list from the second phase of Welsh-medium capital grant funding. Following a further review of the Welsh-medium capital grant reserve list, in July 2023, additional projects were approved in principle, subject to approval of a business case. These seven projects listed at Annex C total £14.540m.
- 3.3.6 These projects will make a substantial contribution to Welsh-medium education across Wales. On a local level, they will provide a positive boost to the language in numerous counties. The total investment since 2018 stands at nearly £129m.

## **Summary**

The budget as relevant to the Welsh language in the Education and Welsh Language MEG Draft Budget for 2024-25 is presented to the Committee for consideration.

**Jeremy Miles MS**  
**Minister for Education and Welsh Language**

## ANNEX A – WELSH LANGUAGE BUDGETS WITHIN THE EDUCATION AND WELSH LANGUAGE MEG FOR DRAFT BUDGET 2024-25, 2023-24 FORECASTS AND 2022-23 FINAL OUTTURN

### Resource budgets

Action	BEL Description	2022-23 Final Outturn	2023-24 Final Budget (Feb 2023)	2023-24 1st Supplementary Budget (June 2023)	2023-24 Forecast Outturn (Period 7)	2024-25 Indicative (Final Budget 2023-24 - Feb 2023)	2024-25 Reprioritised Funding	2024-25 Grant Amalgamation	2024-25 Other Changes	2024-25 Draft Budget (Dec 2023)
£000s										
Pre-16 Education Support via LA's	Cymraeg 2050 (LAEG)	0	0	0	0	0	0	9,770	0	9,770
<b>Total Pre-16 Education Support via LA's</b>		<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>9,770</b>	<b>0</b>	<b>9,770</b>
Welsh in Education	Welsh in Education	17,713	20,775	19,030	18,830	24,275	-3,500	-2,200	-1,675	16,900
<b>Total Welsh in Education</b>		<b>17,713</b>	<b>20,775</b>	<b>19,030</b>	<b>18,830</b>	<b>24,275</b>	<b>-3,500</b>	<b>-2,200</b>	<b>-1,675</b>	<b>16,900</b>
Welsh Language	Welsh Language	23,716	22,404	24,149	26,236	22,404	0	-500	1,675	23,579
	Welsh Language Commissioner	3,101	3,357	3,282	3,282	3,357	-168	0	0	3,189
	Welsh Language Commissioner - Non Cash	165	169	245	245	121	0	0	0	121
<b>Total Welsh Language</b>		<b>26,982</b>	<b>25,930</b>	<b>27,676</b>	<b>29,763</b>	<b>25,882</b>	<b>-168</b>	<b>-500</b>	<b>1,675</b>	<b>26,889</b>
<b>Welsh Language - TOTAL RESOURCE BUDGET</b>		<b>44,695</b>	<b>46,705</b>	<b>46,706</b>	<b>48,593</b>	<b>50,157</b>	<b>-3,668</b>	<b>7,070</b>	<b>0</b>	<b>53,559</b>

### Capital budgets

Action	BEL Description	2022-23 Final Outturn	2023-24 Final Budget (Feb 2023)	2023-24 1st Supplementary Budget (June 2023)	2023-24 Forecast Outturn (Period 7)	2024-25 Indicative (Final Budget 2023-24 - Feb 2023)	2024-25 Changes	2024-25 Draft Budget (Dec 2023)
£000s								
Welsh Language	Welsh Language Commissioner	242	50	50	50	50	0	50
<b>Total Welsh Language</b>		<b>242</b>	<b>50</b>	<b>50</b>	<b>50</b>	<b>50</b>	<b>0</b>	<b>50</b>
<b>Welsh Language - TOTAL CAPITAL BUDGET</b>		<b>242</b>	<b>50</b>	<b>50</b>	<b>50</b>	<b>50</b>	<b>0</b>	<b>50</b>

## ANNEX B – WELSH MEDIUM CAPITAL GRANT ALLOCATIONS – APPROVED OCTOBER 2022

Local Authority	Project	Capital	Status
1. Newport	Sports Hall for Ysgol Gyfun Gwent Is Coed	£3,334,919	Design development. Scheme amended and additional £1,866,410 funding approved.
2. Torfaen	3G Pitch for Ysgol Gyfun Gwynllyw	£1,650,000	Under construction
3. Cardiff	Ysgol Glantaf SRB Unit	£129,202	Complete
4. Cardiff	Ysgol Bro Edern refurbishment	£105,421	Complete
5. Cardiff	Plasmawr demountable unit and refurbishment	£1,148,620	Complete
6. Conwy	Cylch Meithrin Ysgol Bro Aled	£55,644	Complete
7. Anglesey	Ysgol Llanfawr chilcare unit	£596,800	Complete
8. Anglesey	Ysgol y Graig childcare unit	£298,031	Complete
9. NPT	Ysgol Trebannws refurbishment	£460,000	Complete
10. NPT	Mynachlog Nedd refurbishment new seedling school	£550,000	Complete
11. Powys	Ysgol Pennant refurbishment and extension	£671,473	Under construction
		<b>£9,000,110</b>	

An additional project received delegated approval following the original announcement, namely £100,366 during 2022-23 to fund the creation of a pastoral hub at Ysgol Morgan Llwyd. This project was put forward for funding as part of the second phase of the Welsh Medium Capital Grant and was placed on the reserve list. In October 2022, it was identified as a project that could be delivered within the current financial year. A basic business case was submitted and £100,366 Welsh Government funding was agreed for 2022-23.

## ANNEX C – WELSH-MEDIUM CAPITAL GRANT ALLOCATION – APPROVED JULY 2023

Local authority	Project	Capital
1. Cardiff	Glantaf ALN – This project will enable 60 additional Welsh-medium places (30 ASD and 30 CLN)	£7,850,000
2. Denbighshire	Ysgol Bro Elwern – Build a new classroom and ancillary space at the school	£1,066,546
3. Denbighshire	Ysgol Bro Cinmeirch – 2 class extension	£1,359,164
4. Denbighshire	Ysgol Brynhyfryd – Increased capacity and immersion provision	£1,561,924
5. Denbighshire	Ysgol Tremeirchion – 2 class extension	£1,255,021
6. Denbighshire	Ysgol Henllan – 1 class extension	£558,341
7. Vale of Glamorgan	Ysgol Iolo Morgannwg – A self-contained unit to provide Welsh-medium immersion placements, as well as offering Welsh lessons for adults, particularly those living within the residential development.	£888,807
<b>Total</b>		<b>£14,539,803</b>

# Agenda Item 5

By virtue of paragraph(s) vii of Standing Order 17.42

Document is Restricted



Delyth Jewell MS  
Chair  
Culture, Communications, Welsh Language, Sport  
and International Relations Committee  
Senedd Cymru

20 December 2023

Dear Delyth,

I am writing in response to your letter of 14 November on the Welsh Government's Draft Budget 2024-25.

The international profile of Wales continues to rise. Our nation's success in sport and culture, and our innovative approach to policy, mean that demand for international engagement is high and increasing. The value of this international engagement has been clear to see in investments such as Vishay Intertechnology and KLA as well as Memoranda of Understanding with regions such as Baden-Württemberg this year.

However, as we have seen in this financial year, the next financial year is likely to continue to be challenging, resulting in further potential difficult decisions and prioritisations ahead. From an international perspective, this means that next year we will need to balance increasing demand whilst continuing to provide value for money. This response will set out our high-level plans for the next financial year, which will be developed in further detail over the next quarter.

### **Previous and Current Financial Years**

The **2022-23** financial year final out-turn for International Relations was £7.689m, against a figure of £8.424m. The Overseas Network was not fully resourced during 2022-23, which resulted in an underspend. The position has now been addressed, with an increased presence in India and North America.

As outlined in our previous letter, the International Relations budget for **2023-24** was £8.383m. This was reduced to £8.272m at the First Supplementary Budget. The £0.111m reduction was for a £0.100m transfer from the International Relations BEL to the Social Justice MEG's International Development BEL, to cover inflationary pressures for the Mbale Tree Planting Programme and a £0.011m transfer to reserves in relation to IFRS16 leases.

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Rydym yn croesawu derbyn gohebiaeth yn Gymraeg. Byddwn yn ateb gohebiaeth a dderbynnir yn Gymraeg yn Gymraeg ac ni fydd gohebu yn Gymraeg yn arwain at oedi.

We welcome receiving correspondence in Welsh. Any correspondence received in Welsh will be answered in Welsh and corresponding in Welsh will not lead to a delay in responding.

Following an in-year financial savings exercise, £260,000 has been returned to central finance. Our current forecast outturn for 2023-24 is £8.112m.

**2024-25**

Budget Expenditure Line (BEL) allocations

The table below provides a breakdown of the indicative **2024-25** draft budget allocations for International Relations.

Budget Expenditure Line	2024-25 Indicative Draft Budget December 2023	2024-25 Temp in year reduction	MEG to MEG Transfers	2024-25 Indicative Final Budget March 2024
	£000s	£000s	£000s	£000s
International Relations				
<b>Action: International</b>	<b>8,383</b>	<b>290</b>	<b>350</b>	<b>7,743</b>
<b>SPA: International</b>	<b>8,383</b>	<b>290</b>	<b>350</b>	<b>7,743</b>

All departments across Welsh Government were asked to review their budgets in light of the financial challenges being faced. In the case of International Relations, a reduction was made to the overall budget, which provided an initial reduced budget of £8.383m. Further to this, staff in International Relations completed an additional deep dive of the budget requirements for the next financial year and £0.29m savings were identified, reducing the budget to £8.093. After actioning the MEG to MEG transfer of £350,000 to International Development, this leaves the revised budget at £7.743m for 2024-25.

As per previous financial years, the £350,000 MEG to MEG transfer from International Relations to International Development is to support the delivery of the Wales and Africa aspects of the International Strategy. This follows similar transfers undertaken in 2022-23 and 2023-24 which were then confirmed to take place annually for the duration of the International Strategy.

International Development

The International Development Draft Budget for 2024-25 is £1.050m from a previous £1.275m, the reduction of £225,000 is due to the in-year savings exercise. This £1.050m is made up of £700,000 from the Social Justice MEG under the responsibility of the Minister for Social Justice, plus the MEG transfer from International Relations of £350,000 to deliver aspects of the International Strategy.

The International Development budget for 2022-23 was £1.275m, of which only £350,000 was under the responsibility of the First Minister’s office. The final outturn for the year was £1.386m. A £100,000 DEC payment towards the Pakistan flood appeal was provided, with this funding being covered by a £100,000 underspend in the International Relations budget. There was also an additional £11,000 overspend due to awarding an extra grant in round 2 of the Wales and Africa small grants scheme.



The International Development budget for 2023-24 was £1.375m and, due to an in-year savings exercise, we returned £16,000 which reduced the budget to £1.359m and the means that the forecast outturn is £1.359m.

### **Other information**

Wales has its own International Strategy and objectives for engaging with the European Union. The Welsh Government's Brussels Office, and our network of offices across Europe in France, Germany and Ireland, are central to supporting our trade and investment activity in Europe and delivering on our commitment to European engagement. This presence means that we can continue to work with our partners in Europe on our shared values and policy ambitions. It will also enable us to support businesses to trade as efficiently as possible in the future.

With EU exit resulting in additional barriers to trade and investment in the EU market, it is more important than before to have a presence across Europe to promote Wales as an investment destination and to support businesses to continue to trade with our largest trading partner. We must work harder to remain present and relevant to our European partners post-Brexit.

The Welsh Government has shared policy goals with the EU on many key issues and challenges such as sustainability, the environment and biodiversity, climate, innovation and regional development, equality and social affairs, amongst others. The UK's exit from the EU has made it more challenging to engage directly with EU institutions on these topics as we no longer have the same access to EU institutional frameworks to gather intelligence from, and influence, EU policy. The terms of the EU-UK Trade and Co-operation agreement mean that it is important to understand the direction of future EU policy that will have continued implications for Wales.

Through the work of the Welsh Government Brussels Office, our European Representative and priority relationships with European nations and regions, we are re-establishing and reinforcing our connections with EU institutions and partners in a way that reflects the new post-Brexit arrangements. Welsh Government continues to work actively with a wide range of European networks covering a wide range of areas. These networks raise Wales' profile within Europe, provide detailed analysis to EU policy proposals and support the building of consortia for inter-regional collaboration. The activity undertaken by all of our international offices, including those in Europe, is not set out prescriptively in the draft budget allocation and responds flexibly to global challenges and priorities.

Welsh Government has delivered on its Programme for Government commitment to retain the Brussels office. A new and more favourable nine-year lease has been negotiated, securing Tŷ Cymru as an essential hub for Welsh Government, Senedd Cymru and Universities Wales engagement with the EU Institutions.

The action to establish a peace academy is another important Programme for Government commitment. Funding has been awarded to Academi Heddwch, amounting to £140,918 in this current financial year. The Academi held its inaugural peace lecture at the Llangollen International Eisteddfod this year and awarded certificates to schools for their work on peace. The Academi has completed some baseline research on 'Wales as a Nation of Peace' which will assist the development of a Wales' peace research network.

Unfortunately, global conflict remains a significant feature of the international agenda. Although this does not directly impact on the International Relations budget, responding to situations, such as the unprovoked war in Ukraine, remains an important part of the Welsh

Government's work. The UK Government has led on the UK's response to these events, and we work closely with the FCDO to remain updated on developments.

In Wales, the Welsh Government has been able to provide support to those who have been affected through the Homes for Ukraine scheme and working with the Disasters Emergency Committee Cymru. Wales' support for Ukraine is routinely discussed in diplomatic engagements and through our funding to Academi Heddwch, schools and others have been signposted to resources which explain the conflict and ways in which citizens can help.

## **Specific areas**

### **International Strategy**

Within this International Engagement budget of £3.059m, £150,000 has been allocated to the Priority Regional Relationships and Networks Action Plan, £1.3m for the Public Diplomacy and Soft Power Action Plan and £190,000 has been allocated to the Diaspora Engagement Action Plan. The remaining budget of £1.419m will be used to fund cross-cutting activity which supports our overarching International Relations objectives and the International Strategy rather than directly allocated to a particular Action Plan.

International Relations works closely with our strategic partners, including arts and sports organisations, the Office of the Future Generations Commissioner, our global diaspora and our priority regions and countries, to support the delivery of our International Strategy.

We expect our strategic partners to submit their engagement and delivery plans in the first quarter of the 2024 and we will consider their requests for resources accordingly. We will continue to work with strategic partners that we do not directly fund but who contribute to the delivery of the strategy.

There has been significant engagement with priority regions this financial year. During this period the International Relations team has negotiated a new memorandum of understanding with Flanders, a shared statement with Baden-Württemberg and an International Friendship Pact with the city of Birmingham, Alabama.

Wales has hosted several Priority Regions in Wales this financial year, including a delegation from our priority regions at Wales Tech Week. The delegation included representatives from Silesia, Catalonia, the Basque Country, Flanders, Ontario, Baden-Württemberg and Québec.

### **Wales and Africa Programme**

The 2023-24 Wales and Africa budget stands at £1.359m – with the MEG to MEG transfers of £350,000 and an additional £100,000 to cover inflationary pressures for the Mbale Tree Planting project. This additional transfer is for the financial year 2023-24 only. £16,000 of the budget was returned for this financial year in the cost savings exercise.

The Wales and Africa programme is part of the portfolio of the Minister for Social Justice with £350,000 (via transfers) from the International Relations BEL contributing to the delivery of the International Strategy.

The £450,000 International Relations funding contributes to a grant of £550,000 to Size of Wales, primarily to deliver the Mbale Tree Planting Programme, with some funding allocated to the Bore Community Forest project in Kenya.

## 2024-25

The 2024-25 Wales and Africa budget is currently forecast to be £1.050m – with the MEG to MEG transfer of £350,000. The reduced amount is following the central financial savings exercise in which £225,000 was returned centrally.

### Overseas offices

The budget for the International Offices is £5,434,400. This is split into an annual overseas offices running cost budget of £4,684,400 and an annual combined activity budget of £750,000. The overseas offices running cost budget includes office rent, FCDO platform charges, staff salaries and on-costs. The activity budget supports network-wide activity for the overseas offices. We do not set programme running cost budgets for each office as these are managed centrally. The overseas offices are also able to bid into the International Engagement budget to deliver against the action plans and cross cutting activity.

The International Offices deliver against the stated aims of the International Strategy and associated Action Plans, as well as the published remits of the individual offices, with a focus on soft power.

In terms of our engagement with major/international events, a programme of sports diplomacy commenced in August 2022, which looked to capitalise on the opportunities of Wales' qualification at several major tournaments across a range of sports including hockey, netball, rugby and football. Over the whole of 2023, we looked to maximise sporting opportunities starting with the Hockey World Cup in India in January through to the Rugby World Cup in the Autumn in France.

An independent evaluation of the Welsh Government's Tîm Cymru approach positively reported new partnerships, strengthened networks, and enhanced economic, educational and cultural international relations as a result of our work. It also found strong evidence that these activities have reached a wide audience, both domestic and internationally. We will use this learning in future events activity and planning. It is important to note that much of the work using sport as a tool for soft power has been undertaken by teams across Welsh Government, not just International Relations.

Plans for 2024-25 engagement at international events remains ongoing. We anticipate some of these events will be linked to our Wales in India year and St David's Day.

Yours sincerely,



**MARK DRAKEFORD**

# Agenda Item 6

By virtue of paragraph(s) vii of Standing Order 17.42

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# Agenda Item 8

By virtue of paragraph(s) vii of Standing Order 17.42

Document is Restricted

06.12.2023

## A Report into the working environment and atmosphere at S4C



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## Introduction

The S4C Authority (being S4C's Non-Executive Members) instructed us to conduct an independent fact-finding exercise into the working environment and atmosphere at S4C following a letter of complaint it received from BECTU on 28th April 2023. This letter followed an earlier e-mail of complaint from BECTU, dated 2nd December 2022, sent to the Chief Executive and the HR Director at S4C. The Authority engaged Capital Law to undertake an independent fact-finding exercise, and this is our Report on the evidence we gathered that can be made publicly available.

Capital Law is independent of S4C. We have not worked for them for at least 5 years and neither Capital Law, nor any of the people in Capital Law who worked on this Report, have provided legal advice to any of the individual members of the Authority, nor have they had any commercial or personal relationships with them.

Terms of Reference were agreed and are in Appendix 1.

Two lawyers were specifically tasked to undertake a fact-finding exercise – to listen and to report back what was heard. These investigators gathered evidence from members of staff, former members of staff, and people who previously worked with S4C who wanted to contribute to the process and share their comments about the working environment and the atmosphere inside it.

The Authority decided that those who gave evidence must be sure that they were doing so confidentially, with anonymity if they wanted that, and many did (so the investigators reported all the evidence anonymously). The investigator's Evidence Report, together with transcripts of what each witness said, were presented to S4C's Secretary and Chair and another team of Capital Law lawyers, who were to advise the Authority about it. The decisions to appoint both teams within Capital Law were made by the Authority on behalf of S4C.

Given the promise of confidentiality to the witnesses and the request of anonymity made by many, it has been challenging to provide this Report with sufficient clarity and supporting evidence. The Authority's non-executive directors have been given a comprehensive report on the evidence supported by extensive quotations from the witnesses, to enable them to make the decisions required of them, however we have had to paraphrase most of those quotations in this Report so that witnesses can't be identified, or that they don't have to worry that they might be identified.

We had to prioritise protecting the witnesses' identities, particularly as some of them reported being traumatised and nervous about giving evidence. We must therefore state clearly, for the avoidance of any doubt, that when we have been unable to quote from a witness, the evidence exists and has been seen by the Authority's members.

This Report, therefore, provides a distillation of the extensive evidence received. It cannot be the full record of all the evidence provided for the reasons given above.

Generally, reports such as this try to lay out the evidence anonymously to protect the privacy of those involved. Given the nature of this situation, and that the weight of the evidence was that the issues at S4C about its' working environment and atmosphere were caused by specific people, it was impossible not to name them. If we hadn't done so it would still have been obvious who was being discussed.

We were not required by the Terms of Reference to make recommendations about what the Authority should do because of the evidence we received, and we have not done so.

This Report only deals with the evidence provided to Capital Law up until the end of the fact-finding investigation. It does not deal with any matters raised since, whether in the media or in correspondence.



# Introduction

## Methodology to collect the evidence

The contributions received as part of the evidence-gathering process ('the Process') were completely voluntary. Most of the contributions were oral, with several written contributions. Additional documentary evidence was also collected from the participants.

95 individuals volunteered to take part in the Process but 3 changed their minds and didn't do so.

Of the 92 participants that took part in the Process:

- 46 of them were current employees at S4C,
- 14 of them were former employees of S4C,
- 28 were independent of S4C but had previously worked with S4C,
- 3 had left their Employment with S4C since the Process started, and
- 1 did not reveal their name.

Of the 92 participants, we met 79 and 13 provided written contributions only. Of the 79 participants with whom we met, 40 provided additional documentary evidence.

All meetings were audio recorded with permission of the witnesses and transcribed.

The investigators prepared for all meetings in accordance with the Terms of Reference, with questions prepared concerning the working environment and the atmosphere within S4C. All meetings proved to be different. Full consideration was given to all contributions, and effort was made to keep the meetings relevant to the Terms of Reference.

Having considered all the evidence, the investigators collated it by means of a summary of themes that emerged, supported by a selection of quotes from the transcripts and the written contributions. Of the 92 participants, 65 of them are quoted in the Evidence Report.

- Of the 92 participants, 63 asked to remain anonymous.
- As a result of the restrictions regarding confidentiality and the wishes of a majority of the participants to remain anonymous, responses to any specific allegations from participants were not invited.
- Given the sensitivity of the evidence and the number of individuals who requested to contribute anonymously, all the transcripts have been anonymised.
- 38 participants asked to meet us face to face. Those meetings were held in 4 different locations: Cardiff, Carmarthen, Aberystwyth, and Caernarfon. We met 41 of the participants virtually. We accepted 13 written contributions (without meetings).
- Throughout the Process, it became clear that many of the participants were making false assumptions that we were investigating allegations of bullying. Those participants were reminded that this was a listening/fact-finding process, not an investigation process of any specific claim.
- Very few participants commented about the period (or any event) before appointing Sian Doyle as Chief Executive of S4C. Most people came to share their comments, whether positive or negative, on the working environment at S4C since January 2022.

## Structure of this Report

	<p>The overriding theme of the evidence we received was centred around the behaviours and actions of S4C's Chief Executive Officer, Sian Doyle and (but to a lesser extent) the Chief Content Officer, Llinos Griffin-Williams, how they went about their work and how it unsettled the organisation. This leads us to structure this Report as follows:</p>
<p><b>Chapter 1</b> <b>The Chief Executive Officer</b></p>	<ul style="list-style-type: none"> <li>— Overview</li> <li>— Implementing change</li> <li>— Use of critical and derogatory language</li> <li>— S4C Clic</li> <li>— Dictatorial leadership style</li> <li>— Confrontational behaviour</li> <li>— Shoot one and a thousand tremble</li> <li>— Ignoring experience and expertise</li> <li>— Disregarding and ignoring staff</li> <li>— Body language</li> <li>— Disrespectful behaviour</li> <li>— Staff duty of care</li> <li>— Supportive comments</li> </ul>
<p><b>Chapter 2</b> <b>The Chief Content Officer</b></p>	<ul style="list-style-type: none"> <li>— Overview</li> <li>— Removing responsibilities</li> <li>— Regularly cancelling meetings</li> <li>— Lack of communication</li> <li>— The commissioners' relationship with external companies</li> <li>— The behaviours of the commissioners towards Llinos Griffin Williams</li> </ul>
<p><b>Chapter 3</b> <b>The effect on S4C as an organisation</b></p>	<ul style="list-style-type: none"> <li>— Health and well-being</li> <li>— Disorganisation and disfunction</li> </ul>
<p><b>Chapter 4</b> <b>Teams affected</b></p>	<ul style="list-style-type: none"> <li>— Press and Marketing teams</li> <li>— Caernarfon office</li> <li>— The HR department</li> </ul>
<p><b>Chapter 5</b> <b>The Chairman</b></p>	

## Chapter 1 – The Chief Executive

<p><b>Overview</b></p>	<p>Sian Doyle and her behaviour was a prominent theme brought up again and again. We received examples of her behaviour from former employees, third parties and current employees of each of the three S4C offices, from different levels within the organisation and from different departments. Considering the number of participants who commented, and the number of examples given, Sian Doyle's behaviour was highlighted as having the most significant negative impact on the working environment and atmosphere within S4C. This contains relevant examples.</p> <p>Most examples were of Sian Doyle's alleged bad behaviour (87.9%). Of those, 37 participants' (26 current employees and 11 former employees) view was that Sian Doyle's management style was confrontational, abusive and inconsiderate. Sian Doyle's behaviour was said to have had a significant impact on 18 current employees.</p> <p>Many of the examples provided were not proven by documentary evidence nor evidence from more than one witness, but there was a clear theme. Some of the evidence is of significant specific events whilst other evidence is of minor incidents, repeated creating a pattern. We report on both.</p> <ul style="list-style-type: none"> <li>— We received 116 examples of Sian Doyle's behaviour, 101 of which have been categorised as alleged bad behaviour. There are 15 examples categorised as alleged good behaviour.</li> <li>— The 101 alleged examples of Sian Doyle's bad behaviour were provided by 29 participants.</li> <li>— Of the 29 participants who provided examples of Sian Doyle's alleged bad behaviour, 18 were current S4C employees, 9 were former S4C employees, and 2 had left the organisation since the start of the Process.</li> <li>— The 15 examples of Sian Doyle's alleged good behaviour have been provided by 12 participants.</li> <li>— Of the 15 examples of Sian Doyle's alleged good behaviour, 4 were from the participants that also provided examples of Sian Doyle's alleged bad behaviour.</li> <li>— Of the 12 participants who had provided examples of Sian Doyle's alleged good behaviour, 3 were former S4C employees and 9 were current S4C employees.</li> <li>— Of the 12 participants who had provided good examples of Sian Doyle's behaviour, 6 of them were appointed whilst she was Chief Executive.</li> </ul> <p>16 pages of the Evidence Report quote examples of bad behaviour whilst 2 pages quote examples of good behaviour.</p>
<p><b>Implementing change</b></p>	<p>Although participants recognised that change is needed within S4C, and that the general strategic direction that Sian Doyle was working towards was a positive one, the participants described how Sian Doyle had failed to bring S4C colleagues with her in implementing and managing this change.</p> <p>The several reports from witnesses are summarised in these contributions:</p> <ul style="list-style-type: none"> <li>— It was reported that the Chief Executive had made it clear that to deliver change in the workplace, anxiety rather than trust was required and that they understood that the Chief Executive wanted staff to feel insecure at work to achieve this.</li> <li>— It was said that there was a: <i>"..culture of zero critical discourse and she has created a situation where there is no analysis of the truth, the truth gets presented in a way that Sian sees it and the management team do not challenge her because the culture has gone to such an extent that we do not have the right to challenge and in my opinion, to do the job we are supposed to do. I would describe the atmosphere as a type of 'compliance or die'."</i></li> </ul>

## Chapter 1 – The Chief Executive

<p><b>Use of critical/derogatory language</b></p>	<p>Many of the participants described situations where they had seen Sian Doyle behave abusively whilst discussing S4C colleagues and their work. This was described in various ways, but participants referred to her targeting specific colleagues in public (outlined below) and her use of swear words and derogatory language whilst discussing them. This led to an unpleasant feeling of mistrust among participants.</p> <p>There are numerous reports of the Chief Executive being rude or disparaging about colleagues in internal meetings or in public. Examples include:</p> <ul style="list-style-type: none"> <li>— Disparaging comments about S4C programmes and their presenters. In one example, in relation to a specific programme, the Chief Executive was reported as saying: <i>"who the fuck are [redacted - presenters]? Who is watching this rubbish?"</i></li> <li>— <i>"Sian Doyle just started saying about [a former staff member] who no longer works at S4C. She was just wild and then said: "he has to go. I'm not going to have anyone like that working here". That is a paraphrase of her words. She was just telling a room full: "that's it. He has to go. I'm going to get rid of him."</i></li> <li>— In one conversation about a colleague Sian Doyle was reported as saying: <i>'She's fucking gone, she shows me no respect. I'll get rid of her like that.'</i></li> </ul>
<p><b>S4c Clic</b></p>	<p>The participants described their feelings of frustration with the way Sian Doyle was publicly very critical about Clic twice: a management team meeting on 27/1/2022 and at a wider staff meeting on 28/4/2022, and there is a video of the latter and the comments made at it.</p> <p>We also received copies of SLACK messages between S4C staff members who were involved with Clic. Evidence that captures their comments immediately after the staff meeting on 28/4/2022. The evidence showed the adverse effect that Sian Doyle's comments had on the morale of the staff who had worked on Clic and the participants described their disappointment that these comments about Clic had been made publicly, rather than directly and privately to the individuals concerned in a professional manner.</p>
<p><b>Dictatorial Leadership style</b></p>	<p>Participants had reported that Sian Doyle's leadership style was: <i>"dictatorial creating a culture of fear"</i>. Many of the participants described the negative impact of this on them and their work, with many being reluctant to challenge the Chief Executive and afraid to state their own ideas or views to her. We were told that this caused many S4C staff to feel generally scared in the workplace.</p> <p>There are many reports of people considering that they had to do what the Chief Executive said, whether they agreed or not, with her saying:</p> <ul style="list-style-type: none"> <li>— <i>"are you with me or not, are you with me or not?"</i> and: <i>"It's me or the Chair, you have to choose who you are loyal to, me or the Chairman"?</i></li> <li>— A participant reported that when attempting to provide feedback to the Chief Executive it was made clear that their opinion was neither welcomed nor valued.</li> </ul>
<p><b>Confrontational behaviour</b></p>	<p>As well as many participants considering that Sian Doyle's leadership was <i>"dictatorial"</i>, we heard from many people who considered her to be confrontational.</p> <p>There were a number of examples of this, but providing details and quotations in this section, in particular, might breach the confidentiality of the witnesses. Several reports suggest individuals were berated in meetings with many other staff present but the evidence is very personal.</p> <p>At least one incident was described where upsetting behaviour and challenging body</p>

## Chapter 1 – The Chief Executive

	<p>language resulted in a staff member being in tears and needing to be comforted by others present.</p>
<b>"Shoot one and a thousand tremble"</b>	<p>An example of Sian Doyle's leadership style was her alleged regular use of the phrase "Shoot one and a thousand tremble". This was raised by many participants and witnessed first-hand by 3.</p> <ul style="list-style-type: none"> <li>— <i>Investigator: "Have you heard Sian say [shoot one and a thousand tremble]?"</i> <i>[Redacted]: "Yes, and the entire management team has heard Sian say this several times."</i></li> </ul>
<b>Ignoring experience and expertise</b>	<p>We heard that participants felt that Sian Doyle disregarded experience, expertise and past successes. One witness said:</p> <ul style="list-style-type: none"> <li>— <i>"I've worked under 5 chief executives, a good relationship, a number of chairmen, with an interim Chief Executive and I have never felt so worthless as I was working for Siân."</i></li> </ul>
<b>Disregarding and ignoring staff</b>	<p>Witnesses said how they were ignored and/or avoided by Sian Doyle at work and at work events, and this quote captures the evidence:</p> <ul style="list-style-type: none"> <li>— A staff member said: <i>"Nothing was said to me. No thank you. Nothing. Nothing."</i> They further described a challenging environment where they felt persistently ignored by the Chief Executive during conversations with key stakeholders which led to another manager apologising for the behaviour of the Chief Executive.</li> </ul>
<b>Body language</b>	<p>Witnesses spoke of frustration with how Sian Doyle conducted herself during meetings, either ignoring people or using negative body language, such as rolling her eyes, to cast disdain.</p> <p>This evidence is encapsulated by this quote:</p> <ul style="list-style-type: none"> <li>— <i>"So, for months this conversation went on and every time we did it, there was a period for three, four months where I don't think I finished one sentence because the moment I started talking in any meeting, she would interrupt, she would look sarky. If I was making a point that she disagreed with she would roll her eyes at me and at other people around the table in quite a public way in order to try to undermine the point I was doing."</i></li> </ul>
<b>Disrespectful behaviour</b>	<p>Witnesses described occasions where they considered Sian Doyle's behaviour to be disrespectful towards S4C colleagues and of the work of S4C staff.</p> <p>For example, one witness spoke of speaking with the Chief Executive at an event about a new programme which had been well received but which the Chief Executive chose to belittle publicly.</p> <p>Another illustration was provided by a participant who reported that Sian Doyle said forcefully, when being offered advice and a briefing: <i>"Who is the Chief Executive?"</i>, giving the impression that the advice and briefing didn't count and that only the Chief Executive's opinion counted.</p>
<b>Staff duty of care</b>	<p>On two separate occasions, it was alleged that Sian Doyle had asked colleagues about their sickness / health absence in front of other colleagues.</p> <p>An example of this is the Chief Executive asking a colleague to join her in a public</p>

## Chapter 1 – The Chief Executive

	discussion with others then asking her about a specific private health issue.
<b>Supportive</b>	<p>We heard from several participants that they consider Sian Doyle to be supportive, with work issues and personal issues that they had faced. For example:</p> <ul style="list-style-type: none"> <li>— <i>"Siân, the Chief Executive, always makes a point of saying hello, and making sure I'm okay."</i></li> <li>— <i>"She's supportive, she's flexible, she's easy going but I know where I stand too."</i></li> <li>— <i>"- the Chief Executive sorry - has been very supportive of me over the years they have been in the role. I believe they have been very ambitious, and the channel's visibility has been global since they started, and they have been a lot of help to me."</i></li> </ul>
	<p>Further evidence of challenging behaviour from the Chief Executive is included in Chapter 3 and 4 of this Report.</p>

## Chapter 2 – The Chief Content Officer

<p><b>Overview</b></p>	<p>The Chief Content Officer came in for criticism for how she dealt with the S4C commissioners, a key layer of experience and influence within the organisation. They share significant responsibility for S4C's content, and they have influence over the implementation of the organisation's strategic objectives. We heard from a range of people, both working within and outside S4C, who were unhappy about and critical of the working environment and the atmosphere at S4C, such that it had a negative effect on the commissioners and, thereby, on the output of the organisation.</p>
<p><b>Removing responsibilities</b></p>	<p>Five Commissioners expressed frustration that decisions and responsibilities had been taken away from them and centralised in the hands of Llinos Griffin Williams who, in their opinion, micromanaged whilst being unable to make decisions promptly. The participants also said that many decisions were made by Llinos Griffin Williams without their input. This had a wider paralysing effect.</p> <p>Examples included:</p> <ul style="list-style-type: none"> <li>— <i>"From the very beginning, Llinos Griffin Williams was discussing with companies before chatting with us as commissioners e.g. a [redacted - producer] told me that Llinos Griffin Williams wants to appoint more people for the commissioning team as an additional resource. It's unbelievable that Llinos Griffin Williams had not discussed this with us."</i></li> <li>— <i>"Everything went through Llinos, which is fine because she is in her job, but if you're going to do that you have to be available. If you want to micromanage that, you have to be available because things just come to stop. Small things like deciding who is allowed to appear, or if I ask for advice in an email, you have to come in, and then when I have signed off a program, she came in and changed it and said I want to see this and then made changes, just undermining my editorial eyes..."</i></li> <li>— A participant reported a clear pattern of lack of internal communication with commissioners and described an example where a proposition for a series had been shared with the independent production sector but not communicated with the internal colleagues responsible for that area of work.</li> </ul>
<p><b>Regularly cancelling one to one meetings</b></p>	<p>Three Commissioners expressed their frustrations that, after the appointment of Llinos Griffin Williams there was an environment of disorganised work, with meetings repeatedly cancelled. They said that they relied on those meetings to share ideas and confirm plans. The commissioners explained that the cancellation of such meetings created instability and contributed to bad feelings between them and Llinos Griffin Williams.</p> <p>An example is:</p> <ul style="list-style-type: none"> <li>— <i>"121 meeting gets cancelled all the time. Normally we would get 121's every two weeks with the Head of Content. Since Llinos Griffin Williams came these meetings are very rare things. This leads to a delay before being able to answer production companies which often means that many companies are angry and frustrated."</i></li> </ul>
<p><b>Poor communication</b></p>	<p>Two commissioners said there was a lack of communication about important decisions. Specific examples were provided, such as convening a group meeting at short notice unexpectedly involving the head of HR (perceived as ominous), only later to learn (after asking) that it was to discuss a significant restructuring within the commissioning team.</p>

## Chapter 2 – The Chief Content Officer

<p><b>The Commissioners' relationship with external companies</b></p>	<p>We heard from 5 participants from external companies that they knew of the breakdown in the relationship between the Chief Content Officer and the commissioners and that there was growing concern about the effect of her approach on the commissioning department. This led to disfunction and miscommunication in the sector as rumours circulated about what the CCO wanted commissioned, with the commissioners believing that they didn't know what was going on such that they had to ask independent producers what they knew about what the CCO was up to.</p>
<p><b>The approach of the commissioners towards Llinos Griffin Williams</b></p>	<p>Both present and former employees of S4C, and some external witnesses, talked of the breakdown in the relationship between the commissioners and the Chief Content Officer leading to them being negative and hostile towards her.</p> <p>A participant reported that a Commissioner had reacted negatively to the appointment of the Chief Content Officer and raised their voice while challenging her expertise.</p>
	<p>Further evidence of challenging behaviour from the Chief Content Officer is included in the Chapter 3 and 4.</p>



## Chapter 3 – The effect on S4C as an organisation

<p><b>Health and well-being Overview</b></p>	<p>During the Process, the welfare of some of the participants became a concern, because they were clearly uncomfortable and/or upset and some broke down during our meetings with them, especially while detailing their feelings about the work environment and the atmosphere within S4C.</p> <p>In addition, we heard about a serious incident at an S4C management team meeting in Llangrannog between 21/2/2023-22/2/2023, at which one employee suffered a significant health event.</p>
<p><b>The general well-being of the participants</b></p>	<p>During our meetings, 10 of the participants broke down crying, mostly while discussing their experiences in the S4C workplace.</p> <p>11 participants reported on the detrimental effects that they considered the work environment at S4C had on their health.</p> <p>Examples included:</p> <ol style="list-style-type: none"> <li>1. <i>"I left because I didn't feel for any reason that I had a choice but to leave the cause of the situation. The Chief Executive had put me in a very nasty position, many other staff too, I was aware of that. But my friends and my family worried a lot about my mental health at the time. I had become very tearful. I couldn't sleep. And the atmosphere at work during the last few months of employment at S4C were very difficult and I didn't feel like I had a choice but to leave."</i></li> <li>2. One participant described how the: <i>"atmosphere had changed completely"</i> following the appointment of the Chief Executive. They felt that the <i>"impossible work requirements"</i> and the subsequent pressure contributed to them being unable to work due to depression and anxiety.</li> </ol>
<p><b>Management Team Away Day – 22/2/2023</b></p>	<p>Between 21/2/2023 and 22/2/2023 the management team met at an away day where an employee suffered a significant health event.</p> <p>This incident was raised by 18 participants of which 5 had been present, 13 having heard of it by word of mouth.</p> <p>To protect the confidentiality of the individual, and because of her medical condition even though she didn't ask for anonymity, we have significantly summarised the evidence.</p> <p>The employee described an animated conversation involving the Chief Executive and other senior staff members about the level of change that was required at S4C. This included replacing many staff who were described as: <i>"not worth worrying about"</i> and that the Chief Executive suggested a lot of the staff at S4C did not have the skills or knowledge to be able to justify being in their jobs. She described potentially losing: <i>"at least 50 of them"</i>.</p> <p>The witness said she was distressed and challenged the Chief Executive about what she was suggesting. She described how she believed that the stressful situation then contributed to the significant health event she suffered that day, for which she was taken to hospital to receive treatment.</p> <p>The other 4 direct witnesses who were close to the leading of the event, three members of the senior management team and the facilitator, didn't consider the meeting to be abnormal.</p>
<p><b>Disorganisation, dissatisfaction and disfunction</b></p>	<p>Many participants expressed significant dissatisfaction with the working environment and the atmosphere at S4C, and, very often, their reasons for feeling dissatisfied are based on examples of alleged behaviour by Sian Doyle and/or Llinos Griffin Williams. However, it became clear to us that the feelings of some participants</p>

## Chapter 3 – The effect on S4C as an organisation

were based on stories or gossip from colleagues and that they did not witness these events themselves. It can be seen from the evidence, therefore, that the spread of stories, especially about Sian Doyle and Llinos Griffin Williams, contributed negatively to the working environment and the atmosphere in S4C causing disorganisation, dissatisfaction and disfunction.

### **Second Hand Evidence**

During the Process, 19 participants commented on alleged bad behaviour by Sian Doyle and Llinos Griffin Williams, not based on what they had seen, but rather, based on what they had heard second-hand from other members of staff.

The evidence includes:

- The *"Shoot one and a thousand tremble"* comment by the Chief Executive Officer, reported first hand too.
- The management away day incident.
- Comments made by Sian Doyle about a former staff member to: *"get rid of him"*.
- Micromanaging by Sian Doyle and Llinos Griffin Williams.
- The virtual staff meeting on 12th December 2022. One witness described an exchange between an individual and Sian Doyle where she was rude to a colleague who asked a question, and the colleague was later referred to HR for doing so.
- An event was held for S4C staff at Boom Battle Bar in Cardiff on 19th April 2023, where it was alleged that Llinos Griffin Williams called S4C staff: *"twats"* and blew smoke in a colleague's face.

### **Disorganisation**

Many participants spoke of the lack of order within S4C and the way this disorganisation had a detrimental effect on the working environment and atmosphere. The examples given to us by different participants were varied and often unrelated to each other, but the effect on the participants was similar and they spoke about frustration and reduced productivity. Here are two examples:

- *"I'm lost and I have no idea what's going on in terms of what's getting commissioned and what is the discussion around that."*
- *"The biggest issue I think, again with them, is a point I made earlier, and one of the points I wanted to discuss is was just how many meetings [redacted] and [redacted] cancel weekly. That is, to give you an idea. I've spied on the history of the last four/ five weeks and there have been 17 meetings cancelled by [redacted] and [redacted]. Weekly now, and that's 3 ½ meetings a week cancelled."*

## Chapter 4 – Specific teams

<p><b>Introduction</b></p>	<p>Negative comments were made about three teams or divisions in S4C: the Caernarfon office, the Press and Marketing teams and the HR department. To some extent or another they have all been impacted by the disorganisation, dissatisfaction and disfunction that we report at S4C.</p> <p>We've reported on the impact of the events in this Report on the health and well-being of many at S4C and, with that in mind, that people involved in those teams will remain employed and colleagues, we have not provided quotations or paraphrasing of the evidence about them.</p> <p>The evidence received about these teams was not confined to those who worked within them, but also the wider workforce.</p>
<p><b>Press and Marketing teams</b></p>	<p>Participants raised issues regarding the performance of the team and some raised concerns over micromangement.</p> <p>We heard that the Press and Marketing teams have faced significant changes throughout 2022 which naturally affected their work environment and the atmosphere in S4C.</p> <p>Participants described the additional workload experienced after the departure of several team members. Several were dissatisfied with the time it took to fill vacancies, which led to intensified work pressure and contributed to a feeling of a lack of direction. Whilst others said that the added pressure had a detrimental effect on their health.</p> <p>Despite the impact of this on the Press and Marketing teams, we heard that a few recent appointments have been made in key roles and it was said that this has eased their pressure of work.</p> <p>In summary, a negative working environment across the Press and Marketing teams was reported by several participants with a lack of support being a consistent theme. The teams have been through considerable change and a challenging time from which it needs to rebuild.</p>
<p><b>Caernarfon office</b></p>	<p>Although the S4C office in Caernarfon is the workplace for a cross-section of employees and members of various teams across the organisation, the contribution from individuals who work there was striking. Several staff members based in Caernarfon gave evidence and the tenor of their contribution was consistent.</p> <p>There was a widespread feeling that the Caernarfon office was an unhappy and negative workplace, feeling isolated from the rest of the organisation and that there was a lack of support for those working there.</p>
<p><b>Human Resources department</b></p>	<p>We heard from many witnesses that they were dissatisfied with the working environment and the atmosphere within S4C, but despite this, there was a reluctance from many to share their feelings and discuss them with S4C's HR department particularly if the issues were in relation to senior management.</p> <p>A number felt it was a challenge to raise things internally, and some had particular concerns in raising issues if they were in relation to the senior management.</p> <p>There was evidence of a disconnect between the HR department and the wider workforce, with some concerned that staff were reluctant to trust the department to act on concerns or keep issues confidential and that the HR team was perceived by some as being too close to the Chief Executive and the senior management team.</p> <p>There did, though, seem to be a misunderstanding by some of the witnesses</p>

## Chapter 4 – Specific teams

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about the role of HR. Whilst HR departments facilitate support to employees, they must also work closely with management teams and senior individuals. But a HR department must be believed by the members of organisation to perform these roles even-handedly and to maintain the right balance between them.

## Chapter 5 – The Chairman

	<p>Some individuals raised concerns about Rhodri Williams and alleged he intensified the pressure on some, by negatively affecting the working atmosphere and environment within S4C for them.</p> <p>Whilst some of these concerns relate to the Chairman personally, others could be described as directed at the Authority and some of its decisions.</p>
<p><b>Issue already dealt with and resolved</b></p>	<p>One witness expressed concern about Rhodri Williams' behaviour during a meeting between the Non-Executive Members of the Board and the Management Team on 15/6/2023, after a letter from BECTU and after our investigation started, which was witnessed by others. This issue relates to a grievance raised by Llinos Griffin Williams about the Chairman's behaviour. This was subject to a separate process and investigation, distinct from this fact-finding investigation, which concluded soon after the allegation was raised.</p>
<p><b>Issues raised during the Process</b></p>	<p>One witness alleged that the Chair raised his voice on a telephone call and also alleged that he repeatedly "<i>berated</i>" them for not making progress in removing a staff member.</p> <p>Another witness said that the Chair knew of the issues in the workplace at S4C before the BECTU letter was received and had therefore been misleading in a media interview in May, but this interview was widely reported and this is an isolated view.</p>
<p><b>Issues raised in relation to the Process</b></p>	<p>Whilst some of these concerns set out in this section relate to the Chairman personally, others could be described as directed at the Authority and some of its decisions.</p> <p>One witness disliked the Chairman dealing with the media about the investigation before or at the same time as staff were finding out what was going on. They said:</p> <p><i>"The Chair's internal decision to characterise the nature of the complaints of BECTU's letter as not making comfortable reading, if true would cause us worry, and not the kind of things that any one responsible for any kind of body would like to read, were unwise, and no specialist body would advise making such statements publicly in such circumstances."</i></p> <p>This was a feeling echoed by 5 witnesses who felt that the BECTU letter should have been handled more delicately. One said:</p> <p><i>"It's just the way the letter from the union.... just exploded in the news and so on. I'm not a member of the union so I didn't know anything about it. It came as a shock to me. We didn't know... an email came after hours work from the Chairman; I believe. I saw it but there were a lot from the office that hadn't seen it, just seen the story on the news."</i></p> <p>This theme continued with four witnesses speaking in one way or another about the way the Chair had taken charge of communications throughout this period and what he said. One believed he had been briefing the media behind the scenes and that this had made the situation worse. One said:</p> <p><i>"The Chair has repeatedly gone out and briefed the press without letting us know and we've had to read in the press what he said about this. ... even though we have a comms specialist, we asked for crisis comms to be brought in, he put himself in charge of all the communication, which again is something that I've never experienced in any other organisation."</i></p> <p>Two witnesses felt that insufficient regard was had to the impact of the investigation on their health, one of which said that this was brought directly to the attention of the board. They also felt that they should have been provided with legal support during the process.</p>

## Appendix 1 – Terms of Reference

### Terms of Reference for a Fact-Finding Process by Capital Law on the working environment and atmosphere within S4C

#### 1. Commissioning Officer

- i. Rhodri Williams is the Commissioner of this process and Geraint Pugh, Secretary of the S4C Board, will be principal liaison for the Leader.
- ii. The Commissioner has appointed [redacted], a Partner at Capital Law, who is completely external and independent of S4C, and has agreed these Terms of Reference.

#### 2. Process Leader

- i. [redacted] will lead the process (the Leader). [redacted], Solicitor at Capital Law, will support the Leader throughout the process and an individual will also attend each meeting to take notes.
- ii. [redacted] and [redacted] can confirm that they have no prior knowledge of the matters to be investigated and that there are no known conflicts of interests.
- iii. The Leader's primary role is to meet any member of staff (including former members of staff or individuals who have previously worked with S4C) who wish to contribute to the process and share their comments about the working environment and atmosphere within S4C, and then to present their findings to Non-Executive Members of the S4C Board. The Leader will remain completely objective throughout the process.

#### 3. The Process

- i. The Leader will create an email address (S4C@capitallaw.co.uk) so that S4C staff can get in touch to book an appointment to meet them. S4C will refer any member of staff who wishes to contribute to the process to contact the Leader in that way.
- ii. S4C will provide the Leader with a list of its staff members so that he can verify if an individual is eligible to contribute to the process, as a current member of staff, former member of staff or individuals who have previously worked with S4C. While there is no restriction on the date when a former member of staff left S4C's employment, the Commissioner is requesting that the Leader considers the relevance of comments by an individual to what is claimed to be happening currently and recently within S4C. To verify a former member of staff or individual who has previously worked for S4C, after the deadline has been made for individuals to book appointments (see clause 3iii. below), the Leader will ask the Commissioner to provide a list of staff over the period commencing with the earlier month an individual left/worked with S4C to a deadline.
- iii. In the first instance, staff members will be able to contact the Leader until 19 May 2023 to book an appointment.
- iv. Before initiating meetings with staff, so that they can understand more about the context of the process, the Commissioner encourages the Leader to meet with:
  - a. Carwyn Donovan, BECTU,
  - b. S4C's Human Resources Director.
- v. In addition to any relevant documents the Commissioner discloses to the Leader, the Commissioner will disclose any other documents the Leader believes are relevant for him to consider during the process.
- vi. The Leader will arrange meetings with any eligible member of staff as soon as practicable. The meetings will be organised either in person, over Teams/ Zoom or over the phone, whichever is best for each person. The Commissioner anticipates that some members of staff will want to contribute to the process but would not want to meet with the Leader. In that case the Leader will receive

## Appendix 1 – Terms of Reference

comments/contributions in writing from these individuals. Individuals may be accompanied by either a colleague or union representative at meetings with the Leader.

- vii. The Commissioner and Leader acknowledge they cannot give a timetable for when the meetings with staff will be completed because that depends entirely on how many individuals contribute to the process.
- viii. The Commissioner and Leader acknowledge that more members of staff may come forward later than the 19 May 2023 wishing to contribute to the process. The Leader will notify the Commissioner if that happens (without naming the individuals) and the Commissioner will confirm if he is ready for the Leader to arrange more meetings.
- ix. During the process, if the Leader considers it would be beneficial for him to meet any member of staff who has not already come forward, the Commissioner will agree to help arrange meetings with the relevant members of staff recognising neither the Commissioner nor the Leader can compel anyone to meet with or contribute to the Leader.
- x. The Leader will ask the individuals contributing to the process if they wish to be named in the report or remain anonymous. Without the consent of the individual, the Leader will not disclose to S4C who has come forward to contribute to the process, whether by meeting or in writing.
- xi. After meeting with staff members, the Leader will prepare a report laying out the facts and evidence obtained throughout the process. The Leader will only send the full report to the Commissioner and Geraint Pugh. The Leader will also prepare a summary of his findings so that this can be shared with the non-executive members of the Board. The Leader will also prepare a high-level summary of his findings on the understanding that this summary may be made public. The Leader understands that his full report is not to be shared with any other non-executive members of the Board, other than the Commissioner, as they may have to participate in internal processes following this process, if appropriate.
- xii. The Leader is not to reach decisions on any allegations arising through the process, but to state the facts and evidence gathered through the process.

#### **4. Timetable**

- i. The Leader will start the process as soon as possible but there will be no time limit on the process to ensure there is no limit on the number of staff members who can contribute. The Leader intends to submit his report as soon as possible after interviewing staff members but that period will depend on the number of staff who come forward.

Carwyn Donovan

Bectu

20 December 2023

### **Committee evidence session with S4C Authority members**

Dear Carwyn

I am writing to you in advance of the Committee's rescheduled evidence session with members of the S4C Authority on 11 January 2024. This follows the publication by the S4C Authority of the Capital Law report into the working environment and atmosphere at the broadcaster.

In advance of the evidence session, I wanted to provide you with the opportunity to submit written evidence on matters Bectu might wish to raise with Members. Such matters may include the next steps that you would want S4C to take, comments about the process that led to the publication of the report, and views on the existing governance arrangements and internal arrangements for resolving HR concerns.

I would like to stress that Members are unable to discuss, or raise, any issues, concerns or allegations related to individuals where legal proceedings may already have begun, or may be commenced in future. If you do not feel you are able to provide any comment on the above, I understand, however I wanted to ensure that you were offered the opportunity to do so.

I would be grateful if you could provide any written evidence **by no later than 5 January 2024**. Submission should not be any longer than four sides of A4. The evidence provided will be made publicly available unless there is a reason not to do so.

I look forward to hearing from you in due course.

Yours sincerely



*Delyth Jewell*

**Delyth Jewell MS**  
**Committee Chair**

Croesewir gohebiaeth yn Gymraeg neu Saesneg.

We welcome correspondence in Welsh or English.





Culture, Communications, Welsh Language, Sport, and International Relations Committee  
Senedd Cymru,  
Bae Caerdydd,  
Caerdydd,  
CF99 1SN

5 January 2024

Dear Delyth,

**Committee evidence session with S4C Authority members**

Thank you for your letter 20 December 2023 regarding the rescheduled evidence session with members of the S4C Authority following its publication of the Capital Law report into the working environment at the channel. I am grateful your committee is taking the opportunity to consult Bectu on this important matter.

For the purposes of this evidence, I understand S4C's Authority to mean the non-executive members of its Board.

All workers have the right to be treated with dignity and respect, in a working environment free from discrimination and harassment. Through our representation of members who have experienced harassment at work, to our use of collective bargaining to influence and shape better workplace policies and cultures, Bectu is committed to protecting members from harassment at work.

As Senedd Members will be aware, Bectu wrote to S4C's Authority in April 2023 outlining our concerns about the work environment at the channel. Bectu was reassured by the swift action the S4C Authority took to establish an independent investigation following our letter.

Since the publication of the Capital Law report, Bectu has also been reassured by the inclination of the S4C Authority to work with the Union to ensure the channel provides a safe and happy workplace and ensure that such a situation does not occur again. Bectu has been clear that regardless of other action taken, a plan of restorative and repair action is required to achieve that. We welcome S4C's response to that request and Bectu is committed to working with S4C's Authority to that effect.

Such restorative actions should include:

- Training for all S4C's workforce on what positive workplace culture looks like. This should include a paid induction for any freelancers working for the channel.
- Training for all S4C managers on how to foster and maintain a positive workplace culture.
- A review of several of the organisation's policies to be undertaken in consultation with the Union.
- Quarterly union liaison meetings with S4C's executive board members.
- Annual union liaison meetings with S4C's Authority.
- Bectu are long-standing advocates of the need for an Independent Standards Authority for the creative industries. The power imbalances in the sector are particularly extreme and we

welcome the recent development of the Creative Industries Independent Standards Authority (CIISA). CIISA is being developed to uphold and improve standards of behaviour across the sector and to prevent and tackle all forms of bullying and harassment. Bectu understands that S4C is supportive of this initiative, we welcome that and look forward to the channel becoming a formal signatory to CIISA.

As the collective voice of S4C's workforce, Bectu is integral to bringing about the changes necessary to the organisation. We are committed to playing our part in delivering a first-class workplace for those dedicated individuals who deliver Welsh language television to the world.

Yours sincerely,



**Carwyn Donovan**  
Negotiations Officer - Wales



# Investment Review 2023

## Making an Appeal

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Arts Council of Wales is committed to making information available in large print, braille, audio and British Sign Language and will endeavour to provide information in languages other than Welsh or English on request.

Arts Council of Wales operates an equal opportunities policy.



## 1. The purpose of this document

- 1.1 In 2023 we undergo our Investment Review process. It is likely that there will be changes to the organisations that we support and the levels of funding that we offer. Not all organisations will be successful and it's possible that there will be organisations that see the level of funding that they've previously received, reduced or discontinued.
- 1.2 In this document we explain the right of appeal, and associated procedure, available to any organisation that is dissatisfied with our funding decision. This Appeal Procedure applies only to the Investment Review 2023. If you have complaints about any other matter, please refer to the standard procedures outlined in our Complaints Procedure. [This document is available on our website.](#)
- 1.3 Where this documentation refers to specific job titles these may change in the case of absence or unavailability, or where there are amendments to job titles. The steps in the process will not be changed.

## 2. Deciding if you have grounds for an appeal

- 2.1 We know that no one likes having to make an appeal. We will use our very best endeavours to reach decisions that are clear, fair, and consistent with our stated policies and priorities. However, if you are unhappy with how our decision was reached and want to make an appeal, it is important that you are clear about the grounds on which an appeal can be considered.
- 2.2 One of the Arts Council's most important responsibilities is to make strategic decisions about the allocation of public funds.

We want to invest in organisations that make a significant impact on cultural life across Wales. The extent to which we can achieve this goal depends on the funding that is available and the strategic choices that we make. The demand for funding is greater than the money available to us so we will have to make difficult and challenging choices using our professional judgement. It is possible that we will reach decisions that are unpopular, or that an organisation does not welcome. Under the terms of our Appeal Procedure, this in itself is not sufficient grounds for an appeal.

- 2.3 If you are considering an appeal, you should look carefully at what we are trying to do through our Investment Review. The rationale for the Investment Review is set out in the Investment Review 2023 Guidance Document and is available on our website.
- 2.4 We recognise that one of the potential outcomes of the Investment Review is the removal/reduction in funding to an organisation that has previously been receiving support. This means, therefore, that you cannot appeal against the removal/reduction of grant solely on the basis of Council's decision to undertake the Investment Review.
- 2.5 The basis for our assessment and decision-making is set out in the Investment Review 2023 Guidance Document
- 2.6 At the heart of our assessment and decision-making process will be the application that you yourself will have made, along with any other information that we have detailed as part of the application process. It will be your responsibility to ensure your application is received, in full, within the published deadline. We will not accept late applications nor any additional material you may wish to supply as part of your application if it is after the published deadline. You may only appeal against the decision of the Arts Council in respect of that submission that you make as part of the Investment Review process.
- 2.7 You may only appeal if you have specific evidence that demonstrates one or more of the following:
- we did not follow the published procedures for assessing your application;
  - we misunderstood a significant part of your application;
  - we did not take notice of relevant information, i.e. the information that we will have taken into account as defined in the **Investment Review 2023 Guidance Document**.
- 2.8 Should your appeal be considered as eligible for hearing (see section 4 below) it will go forward to an Appeal Panel ("the Panel"). The Panel is not a legal tribunal and will proceed on the basis of common sense and fairness.

- 2.9 All decisions on funding are the responsibility of the Members of Council. The decisions of the Panel are, therefore, advisory and in the form of recommendations to Council.
- 2.10 There is no right of appeal against the amount awarded by the Arts Council, unless one or more of the grounds of appeal noted in 2.7 applies.
- 2.11 There is no right of appeal against a decision in respect of another organisation.

### 3. How to make an appeal

- 3.1 Any appeal must be made on the Appeal Form (Appendix 1). You can get a copy from our website. No other method of making the appeal will be accepted.
- 3.2 You must complete the appeal form fully, providing detailed reasons for the ground(s) of appeal as outlined in paragraph 2.7. For example, it is not enough to merely assert that the Arts Council's decision was wrong. You must also state in what way exactly the decision was wrong and the basis for that assertion. An appeal which does not give adequate reasons may be deemed ineligible (see section 4 below).
- 3.3 Any extract from your application which is referred to in the appeal form must be clearly and unambiguously identified. No amended or additional information will be considered; the appeal must relate only to information which you have either already provided as part of your application or the additional relevant information, as defined in the **Investment Review 2023 Guidance Document**, which we have and which has, or should have been, considered during the Arts Council's assessment and decision-making process.
- 3.4 The appeal form must be signed by a senior staff representative of your organisation and the Chair of your Board (or senior member of the management body that oversees your work).



- 3.5 Appeals must be received by 4pm, 21 calendar days after the letter of notification of the decision which is being appealed.

Appeals should be in electronic format and should be sent to the following email address: [appeals@arts.wales](mailto:appeals@arts.wales)

However, if for any reason you are unable to submit your appeal electronically, a hard copy should be submitted in an envelope addressed to the:

Director of Finance and Business Services  
Arts Council of Wales  
Bute Place  
Cardiff CF10 5AL

- 3.6 Appeals will not be accepted if received after the specified deadline.

## 4. What happens once you have made an appeal?

The first stage in the process is **Initial Consideration**. This is undertaken by an external independent person (“Reviewer”). We will use an independent complaints reviewer to undertake this role. Its purpose will be to decide if your appeal is eligible for hearing by the Appeal Panel on one or more of the grounds outlined at paragraph 2.7 above. This is to avoid a waste of resources by both your organisation and the Arts Council in the event that the Reviewer concludes that the appeal has no prospect of success.

- 4.1 The Reviewer will consider the appeal in order to decide three matters of principle. These are:

- **whether your appeal has been properly made** – by this we mean that the form has been properly completed and signed, and contains all the information required;
- **whether your appeal is in time** – by this we mean that your appeal has been received by 4pm within 21 calendar days of the date of the letter of notification of the decision which is being appealed;
- **whether your appeal is misconceived** – by this we mean either that your appeal is not based on one or more of the grounds of appeal noted in paragraph 2.7 above, or that a wholly inadequate basis is given for the ground of appeal.

- 4.2 The Reviewer will decide whether to accept or reject your appeal based on the above. If the Reviewer decides that your appeal has not been properly made, and/or is out of time, and/or is misconceived, the appeal will be rejected and points 4.3-4.7 will apply.
- 4.3 The decision of the Reviewer is final. There is no further right of appeal against this decision.
- 4.4 The Reviewer will inform by letter both you and the Arts Council's Director of Finance and Business Services of their decision. This will be done within 16 calendar days of the appeal submission deadline. The letter will outline the summary reasons for the rejection of the appeal and will inform you of your right to approach the Public Services Ombudsman for Wales (see paragraph 7.6).
- 4.5 The Director of Finance and Business Services will report the decision to the Arts Council's Chief Executive and to Members of Council.
- 4.6 The Reviewer is not permitted to make any contact with you at this stage and must conduct the Initial Consideration solely on the basis of the information contained in the appeal. Therefore it is in your best interests to ensure that all the relevant information that the appellant wishes to be considered is contained within the appeal documentation.
- 4.7 The Reviewer will exercise his/her powers sparingly and reasonably. If s/he has any doubt as to whether your appeal should be rejected at this stage, you will be given the benefit of the doubt and your appeal will go forward to hearing.

## 5. Full consideration of your appeal

- 5.1 If your appeal has not been rejected during Initial Consideration, the Appeal Panel will give it full consideration.
- 5.2 **Constitution of the Appeal Panel:** The Appeal Panel will consist of three external, independent members, one of whom will be designated as the Chair. The Arts Council's Director of Finance and Business Services will act as convenor for the Appeal Panel but will play no part in making a decision on your appeal.
- 5.3 Within 6 calendar days of receipt of the Reviewer's decision letter by the Arts Council, the Director of Finance and Business Services will inform the Arts Council's Chief Executive, Members of Council and the Chair of the Appeal Panel that the appeal is to be considered in full.

- 5.4 The Arts Council's Chief Executive may make a written submission to the Appeal Panel if s/he sees fit. The Chief Executive will complete this submission within 21 calendar days of notification of the Reviewer's decision, a copy of which will be sent to the appealing organisation.
- 5.5 The Arts Council's Director of Finance and Business Services will, at the time of receipt of the appeal, contact all members of the Appeal Panel to ascertain a suitable date, time and place for the hearing. S/he will then write to you, and to the Arts Council's Chief Executive. S/he will inform them that the appeal is to be considered by the Appeal Panel and notify the date, time and place for the hearing.
- 5.6 The Chair of the Appeal Panel shall have the power to alter the date, time or place of the hearing for any good reason at any time on request. The date of the appeal hearing must be no later than 28 calendar days following the date of receipt by the Director of Finance and Business Services of the Reviewer's appeal decision. If the parties agree otherwise, or if it is wholly impracticable to hold the hearing in that time, the appeal must be heard as soon as is practicable thereafter.
- 5.7 Those members of the Appeal Panel who are to consider the appeal shall be sent full copies of the appeal form and any response by the Arts Council at least 7 calendar days before the date of the hearing.

## 6. The appeal hearing

- 6.1 The hearing is designed to allow all members of the Appeal Panel to gain a full understanding of the reasons for the Arts Council's decision and for the reasons of your appeal, in order that a fair determination of the appeal can be made.
- 6.2 The quorum for the Panel hearing the appeal is three independent members, one of which will be designated as the Chair.
- 6.3 No Panel member may hear an appeal if s/he has had any significant involvement with the decision appealed against or if they, or a close member of their family, have any interest in your organisation.
- 6.4 Prior to the hearing the Appeal Panel may, at their discretion, meet to consider the issues raised by the appeal and the procedure that is to be adopted in the hearing.

- 6.5 The Appeal Panel shall only consider those matters raised by the parties in the appeal and in the Arts Council's response. No other issues can be dealt with by the Appeal Panel at the hearing.
- 6.6 Both you and the Arts Council will be entitled to appear at the hearing and be heard. Either party may choose not to appear and ask for the appeal to be decided on the basis of their written representations. You and the Arts Council may each be represented by up to two people of their choosing at the hearing, not including any person(s) present solely for the purpose of providing additional communication support to either party (e.g. sign language support).
- 6.7 The hearing of the appeal will be in private and conducted in English or Welsh as per the appellant's choice.
- 6.8 The procedure to be followed at the hearing should be as informal as possible, consistent with the objectives noted at paragraph 6.1 above and the need for a fair hearing for all concerned. Subject to what follows, the Chair shall be solely responsible for determining the precise procedure to be followed at the hearing and the conduct of the appeal as a whole. The procedure that is adopted at the hearing will include the following elements:
- 6.8.1 The representative(s) of the Arts Council will briefly explain to the Appeal Panel the decision appealed against, the reasons for the decision, the Arts Council's response to the appeal, and response to any matters raised by you before and during the hearing. The representative(s) may refer to any relevant documentary evidence to justify the Arts Council's decision provided that the material has previously been copied to you and the Appeal Panel.
- 6.8.2 Your representative(s) will be invited to briefly explain to the Appeal Panel the reasons for the appeal and why you are dissatisfied with the decision. You may refer to any relevant documentary evidence to justify your appeal provided that the material has previously been copied to the Appeal Panel and formed part of your original Investment Review application to the Arts Council. You will have the opportunity of commenting on all matters raised by the Arts Council before and during the hearing.
- 6.8.3 The members of the Appeal Panel may ask questions of any person at the hearing which they deem relevant to the appeal.
- 6.8.4 At the end of the hearing, both parties will be given the opportunity to briefly summarise their position and to make any final comments that they wish in relation to any matters that have been raised at the hearing by the other party and the Appeal Panel.

- 6.9 If you or your representative(s) fail(s) to appear at the hearing, the Appeal Panel, after being satisfied that proper notice has been given of the date, place and time of the hearing, may, at their discretion, either hear the appeal in your absence, or reject the appeal without hearing.
- 6.10 The burden of proof is on the organisation making the appeal. In other words, you must prove to the satisfaction of the Appeal Panel that the grounds for appeal against the Arts Council's funding decision is established.

## 7. Procedure after the hearing

- 7.1 **Powers of the Appeal Panel.** Following the hearing, in the absence of the parties' representatives, the Appeal Panel shall consider its decision. Each member of the Panel, including the Chair, has a vote. There are three decisions that the Appeal Panel can make:
- allow the appeal
  - continue the hearing of the appeal at a future date
  - dismiss the appeal
- 7.2 **Time for giving decision.** The decision of the Appeal Panel, together with supporting reasons and, where appropriate, recommendations, must be sent in writing to both parties within 7 calendar days of the hearing. That decision together with the supporting reasons and, where appropriate, recommendations must be reported at the same time to the Chair of the Arts Council.
- 7.3 **Appeal allowed.** The Appeal Panel may only allow the appeal if it is satisfied that one or more grounds of appeal, as contained in paragraph 2.7 above, is established. If the Appeal Panel allows the appeal, it does not have the power to substitute a fresh decision. Instead, the Chair of the Panel will notify you that it has recommended to the Chair of Council that the matter should be reconsidered, and will outline the grounds on which it has recommended Council to reconsider the matter. The Appeal Panel's recommendation will then be considered at the next meeting of Council, and Council's decision will be conveyed to you within 7 calendar days of that Council meeting.

- 7.4 **Hearing continued.** If the Appeal Panel decides that the hearing needs to be continued, the date for the continued hearing shall be fixed, where possible, at the first hearing and if not, as soon as possible thereafter in writing.
- 7.5 **Appeal dismissed.** There is no further appeal against the decision of the Appeal Panel.
- 7.6 **The Ombudsman.** If you consider that there has been maladministration on our part, or in the conduct of the appeal, you are entitled to approach the Public Services Ombudsman for Wales. The Ombudsman has produced a leaflet explaining how to refer complaints. This is available from Citizen's Advice Bureaux, Public Libraries and from the following address:

The Office of the Public Services Ombudsman Wales  
1 Ffordd yr Hen Gae  
Pencoed CF35 5LJ  
[www.ombudsman.wales](http://www.ombudsman.wales)

## Investment Review 2023 – Appeals Process Timeline





Cyngor Celfyddydau Cymru  
Arts Council of Wales

# Investment Review 2023

## Appeal Form

December 2022





## Accessibility

Arts Council of Wales is committed to making information available in large print, easy read, braille, audio and British Sign Language and will endeavour to provide information in languages other than Welsh or English on request.

Arts Council of Wales operates an equal opportunities policy.



## Section 1: About your organisation

---

**Name of your organisation:**

Click or tap here to enter text.

**Address:**

Click or tap here to enter text.

**Telephone:**

Click or tap here to enter text.

**Email:**

Click or tap here to enter text.

**Name and position of representative(s) who will appear in the event of a hearing:**

Click or tap here to enter text.

## Section 2: How to complete this Appeal Form

---

You must use this form if you wish to appeal against a decision of the Arts Council of Wales in relation to the Investment Review 2023. We will not accept an appeal unless it is made on this form. Before completing this appeal form, **you are strongly advised to read the attached “[Appeal Procedure – Investment Review](#)”**. This appeal form must be completed in full, indicating the ground(s) under which you are appealing together with detailed reasons.

Any extract of your original Submission referred to in this form must be clearly and unambiguously identified. No amended or additional information will be considered. The appeal must relate only to information which you have already provided as part of your Submission, and which has, or should have been, considered during the Arts Council's decision making process.

It is essential that copies of this information are sent with the appeal form. Your appeal will initially be considered by an Independent Reviewer who may have to reject your appeal if this documentation is not enclosed with this appeal form.

**This completed Appeal Form must be received at the address quoted on the last page. It must reach us within 21 calendar days of the date of the notification of the decision which is being appealed. Please keep a full copy of your appeal. You are responsible for ensuring your appeal submission reaches us within the stated deadline.**

### Section 3: Ground(s) of your appeal

---

You may only appeal on the basis that you have evidence that demonstrates one of more of the following (please tick all that apply):

- We did not follow the published procedures for assessing your Submission.
- We misunderstood a significant part of your Submission.
- We did not take notice of relevant information.

## Section 4: The basis for the Appeal

---

Here you should explain the basis for your appeal. You should state the reasons why you consider the above ground(s) indicated apply and why you consider the Arts Council's decision was wrong.

It is important that you are as specific as possible. For example, a generalised complaint of wrongdoing without any factual basis alleged is unlikely to form an adequate basis for the appeal. You should refer to any accompanying material, contained within your original Submission, that you consider supports your appeal. Please continue on a separate sheet(s) if necessary.

**The basis for my appeal is:**

Click or tap here to enter text.

**I attach the following documents:**

Click or tap here to enter text.

**We, as the appealing organisation's designated representatives, submit this appeal document.**

**Signed:** Click or tap here to enter text.

**Print name:** Click or tap here to enter text.

**Position:** Click or tap here to enter text.

**Date:** Click or tap here to enter text.

**Signed:** Click or tap here to enter text.

**Print name:** Click or tap here to enter text.

**Position:** Click or tap here to enter text.

**Date:** Click or tap here to enter text.

**Address for correspondence is:**

Click or tap here to enter text.

This appeal form and accompanying documents should be sent via email to: [appeals@arts.wales](mailto:appeals@arts.wales)

And clearly marked "Appeal" in the email subject line.

**Your Appeal must be received in full by 4pm, 21 calendar days of the date of the notification of the decision which is being appealed.**

## **Appeal by National Theatre Wales**

National Theatre Wales (NTW) submitted an appeal against the Arts Council of Wales' (ACW) decision to discontinue its funding of NTW, that decision having been made as part of the ACW's Investment Review 2023.

At its meeting on the 13th of December, and following the full appeal hearing of the 29th November, Council considered and discussed, in detail, the report and recommendations of the Independent Panel, appointed to consider the appeal. As part of this process, Council carefully considered the recommendations of the Panel both in relation to NTW's appeal and the Investment Review generally.

A detailed response has been sent to NTW and, in accordance with our commitment to transparency throughout the Investment Review, we provide below a summary of Council's decision.

NTW submitted a very detailed appeal, which was shared with both the Panel and ACW Officers in accordance with our published Appeals Process. In response, ACW made an equally detailed submission, which directly addressed each of the points of appeal. This was also shared with NTW prior to the hearing. The Panel's report noted that, in its deliberation, it had not been possible to address all elements of what it referred to as a 'detailed and complex' appeal, and had therefore focused its report on what it described as 'relatively high level factors'.

In accordance with our published Appeals Process, paragraph 7.3, the Panel, whose role is advisory (and does not have the power to substitute its own decision in respect of NTW's funding application), made a recommendation to the Chair of Council that NTW's funding application should be reconsidered and outlined the grounds on which its recommendation was made.

As also required by the Appeals Process, Council gave due consideration to the matters raised by the Panel in its report, as well as considering other relevant information, such as ACW's published Investment Review Guidance, which The Panel described as an 'exemplary document'. Council agreed unanimously that there were no material factors to warrant review and reassessment of the application and therefore decided to uphold its original decision not to offer NTW multi-year funding in the Investment Review 2023. In reaching this decision, Council placed particular weight on the Investment Review Guidance and that the assessment process described had been followed in full. Our detailed response to NTW sets out Council's specific reasons for reaching this decision.

This concludes our Appeals Process.

## Correspondence from Mike How (Executive Artistic Director and founder of Grass Under Foot)

Dear Culture, Communications, Welsh Language, Sport, and International Relations Committee,

I grew up in North Wales from the age of 14 - 19 and in many ways they were my formative years. It's here that I first discovered my love of theatre being involved in Clwyd Youth Theatre productions. That was 40 years ago and in the last few years I've moved back to North Wales as a creative theatre professional. I'm happy to say that once again I call Wales my home.

I writing to share this open letter to you from National Theatre Wales regarding the recent funding decision that I'm sure you are aware of.

<https://www.nationaltheatrewales.org/news-stories/an-open-call-to-acw-for-conversation>

I acknowledge the great work that Arts Wales does to support Wales unique and wonderful cultural heritage. I also accept that in a highly competitive and under funded sector that they have been forced to make some tough, if not impossible choices. However, as someone who is committed to grass roots theatre, (something that Wales does so well) I do think that this particular decision is, in my view, an extremely short sighted one. In my considered opinion it goes against, not only their own stated aims of broadening the appeal of theatre in Wales, but also that of the cultural aims of the Country as a whole.

I urge you to enter the debate to save Wales' National Theatre and to call on Arts Wales to enter an interim dialogue with them. The unique cultural landscape of Wales, based on community is what attracted me back here and it saddens me that this brilliant company, a flagship of theatre arts in Wales has been put at risk.

Many thanks for considering this email.

Best Regards,

Mike How (Executive Artistic Director and founder of Grass Under Foot)—





By virtue of paragraph(s) vii of Standing Order 17.42

Document is Restricted

**Culture, Communications, Welsh Language,  
Sport, and International Relations  
Committee**

Ashok Ahir  
Chair  
Pedr ap Llwyd  
Chief Executive and Chief Librarian  
National Library of Wales

**Senedd Cymru**  
Bae Caerdydd, Caerdydd, CF99 1SN  
SeneddDiwylliant@senedd.cymru  
senedd.cymru/SeneddDiwylliant  
0300 200 6565

**Welsh Parliament**  
Cardiff Bay, Cardiff, CF99 1SN  
SeneddCulture@senedd.wales  
senedd.wales/SeneddCulture  
0300 200 6565

13 December 2023

**General scrutiny of the National Library of Wales**

Dear Ashok and Pedr

Thank you for appearing at the Committee's meeting on 23 November 2023, to give evidence to inform our general scrutiny of the National Library of Wales. We are grateful for the evidence provided during the session, and we are writing to request some additional information.

During the meeting, we discussed widening access and engagement. The Committee would like to understand better the copyright limitations placed on the broadcast archive and why more content cannot be made more available online. We would be grateful to receive more information about this and the purpose of the Library's Clip Centres.

We understand the need to review the current strategy for the Library and to reconsider what can be achieved in the light of the changing financial situation. You explained that there may be a need to bring a new strategy forward once the details of the Draft Budget 2024-25 is known. We also acknowledge and welcome your offer to discuss your vision for a National Art Gallery for Wales. We would be keen to hear from you again to discuss these matters in the Spring of 2024.

In view of the short reporting timeline for parliamentary scrutiny of the Welsh Government's Draft Budget 2024-25, we would be grateful if you could outline any further issues you think we should consider during that scrutiny by 3 January 2024.

We look forward to your response in due course.

Yours sincerely



**Delyth Jewell MS**  
**Committee Chair**

Croesewir gohebiaeth yn Gymraeg neu Saesneg.

We welcome correspondence in Welsh or English.

Delyth Jewell AS  
Senedd Cymru  
Bae Caerdydd  
Caerdydd  
CF99 1SN

Dear Chair,

Thank you for the recent invite to join the Committee as part of a scrutiny session with Sport Wales. It was really positive to be able to share the work that we as an organisation, and sector, are undertaking. We also welcomed the opportunity to hear the views, questions and challenges from Committee members and we continue to be grateful for the constructive challenge that the Committee brings to these sessions.

We felt it important to ensure that we build on some of the points raised, as well as provide more in depth information and resources in relation to some of the points that both we, and the Committee members, highlighted during the discussions.

### Cost of living and inflation

We wanted to initially respond to the issues of the cost-of-living crisis and inflationary pressures. These present themselves both as a challenge to Sport Wales and our partners in terms of our own budget resourcing and to the broader public's financial ability to participate in sport.

As noted, Sport Wales has been modelling the impact any financial cuts would have on our operational capability. We will seek to absorb as much as possible any changes to our indicative budget, but it is important to repeat that it is highly unlikely that we will be able to avoid having to reflect any negative budget changes in the offers that we make to partners. Undoubtedly, this will put pressure on their capacity, as well as our own, to deliver the services that we collectively provide.

There is also the impact on capital funding projects. We have been incredibly grateful to the Welsh Government for the foresight that they have had in investing significantly in capital projects via Sport Wales in recent years. The demand of course has far and away exceeded the level of funding available. With inflation pushing capital project costs up by up to 25%, the funding available is not able to stretch as far as it previously would have. This impacts both future and existing project costs.

Our concerns also relate to the participatory barriers. We know from the most recent published [Wales Activity Tracker](#) that the ongoing cost-of-living crisis is having a sustained impact on the public's participation rates and trends. Over a series of tracker surveys we have consistently seen the public note that they are changing their habits due to financial concerns. In some instances this has meant switching to free activities, in others it has resulted in the decision to stop activities altogether. We will continue to monitor this key trend through this quarterly data set.

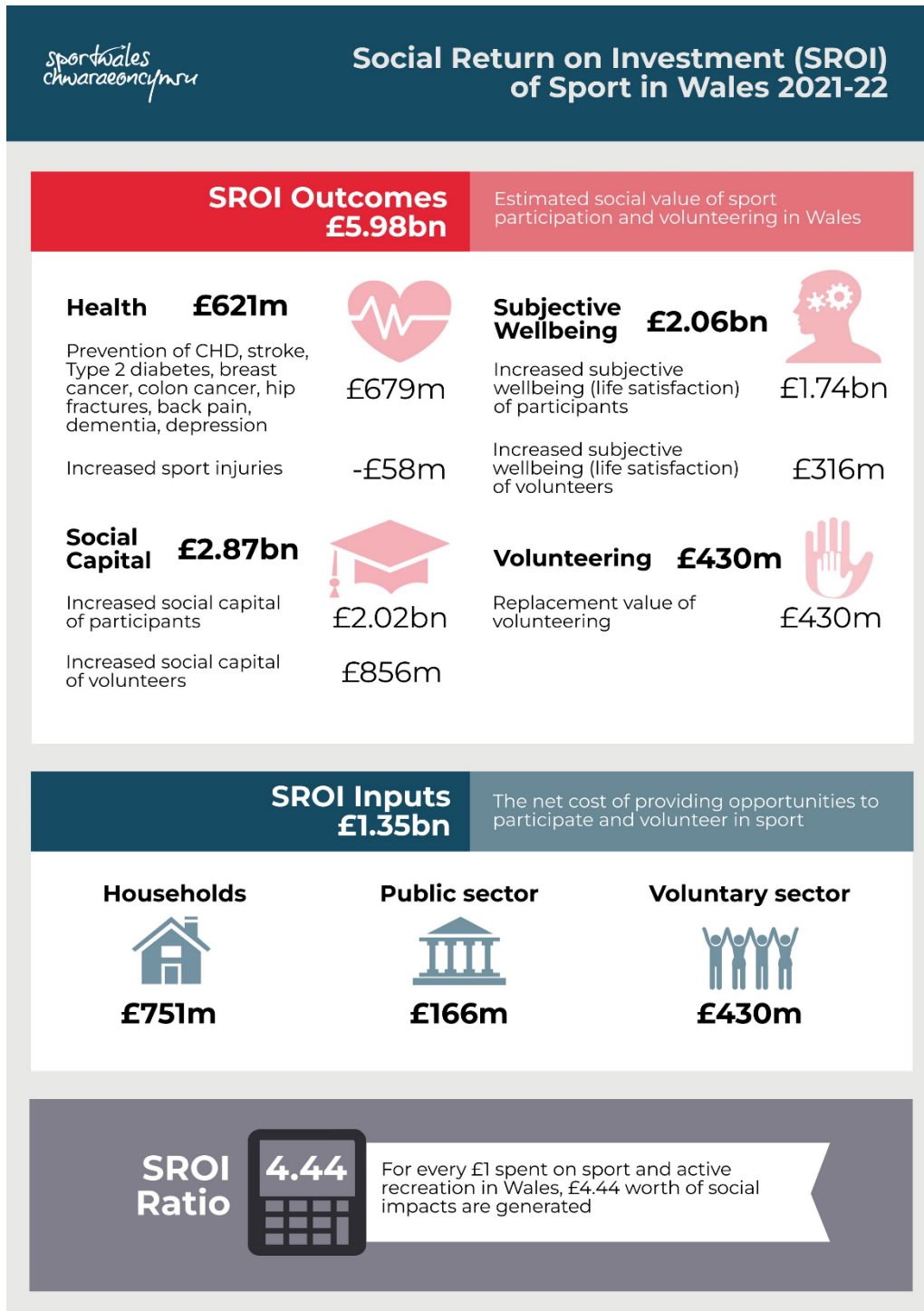
### Sport Wales Investment

As part of the session we were asked what data was used within the Sport Wales funding model. Our approach to investment was also referenced at several points throughout the conversation. As such we felt it correct to furnish the Committee with links to the resource we have previously published to ensure this is the most transparent investment approach possible. We are extremely proud of being completely open about the nature of the data we are using, why we have prioritised it, how it is used, and the sources it is drawn from.

Committee Members will find our approach to partner investment accessible [here](#), whilst the specific data that underpins the National Governing Body funding can be accessed [here](#). As always, should any Member of the Committee wish to have a discussion on this funding approach we would be happy to facilitate.

### Social Return on Investment

In response to the challenges faced by inflation and the cost of living we were very clear about the need for collaboration across different sectors. It is imperative that sport plays an important role in the future as part of a preventative approach to tackling some of the fundamental challenges faced by the National Health Service. This requires a shift in financial approach where sport is considered as part of the early stages of interventions and is part of a well-being approach to health spending. We have recently published the Social Return on Investment (SROI) study for sport in Wales, conducted by the world leading Sport Industry Research Centre at Sheffield Hallam University. The figures are staggering and show the incredible annual contribution sport makes to health, and other areas, which further adds weight to the Government's aspiration that sport has the potential to be the most effective preventative health tool in the country. Details of the results are provided in the infographic below.



We will be seeking to work with colleagues across a wide range of policy areas, but specifically health as a priority, recognising both the financial pressures that can be creatively addressed in collaboration, as well as the fundamental impact of sport on delivery that we need to maximise for the people of Wales.

### Education

An area that was highlighted during our evidence session was the importance of education in developing inclusive sporting opportunities that lead to a lifelong enjoyment of sport. As noted, we ran several pilots across Wales, in conjunction with schools and local authority partners, and gained important insights into the way in which this approach can drive both sporting and educational outcomes. A review of the pilot is available [here](#).

Further to this, we also noted the significant resources that Sport Wales has developed with the education sector as part of our "CitBag" programme. This is an online learning hub to help give young people the skills, confidence, and sporting experiences for a lifelong enjoyment of sport. The resources are for teachers, parents, guardians, learners, volunteers and coaches alike. The resources have been very well received by the education sector to date and we would encourage Committee Members to share access to Citbag with constituents through this [link](#).

### Sport Partnerships

We also wanted to draw your attention to our ongoing roll out of Sport Partnerships. This shift to a regional delivery model is at the heart of much of what has been discussed above. We continue to work towards establishing the 5 Sport Partnership regions, with Actif North Wales having previously been established and the new Sport Partnership in West Wales soon to be fully operational. This approach is helping to create a transformational change in sport delivery. Sport Partnerships will help to ensure that multi-sector expertise is pulled together as a way of ensuring that sport supports a broad range of outcomes, whilst creating offers that are safe, inclusive, developmental and led by need.

We would welcome the Committee's continued support for this programme and look forward to updating you on progress over the coming year.

### Annual report

Finally, you may have seen our Annual Report has recently been laid before the Senedd. This captured all the work of the organisation across the past financial year. We are incredibly proud of the work that has been done by the organisation and the wider sport sector. You can look back at the detail [here](#) and we look forward to continuing the constructive approach to working with the Committee in future.

Yours Sincerely,



Brian Davies  
Prif Weithredwr  
Chwaraeon Cymru



Y Farwnes Grey-Thompson  
Cadeirydd  
Chwaraeon Cymru

Baroness Grey-Thompson  
Chair  
Brian Davies  
Chief Executive Officer  
Sport Wales

13 December 2023

### **Annual Scrutiny of Sport Wales**

Dear Tanni and Brian

Thank you for attending the general scrutiny session with the Committee on Wednesday 8 November 2023, and thank you for the letter dated 7 December 2023. We are grateful to you for engaging with our questions. Following our discussion, we would be grateful to receive the additional information outlined below.

We would be grateful if you could share information about the percentage of sports facilities that are located behind school gates, as you offered during our meeting. We would also like to know more about the integrity units in Australia, New Zealand and Canada that you mentioned.

We understand that your key achievements are set against a difficult backdrop of real-terms reductions in funding, as well as a cost of living crisis which is impacting resources for capital projects in particular, and widening socio-economic gaps in participation. In view of the short reporting timeline for parliamentary scrutiny of the Welsh Government's Draft Budget 2024-25, we would be grateful if you could outline to us any specific issues you think we should consider during that scrutiny by no later than 3 January 2024.

I look forward to hearing from you in due course.

Yours sincerely,





**Delyth Jewell MS**  
**Committee Chair**

Croesewir gohebiaeth yn Gymraeg neu Saesneg.

We welcome correspondence in Welsh or English.

**Sport Wales National Centre**

Canolfan Genedlaethol Chwaraeon Cymru

Sophia Gardens | Gerddi Sophia

Cardiff | Caerdydd

CF11 9SW

0300 3003123

www.sport.wales | www.chwaraeon.cymru

CEO | Prif Weithredwr: Brian Davies

Chair | Cadeirydd: Baroness, Y Farwnes Tanni Grey-Thompson DBE, DL

Delyth Jewell MS

Senedd Cymru  
Pierhead St,  
Cardiff  
CF99 1SN

Annwyl Cadeirydd,

Thank you for your letter dated 13 December and for the recent opportunity to provide evidence to the Committee. Your request for additional information is welcome, and I have added the relevant answers in this letter to your queries around 'sports facilities behind school gates', 'integrity units' and 'issues relating to the Welsh Government Draft Budget'. I hope you find the answers useful and insightful.

### Sports Facilities

With regards to information requested about the percentage of sports facilities that are located behind school gates, we don't currently hold definitive data on this in Wales. Whilst it is well known that a lack of access to school facilities for community use has been a barrier to increased participation, the extent of the challenge remains unquantified. We are currently working with the Welsh Government in relation to the publication of a facilities map on [DataMapWales.](#)

In summary, we are mapping artificial pitches across Wales of all types and all sizes. As part of this work, we will be able to identify the location of each pitch and as such, would be able to highlight those facilities open to the community (or not, as the case may be) on school or education sites. This is expected to be made public in the New Year and will help identify local community facilities, including those located within school sites.

### Welsh Government Draft Budget 2024/25:

With the news of the Welsh Government's Draft Budget 2024-2025, we are looking at a difficult landscape as we move into 2024. A 10.5% reduction in our budget will likely see an enormous impact, including potential redundancies within the sector, significant programmes being delayed or cancelled altogether and tough decisions having to be made for many organisations, leading to a disproportionate impact on the nation's most underserved groups.

As the committee's own [Levelling the Playing Field](#) report noted, 'Sport can be the nation's most effective preventative health tool.'

The proposed cuts to Sport Wales's budget will also seriously impact upon our ability to ambitiously deliver on the wider elements of the Well-Being of Future Generations legislation. We know from experience that the wider public sector recognises that sport has an ability to touch the lives of individuals in Wales like few other sectors. We are fully committed to sport being harnessed to deliver the Government's ambitious public health, equality, child poverty and social justice programmes, as we are a proven deliverer against these vital agendas. We would want to see investment in sport sustained that enables our sector to continue to deliver on these outcomes. We firmly believe that Sport Wales can be a champion for modernisation and delivery of the Well-being of Future Generations Act for the wider Welsh public service.

Whilst we are currently working on how we can absorb as much of these cuts as possible, there will invariably be costs that will be passed on to partners. We have instigated early discussions with our partner network to identify the scale of the challenge to each of them, as well as what support Sport Wales can make available to help in any transition. As an organisation we are also reviewing our own capacity and programmes in light of the funding situation.

Whilst the funding cut of 10.5% in the forthcoming financial year will be incredibly challenging for Sport Wales and the sport sector, the bigger concern would be a compounding effect of a similar cut in future years. Sport Wales will absorb as much of this funding cut as possible in order to protect our partners in their ability to retain staff and programmes.

If this trend continues and future financial years see sizable funding cuts, there will be little scope for Sport Wales to protect our partners and this will inevitably have critical consequences for the sport sector in Wales, as well as the communities and individuals that they support.

The financial situation also means that programmes with a significant preventative health impact which have been planned or are underway for targeted groups may not be able to start or continue, and we fear for the long-term impact that may have on the health and wellbeing of people in Wales. As outlined in our previous letter to you, the recently published Social Return on Investment Study highlighted that the health sector in Wales benefits to the tune of £621m as a result of sport's impact on ill-health prevention. It is hugely concerning that any future reductions in sport funding, and the associated impacts on participation, will reduce this figure, adding a greater long-term pressure on health services in Wales, at a time where it is more important than ever that we move to a truly preventative approach to the nations well-being.

Our recent SROI study shows that for every pound spent on sport in Wales there is a massive £4.44 return to people's health, wellbeing and the economy.

We are grateful that our budget has not been cut to the extent other bodies have faced, and we recognise the Welsh Government's incredibly difficult choices in this period. However, we are firm believers that sport and the work of Sport Wales contributes far beyond the culture and economy brief, and we will continue to push for the need for sport to be considered in all policy briefs and for other portfolios to maximise the impacts of sport and physical activity.'

With regards to the Welsh Government's Draft Budget 2024-25 consultation, we responded to the finance committee's initial consultation into the draft budget, where our response can be found here:

[Sport Wales response](#)

We discussed some of the points during the scrutiny session but the key points that emerged for us were:

- We believe sport should be maximised across Government portfolio areas, and the unique benefit sport can play in delivering for Wales is understood and recognised in the budget.
- We wish to see health prevention budgets consider sport and physical activity as a method for delivering their outcomes and pool budgets where others are better placed to deliver activity.
- We believe there is a need for a continuous long-term view on budgeting with a bigger focus on prevention.

#### Integrity units:

During the session we also touched on integrity units, and I have added some additional information on these here in answer to your request.

Below I have shared links to all three of the integrity units mentioned during the scrutiny session. These have all been set up within the context of these individual nations so accordingly have a different focus.

**Canada:** <https://sportintegritycommissioner.ca/>

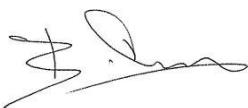
**Australia:** <https://www.sportintegrity.gov.au/>

**New Zealand:** <https://sportnz.org.nz/integrity/>

On a UK level the landscape is slightly different with all five sports councils across the UK exploring mechanisms by which we can be both more effective and efficient in this space. We believe there are sufficient synergies across the UK sporting landscape to warrant a joined-up approach while ensuring Wales's particular interests are well served.

I hope you find all of this information useful and as always, I am more than happy to answer any additional questions you might have. Again, I would like to thank you for the opportunity to talk to the committee in November and I look forward to working closely with you and the other committee members during 2024 and beyond.

Diolch



Brian Davies  
Chief Executive / Prif Weithredwr  
Sport Wales / Chwaraeon Cymru

—  
**Culture, Communications, Welsh Language,  
Sport, and International Relations  
Committee**

Efa Gruffudd Jones

Welsh Language Commissioner

5 December 2023

**Annual scrutiny follow-up**

Dear Efa

Thank you for attending the Committee meeting on Wednesday 8 November 2023 for annual scrutiny. We are grateful to you for engaging with our questions. Following our discussion, we would like to ask a series of questions arising from the evidence you provided.

**Case Management System**

We were concerned to hear about progress with the implementation of the new Case Management System for the office. Your annual report notes that the new system will be operational during this current financial year, but your response in the meeting indicated that it would not be fully operational. You told us that:

*This system originally was to be introduced in October 2022 for testing. That was knocked back to February 2023, and I'm sorry to tell you that we're still in a position where we can't use the system...There are elements of the system that we can use, but the system as a whole is not yet ready for us to use.*

We would be grateful if you could outline what aspects are currently operational and when you expect the other elements of the system to be ready.

We are sure you can appreciate that given that your office has spent £243,000 on this project to date, that we are keen to ascertain how it provides value for money (especially given the pressures on your budgets) and how it will support the functions of your office. We would welcome a summary of the benefits the new system will provide.



We were also concerned to hear that there may be unknown additional costs that will arise due to the nature of the contract. Given the amount already spent, and the financial envelope you have to operate within, we would welcome assurances from you that the cost of this project won't spiral, and that there is plan for getting it operational.

### **Independence of government**

During the meeting, we also discussed how you intend to maintain your independence from the Welsh Government.

You have previously announced that you will no longer be maintaining the number of offices you had (four in total). As part of this office space reorganisation, you will be leasing office space within the Welsh Government's offices in Cathays Park. With regards to Cathays Park, you told us:

*We are on a separate floor to Welsh Government officials and have a pass system that means that we can't wander into the Welsh Government offices, and they can't come into ours.*

We were grateful to you for clarifying that position. There is, however, and as discussed in our session, some uneasiness amongst some Committee Members about this arrangement. You told us that:

*I do think that we can put the necessary steps in place to secure our independence.*

We would be grateful if you could outline the further steps you will take to show how you'll be able to maintain, as well as display, this independence.

In addition, we have concerns over any future budget shortfalls you may experience, and your independence in approaching such a scenario. You told us that:

*...we have a letter on file from Welsh Government, which says that, if we were in a situation where we reached the end of the financial year and we needed additional funding, they would give full consideration to providing that...*

Should such a situation arise again, in a situation where funding was required to challenge the Welsh Government itself, there is a concern that that might be seen to compromise your independence. We would be grateful if you could please outline what consideration you've given to such a scenario, and provide any assurances that your independence wouldn't be compromised.

### **Funding challenges for 2024-25**

We noted that your staffing costs represent around 75 per cent of annual expenditure, and that you state in your annual report that the trade unions "have been campaigning for wage increases" in response to inflationary pressures. With inflation remaining high, we were worried to hear that the consequence of meeting this pay request could result in redundancies. We would be grateful to receive information as to what assessment you have made of the impact such redundancies could

have on the ability of your office to deliver on its work, both in terms of your regulatory functions and promoting and facilitating the language in the private and third sectors.

In view of the short reporting timeline for parliamentary scrutiny of the Welsh Government's Draft Budget 2024-25, we would be grateful if you could outline to us any further issues you think we should consider during that scrutiny by **no later than Friday 15 December 2023**.

I look forward to hearing from you in due course.

Yours sincerely,



**Delyth Jewell MS**  
**Committee Chair**

Croesewir gohebiaeth yn Gymraeg neu Saesneg.

We welcome correspondence in Welsh or English.





Delyth Jewell AS  
Chair  
Culture, Communications, Welsh Language, Sport, and International Relations Committee  
Senedd Cymru

15/12/2023

Annwyl Delyth

### Annual scrutiny follow-up

Thank you for the opportunity to appear before the Committee to discuss my 2022-23 Annual Report and 2023 Assurance Report at the beginning of November. Thank you also for the subsequent letter where you ask for more information about certain aspects of our evidence. Below I respond to your questions by area.

#### 1. Case Management System

A case management system was presented to us by the providers for testing in February 2023. Following our testing work we were of the opinion that aspects of the system which relate to governance and work to promote the Welsh language with the third and private sectors had been delivered in accordance with our expectations by the end of the contract period. We were not, however, of the opinion that significant aspects of the system relating to the organisation's regulatory work had been carried out in accordance with our expectations. However, due to the nature of the system, and the fact that we did not consider that large aspects of the work had been carried out in accordance with our expectations we have decided not to use the elements that we deemed to be acceptable for the time being.

I understand your concerns about the additional costs associated with completing the work. Due to the nature of the contract we understood that the system would need some further refinement following the initial testing period and that there would be some costs associated with that, but as I explained above, we are not of the opinion that the system that was presented to us for testing met our expectations in the first place. We are in the

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**Correspondence welcomed in Welsh and English**

welshlanguagecommissioner.wales





process of obtaining further specialist advice to assist us with the next steps. Following this, we will be in a better position to consider the subsequent steps. In doing so we will fully consider the costs of the project and value for public money.

In the meantime, as I explained at the Committee meeting, the Commissioner's staff are able to continue their work effectively. The anticipated benefits that would come from the system mainly relate to savings in terms of the efficiency of the use of staff time and include:

- Automating some tasks that would mean savings in staff time
- Reducing the burden of day-to-day repetitive and administrative tasks
- Enabling us to keep a better record of our work and adhere to timetables
- Enabling us to measure progress more easily against our performance indicators
- Enabling us to report better on the performance of the bodies that we regulate

## 2. Independence of government

Before deciding to lease space in the Welsh Government building in Cathays Park an exercise was carried out to weigh the risks and costs of doing so in relation to the risks and costs of moving to another space. It was concluded that the costs of leasing space at Cathays Park would be significantly lower than leasing space from a commercial provider and that steps could be put in place to mitigate the risks identified in relation to the independence of the organisation. I am confident following that exercise that we have come to the right conclusion in terms of my office's resources and that suitable steps will be in place to protect the independence of the Commissioner. These steps include:

- All members of the Commissioner's staff have committed to acting in accordance with a code of conduct based on Nolan's principles of conduct in public life. Ensuring the independence of the Commissioner is at the core of that code of conduct. That means that my and my staff's decisions and dealings will not be influenced by the location of our office, and that we will not treat the Welsh Government differently from the other organisations that are regulated by us.
- In relation to the above, the Welsh Government and the Commissioner have a memorandum of understanding which sets out the responsibilities of the two organisations and their relationship with each other.
- Sharing space in this way brings financial savings to the Commissioner and to other public bodies with whom we will share the space. It is a prudent way of working in a difficult financial climate. It would be extremely difficult for the Commissioner to share space with other public bodies that do not have to comply with Welsh language standards. In this regard, we will share our space with other regulatory bodies including the Food Standards Agency and Natural Resources Wales.
- The Commissioner's staff will have unique passes to enable them to access the fourth floor of the building and public areas only. Welsh Government staff will not have access to the fourth floor of the building.
- A minority of the Commissioner's staff will be located in these offices, and they will all operate a hybrid working arrangement. The Caernarfon office is now the



Comisiynydd y  
Gymraeg  
Welsh Language  
Commissioner

Commissioner's main office and this is the address that will be used for communication purposes.

The Commissioner does not have the right to spend more than the sum voted by the Senedd, this is in accordance with the principle of 'Parliamentary Supply' of the UK Public Money Management framework. If we need additional funding for any of our expenditure categories we are required to apply to the Welsh Government through the 'supplementary budget' process. Previously, the Commissioner would have been able to control any additional expenditure requirements from our reserve fund, but now it is not possible to keep a reserve fund for these purposes so my ability to control additional expenditure is limited.

When establishing this procedure, the Commissioner underlined the conflict that could arise in connection with the possibility of needing to request additional funding in order to bring proceedings against the Government which of course, is regulated by the Commissioner. A commitment was given in a letter that the Welsh Language Commissioner would be able to request funding from the Finance Minister for the purposes of bringing legal proceedings against the Government if we did not have enough funding in the absence of a reserve fund. There is therefore recognition of the potential conflict and there is a process in place to overcome this difficulty and to protect the independence of the Commissioner.

### **3. Funding challenges for 2024-25**

As required, I submitted a paper to the Government by 31 October 2023 outlining the funding my office needs to carry out our work. In the paper presented I noted that an increase of £147,000 was needed to the Commissioner's revenue budget for 2024-25 to carry out the same activities as last year. This includes an increase of £132,000 to meet a 5% increase in employment costs. As an organisation, we follow the Welsh Government salary pattern. Without an increase to the underlying revenue budget to meet that increase, we will inevitably need to make difficult decisions in order to achieve savings to meet the deficit. We will have already achieved savings of £97,000 in 2023-24 by reducing our estate so there are very few further savings that we will be able to make towards the organisation's running costs in the coming years.

As we do not yet know the terms of the settlement that we will receive from the Welsh Government we are currently working on different scenarios dependent on predicting different settlements. This, inevitably, includes looking at the staffing structure. Introducing changes to our staffing structure would significantly affect the office's ability to carry out our work; I have already, for example, decided to keep two positions vacant for the time being following staff departures. I should point out that the organisation already employs 4 fewer members of staff than in 2015-16 - a reduction of 6 would be a reduction of over 10%. This work of preparing for different scenarios also means that we need to look at our already small programme budget (£150,000).



Comisiynydd y  
Gymraeg  
Welsh Language  
Commissioner

I hope that this letter fully answers the Committee's questions. Please feel free to contact me if you need further information.

Yr eiddoch yn gywir,

**Efa Gruffudd Jones**  
Welsh Language Commissioner

Huw Irranca-Davies MS  
Chair  
Legislation, Justice and Constitution Committee  
Senedd Cymru

15 December 2023

Dear Huw,

**Inter-Institutional Relations Agreement: British-Irish Council Summit in Dublin**

Further to my letter of 23 November regarding the inter-institutional relations agreement and a British-Irish Council Summit being held in Ireland, I would like to draw your attention to my [written statement](#) of today, and to the BIC [communiqué](#) summarising the outcomes of the Summit.

Whilst at the Summit, I took the opportunity to hold bilateral meetings with the Minister for Public Expenditure and Reform, Paschal Donohoe TD, the Taoiseach Leo Varadkar TD, the First Minister of Scotland the Rt Hon Humza Yousaf MSP, and the Secretary of State for Levelling Up, Housing and Communities and Minister for Intergovernmental Relations the Rt Hon Michael Gove MP.

I have also copied this letter to the Chairs of the following Committees: Climate Change, Environment, and Infrastructure; Local Government and Housing; Culture, Communications, Welsh Language, Sport, and International Relations; and Equality and Social Justice.

Yours sincerely,



**MARK DRAKEFORD**

Bae Caerdydd • Cardiff Bay  
Caerdydd • Cardiff  
CF99 1SN

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Rydym yn croesawu derbyn gohebiaeth yn Gymraeg. Byddwn yn ateb gohebiaeth a dderbynnir yn Gymraeg yn Gymraeg ac ni fydd gohebu yn Gymraeg yn arwain at oedi.

We welcome receiving correspondence in Welsh. Any correspondence received in Welsh will be answered in Welsh and corresponding in Welsh will not lead to a delay in responding.

—  
**Culture, Communications, Welsh Language,  
Sport, and International Relations  
Committee**

Mark Drakeford MS  
First Minister  
Vaughan Gething MS  
Minister for Economy  
Welsh Government

**Senedd Cymru**  
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—  
**Welsh Parliament**  
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0300 200 6565

19 December 2023

**Shared Statement of Cooperation between the Welsh Government and the Government of  
Baden-Württemberg**

Dear Mark and Vaughan

I am writing to you with regards to the Shared Statement of Cooperation concluded between the Welsh Government and the Government of Baden-Württemberg announced on 14 November 2023.

To date, the Committee has undertaken a detailed inquiry of the Shared Statement and Joint Action Plan between the Welsh and Irish governments. This work culminated in our report, followed by a productive and valuable debate in the Senedd on 29 November 2023. As you will both be aware, recommendation 11 of our report recommended that:

*Where the Welsh Government adopts a similar approach for other priority international relationships, it should build in the findings of this report from the outset.*

This recommendation was accepted by the Welsh Government in its response to the report.

I note that whilst you have issued a press release on the Welsh Government website, as well as updating the international bilateral agreements webpage, there does not appear to be any further detail available about this latest agreement. I would be grateful to understand why so little detail has been published by the Welsh Government now, compared with how much information was published relating to your government's agreement with Ireland. I would also note that the Government of Baden-Württemberg seems to have taken a different approach, by publishing a detailed announcement and the full text of the Shared Statement in both the German and English languages.

In light of the positive response we received from the First Minister to the Committee's recommendations on future international bilateral agreements, and indeed in light of the constructive spirit shown by the Welsh Government to our international relations scrutiny more broadly, I would have hoped that a copy of this Shared Statement would have been shared proactively with this Committee.

In order to inform the Committee's future work programme, I would be grateful if you could please:

- Provide a copy of the agreement to this Committee;
- Confirm whether any associated action plans have been agreed, and if so, please share copies of these with the Committee; and
- Confirm how recommendation 11 of the Wales-Ireland report, accepted by the Welsh Government, has or will be carried out in relation to this agreement.

I look forward to hearing from you in due course.

Yours sincerely,



**Delyth Jewell MS**  
**Committee Chair**

Croesewir gohebiaeth yn Gymraeg neu Saesneg.

We welcome correspondence in Welsh or English.

# Brexit and Pandemic Impact Report.

**Entourage Pro: *Insights***  
**'Then & Now'**  
**2019 – 2023**

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Our Partners



# Who We Are

Entourage Pro: Insights is the research division of Entourage Pro Ltd: The World's first free, verified freelance global crew network, specialising in, and reporting on, the live entertainment sector.

No nonsense, impartial & detailed reports prepared by the industry for the industry.

In digitising traditional methods of sourcing and engaging with the global community of specialist production crew, Entourage Pro has built the New Way for freelancers to be seen, to be heard and to be hired.

In developing a robust and secure environment for skilled practitioners to exist, Entourage Pro provides the industry with not just a free resource to connect and employ crew but a route-one, direct line of communication with experienced production practitioners and those who are new to the industry. This is a live event production first.

## Intro + Overview

The Entourage Pro: Insights Brexit/Pandemic Impact Report is a piece of work which provides a clear overview of the obstacles and challenges our community has faced during the past 4 years.

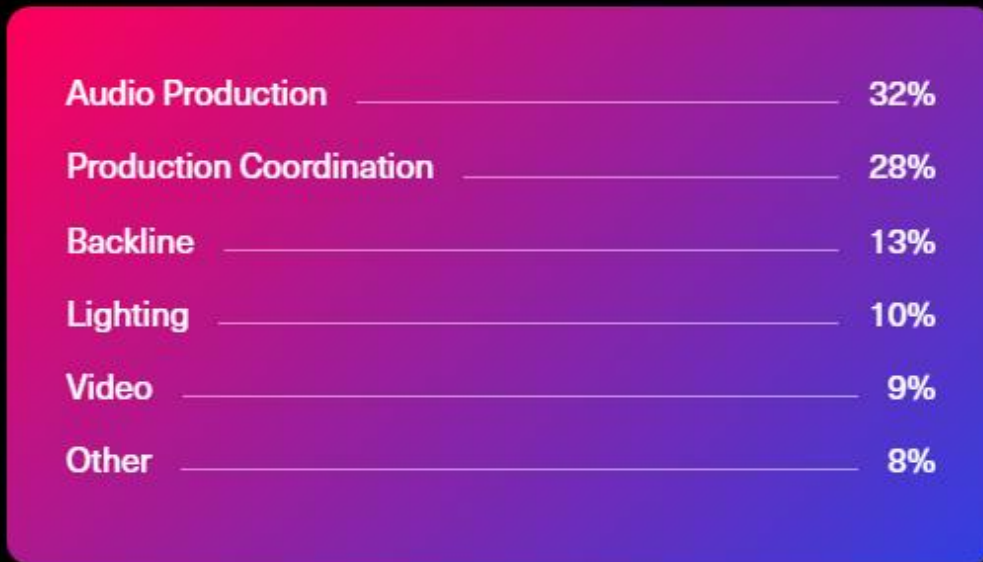
It has been developed with input from various organisations working towards a more stable future for our industry, its services and its people. Its purpose is not to bring about a collective groan from the sector, but to add context to the concerns our freelance community have faced, to a wider audience. The work has been shared amongst relevant parties with a view to fixing issues, brought about by the complexities of Brexit and the Pandemic.



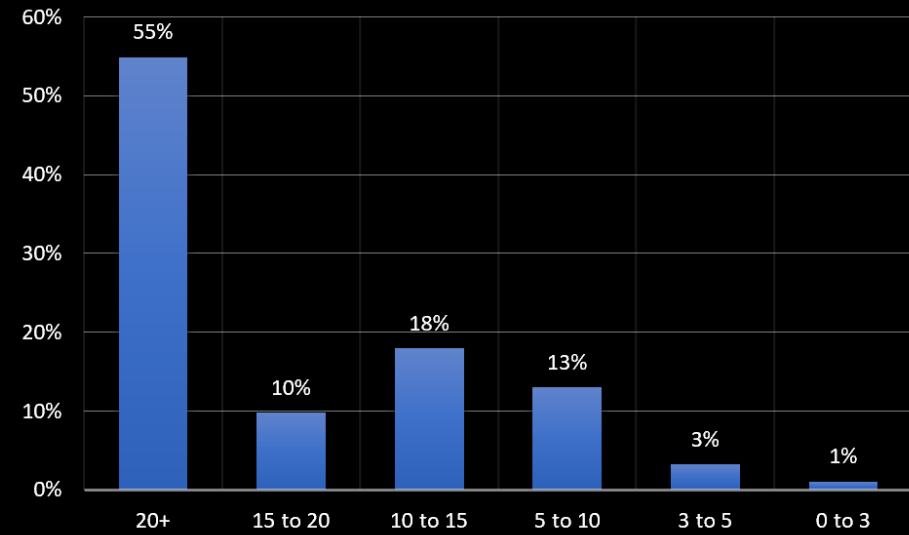
# The Respondents

603 core respondents from the Entourage Pro network consisting of UK-based freelance crew. With every crew member verified by at least one colleague in the production industry.

## Industry Disciplines



## Years' Experience





# **Demand.**

## **Overall 2019-2023 Comparison.**

**41%**

...of all respondents are doing more or much more work now compared to 2019

**25%**

...are doing around the same compared to 2019

**34%**

...are doing less or much less

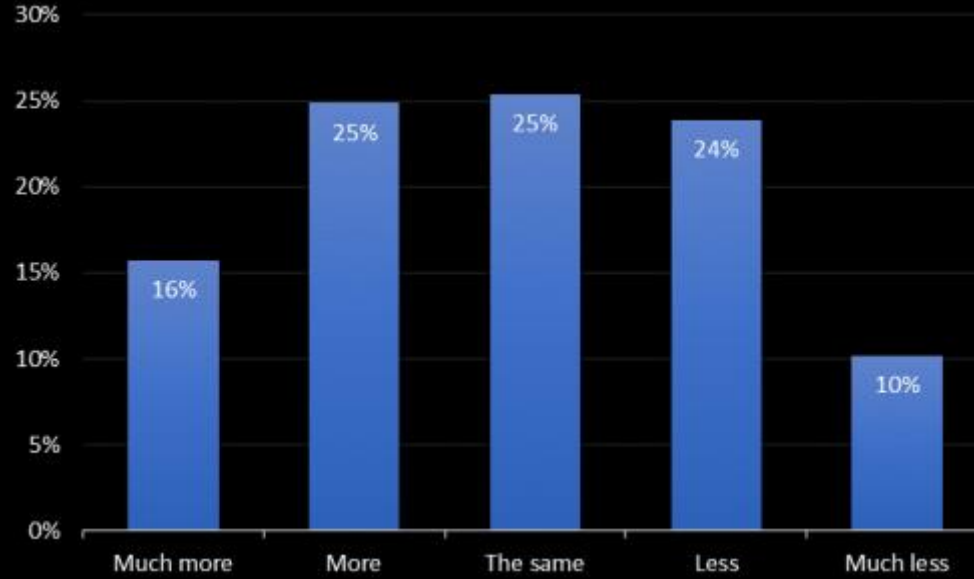
**48%**

...of respondents with more than 20 years experience are doing considerably less work now compared to 2019

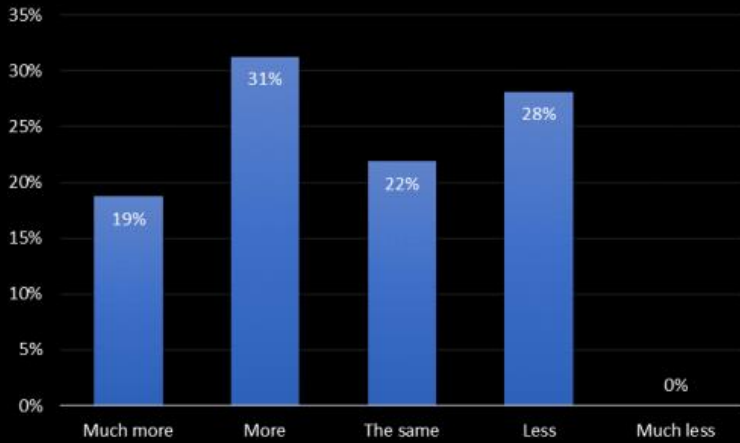
**59%**

...of respondents with between 10 and 20 years experience are doing considerably more work now compared to 2019

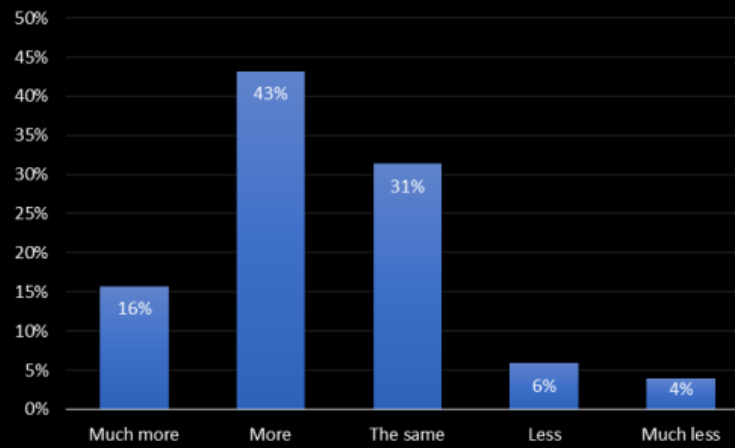
### All Respondents



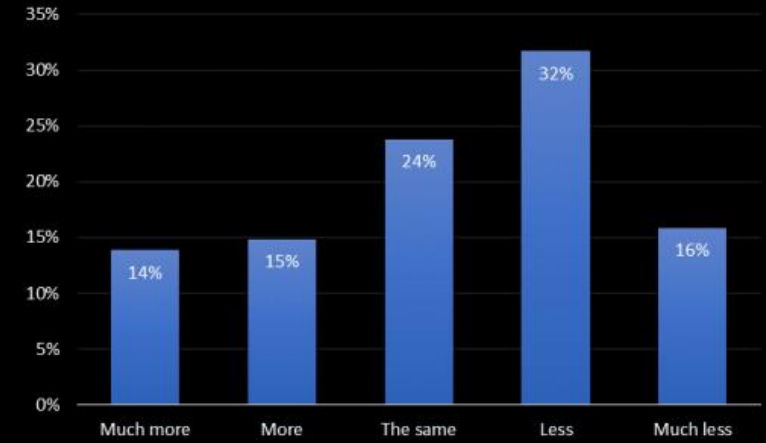
### 0 to 10 Years Experience



### 10 to 20 Years Experience



### 20+ Years Experience





# **Demand.**

## **EU 2019-2023 Comparison.**

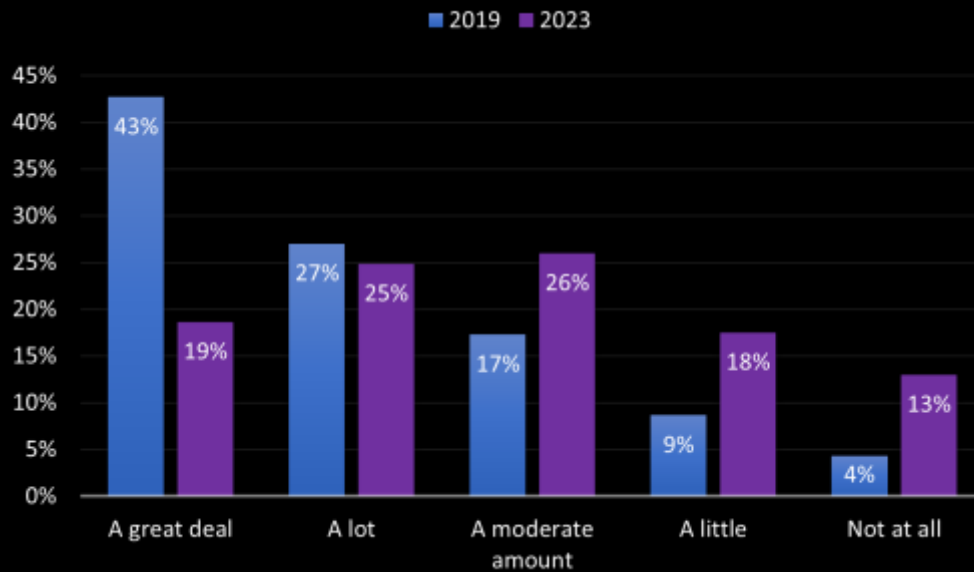
**70%**

...of all crew said EU touring was a vital component of their yearly income pre-2019

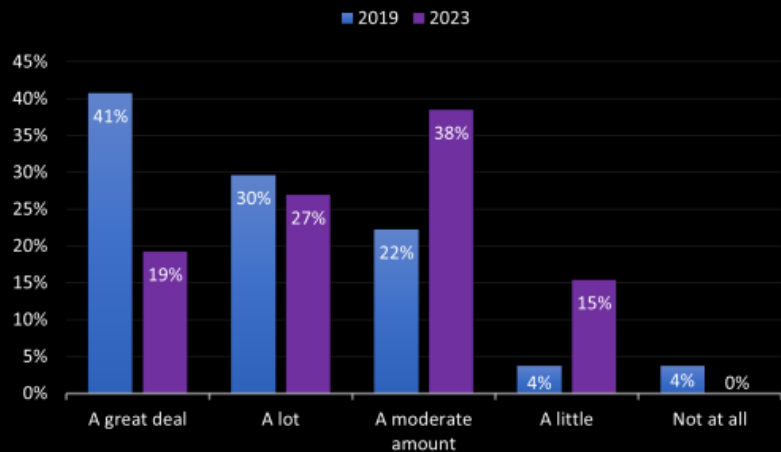
**44%**

...of crew now see EU touring as a vital component of their yearly income

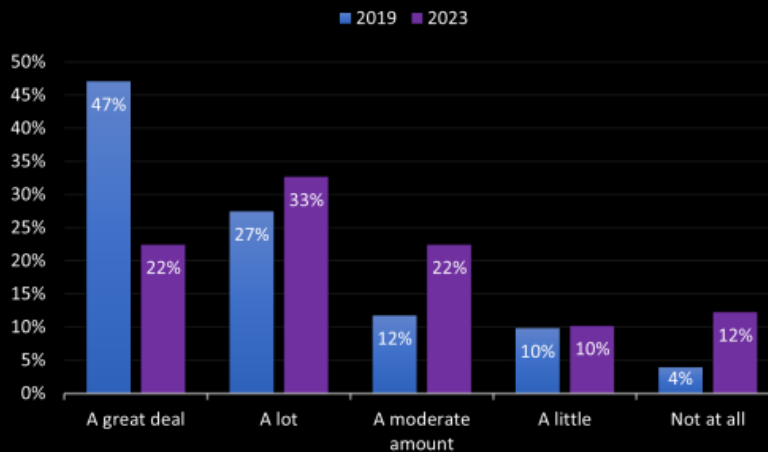
### All Respondents



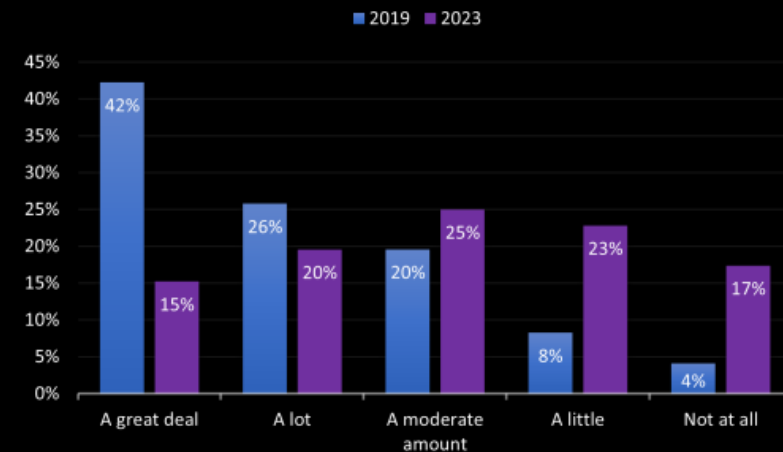
### 0 to 10 Years Experience



### 10 to 20 Years Experience



### 20+ Years Experience





## Travel

**62%**

...of all crew have had reduced earnings due to EU travel restrictions since 2019

**74%**

...of crew with 20+ years experience have had reduced earnings due to EU travel restrictions since 2019

**58%**

...of all crew say their ROW/US work quota has not increased to compensate

**66%**

...of crew with 20+ years experience say their ROW/US work quota has not increased to compensate

**84%**

...of all crew have seen UK/EU tour cancellations which have impacted them, or their friends/colleagues



# EU Member State Touring

Other than the UK, Germany, Spain, Italy and France, it's these countries that provide UK crew with the most work





# The Major Factors for Having Less EU Work

**75%**

Increase in costs whilst lowering budgets

**71%**

Schengen restrictions (90/180 day period of working)

**68%**

Visa issues and red tape

**51%**

Fewer job offers/less work

**42%**

EU Promoters securing local crews

**35%**

More competition for work amongst peers





## Loud and Clear

**90%**

...say there is not enough clarity surrounding post-Brexit touring regulations.

**93%**

...are unhappy and unclear with government guidelines.

**94%**

...say we need clarity surrounding visa-free touring.

**79%**

...need more clarity surrounding Carnets.

**85%**

...are not aware of the proposed Labour EU deal.

**92%**

...are not aware of the French Talent Passport.

**91%**

...are not aware of UK UK Creative Industries: International Strategy

**95%**

...have never heard of the Creative Export Faculty

**83%**

...have not been made aware of the necessary legislation and processes required to re-instate achievable travel solutions for artists and crew



# Mental Health

**34%**

of all respondents are  
doing less overall work  
now compared to 2019

**91%**

have had their earnings  
affected

**65%**

have had their mental  
health affected

*"There's a lack of EU touring work."*

*"Smaller acts are now unable to tour and a sizeable earn out was from these artists."*

*"Borrowing money from family and friends."*

*"Visa and carnet issues at borders, mean less US artists taking UK crew out."*

*"I'm finding it difficult to make ends meet."*

*"Band show fees are much less - meaning tighter budgets."*

*"Instability. Taking work at a lower rate which isn't good."*

*"Feeling the pressure of providing for the family and home."*



## Conclusion

- General demand is up but there has been a huge drop in who now see EU touring as a vital part of their yearly income.
  - Most freelancers have earned less due to EU restrictions.
  - The main issues have been increased costs v lower budgets, Schengen restrictions and tour cancellations.
    - Much more clarity is needed around general touring regulations, carnets and visas.
      - The industry is still far from what it was pre-covid.
        - Fewer European artists playing UK venues.
    - Fewer UK artists requesting UK based crew for overseas work.

Whilst clearly there is still huge work to be done, critically, the industry's resilience, adaptability and optimism again signals that we need to come out of a post-pandemic world stronger and reach a definitive situation to the current EU touring situation.

There is evidence to support clearer guidelines, processes and representation to us as individuals and as businesses and a requirement to call upon the various industry bodies to come together, collectively for stronger more targeted representation.

We'd love to hear from you if you're a manufacturer, supplier, promoter, operator or educator and you'd like to work with us. Find out how you can jump on our transformational tour bus, become an integral part of our amazing onward journey and safeguard the future of our industry – contact us at [connect@entouragepro.com](mailto:connect@entouragepro.com)



Comisiynydd y  
Gymraeg  
Welsh Language  
Commissioner

Oliemata O'Donoghue  
Drwy e-bost - [political.engagement@hsbc.com](mailto:political.engagement@hsbc.com)

8/11/2023

Annwyl Oliemata,

## **Welsh language customer service phone line**

I have just received a letter from you stating your intention to end the Welsh language helpline on the 15 January 2024. It is extremely disappointing that you have reached this decision, and that you failed to consult with my office in making the decision or given warning of the announcement.

The offer of a call-back service in Welsh within three working days in Welsh means that you are providing an inferior service to Welsh speakers, and as you know the Welsh language is an official language in Wales.

You state that the numbers accessing the Welsh phone number is low, however, you have received advice and encouragement by my office to promote the service better, but there has been no evidence that this has happened.

I would like to arrange an urgent meeting with you to discuss the situation and to discuss any further options before this important service comes to an end. I'd be grateful if you can you please suggest some possible dates and time?

Yours sincerely,

**Efa Gruffudd Jones**  
Welsh Language Commissioner

José Carvalho  
Head of Wealth and Personal Banking  
HSBC UK

Oliemata O'Donoghue  
Managing Director, Wealth and Personal Banking  
HSBC UK

Copy to: Ian Stuart  
Chief Executive Officer  
HSBC UK

11 December 2023

**Re: HSBC UK's decision to close its Welsh speaking customer service phone line**

Dear José

I am writing to thank you for appearing in front of the Committee on Wednesday 29 November 2023. Members of the Committee were grateful for your time, and we appreciate that you were the representative put forward to respond to our concerns about HSBC UK's decision to close its Welsh speaking customer service phone line. Following your evidence session with us, we wish to pursue some further questions.

Firstly, we would like to reiterate our position as a Committee. We implore HSBC UK ("HSBC") to overturn its decision to close its Welsh speaking customer service phone line ("the Service"). HSBC's website outlines its existing Welsh language commitments, noting that the bank is:

*"...dedicated to the life, culture and people of Wales and we aim to embrace the Welsh language in all our branches in Wales, and in doing so provide the highest quality service to our customers."*

HSBC will be aware of the strength of feeling amongst Committee Members about the bank's recent decision, and that this feeling is shared by Members from all political parties in the Senedd. HSBC's failure to maintain an approach consistent with its values is considered disingenuous and disturbing, and there is a potential for this to have a significant impact on your Welsh speaking customers. We outline our rationale for coming to this view below.

### **Number of users of the Welsh Language Service**

During our evidence session, you informed us that there are three full-time members of staff working to provide the Service. Between these three agents, they receive around 22 calls a day. You also stated, however, that of the Welsh calls that HSBC receive:

*"...we end up with only six per cent of the calls that are coming in being answered in Welsh by these three agents."*

This means that 94 per cent of calls to the Service are not being answered in Welsh, despite speakers requesting to use the service.

HSBC have referred on a number of occasions to a steady decline in the number of users of the Service, compared with the almost 20,000 daily calls to the English language line. We would posit that HSBC's claim in its **letter** of 8 November 2023 that the service is, "...no longer being fully utilised" is not in fact the case: rather, the low number of calls to which HSBC refers reflects your bank's inability to provide a functioning and coherent service that meets the needs of its Welsh speaking customers.

We believe that this shows a level of contempt towards HSBC's customers, and that the bank's language and rationale surrounding the decision to close the Service has been disingenuous. The effect of HSBC's actions has been to push Welsh speakers out by stealth. To suggest that the decision to close the Service was taken because of a decline in usage is a misrepresentation of the facts and, as a result of this, we would reiterate our calls for HSBC to reconsider the decision to close the Service in the strongest terms.

### **Protecting and supporting vulnerable customers**

Our Committee also raised concerns about the need to protect and support vulnerable customers as a result of the decision to close the Service. We were informed that there is a consumer duty to look after vulnerable customers, and that HSBC has identified 85 existing customers who are considered "vulnerable". We were also told that these customers will be contacted in advance of the change in January 2024. We welcome the proactive steps taken by the bank in this regard, but we still have a number of outstanding concerns.

We would be grateful if HSBC could outline how it determines whether or not a customer is "vulnerable". The bank has approximately 600,000 customers in Wales, with only 85 of those having been identified as "vulnerable". This is 0.01 per cent of the bank's customer base in Wales. This seems



a particularly low figure, when compared with data made available by the Financial Conduct Authority.<sup>1</sup> Given the impact the decision to close the Service will inevitably have on vulnerable customers, we would welcome further assurance from HSBC that these customers are being identified correctly, and supported accordingly.

We are of the view that waiting three days for a call back is too long. In our view, this is inconsistent with HSBC acting with an appropriate level of care, especially for vulnerable customers who may not be able to access a banking service in other ways. For example, if such a customer were to have an urgent banking matter, such as paying an energy bill, or resolving a financial penalty on an account, waiting three days for a call-back would be considered unacceptable. In such a scenario, we would ask what assurances HSBC can provide that Welsh speaking customers would not be at a disadvantage, through no fault of their own, because of the three-day wait for a callback.

Furthermore, we are acutely worried about the increased risk of vulnerable customers being exposed to harm, like data theft or scamming. We would ask, for example, how customers (and in particular, vulnerable customers) will know to whom they are speaking when receiving a call back from the bank. That is, what steps are being taken to ensure that vulnerable customers will know that it's HSBC calling, and not a "scammer"? If the call is missed by the customer, how will they be followed up, and how many further attempts will be made to call them? We would suggest that scheduling a time for a call back would be more appropriate.

Given the concerns we have outlined, we have not received the reassurances necessary to provide confidence that the decision to close the Service is appropriate or safe, particularly for vulnerable customers. As a Committee, we were not convinced by your answers that sufficient consideration has been given to such potential scenarios by HSBC. This shows a significant lack of empathy on the bank's behalf.

We think that efforts must be made urgently to ensure that vulnerable customers are not at a disadvantage compared with those customers who are able to bank more easily via different methods. As such, we would implore HSBC, as we and others have stated, to overturn its decision to close the existing Service. Having said this, and given that the bank has provided no indication to date that it has listened to such calls, we would ask that the following changes be introduced for vulnerable customers to ensure their safety:

- A guarantee that they will receive a Welsh language callback within one business day;
- A guarantee that a pre-arranged time will be provided for a callback;

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<sup>1</sup> **In October 2022, 52 per cent of UK adults had characteristics of vulnerability, up from 46 per cent in February 2020, FCA Financial Lives Survey 2020.**



- A guarantee that they will receive a minimum of three callbacks should the first callback not be answered;
- A guarantee that vulnerable customers who cannot fulfil the security requirements for a callback from the bank will be given additional specialist support from the bank.

These changes would, at least, go some way towards showing that HSBC is serious about its duty to protect these customers.

### **Bilingual digital services**

With regards to digital banking services, it was noted that:

*"...about 97 per cent of...transactions today are done digitally, either in the app or on internet banking."*

We also questioned why the HSBC banking app is not available in Welsh. In response to this line of questioning, we were told that it's not *"...as simple as translating the app"*. We were told the reasons for this are that:

*"...most of the screens that you see and most of the services behind an app and internet banking come from different parts and different systems across the bank... at the moment, we have no plans to create the capability for multilanguage within the UK infrastructure. It would be quite a significant investment and change in the technology set-up for us."*

It was, however, confirmed to us that the HSBC banking app is available in different languages across the world.

We were not convinced by the reasons given as to why it wasn't possible to create a Welsh version of the HSBC banking app. As was outlined, it is indeed possible to do this, but it would seem that HSBC has chosen not to make this investment in Welsh. As was the case with the bank's inability to successfully answer calls from Welsh speakers, we are concerned that the bank is also handling technological change poorly and with complete disregard for its customer needs.

In spite of this, we believe that there is now an opportunity for HSBC to reassert its commitment to Wales and the Welsh language by transforming its digital banking offer. We would urge HSBC to commit to working with the Welsh Language Commissioner to improve its Welsh language offer, in order to better support the bank's 600,000 customers in Wales. This would include providing a Welsh version of the banking app. We would strongly encourage HSBC to consider this matter.

To conclude, we implore HSBC to reverse its decision to close the Welsh Language Service in January 2024. **HSBC's own values** state that:



*We were born speaking different languages....The greater our empathy and diversity, the better we reflect the worlds of our customers and communities...*

We were born speaking different languages in Wales, and we are still living and speaking different languages. It is vital, especially for those who are vulnerable in Wales, that they are not disadvantaged by having to wait three days to be able to speak to a Welsh language agent. As we have outlined repeatedly in this letter, we implore HSBC to reconsider its decision and reflect on its own words that the bank better reflects the worlds of its customers and communities.

Should the bank's existing position remain unchanged, we would urge HSBC to take action on the changes we have outlined in this letter. A failure to do so would in effect mean that HSBC's commitments to Wales and the Welsh language are redundant.

I look forward to receiving a response from you in due course.

Yours sincerely,



**Delyth Jewell MS**  
**Committee Chair**

Croesewir gohebiaeth yn Gymraeg neu Saesneg.

We welcome correspondence in Welsh or English.



**José Carvalho**

*Head of Wealth & Personal Banking, HSBC UK Bank plc*

Delyth Jewell MS

Culture, Communications, Welsh Language, Sport, and International Relations Committee

Via email: [SeneddCulture@senedd.wales](mailto:SeneddCulture@senedd.wales)

21 December 2023

Dear Chair,

Thank you for your letter of 11 December 2023 with further questions following the oral evidence I gave to the Committee on 29 November 2023.

I have taken each of your points in turn, which I hope provide helpful insight.

***Number of users of the Welsh Language Service***

In the period April22-March23 we received an average of 22 calls per day into our Welsh Service Line. As part of our decision-making process, we reviewed historic call volumes to understand the trend. Naturally, there was some fluctuation over the course of the pandemic, but between 2019 and 2023 we have seen a 41% decrease in calls into the line.

***We would be grateful if HSBC could outline how it determines whether or not a customer is “vulnerable”.***

We will be calling 85 customers who we have deemed to be vulnerable. These 85 have been identified from the 1676 unique users of the Welsh Service Line, rather than from c.600,000 customers in Wales. The customers we will be calling have been identified based on those who call more than twelve times a year and are not digitally active, and those for whom we already hold care markers.

***What assurances can HSBC provide that Welsh speaking customers would not be at a disadvantage, through no fault of their own, because of the three-day wait for a call-back.***

We will always attempt to assist our customers at first point of contact when they call, albeit this will be in English. As part of our review, we will look into individual circumstances to understand whether the call-back service caused any issues.

***A guarantee that they will receive a Welsh language call-back within one business day.***

We cannot guarantee a call-back within one working day. The maximum waiting time for this replacement call-back will be three working days, although we will endeavour to call as soon as possible. We do not want to promise something on which we cannot deliver.

**HSBC UK Bank plc**

1 Centenary Square, Birmingham, B1 1HQ

Registered in England number 9928412. Registered Office: 1 Centenary Square, Birmingham, B1 1HQ

Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority

***A guarantee that a pre-arranged time will be provided for a call-back.***

On a first attempt to call a customer, if they answer but it is not a convenient time to speak, we will arrange a time and date with them to call back, Monday-Friday 0900-1700. Should they not answer, we will leave a voicemail and send an email, if we hold the information for the customer. In that email we will invite the customer to reply with a date and time that is convenient for them to speak, Monday-Friday 0900-1700.

***A guarantee that they will receive a minimum of three call-backs should the first call-back not be answered.***

After 15 January 2024, when a customer calls the Welsh Service Line number, they will be redirected to our main English-speaking menu. If the customer wishes to speak in Welsh, the agent will send an internal message requesting a call-back. The maximum waiting time for this replacement call-back will be three working days, although we will endeavour to call as soon as possible. Whilst this service is new, and customers are adapting, we will make five attempts across three working days for the first three months. This is to ensure we make as much effort as possible to contact the customer. After three months, we will review contact rates and adjust our approach accordingly. We will also send an email and leave a voicemail each time we call, if we hold this information for the customer. If, after three working days with five attempts, we are still unable to reach a customer, no further attempts will be made unless a new referral is generated.

***A guarantee that vulnerable customers who cannot fulfil the security requirements for a call-back from the bank will be given additional specialist support from the bank.***

I cannot go into detail of our security procedures, but we ensure all customers have security credentials, so we know the customer is who they say they are in order to meet our regulatory obligations.

***The HSBC banking app is available in different languages across the world.***

Our international online banking offering varies significantly between the markets in which we operate. For the majority of markets, English is the only option offered. In Malaysia and the Philippines, for example, where several minority languages are spoken, online banking and the app are only offered in English. Similarly, in Argentina, where the national language is Spanish, and English is a minority language, we only offer online banking in Spanish with no English alternative.

Additionally, in the session I committed to write back on the following points:

***Banking hubs***

Cash Access UK have announced the creation of seven banking hubs in Wales; two opened in 2023 (Prestatyn and Welshpool) and five will open in 2024 (Porthcawl, Treorchy, Risca, Abergele, and Abertillery). We have committed a community banker to each of them.

***Customer communications***

We will be writing to all users of the line again, in Welsh and in English, week commencing 18 December 2023. In this letter, we will restate the replacement call-back option open to customers, as well as alternate ways of banking with Welsh language support. For example, some of our branches continue to offer a Welsh translation service, have Welsh speaking staff, and we will still reply to any Welsh correspondence in Welsh. This is additional to the English language options to bank at the Post Office, banking hubs, and our branch and telephony services. As well as in the customer letter, the replacement call-back service will be advertised in branch through posters and branch radio, and added to our current Welsh webpage, found [here](#).

***Review***

As I mentioned to the Committee, we will be conducting a review of the volumes of call-back requests received, in 2Q24, to assess customer demand and how the replacement service is functioning, including through customer feedback. I am committed to our Consumer Duty obligations of providing good outcomes for our customers. I will provide a written update to the Committee after this review is complete.

I hope you find the above information useful. Please let me know if I can be of further help.

Kind regards,



José Carvalho

Jeremy Miles MS

Minister for Education and Welsh Language

11 December 2023

## **Welsh Government actions related to Welsh language requirements for banking**

Dear Jeremy

You'll be aware that the Committee spoke to José Carvalho, Head of Wealth and Personal Banking at HSBC UK at its meeting on 29 November 2023 about HSBC's decision to close its Welsh speaking customer service phone line. We are aware of your concerns about the decision taken by the bank.

As you will see from the letter which we've sent to HSBC, we have told them that:

*"...a failure to [change their position] will mean HSBC's commitments to Wales and the Welsh language are in effect redundant."*

Further to our evidence session with HSBC, we would like to ask you to outline what actions the Welsh Government will consider taking to encourage and increase the use of Welsh language in the banking sector. We would be grateful if you could outline these actions, as well as how the Welsh Government and partner bodies will seek to encourage and increase Welsh language use in other sectors that fall outside the scope of the 2011 Measure. We will look to consider these points early in the new year.

I look forward to receiving your response in due course.

Yours sincerely



**Delyth Jewell MS**  
**Committee Chair**

Croesewir gohebiaeth yn Gymraeg neu Saesneg.

We welcome correspondence in Welsh or English.





Comisiynydd y  
Gymraeg  
Welsh Language  
Commissioner

Ian Stuart  
Chief Executive Officer HSBC UK

Oliemata O'Donoghue  
Managing Director, Wealth and Personal Banking  
HSBC UK

Claudia Evans  
Public Policy Manager  
HSBC UK

21/12/2023

Dear Ian Stuart,

**Culture, Communications, Welsh Language, Sport, and International Relations  
Committee – Welsh Parliament**

Following the appearance of HSBC UK's Head of Wealth and Personal Banking, José Carvalho, in front of the Welsh Parliament's Culture, Communications, Welsh Language, Sport, and International Relations Committee on [29 November 2023](#), Delyth Jewell, the Committee's chair has written a [letter](#) to HSBC UK, dated 11 December 2023. The letter refers to HSBC UK's digital provision and notes:

*'In spite of this, we believe that there is now an opportunity for HSBC to reassert its commitment to Wales and the Welsh language by transforming its digital banking offer. We would urge HSBC to commit to working with the Welsh Language Commissioner to improve its Welsh language offer, in order to better support the bank's 600,000 customers in Wales. This would include providing a Welsh version of the banking app. We would strongly encourage HSBC to consider this matter.'*

As you know I have recently held a meeting with your officers and have also expressed my concerns about the current situation. There was an opportunity at that meeting to exchange views, but you will understand that I remain keen to ensure that HSBC, and indeed the banking sector in general, understands the linguistic context in Wales, and develops up-to-date services for Welsh speakers.





Comisiynydd y  
Gymraeg  
Welsh Language  
Commissioner

I would be grateful if we could meet to discuss this further, as recommended by the Committee. Please can you contact Mathew Thomas, Senior Promotion Officer at [mathew.thomas@cyg-wlc.cymru](mailto:mathew.thomas@cyg-wlc.cymru) to arrange possible dates and times for us to meet?

Yours sincerely,

**Efa Gruffudd Jones**  
Welsh Language Commissioner

Cc: Delyth Jewell, Chair of Culture, Communications, Welsh Language, Sport, and International Relations Committee – Welsh Parliament

Joanne Watkin-Jones – HSBC UK

**Y Pwyllgor Deddfwriaeth,  
Cyfiawnder a'r Cyfansoddiad**

**Legislation, Justice and  
Constitution Committee**

**Welsh Parliament**  
Cardiff Bay, Cardiff, CF99 1SN  
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Llyr Gruffydd MS

Chair, Climate Change, Environment, and Infrastructure Committee

Paul Davies MS

Chair, Economy, Trade, and Rural Affairs Committee

Delyth Jewell MS

Chair, Culture, Communications, Welsh Language, Sport, and International Relations Committee

Jenny Rathbone MS

Chair, Equality and Social Justice Committee

19 December 2023

Dear Chairs,

### **Inquiry into UK-EU governance**

You will be aware that the Senedd's Legislation, Justice and Constitution Committee considers the constitutional impact of Wales's external affairs, including the governance and implementation of UK-EU agreements.

We have recently undertaken a short inquiry into UK-EU governance to build on our early findings on the role and representation of the Welsh Government and Senedd in post-Brexit UK-EU relations, as outlined in our [submission to the House of Lords European Affairs Committee](#) in October 2022.

Due to the work that your Committees undertake within your remit in relation to UK-EU agreements, we agreed to draw your attention to our [report](#) on the inquiry.

For information, we intend to hold a debate on the report on 21 February 2024.

Yours sincerely,

*Huw Irranca-Davies*

Huw Irranca-Davies

Chair



Helgard Krause  
Chief Executive  
Welsh Books Council

13 December 2023

## **Magazine funding model**

Dear Helgard,

At our Committee meeting on 16 November 2023, we considered a letter from Wales Arts Review about the Books Council of Wales's magazine funding model. This followed another letter which we received over the summer from the Save Welsh Magazines campaign team about chronic underfunding in the sector.

The gravity of the situation has, however deepened yet still since the publication of grant recipients for English language cultural periodicals for 2024-28 on 7 December 2023. We note already that the Board of Planet Magazine is currently considering its options following the decision not to continue providing grant support to it.

Following our consideration of these matters, we would like to ask the following questions:

- Can you explain why Welsh language magazines receive a significantly higher proportion of funding compared with English language magazines? The Welsh language grant was £388,875 in 2023, compared with £147,900 for English language magazines. Both figures are reduced from 2022.
- What discussions has the Books Council of Wales had about changes to the magazine sector in Wales? Given that there have been static levels of funding for the past few years, what changes have you considered introducing?

- What review of the funding model, guidelines or application remit has the Books Council made in the previous five years? Are there any plans to review these in the near future?
- We would also be grateful if you could provide us with an explanation of what underpinned the decisions you've made about the funding available to English language cultural periodicals. By this we mean, for example, the process you undertook, the criteria set out for grant applicants, how you benchmarked all the applications received against such criteria, and the full decisions you have made in this regard.

I look forward to hearing from you in due course.

Yours sincerely,



**Delyth Jewell MS**  
**Committee Chair**

Croesewir gohebiaeth yn Gymraeg neu Saesneg.

We welcome correspondence in Welsh or English.





HK/MLW

20 December 2023

Delyth Jewell MS  
Committee Chair  
Culture Communications, Welsh Language,  
Sport, and International Relations Committee  
Welsh Parliament  
Cardiff Bay  
Cardiff  
CF99 1SN

Dear Delyth Jewell,

**Re: Magazine Funding Model**

Thank you for your letter dated 13 December 2023 regarding The Books Council of Wales's funding model for magazines. We are pleased to have the opportunity to answer the following questions you have asked us to consider:

- ***Can you explain why Welsh language magazines receive a significantly higher proportion of funding compared with English language magazines? The Welsh language grant was £388,875 in 2023, compared with £147,900 for English language magazines. Both figures are reduced from 2022.***

This financial year (2023/24), the Welsh-language grant supports 15 titles compared to the 6 titles supported by the corresponding English-language grant. As you would expect, this is reflected in the budgetary allocations.

The figures you have quoted are taken from our annual financial statement which reflects actual payments made to the magazines. In order for us to make the best use of the grant available in a given year and to support magazines in a flexible way, we occasionally prepay the first quarter of the next financial year which means that the time when payments are made can vary year on year.

The annual budget is £380K for the Welsh-language magazine grants and £180K for the English-language magazine grants; this broadly reflects the split in the Books Council's overall budget for books and magazines in both languages (£1.7m Welsh-language, £700K English-language). While this allocation is not defined in our Award of Funding letter, we would not choose to change it without a detailed discussion with our funders. Neither grant was reduced year on year.

The context for funding differs in both languages due to completely differing market conditions. Worldwide there are several hundred literary magazines available to English-language writers and readers, reflecting the enormous scale of English-language publishing in general. Our grant ensures that magazines with specifically Welsh content and perspectives are available to readers and writers, as Wales-related content is considered niche by mainstream publications and is unlikely to be covered in depth elsewhere.

The market conditions for Welsh-language magazines are such that, most likely, very few would be available if it weren't for public subsidy. The purpose of the grant is to ensure the widest possible variety of content and formats, and that readers of all backgrounds and interests are served with relevant content and formats.

- ***What discussions has the Books Council of Wales had about changes to the magazine sector in Wales? Given that there have been static levels of funding for the past few years, what changes have you considered introducing?***

The Books Council and its subcommittees are constantly monitoring the situation in the magazine sector in Wales and regularly discuss the situation during meetings. Officers hold regular annual appraisal meetings with grant recipients and any issues facing the publishing industry in Wales are discussed during quarterly meetings with Welsh Government with regular calls for more funding for the sector, especially following prolonged standstill funding against rising costs and higher inflation.

Magazines are offered equitable access whenever opportunities arise for extra funding. Over the past few years, magazines have been in receipt of several funding streams made available from Welsh Government through Creative Wales, including post-Covid emergency funding. In addition, the New Audiences Fund alone (£1.1M over two years) has provided the magazine sector with almost £320K of funding during 2022–24. £260K of this went to English-language magazines who have made constructive and innovative use of the funding.

During the current tender round some, but not all, of the magazines, made the case that their business model was no longer sustainable. This would have remained the case even if the grant could have been increased. Within the current tender guidelines, as well as the budgetary context, the requested increases were not feasible. This dilemma was further underlined during the interview process and led to the Subcommittee's decision that the best use of public funding, moving forward, was to commit £95K to one brand-new English-language literary magazine focussing on fiction and creative non-fiction that will have a viable business model at its core. The recent public campaign and open letter in support of magazines highlighted

concerns about sustainability and pressure on staff and working conditions. The English-Language Publishing Development Subcommittee believes that this new tender will go some way to addressing those concerns whilst providing a sustainable new platform to the readers and writers of Wales. More information regarding this new opportunity will be available in February.

- ***What review of the funding model, guidelines or application remit has the Books Council made in the previous five years? Are there any plans to review these in the near future?***

A panel of the English-language Publishing Development Subcommittee\* along with two external experts (themselves publishers of small independent magazines) met during 2022 to discuss in general terms what the context of the 2023 tender might look like. They produced a report for the Subcommittee which informed their discussions and the subsequent tender process. There are no plans to review these in the near future, but a review will be undertaken again in time for the next franchise round to be held in 2027.

As there will be a separate tender process for the funding made available following the recent decisions, specific guidelines and application remit will be produced for the new tender.

*\*(All the Books Council's core grants, for both books and magazines, in English and in Welsh, are distributed by two Subcommittees of the Board of Trustees, one for each language, comprising of external independent experts.)*

- ***We would also be grateful if you could provide us with an explanation of what underpinned the decisions you've made about the funding available to English language cultural periodicals. By this we mean, for example, the process you undertook, the criteria set out for grant applicants, how you benchmarked all the applications received against such criteria, and the full decisions you have made in this regard.***

As noted above, the funding available to English-language cultural periodicals reflects the general split in the grant allocations between the two languages. The Books Council's core grant has not been increased; therefore it was not possible to increase individual grants within the portfolio without detrimentally affecting other, equally important, funding streams.

The Books Council's current 5-year Strategic Plan, as agreed by our Board of Trustees and with Welsh Government, informed this process as it does all of our processes. Amongst other things, the strategy asks us to:



- encourage and reward risk-taking and experimentation, especially where there are identifiable gaps,
- examine and challenge the power of incumbency,
- [Support] business models that are flexible and agile and that do not solely rely on grants to publish content. (Regular review of financial viability of business to ensure that only sustainable businesses are funded.)

This franchise round was advertised openly and widely in spring 2023 with closing dates in August (stage 1) and October (stage 2). Current franchise holders were aware of this timeline in advance as it corresponded to the end of their current franchise.

The documents were available online and are still available here [Tenders | Cyngor Llyfrau Cymru](#)

The process was open to new applicants as well as current franchise holders. We received applications worth £400K for a grant pot of £180K. Five current franchise holders and four new entrants were interviewed.

The interviews were held face-to-face in Aberystwyth over two days. All bar two members of the Subcommittee attended, including one Books Council Trustee as well as the two external experts who were part of the 2022 review. The Panel was chaired by the Subcommittee's Vice-chair and served by four of BCW's officers.

All applicants were allocated 45 minutes for the interview, and a set of 7 questions, reflecting the key priorities, were asked of all applicants; these included sustainability of business models, mitigation proposals in case of future funding cuts, fair working conditions, covering underrepresented writers and topics, reaching new audiences and providing quality content.

The written applications and subsequent interviews were evaluated against the priorities set out in the guidelines (see attachment 1) and scored against those criteria. The panel's decisions were based on the merit of the application and the interview, and included due diligence regarding the validity and sustainability of the business model in order to make the best possible use of public money.

The following four applicants were successful in meeting these criteria:

**The Paper / Y Papur** – £10,000 per year plus a £10,000 start up grant during 2023/24. For providing a new platform for younger underrepresented writers, with a particular focus on working class writers.

**Poetry Wales** – £25,000 per year for providing a print and digital poetry magazine.

**Welsh Agenda** – £25,000 per year for cultural content including book reviews and providing a print and online platform for the publishing sector in Wales.

**Nation.Cymru** – £25,000 per year for cultural content including book reviews and providing a digital free at the point of use platform for the publishing sector in Wales.

Three out of the four successful applicants received offers lower than they had applied for but had a mitigating proposal in place to adapt their model, enabling them to accept the offers they received. Five applicants were unsuccessful and were provided with feedback, some using the opportunity to gain additional clarification from Books Council officers.

Digital developments greatly influence how readers engage with content and have led to an ever-changing publishing environment, especially for magazines. A regular, open and competitive call for applications acknowledges this fast-changing landscape and safeguards the best use of public money whilst ensuring that readers and writers benefit from a variety of platforms, formats and content.

We look forward to advertising the new tender following the February meeting of the English-language Subcommittee. We hope we've answered your questions in detail, but please feel free to contact us at any time should you require any further clarification.

Best wishes,



HELGARD KRAUSE  
Chief Executive

## **Attachment 1**

### **ASSESSMENT CRITERIA**

Current franchise holders will be assessed on the basis of their track record, their achievements of targets within the last franchise, and their proposals for the next funding period. Submissions from both new applicants and current recipients of funding will be assessed according to the following general criteria:

- the likely quality of the contents and editorial standards, based on previous issues/pilot editions/mock-up and the editorial policy outlined in the application;
- the applicant's commitment to supporting a diverse and inclusive publishing landscape, both in editorial policy and at the board level;
- the applicant's commitment to supporting skill development, to ensure a healthy publishing ecosystem;
- the applicant's ability to compensate contributors;
- the applicant's readiness to support material likely to attract new writers and readers;
- the likely quality of design and production, based on previous issues/pilot edition/mock-up;
- the applicant's ability to market and distribute throughout Wales and (where appropriate) beyond, based on a detailed marketing strategy;
- the applicant's ability to adhere to a publishing schedule;
- clarity of role in relation to other periodicals. The Books Council will consider whether a proposed title is likely to fill a gap in provision *or* perform more effectively than competing titles;
- the applicant's ability to attract funding, sponsorship and contribution in kind from other sources, and to diversify revenue streams;
- sales targets for the franchise period (through subscription and shops);
- value-for-money;
- the ability to develop content in multiple formats (e.g. print, web, app, e-pub etc.).

Delyth Jewell AS  
Chair of the Culture, Communications, Welsh Language, Sport, and International  
Relations Committee

[Delyth.Jewell@senedd.cymru](mailto:Delyth.Jewell@senedd.cymru)

17/11/2023

Dear Chair,

### **Post-compulsory education and the Welsh language: the learners' voice**

Today I've published a research report into the experiences of post-16 learners in Welsh-medium or bilingual education in schools and further education colleges across Wales. Over 1,000 young people contributed to the research, which provides valuable insights into their views and experiences, including their reasons for choosing Welsh-medium education, their views on the provision and their intention in terms of their future education and careers.

The key findings are presented below and a copy of the full report is attached for your information.

#### **Key findings of the research:**

- The majority of Welsh speakers over the age of 16 who were surveyed in schools and further education colleges are proud that they can speak Welsh, and see the language as an advantage for their career prospects.
- Opportunities to study through the medium of Welsh are important for Welsh speakers when choosing a place of study, as well as opportunities to use Welsh as part of everyday life at school or college.
- The majority of learners surveyed in schools and further education colleges state that their experience of Welsh-medium or bilingual education is good or very good.
- Of the Welsh speakers who intend to continue their education after leaving school or college, only 40% intend to stay in Wales. For Welsh speakers who intend to

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Comisiynydd y  
Gymraeg  
Welsh Language  
Commissioner

continue studying in Wales, the opportunity to study in Welsh or bilingually will be an important factor in choosing their next place of study.

- The research highlights differences between school and college learners, in terms of their perception of their ability in Welsh, the language medium of their education and their attitudes as regards the importance of the Welsh language.
- Learners' main reasons for not choosing to study subjects through the medium of Welsh were:
  - the perception that their English language skills were stronger and that studying through the medium of English was easier for them;
  - that a subject (or subjects) were not available in Welsh;
  - the perception that their further studies were likely to be in English or that there were better study prospects in English.

The report concludes that careful consideration must be given to how to support and strengthen Welsh language provision in the post-16 education sector, particularly in the context of developing the language skills of the future workforce.

We hope that this research will contribute to the development and expansion of post-16 education through the medium of Welsh, thereby increasing young people's opportunities to develop their Welsh language skills and use the language in education and beyond. We hope therefore to contribute to reaching the targets of the Cymraeg 2050 strategy.

We trust that the report will be of interest to you and we would welcome an opportunity to discuss it further.

Yours sincerely,

**Efa Gruffudd Jones**  
Welsh Language Commissioner

Copi at: [SeneddDiwylliant@senedd.cymru](mailto:SeneddDiwylliant@senedd.cymru)



# Post-compulsory education and the Welsh language: the learners' voice

17 November, 2023

## Key findings at a glance

- The vast majority of Welsh speakers over the age of 16 who were surveyed in schools and further education colleges are proud that they can speak Welsh, and see the language as an advantage for their career prospects.
- Opportunities to study through the medium of Welsh are important for Welsh speakers when choosing a place of study, as well as opportunities to use Welsh as part of everyday life at school or college.
- The vast majority of learners surveyed in schools and further education colleges state that their experience of Welsh-medium or bilingual education is good or very good.
- Of the Welsh speakers who intend to continue their education after leaving school or college, only 40% intend to stay in Wales. For Welsh speakers who intend to continue studying in Wales, the opportunity to study in Welsh or bilingually will be an important factor in choosing their next place of study.
- The research highlights differences between school and college learners, in terms of their perception of their ability in Welsh, the language medium of their education and their attitudes as regards the importance of the Welsh language.
- Learners' main reasons for not choosing to study subjects through the medium of Welsh were: the perception that their English language skills were stronger and that studying through the medium of English was easier for them; that a subject (or subjects) were not available in Welsh; that their further studies were likely to be in English or that there were better study prospects in English, in their opinion.

## Introduction

The post-compulsory education and training sector plays a crucial role in ensuring linguistic progression for learners. This is the period that bridges statutory education and the world of work, and it contributes directly to the aim of creating long-term Welsh speakers.

This research was intended to learn about the views and experiences of post-16 learners in Welsh-medium or bilingual education in schools and further education colleges across Wales. The aim was to find out their reasons for choosing Welsh-medium education, their views on the provision and their intention in terms of their future education and careers.

## Sample

Purposive sampling was used to obtain feedback from young people in schools and further education colleges that provide education through the medium of Welsh or bilingually. Schools and further education colleges were contacted in a cross section of areas and learners were interviewed via an online questionnaire in early 2023. 1063 individuals responded from 37 different education establishments, including five further education colleges and 32 schools. 637 respondents were Year 12 or 13 learners in schools and 426 attended further education colleges. Respondents were asked to note their ability in Welsh, on a five-point scale, and their response is shown in Figure 1 below.

As the purpose of the questionnaire was to gather the views and experiences of learners who were likely to receive some of their education through the medium of Welsh, the discussion below, in many cases, focuses only on the response of fluent Welsh speakers and those who can speak a fair amount of Welsh. This also allows for a fairer comparison between the outcomes of school and college learners.

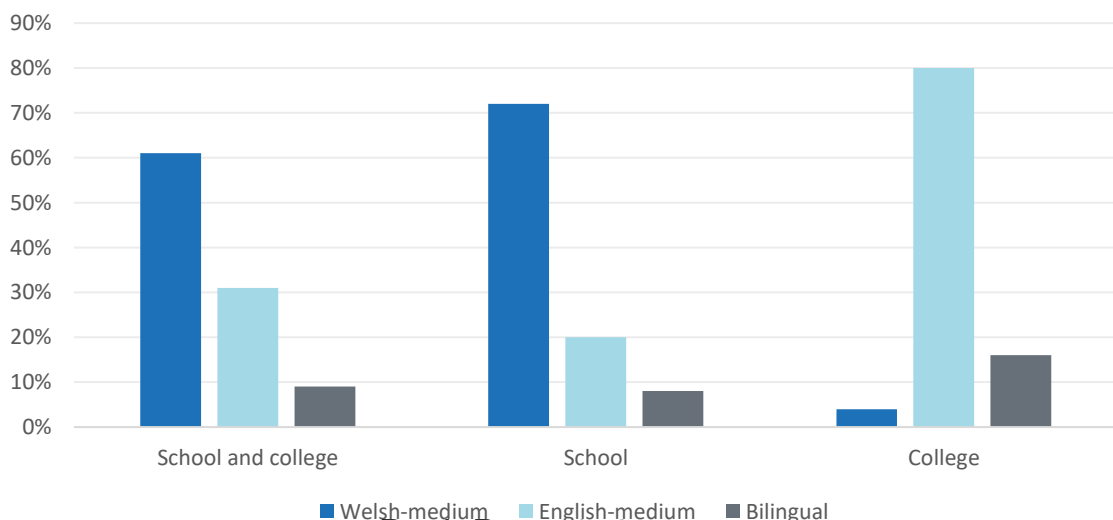
**Figure 1:** Learners' perception of their ability in Welsh

	Total	School	College
I am fluent in Welsh	70%	93%	35%
I can speak a fair amount of Welsh	9%	5%	15%
I can speak a little Welsh	8%	0%	20%
I can say just a few words	8%	0%	19%
I cannot speak Welsh	4%	0%	10%

## Language medium of study

Respondents were asked what subjects they were studying, and in which language they were studying those subjects.

**Figure 2:** The percentage of subjects fluent Welsh speakers and those who can speak a fair amount of Welsh study through the medium of Welsh, through the medium of English, or bilingually

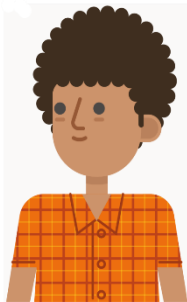
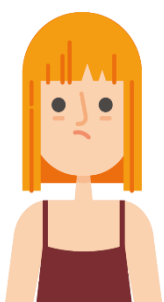


Considering all the fluent Welsh speakers and those who can speak a fair amount of Welsh, we see that they studied 61% of their subjects through the medium of Welsh. When comparing school and college learners with each other, however, there is a big difference between the percentage of subjects that school learners studied through the medium of Welsh (72%) and the percentage that college learners studied through the medium of Welsh (4%). There was also a big difference between the two cohorts in terms of the percentage of subjects they were studying through the medium of English. 33% of fluent Welsh speakers and those who can speak a fair amount of Welsh studied all their subjects through the medium of Welsh. This equated to 44% of school learners and only 1% of college learners who responded to the questionnaire, which is another marked difference between the two cohorts.

Context for the above results is found in Welsh Government statistics on Welsh-medium and bilingual learning activities in post-16 education during 2021-22.<sup>1</sup> That year, 15.2% of school sixth form activities, and only 0.2% of further education institutions' activities, were Welsh-medium. When comparing activities labelled as bilingual, we see that 5.9% of school sixth form activities were in that category and 3.7% of further education institutions' activities.

The questionnaire asked fluent Welsh speakers and those who can speak a fair amount of Welsh, who weren't studying every subject through the medium of Welsh, for their reasons for not doing so. Three main replies became apparent.

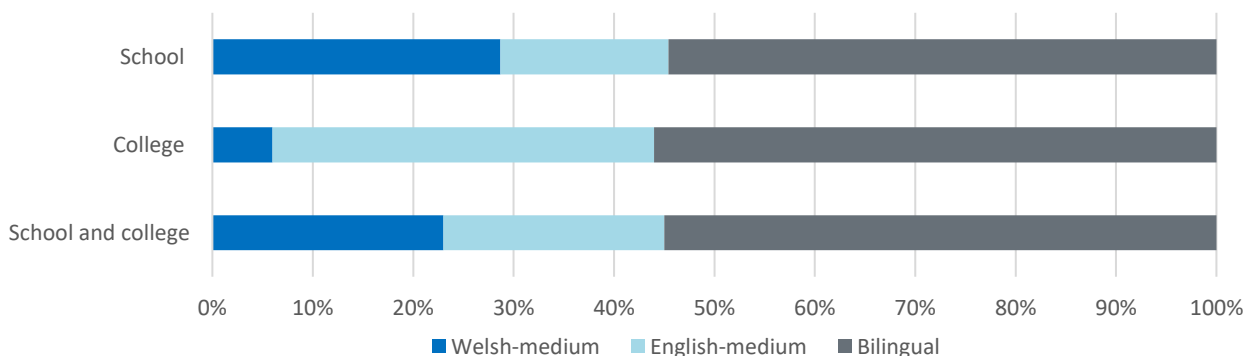
**Figure 3:** The three most common reasons why fluent Welsh speakers and those who can speak a fair amount of Welsh do not study through the medium of Welsh



- A perception that their English language skills are stronger and that studying through the medium of English is easier for them
- Subject/subjects are not available in Welsh
- A perception that further studies are likely to be in English or that there are better study prospects in English

The fluent Welsh speakers and those who can speak a fair amount of Welsh were asked whether they would prefer to study through the medium of Welsh or English or bilingually.

**Figure 4:** The ideal language medium of fluent Welsh speakers and those who can speak a fair amount of Welsh

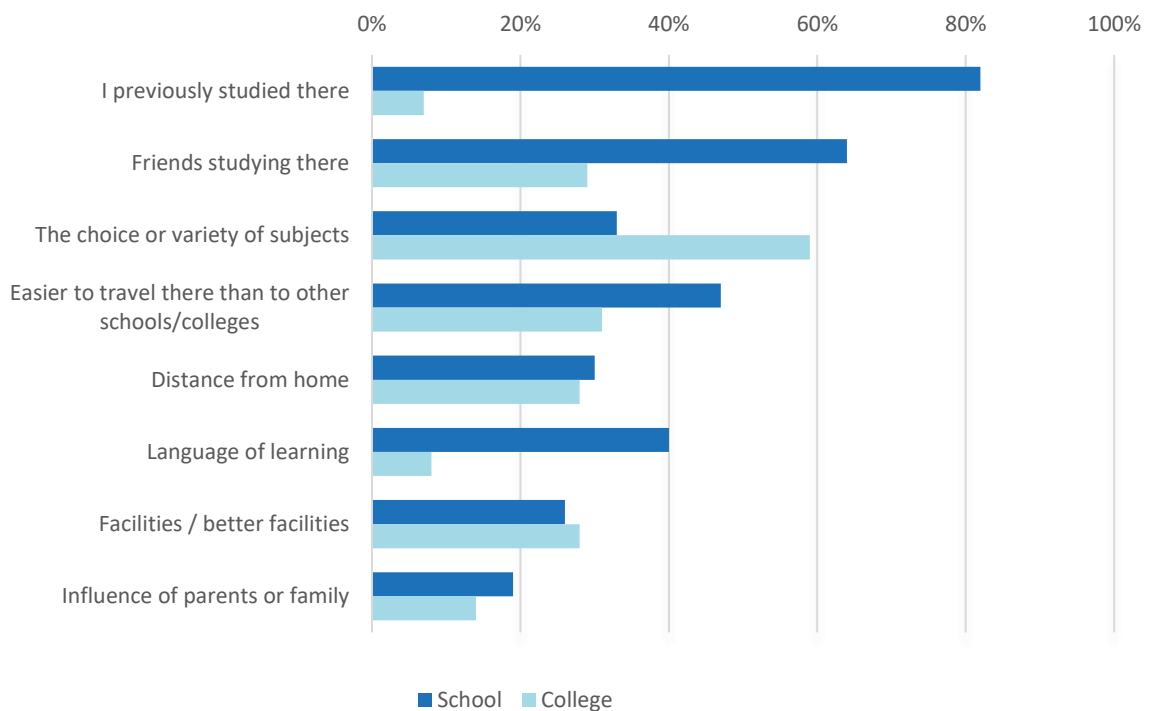




The fact that over half of the fluent Welsh speakers and those who can speak a fair amount of Welsh state that they favour bilingual education raises further questions. For example, what does bilingual education mean to those learners? Bilingual education can vary considerably in terms of how and when both languages are used. The outcomes of that education can also vary considerably, in the context of learner attainment in both languages and the evidence that it is Welsh-medium education that is most likely to ensure that learners have strong skills in Welsh and English. It is important to consider these results in the context of learners' views on the importance of the Welsh language to them. These statistics must be treated with caution therefore and further research carried out with post-16 learners in order to establish what bilingual education means to them.

## Reasons for choosing a place of study

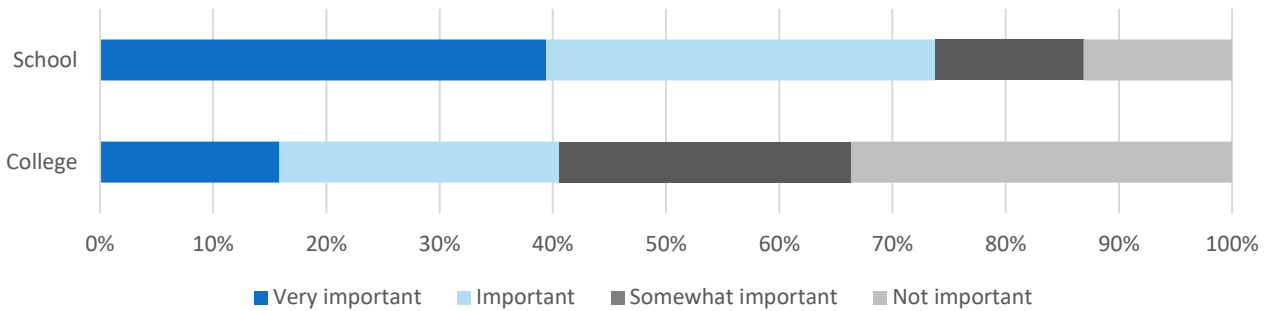
Figure 5: Learners' most common reasons for choosing their place of study



The figure above shows some interesting differences between learners at school and further education colleges, in the context of their reasons for choosing their place of study. For example, the language of learning is a factor identified by five times more school learners than college learners. In addition, the choice or variety of subjects is seen as a factor identified by over half of the college learners, compared to a third of the school learners.

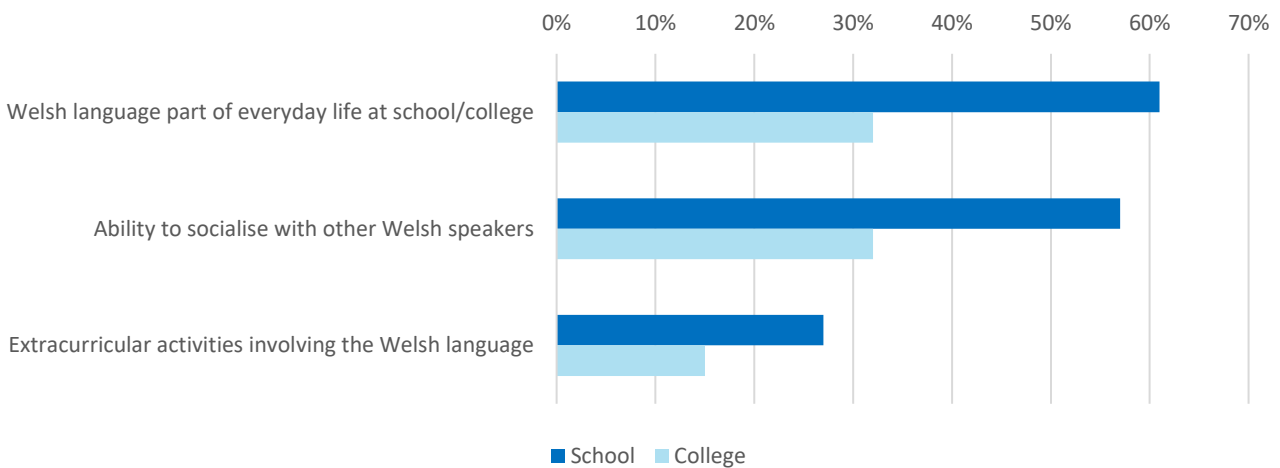
The sample was asked how important it was to them that the school or college they chose offered an opportunity to study through the medium of Welsh. For 65% of fluent Welsh speakers and those who can speak a fair amount of Welsh, the availability of Welsh-medium provision was important or very important when selecting a place of study. Among the school learners, this was true of 73% of fluent Welsh speakers and those who can speak a fair amount of Welsh, compared to the equivalent figure of 41% for further education college learners. Their response is shown below.

**Figure 6:** The importance of Welsh-medium provision to fluent Welsh speakers and those who can speak a fair amount of Welsh when choosing a place of study



They were also asked about the importance of other opportunities to use the Welsh language and the learners' response is shown below.

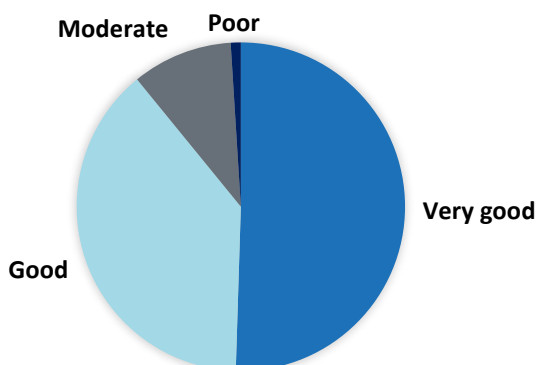
**Figure 7:** The percentage of Welsh speakers and those who can speak a fair amount of Welsh who noted that the following matters were important to them when selecting a place of study



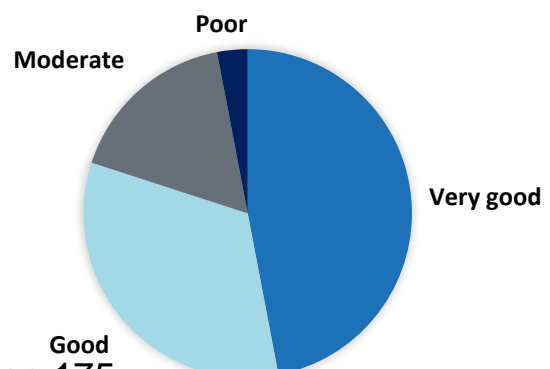
## Experiences and opinions regarding Welsh or bilingual education

Learners were asked to describe their experience of studying through the medium of Welsh or bilingually, and their response is shown below.

**Figure 8:** The experience of fluent Welsh speakers and those who can speak a fair amount of Welsh in schools

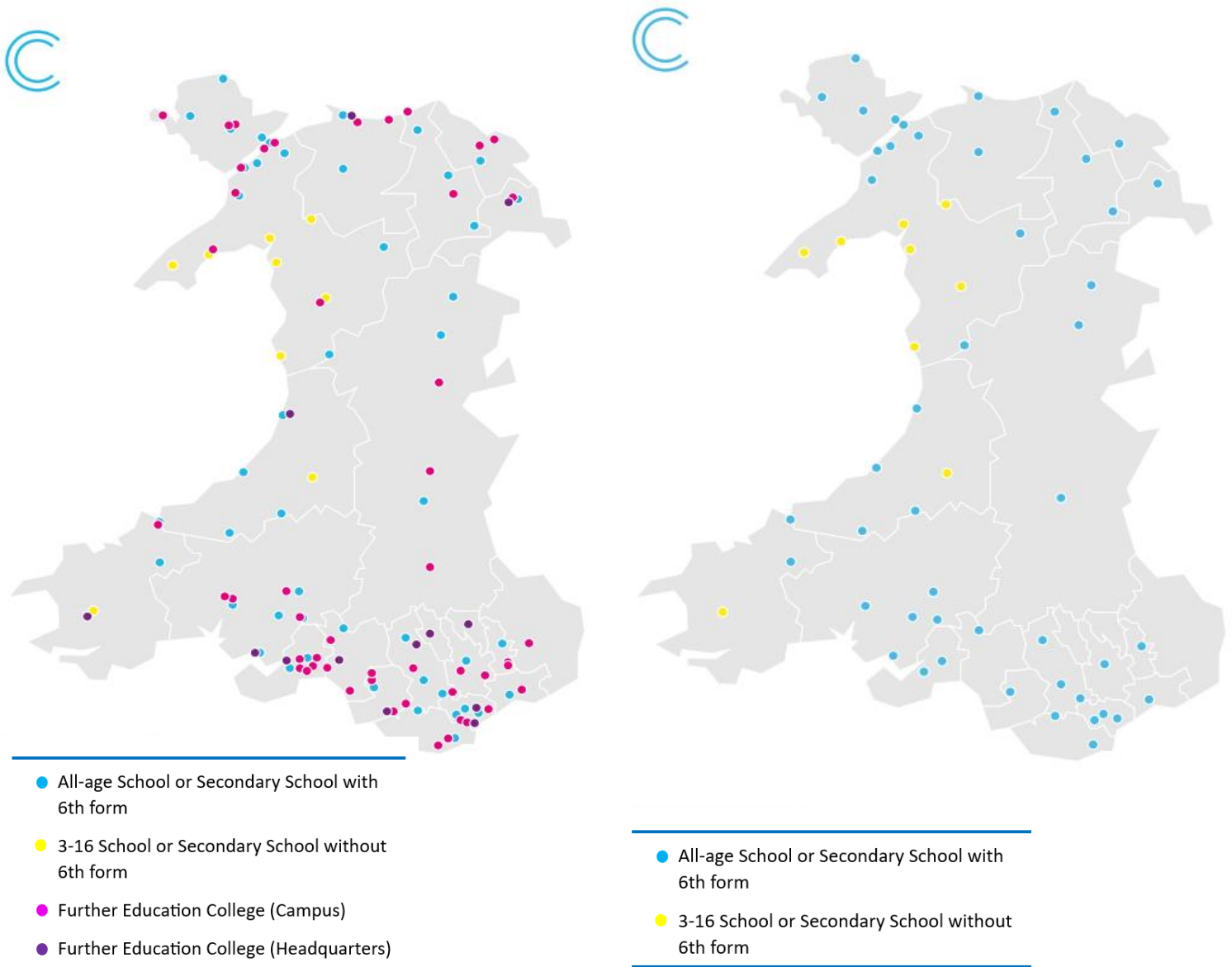


**Figure 9:** The experience of fluent Welsh speakers and those who can speak a fair amount of Welsh in colleges



90% of fluent Welsh speakers and those who can speak a fair amount of Welsh who attended schools said that their experience was good or very good. The corresponding figure for further education colleges was 80%. For learners at schools and further education colleges, the main reasons for noting that their experience was good or very good were good teachers, good support and that the education through the medium of Welsh was excellent.

**Figure 10:** Schools and further education colleges providing Welsh-medium or bilingual education, based on a mapping exercise in 2021



The questionnaire asked learners to what extent they agreed with the statement that there were sufficient opportunities to study through the medium of Welsh in their area. 60% agreed or strongly agreed. The proportion of positive responses varied according to the region where learners studied. In mid Wales 78% of learners agreed or strongly agreed with the statement, and it should be noted that the vast majority of responses came from the west of the region. In north Wales 68% of learners agreed or strongly agreed with the statement. In south-west Wales the proportion was 57% and in south-east Wales 47% of learners agreed or strongly agreed. The maps above show the location of schools and further education colleges in Wales that provide Welsh-medium or bilingual education. There is a clear lack of post-16 provision in several areas.

## Using the Welsh Language in the future

Respondents were asked to what extent they agreed with a number of statements about using the Welsh language in the future and their response is shown below.

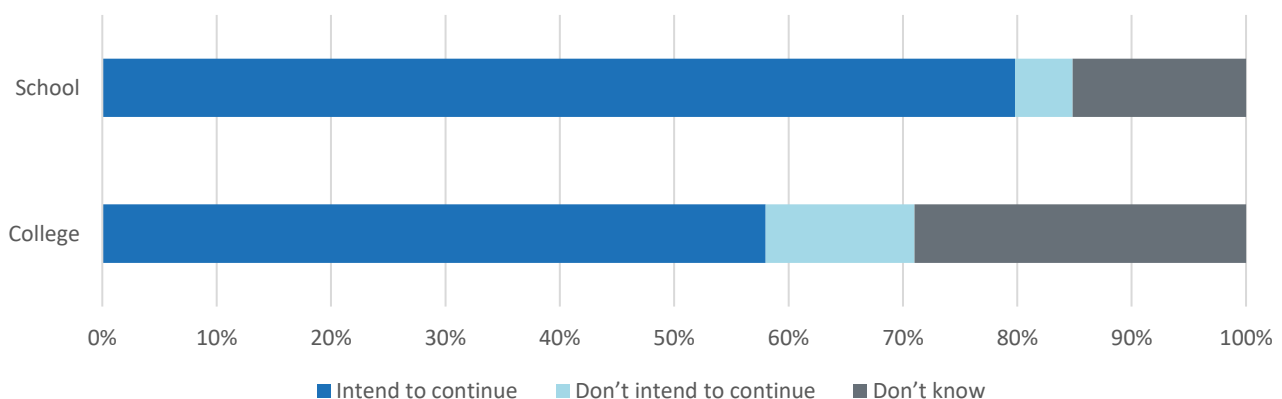
**Figure 11:** The percentage of fluent Welsh speakers and those who can speak a fair amount of Welsh in schools and colleges who agreed or strongly agreed with the statements below

	School	College
I'm proud that I'm able to speak Welsh	96%	92%
Being able to speak Welsh will help in my career or with my job prospects	87%	80%
I am confident that I have skills to use Welsh in my career	93%	81%
I am confident that I will use Welsh in my career	60%	58%

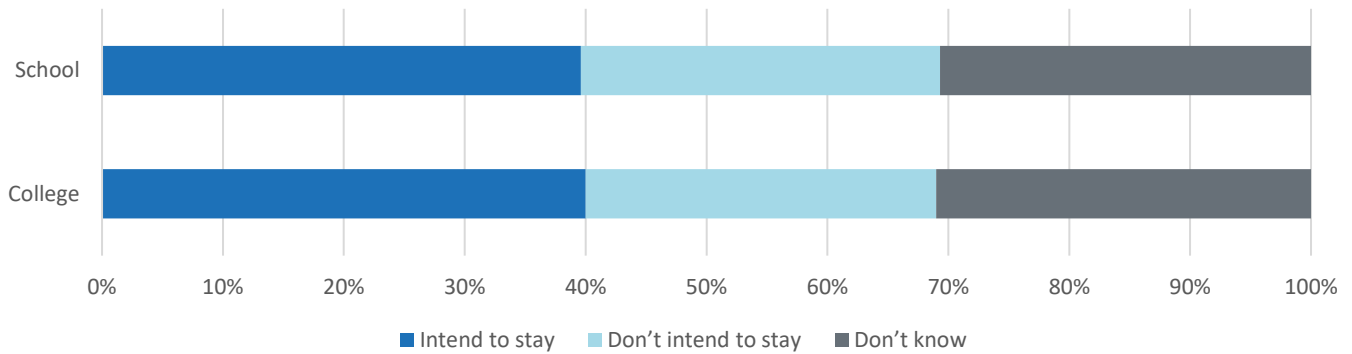
The vast majority of fluent Welsh speakers and those who can speak a fair amount of Welsh were proud that they could speak Welsh and considered their language skills to be advantageous to them in the context of their career prospects. A high percentage of them were confident in their Welsh language skills for their careers but, significantly, a lower percentage were confident that they would *use* those skills. This raises a question about learners' perception of opportunities to use the Welsh language in the workplace and suggests a need to discuss that and to raise learners' awareness of the opportunities that could be available to them in the future.

Respondents were asked whether they intended to continue their education after leaving their current place of study and whether they intended to do so in Wales.

**Figure 12:** The intentions of fluent Welsh speakers and those who can speak a fair amount of Welsh in terms of continuing their education after leaving their current place of study



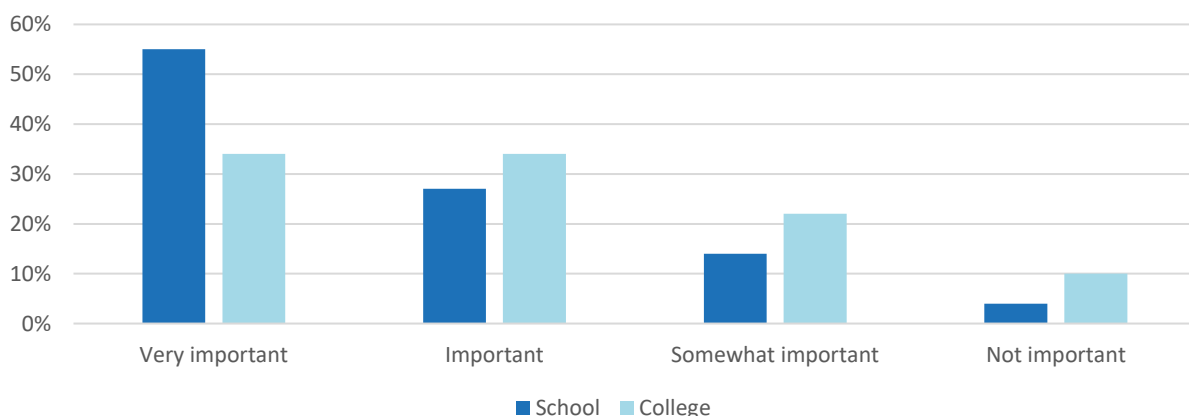
**Figure 13:** The intentions of fluent Welsh speakers and those who can speak a fair amount of Welsh, who wish to continue their education, in terms of staying in Wales



Only 40% of school and college learners who are fluent Welsh speakers and those who can speak a fair amount of Welsh intend to stay in Wales. Context for this figure is found in Welsh Government statistics on the cross-border flow of students in 2020/21.<sup>2</sup> These statistics show that 62% of undergraduate and postgraduate students from Wales went to universities in Wales, while 37% went to universities in England. In the same year, 95% of students from England went to universities in England and 95% of students from Scotland went to universities in Scotland. This shows that a substantial percentage of students from Wales leave their country to study, compared with the situation of students from England and Scotland.

The questionnaire respondents who are fluent Welsh speakers and those who can speak a fair amount of Welsh, and who said that they intended to continue studying in Wales, were asked how important it was to be able to study in Welsh or bilingually in their next place of study. 79% of school learners intend to continue their education after leaving school. Of the 40% who intended to stay in Wales, 82% of them, the vast majority, noted that being able to continue to study through the medium of Welsh or bilingually was very important or important to them. 58% of fluent Welsh speakers and those who can speak a fair amount of Welsh in further education colleges were planning to continue their education after completing their course. Of the 40% of these learners who intended to stay in Wales, 68% considered that being able to continue to study through the medium of Welsh or bilingually was very important or important to them.

**Figure 14:** The views of fluent Welsh speakers and those who can speak a fair amount of Welsh regarding the importance of being able to continue to study through the medium of Welsh or bilingually in their next place of study



<sup>2</sup> [Cross border flow of full-time students by level of study \(to Wales\)](#)

## Main findings and considerations

### Importance of the Welsh language and education through the medium of Welsh

- The **results show very clearly the importance of the Welsh language to learners in Wales**. The vast majority of Welsh speakers are proud to be able to speak the language (Figure 11). They also note that opportunities to study through the medium of Welsh are important when selecting a place of study, as well as opportunities to use Welsh as part of everyday life at school or college and with their friends (Figures 6 and 7). These findings are significant in the context of future planning of post-compulsory provision.
- Also very positive was the clear message from the majority of learners across Wales that their **experience of Welsh-medium or bilingual education was good or very good** (Figures 8 and 9).

### Differences in the situation of the Welsh language in schools and colleges

- The research highlighted **differences between school and college learners, in terms of their perception of their ability in Welsh, the language medium of their education and their attitudes as regards the importance of the Welsh language**.
- Differences in provision in both types of organisation must be taken into account when interpreting the above outcomes, and also when **developing future policies in post-compulsory education**.

### Barriers

- **Learners' reasons for not choosing to study subjects through the medium of Welsh** need to be considered further. The **lack of Welsh-medium provision**, particularly in more vocational areas, is a difficulty that the post-16 sector needs to address. This will include ensuring that there is a **sufficient number of staff with Welsh language skills to teach the whole range of subjects** in this educational stage. It is important to recognise that the Cymraeg 2050 strategy<sup>3</sup> and the *Further Education and Apprenticeship Welsh-medium Action Plan*<sup>4</sup> aim to address these issues.
- As Figure 3 suggests, the **lack of confidence among learners in their Welsh language skills compared to their English language skills** is a matter for further consideration in the context of the linguistic attainment of learners within the education system in Wales. Linked to this is the perception of some learners that English language skills will be most advantageous to them for further study. This highlights a need to raise learners' awareness of the opportunities that are available to them to use their Welsh as they continue their education, and the advantages of doing so. It also underlines that which was indicated by the responses to the questionnaire, that is, that less than half of the learners who are fluent Welsh speakers and those who can speak a fair amount of Welsh intend to stay in Wales (Figure 13).

### Bilingualism

- The fact that over half of the fluent Welsh speakers and those who can speak a fair amount of Welsh state that they favour bilingual education raises further questions as to **what exactly is meant by**

<sup>3</sup> [Cymraeg 2050: A million Welsh speakers \(gov.wales\)](https://gov.wales/cymraeg-2050)

<sup>4</sup> [towards-cymraeg-2050.pdf \(colegcymraeg.ac.uk\)](https://www.colegcyfraeg.ac.uk/towards-cymraeg-2050.pdf)

**bilingual education** (Figure 4).

- The above matters must be considered in the context of **learners' perception of the importance of the Welsh language to their careers and the extent to which different language models of education are likely to develop the skills needed by employers in Wales**. As noted above, the outcomes of bilingual education can vary greatly in the context of learner attainment in both languages, and it is known that it is Welsh-medium education that is most likely to lead to strong skills in Welsh and English. It must be ensured that the linguistic attainment of all learners is supported robustly and practically at every stage of their education, and **Welsh language provision in the post-16 sector needs to be strengthened in order to achieve that**.

### Supporting progress and progression

- The Welsh Government's Cymraeg 2050 Strategy states that 'young people will need to be aware of the benefits of continuing to develop their Welsh language skills for the workplace and the importance of using the language regularly in order to maintain fluency and confidence'.<sup>5</sup> **Increasing the numbers studying post-16 qualifications through the medium of Welsh will be vital in order to ensure effective progression from statutory education to further education and the world of work**.
- It is clear that Welsh speakers see their Welsh language skills as an advantage to them in the context of their career prospects. A high percentage of them were confident in their Welsh language skills for their careers but, significantly, **a lower percentage were confident that they would use those skills** (Figure 11). As discussed above, this suggests a need to discuss learners' perception of opportunities to use the Welsh language in the workplace. The responses also highlighted the **importance of continuity of Welsh-medium or bilingual provision as learners progress to further studies** (Figure 14). These results emphasise the importance of increasing opportunities to use the Welsh language in the workplace, which is one of the Welsh Language Commissioner's strategic priorities. Consideration should also be given to whether providing more opportunities to study through the medium of Welsh would be a means of increasing the numbers who choose to continue to study in Wales and reduce the numbers of skilled young people who leave the country.

### Strengthening the position of the Welsh language in the post-compulsory sector: looking to the future

- The results raise **significant questions about how to strengthen Welsh language provision in the post-compulsory sector and what the direction of public policy will be** in this area. These questions are extremely timely, considering that the Commission for Tertiary Education and Research is currently being established. An important development took place in 2017 when the *Review of the Activities of the Coleg Cymraeg Cenedlaethol* was published.<sup>6</sup> The report recommended that the Welsh Government extend the role of the Coleg to become a recognised national strategic body for the development of the Welsh language across the higher education, further education and work-based learning sectors. Following this the *Further Education and Apprenticeship Welsh-medium Action Plan* was published in

<sup>5</sup> [Cymraeg 2050: A million Welsh speakers \(gov.wales\)](https://gov.wales/cymraeg-2050-a-million-welsh-speakers)

<sup>6</sup> [review-of-the-activities-of-the-coleg-cymraeg-cenedlaethol-the-task-and-finish-group-s-report-welsh-language-and-welsh-medium-education.pdf \(gov.wales\)](https://gov.wales/review-of-the-activities-of-the-coleg-cymraeg-cenedlaethol-the-task-and-finish-group-s-report-welsh-language-and-welsh-medium-education.pdf)

2019. The plan is based on the vision that all learners should be enabled to maintain or develop their skills in the Welsh language. The plan places clear responsibilities on a number of partners over the short, medium and long term in relation to six key strategic areas, including increasing staffing capacity, improving provision and expanding resources. The Coleg has established a Post-16 Strategic Board which includes representatives from further education institutions, apprenticeship providers and employers, and ensures that learners' voices are also heard. These developments are very welcome and the Coleg needs to be supported in its efforts to bring about far-reaching changes in the provision of post-16 Welsh language education.

- In general terms, the post-16 education sector must act positively to support the development of the Welsh language skills of young people in Wales, at all levels of proficiency. In order to do this, it **will be necessary to address some of the obvious barriers that prevent some learners from studying through the medium of Welsh** and ensure that there are opportunities to study through the medium of Welsh in all types of post-16 education institutions.
- As well as strengthening provision in the further education sector, careful consideration must also be given to how to support and build on the provision where it is currently at its strongest. In most areas of Wales, **that provision is at its strongest in schools, and national consideration needs to be given to the role of Welsh-medium and bilingual schools in the post-compulsory education landscape of the future.** This should include planning and collaboration at a regional level between schools and further education colleges to ensure that adequate provision is available and is being promoted in order to increase the number of post-16 learners in Welsh-medium education across Wales. It is vital that this strategic planning takes place in the interests of the Welsh language, and reinforces the strong provision that currently exists in schools.
- Finally, there is a need to consider the **messages conveyed to learners about the value and importance of Welsh language skills** and how to support learners to make the most of the provision available. As part of this, it should be ensured that any bilingual provision and Welsh language provision fully support the linguistic attainment of all learners, and it is essential that this **is considered in the context of developing the language skills of the workforce of the future.**





Jeremy Miles MS

Minister for Education and Welsh Language

21 December 2023

## **Post-compulsory education and the Welsh language: the learners' voice**

Dear Jeremy,

We recently considered the Welsh Language Commissioner's new report on post compulsory education and the Welsh language: the learners' voice.

We note some of the statistics provided in the report. For example:

- The differences between the percentage of subjects taught in the Welsh medium between school learners (72%) and college learners (4%).
- The statistics from the Welsh Government that show that during 2021-22 15.2% of school sixth form activities were Welsh medium compared with 0.2% of further education institutions activities.
- The three common reasons for those who are fluent or can speak a fair amount of Welsh for not studying through the Welsh medium are the:
  - Perception that their English language skills are stronger, and that studying through the English medium is easier for them;
  - Subject / subjects not available in Welsh; and
  - Perception that further studies are likely to be in English or that there are better study prospects in English.

- The regional differences between those learners who felt there were sufficient opportunities to study through the Welsh medium in their area. While the overall figure was 60% who agreed or strongly agreed, the report shows clear regional differences. For example, in Mid Wales 78% of learners agreed or strongly agreed whereas, in South East Wales only 47% of learners agreed or strongly agreed. The report states that “there is a clear lack of post-16 provision in several areas”.

In the conclusions and findings of the report, it notes that the post-16 sector needs to address the lack of Welsh-medium provision, particularly in “more vocational areas”. The Commissioner also highlights a number of other areas where further work or consideration is needed including:

- Raising awareness of the opportunities to use Welsh as learners progress through their post-school education;
- Strengthening Welsh language provision across the post-16 sector;
- Increasing the number of students taking post-16 qualifications through Welsh medium;
- Increasing opportunities for people to use the Welsh language in the workplace; and
- Addressing barriers that prevent learners from studying in Welsh post-16.

We would welcome your thoughts on the issues covered in the Commissioner’s report; what steps the Welsh Government can take to address these issues; and what role the newly established Commission for Tertiary Education and Research will play in dealing with these issues. .

Due to their responsibilities for the Welsh language, I am copying this letter to the Culture, Communications, Welsh Language, Sport and International Relations Committee. I am also copying this letter to the Welsh Language Commissioner.

We would appreciate a response by 1 February 2024.

Yours sincerely,



Jayne Bryant MS  
Chair

Croesewir gohebiaeth yn Gymraeg neu Saesneg.

We welcome correspondence in Welsh or English.

B B C

Agenda Item 9.13

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# DOCTOR WHO: ECONOMIC IMPACT

# FOREWORD



**T**his year, 2023, the BBC celebrated a significant milestone as we marked one hundred years of broadcasting in Wales. This has been a landmark moment and one which has provided an opportunity to reflect on both our role within Welsh society and on the incredible transformation with regards to content and technology over the last century.

It is a source of immense pride to us that the BBC's contribution to Wales today is probably greater than ever before in terms of the services we provide. We are producing or commissioning content for BBC One, BBC Two, S4C, BBC iPlayer, Radio Cymru, Radio Wales, BBC Sounds, BBC News, BBC Cymru Fyw and BBC Sport Online, Bitesize as well as supporting the BBC National Orchestra and Chorus of Wales. Wales is also now home to weekly programmes on BBC Radio 1, Radio 2, Radio 3, Radio 4 and Radio 6 Music. Beyond that we continue to make a significant contribution to the social and cultural fabric of this nation, to the Welsh language, and of course to the Welsh creative economy and sector.

As this report concludes, a significant catalyst for growth in that sector was the decision to revive and regenerate Doctor Who in 2005 and to locate the series to Cardiff.

This decision was nothing less than transformative for us in Wales, and it is remarkable, as we celebrate Doctor Who's 60th anniversary, that the ambition for this title which has been the cornerstone of the BBC's schedules continues to evolve and grow.

The commissioning risk taken in 2004 was the right one. The return of the series was welcomed by audiences globally, and it paved the way for Wales to become one of the primary locations for drama production in the UK. It created confidence in the skills and talent of our workforce, and became a catalyst for growth in the Welsh creative economy. This has developed to such an extent that today, in 2023, Wales is experiencing its biggest ever year of BBC drama production.

As well as the new series of Doctor Who produced for us by Bad Wolf with BBC Studios, and our BBC Studios continuing dramas, Casualty and Pobol y Cwm for S4C, there are a further six new BBC drama titles from Wales which have already hit the screens or are set to broadcast soon to audiences across the UK. From Steeltown Murders to Lost Boys and Fairies, Wolf, Men Up, Tree on Hill and The Way, the portrayal and representation of Wales on our screens through drama has never been stronger.

Yet, it is not just the BBC that has been able to develop its production base in Wales as a result of Doctor Who. Other broadcasters and streamers have subsequently brought high-end drama commissions to Wales, contributing to the growth of the whole sector. Together, with the support of the Welsh Government as well as other broadcaster and industry stakeholders, we now have a creative landscape of which we can be very proud.

Penblwydd hapus Doctor Who yn 60 – ymlaen i'r dyfodol! Happy birthday Doctor Who, and thanks to all who had the vision and the ambition to make Wales the home of this inimitable Time Lord.

**Rhuanedd Richards**  
Director, BBC Cymru Wales



# EXECUTIVE SUMMARY

To celebrate the 60th anniversary of Doctor Who, this report examines the legacy impact of Doctor Who's production in Wales since the series relaunched in 2005, with filming starting in July 2004.

In particular, it focuses on the economic contribution from the Doctor Who production itself as well as the role of Doctor Who as a catalyst for Welsh screen sector growth and its specialism in high-end scripted drama.

The report considers Doctor Who's impact since the relaunched series in 2005 to the most recent series with Jodie Whittaker as the Doctor (Series 13). It does not consider the continuing economic impact of the 60th anniversary episodes or forthcoming series that are produced by BBC Studios Production in partnership with Bad Wolf (Wolf Studios) and Disney Branded Television, as the economic data beyond Series 13 is not yet complete nor available.

The research has focused on three key areas: quantifying the economic impact of production activities, measured in terms of gross value added (GVA) and employment; describing the timeline and key decisions in regenerating Doctor Who in Wales and the immediate and legacy impacts on the Welsh screen sector as well as the role of other key stakeholders; and the economic and cultural spillover effects of Doctor Who.

This report was written and the underlying analysis (including economic modelling and research interviews) was conducted in-house by economists in the BBC's Public Policy team, from June to October 2023.



# Regeneration of the Doctor and the Welsh screen sector

Part of popular culture in the UK and beyond for sixty years, Doctor Who was first broadcast on BBC television in 1963.

The show returned after a period off-screen in 2005, with the regenerated Doctor Who series produced in Cardiff by the BBC. Doctor Who's return was a pivotal moment and became a catalyst for the immense growth of the Welsh creative industries over the last 15 to 20 years. The screen sector – comprising of production, post-production, digital and special effects for film and TV, and TV broadcasting – is now the largest of the five Creative Industry sub-sectors prioritised by the Welsh Government and accounted for more than £4.99m turnover in 2022.

Commissioning Doctor Who in Wales was a risk for the BBC. Highly specialist sci-fi drama for TV had not been made in the UK for a significant number of years, and Welsh drama commissions for the BBC (UK network) was relatively limited. The immediate success of the first series helped establish Cardiff's reputation for delivering high-end drama and kicked off a series of Welsh drama commissions.



## Economic impact of production activities

Our analysis of Doctor Who production activities (Series 1 to 13) estimates the economic impact to be:

More than

**£134m**

in gross value added (GVA) generated Wales alone.

Employed roughly

**170**

crew roles per series, with the majority of crew (67%) based in Wales.

This is in addition to above-the-line crew, which includes but is not limited to core cast, supporting artists, writers and other jobs created by the show.

Total UK contribution of more than

**£256m**

in GVA and supporting 94.5 FTE jobs per series in the supply chain and wider economy.

# Catalyst for creative sector growth

The GVA of production activity understates the transformative impact that Doctor Who has had on the Welsh creative economy.

The show's overnight success strengthened industry confidence further that Wales could deliver world-class, high-end drama. Our research interviews and supplementary desk research identified the following key factors as fundamental to the outcomes observed today.

- Returning series of Doctor Who and successful spin-offs Torchwood and The Sarah Jane Adventures provided trust in the ability to deliver Welsh-made drama for network channels. The franchise was also crucial in offering scale and sustainable year-round work for local crew and opportunities for junior talent to develop their skills.



- The success of Doctor Who resulted in the BBC commissioning more Welsh-made drama for network and this includes both in-house and independent production. Moreover, the BBC built Roath Lock – the first purpose-built drama studio in Wales and an intended centre for excellence – and later invested in the new BBC Cymru Wales headquarters, Central Square. This demonstrated the BBC's intent and commitment to the Welsh screen sector and further high-end drama specialism.
- Other stakeholders have played a crucial role in realising the success of the Cardiff cluster and growth of creative industries across Wales; the creative cluster cannot solely be attributed to Doctor Who or the BBC. There has been a shared and continued ambition amongst industry stakeholders that has “helped create a virtuous circle where confidence, ambition and tangible sectoral growth interacted to change perception both within and outside Wales”.<sup>1</sup> The Welsh Government recognised that high-end TV drama would be an economic driver for the screen sector in Wales and focused their investments on local productions and large inward investments that would spend their budgets on local crews, facilities and locations, but also had the potential to be returning series. Independent producers, in particular Bad Wolf, have been immensely important in attracting international streamers and levelling up scale and production skills in Wales. There's also cross-industry commitment to skills and talent from Welsh universities, Sgil Cymru and Screen Alliance Wales in addition to strong innovation programmes and policy analysis from Media Cymru and Clwstwr.



## What comes next?

The 60th anniversary specials and forthcoming Season 1 have been commissioned by BBC and Disney Branded Television under a shared creative vision that will deliver this quintessentially British show on an unprecedented scale, with Disney+ as the exclusive home for new seasons of Doctor Who outside the UK and Ireland.

Doctor Who, produced by Bad Wolf in association with BBC Studios Production continues to be made in Wales, retaining the strong association between Wales and the production. There's no doubt that the new Doctor Who series will continue to generate economic growth for Wales, the Welsh screen sector as well as engaging Welsh creative and production talent.

<sup>1</sup> Centre for the Creative Economy. October 2023.

# INTRODUCTION

Part of popular culture in the UK and beyond for sixty years, Doctor Who was first broadcast on BBC television in 1963. Since then the ground-breaking series has showcased the best of British creativity to international acclaim and is loved by audiences across the globe.

Sixty years of Doctor Who has seen spin-offs on stage and screen as well as factual companion TV shows and podcasts for fans to peek behind-the-scenes or to celebrate the show's history. In 2022, Doctor Who was in the top 10 of TV franchise sales on DVD and paid-for download. Elsewhere, the show has a dedicated 24/7 FAST channel – Doctor Who: The New Adventures (2005 – 2022) – in Canada; and in France, Spain, and Italy Doctor Who is dubbed from English to the local language.<sup>2</sup> Prior to the landmark global distribution deal with Disney Branded Television in 2022, Doctor Who was available in 13 regions worldwide via 56 partners and in 54 languages. BBC Studios distribution includes more than 150 DVD products and almost 40 Blu-ray offerings. The breadth and depth of Doctor Who's fandom has also seen a range of gaming, live events, media and other products launched over the years.

“Our aim was to make an absolutely international programme that would be seen in Hong Kong and India and Australia and America, made in Wales... It's made here absolutely. And I think that's a really powerful thing to do.”

*Russell T Davies, showrunner of Doctor Who (Series 1-4, the anniversary specials and forthcoming Season 1).*



<sup>2</sup> Translated into French, Castilian Spanish and Italian respectively.



As a content brand, Doctor Who has generated significant economic value for the UK by exporting the best of British content and creativity to international audiences.

However, it is relevant to also consider significant economic activity generated by production of Doctor Who in the UK, and particularly in Wales.

The BBC's decision to make the rebooted Doctor Who in Cardiff has played a pivotal role in the development of Wales's creative industries.<sup>3</sup> Creative industries are those which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property.<sup>4</sup> Today the Welsh creative industries account for 3.3% of total businesses in all industries;<sup>5</sup> generating more than £1.4 billion annually and with more than 3,500 creative businesses employing almost 32,500 people.<sup>6</sup> In 2019, 60% of all creative companies in Wales were concentrated in and around Cardiff, and more than a third of all Welsh creative industries turnover was generated in Cardiff alone.<sup>7</sup> This report provides a new analysis of the regional economic impact of Doctor Who in Wales since the mid-2000s.

### 1.1 The Screen sector in Wales today

The screen sector in Wales has grown rapidly over the last 15 to 20 years, and has distinguished itself as a place to make quality, high-end drama for both TV and film.

The screen sector is the largest of the five Welsh Creative Industry sub-sectors prioritised by the Welsh Government, contributing 33.4% of total creative industries turnover in Wales.<sup>8,9</sup> The other priority sub-sectors include Music, Digital, Publishing and an umbrella Emerging sub-sector. In 2022, the screen sector accounts for more than a third of all creative industries turnover with an annual turnover of £459m and employed around 6,200 people across 650 businesses. However, the screen sector has a high concentration of freelance workers and actual employment figures are likely to be much higher given the large freelancer workforce that makes up the sector are not always captured by official statistics.

Much of the screen sector is clustered around Cardiff, which now has the third largest film and TV cluster in the UK after London and Manchester.<sup>10</sup> The number of full-time workers in the audio-visual media sector (defined to include film, TV and gaming) in the Cardiff Capital Region almost doubled from 2,600 in 2005 – when the first Doctor Who series aired – to around 4,500 in ten years to 2015.<sup>11</sup>



<sup>3</sup> As defined by Creative Wales (Welsh Government). Creative Industries definition varies slightly from UK GOV Department of Culture, Media and Sport (DCMS) in terms of industry sub-sectors that are included.

<sup>4</sup> UK GOV DCMS definition of Creative Industries.

<sup>5</sup> Source: Creative Wales Business and Labour Market Statistics 2022.

<sup>6</sup> As of 2022. Source: Creative Wales, 2016-2022 Year on Year Statistics for the Number of Businesses, Employment and Turnover in the Creative Industries in Wales and its Subsectors.

<sup>7</sup> Clwstwr, [Creative Industries Report No 1.2: Report Update: The size and composition of the Creative Industries in Wales in 2019](#). January 2021.

<sup>8</sup> Source: Creative Wales, 2016-2022 Year on Year Statistics for the Number of Businesses, Employment and Turnover in the Creative Industries in Wales and its Subsectors.

<sup>9</sup> Note, Creative Wales statistics indicate that the Welsh Screen sector has the largest turnover in 2022. This applied in 2021, but it was also the smallest subsector in terms of FTE employment and number of businesses.

<sup>10</sup> Clwstwr, [Creative Industries Report No.2: The media sector in the Cardiff Capital Region – driving economic growth through audio-visual activities](#). February 2021.

<sup>11</sup> Ibid.

## 1.2 Scope and analytical approach

This report examines the legacy impact of Doctor Who's production in Wales since the series relaunched with production activity starting in 2004. In particular, we focus on the economic contribution from the Doctor Who production itself, as well as its contributing role in the growth of the creative cluster around Cardiff and the specialism in high-end screen production across Wales.

The analysis considers the impact of Doctor Who from the start of production on Series 1 to the most recent series with Jodie Whittaker as the Doctor (Series 13). It does not include the 60th anniversary episodes or forthcoming season that have been produced by BBC Studios Production in partnership with Bad Wolf (Wolf Studios) and Disney Branded Television, as the economic data beyond Series 13 is not yet complete nor available.

The analysis presented relies on a combination of primary research, desk research and economic modelling and has been undertaken in-house by economists in the BBC Public Policy team. It also incorporates primary research conducted by Media Cymru.

- Primary research from BBC-led stakeholder interviews with 13 individuals involved in the Welsh screen sector or involved in the Doctor Who production (list provided in Annex I). This is supported by research from the Centre for the Creative Economy at Cardiff University based on focus groups and interviews with 11 industry leaders in Welsh creative industries.
- Complementary desk research that included a review of distribution and production data provided by BBC Studios for this study and a range of data and industry reports from Media Cymru, Clwstwr, Creative Wales and DCMS amongst others.

- Economic modelling to estimate the gross value added (GVA) of Doctor Who production spend. This relies on production data supplied by BBC Studios, industry data from Wales Screen (now part of Creative Wales), and economic statistics published by the Office of National Statistics (ONS). Annex II provides further detail on economic approach.

## 1.3 Structure of this report

The rest of this report is structured as follows.

- Section 2 presents the economic impact of Doctor Who production activities for Series 1 to 13, estimated as GVA and FTE job creation.
- Section 3 describes the factors that meant the Doctor Who reboot was produced in Wales, the immediate and legacy impacts on the Welsh screen sector, and the role of other key stakeholders in developing significant creative industries observed in Cardiff and Wales today.
- Section 4 highlights some of the spillover impacts of Doctor Who in Wales – notably the impacts on Welsh tourism and spin-off events across the UK.
- Section 5 sets out our conclusions and what comes next for Doctor Who in Wales.
- Annex I lists the key stakeholders that were interviewed as part of the BBC's qualitative research for this study.
- Annex II is a technical annex that sets out the data sources and methodology of the economic impact modelling.



# ECONOMIC IMPACT OF PRODUCTION

This section estimates the economic impact that the production activities of Doctor Who has had on the Welsh and the broader UK economy from 2004 to 2021.<sup>12</sup>

During this time, Doctor Who was produced in-house by the BBC; first by BBC Cymru Wales from 2004 to 2018, and then by BBC Studios from 2018. We consider the production's gross value added (GVA), which includes direct economic activity generated by the BBC and within the wider supply chain, as well as broader impact on employment.

To estimate economic impact, we construct a representative timeseries for Series 1 to 12 production spend, based on Welsh Screen tracking data combined with detailed production spend data for Series 12 and 13 provided by BBC Studios Productions.

Thus, our analysis considers the economic impact of the production from Series 1 to 13 (July 2004 to October 2021). The time series data is then used within the BBC's GVA model along with economic statistics and multipliers published by ONS to identify the gross value added generated directly by production activity, from spend with direct suppliers, and within the wider supply chain.

Further details on the data analysis and modelling approach are set out in Annex II.



<sup>12</sup> Production activities for Series 1 (filming dates start July 2004) to Series 13 (production activities ending October 2021).

## 2.1 Gross economic impact of Doctor Who production

Doctor Who production activities contributed approximately £134.6m in GVA to the Welsh economy between 2004 and 2021, of which more than £113.1m was in the Welsh creative industries. Across all the UK, Doctor Who production activities generated £256.0m since the show was relaunched and produced in Wales and 87% of economic output was generated in the UK creative industries.

For every £1 of direct economic output (GVA) generated by the production of Doctor Who, a subsequent £0.96 of economic output was generated in Wales, making its total economic contribution £1.96. This captures GVA generated directly from production and post-production activities, indirect GVA from spend within production supply chain, and induced GVA within wider economy. The latter captures production staff and workers within the supply chain spending their wages on consumer goods and services. This is further explained in Annex II.

Figure 1: GVA contribution (£m) of Doctor Who production activities, Series 1 to 13

GVA (£m)	Wales	All UK
Direct GVA	68.8	132.6
Indirect	38.7	71.5
Induced	27.1	51.9
<b>Total</b>	<b>134.6</b>	<b>256.0</b>

Source: BBC estimates based on analysis of data from BBC Studios, Wales Screen and ONS

“That’s why I completely love this [approach to commissioning]. I love it. When people say, Oh, a television or television drama cost £2 million... But what that means is £2 million goes into Cardiff. £2 million to the drivers and the office staff and the hospitality, the hotels and then pubs and the bars, and then supermarkets. It’s £2 million ploughed into Cardiff”

*Russell T Davies, showrunner of Doctor Who (Series 1-4, the anniversary specials and forthcoming Season1).*



## 2.2 Employment impact of Doctor Who production

Production of Doctor Who has a positive economic impact through employment – both for those directly involved in making the show as well as in the supply chain and wider economy.

We have analysed Wales Screen data that tracks crew roles on Doctor Who productions. We consider that using this actual data will provide a more robust view of job creation than estimating direct employment from the GVA model. However, it is important to note that this generates a limited view of direct employment on Doctor Who, as the Wales Screen crew data does not include above-the-line crew.<sup>13</sup>

The direct employment footprint is also substantial with typical series directly employing 170 crew,<sup>14</sup> with the majority of crew – 67% – were local and permanently based in Wales. The overall crew size and composition of local Welsh crew varies across series in response to factors such as budget and scale of production, filming outside of Wales and does not adjust for part-time roles<sup>15</sup>

We also estimate the indirect employment generated through Doctor Who’s production supply chain and the induced employment within the wider economy from production employees and supply chain workers spending their wages on other goods and services. Annex II provides more detail on how this is estimated from GVA figures.

We estimate that each series of Doctor Who (Series 1 to 13) generated indirect and induced employment equivalent to 50.3 full-time equivalent FTE jobs per series in Wales, and 94.5 full-time equivalent (FTE) jobs within the UK overall.

In Wales, this breaks down as each series typically creating 33.0 FTE roles within the supply chain (indirect employment) and 17.4 FTE roles within the wider Welsh economy (induced employment) for each series of filming.



Figure 2: Employment impact of Doctor Who production activities, Series 1 to 13

Employment per series	Wales	All UK
Indirect (FTEs)	33.0	61.4
Induced (FTEs)	17.4	33.1
<b>Indirect + induced (FTEs)</b>	<b>50.3</b>	<b>94.5</b>

Source: BBC analysis of BBC Studios, Wales Screen and ONS data.

<sup>13</sup> Above-the-line crew includes but is not limited to producers, directors, screenwriters, principal cast and supporting artists.

These are excluded from Wales Screen figures. However, staff costs for these roles are included within the direct GVA (£m) estimates.

<sup>14</sup> Wales Screen data only includes Welsh and total crew figures for Series 5-10 and 12; BBC Studios Productions figures used for Series 13.

<sup>15</sup> Wales Screen data captures all crew involved in production, therefore not adjusting for part-time roles or provided FTE equivalent as with the GVA model.

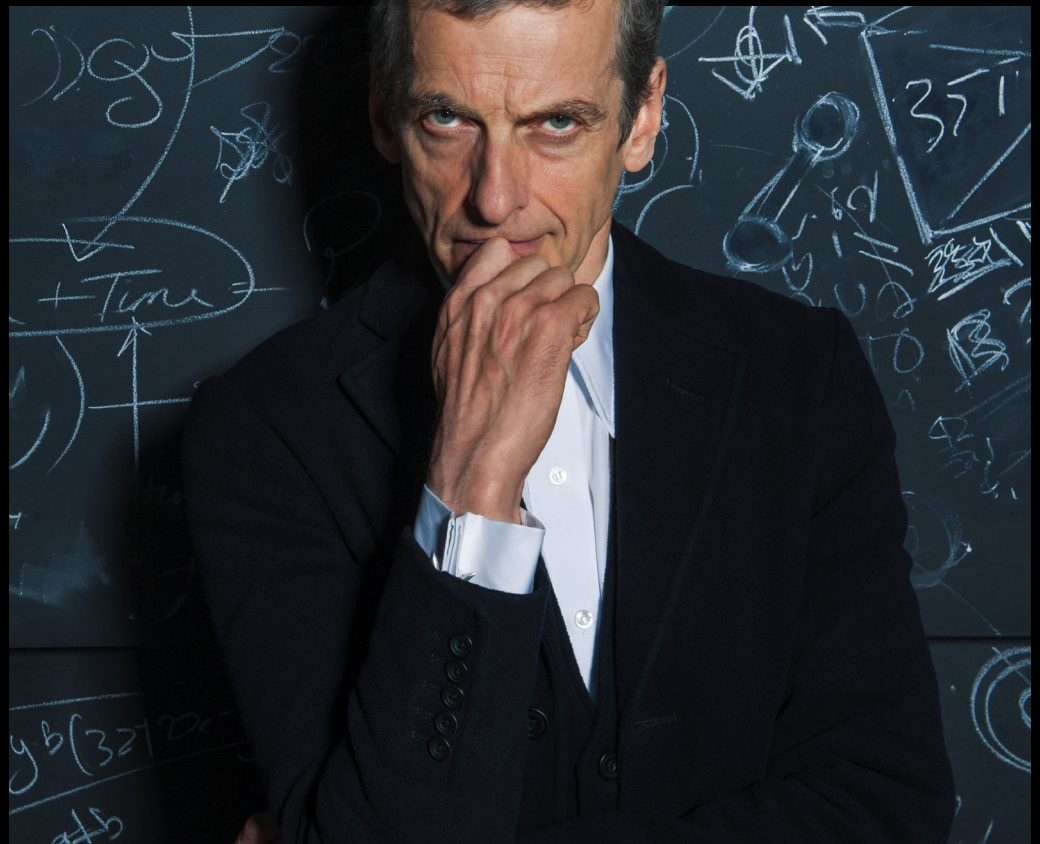
# DEVELOPMENT OF WELSH SCREEN SECTOR

This section explores the wider impact that Doctor Who has had in Wales, which far exceeds the economic output (GVA) generated from the Doctor Who production activities.

The regeneration of the show in Wales is widely acknowledged as the catalyst for investment in the South Wales creative cluster and its specialism in high-end television and drama production. Analysis by Cardiff University's Centre for the Creative Economy pinpoints Doctor Who as the moment the South Wales creative cluster shifted from strength to recognised excellence.<sup>16</sup> This sentiment was "universally endorsed" in interviews with senior industry representatives, and evidenced by statements such as:

"I think it's undeniably been the catalyst for Wales scripted [TV sector], everything has stemmed from that" and "It's perhaps the single most important production that has cemented the positioning of Cardiff as one of the three key media centres in the UK".<sup>17</sup>

This section sets out the factors leading to the Doctor's return and the history of the production Wales.



<sup>16</sup> Centre for the Creative Economy, Cardiff University, [Summary report on the impact of Doctor Who on the Cardiff and South Wales media sector](#). October 2023.

<sup>17</sup> Ibid.

### 3.1 Early 2000s and decision to bring back Doctor Who

In the early 2000s, the BBC's productions in Wales were mostly broadcast to audiences in Wales which included a mix of Welsh-language content like the iconic *Pobol Y Cwm*, the Welsh language continuing drama series, produced by BBC for S4C along with some English-language hits, such as *Belonging*, broadcast on BBC One Wales. More widely, scripted English-language TV production in Wales prior to *Doctor Who* has been described as full of potential and solid, but lacking self-confidence and recognition in its abilities to deliver network and high-end content.<sup>18</sup>

Whilst much loved and respected by audiences in Wales, Welsh-made drama was under-represented on the BBC's UK network channels.<sup>19</sup>

"Network production [in] Wales before *Doctor Who* was pretty meagre. You might have had about £10 million or so of network spend per annum going into Wales. Let's be honest, it was pretty derisory."

*Rhodri Talfan Davies, Director Nations, BBC.*

The BBC at the time was looking to distribute spend out of London and across the nations and regions, in response to the Communications Act 2003 which introduced requirements on public service broadcasters to make a proportion of their programmes outside the M25 area and a shared ambition to grow its role supporting the creative economy across the UK. At the same time, BBC Wales, had an ambition to strengthen Wales's reputation for production with network

commissions. Russell T Davies' personal connection to Wales, as a Welshman, then provided the final impetus for BBC Wales to produce the relaunched series and film it in Wales.

"I went to my first meeting with Jane Tranter in my new job as Head of Drama, Wales. We talk about network programming. We talk about some of the things on the existing BBC Wales drama development slate. And there, for the first time, Jane asked me, what I would think about bringing *Doctor Who* back. This was a light bulb moment."

*Julie Gardner, Head of Drama, BBC Wales (2003-2009), Controller of Drama Commissioning, BBC (2006-2009), Executive Producer Scripted Projects, BBC Worldwide (2009-2015), Founder, Bad Wolf and Bad Wolf America (2015-)*

However, commissioning *Doctor Who* in Wales was a substantial risk for the BBC. Highly specialist sci-fi drama for TV had not been made in the UK for a significant number of years, and high-end drama production experience, made in Wales for network specifically, was relatively limited. The first series required a rapid upskilling of local production staff, and extensive hiring of experienced staff and suppliers such as for prosthetics and visual effects from outside of Wales.

To credit the return and accomplishment of *Doctor Who* to Wales, the BBC hosted the premiere of the first episode – *Rose* – in Cardiff with the UK press descending on the city, and when it aired on 26 March 2005, it was an overnight success. The risk taking had paid off.



<sup>18</sup> Ibid.

<sup>19</sup> In 2003/4 the BBC reported that about 1.4% of network hours across all genres were being produced in Wales. In 2022, it stood at 5.8% of network hours – more closely aligned and representative of the Nation as a percentage of UK population. Source: BBC Analysis of BBC Annual Report and Accounts 2003/4 and the Commissioning Supply Report 2022/23. Note, definitions of what qualifies as out of London spend and thus figures reported by BBC has changed over time. Here, the analysis adjusts published figures to provide comparable definitions.

### 3.2 Building confidence in Wales

The show resonated with audiences in Wales and across the UK, and grew industry confidence in Wales's ability to deliver high-end drama for network TV.

"[Confidence] developed really fast through Doctor Who. I think it gave the whole nation a huge amount of confidence that it could pull off the show. That was an impactful and immediate success... It's not an easy show to conquer, but the fact that it did get conquered and then some – and with such verve, passion, love and warmth."

*Jane Tranter, Controller of Drama Commissioning / Head of Fiction, BBC (2000-2008), Executive VP Programming and Production, BBC Worldwide (2009-2015), Founder, Bad Wolf (2015-)*

The end of Series 1 saw the Ninth Doctor, played by Christopher Eccleston, regenerate into David Tennant's Tenth Doctor. Given the success of the show alongside Series 2, the BBC commissioned the first spin-off series pitched by Davies, Torchwood, following Captain Jack Harkness, a popular character from Series 1. Torchwood was deliberately set in Cardiff, the show addressed some of the Welsh audiences and industry concerns that the main Doctor Who series did not represent or portray Wales on-screen. Torchwood aired from 2006 to 2011, with four series in total.

"There was an opportunity to make a spin off that would give significant representation to Wales. It wasn't Cardiff pretending to be somewhere else... Torchwood was very deliberate. It would showcase contemporary Wales. The show would be glossy and contemporary, and make Cardiff look beautiful."

*Julie Gardner, Head of Drama, BBC Wales (2003-2009, Controller of Drama Commissioning, BBC (2006-2009), Executive Producer Scripted Projects, BBC Worldwide (2009-2015), Founder, Bad Wolf (2015-)*

A second spin-off, The Sarah Jane Adventures, made by BBC Wales for CBBC, was aired in 2007 to 2011. Although the show is largely set in and around Banner Road, Ealing, the show was filmed using locations in Wales.

The three shows built a critical mass through the franchise that could secure year-round employment and development opportunities for the crew. Together they created a secure continuation of work for a period of six years. Talent were able to move into more senior roles on the smaller-scale spin-off shows, providing more opportunities for career development. This provided sustainable opportunities for the sector and its talent to grow and, as one Cardiff University interviewee notes:<sup>20</sup>

"It's an example of a production that's really delivered sustainable legacy from [being] a returning series. It's allowed people to actually upscale in a sensible, controlled manner and develop really skilled, talented individuals over time".

The returning series of Doctor Who and spin-offs demonstrated its ability to create legacy and build trust in Wales's capability to deliver. As one Cardiff University interviewee notes:<sup>21</sup> "Its mere presence and profile as a drama mainstream juggernaut has stimulated growth and confidence in the film and tv sector more broadly. This has led to increased credibility and clearly enhanced the positive perception of Cardiff as a maturing and exciting media hub capable of producing world class content". Ultimately, this gave a launch pad for the future of scripted drama in Wales.

"Doctor Who was maybe the first moment where I think just about everyone clocked you could deliver high-end television drama production with a cast and crew based in Wales. I think everyone thought two things. One, it's obviously possible, so can we please get over the snobbery? And the second – if you can do Doctor Who what else can you do?"

*Rhodri Talfan Davies, Director Nations, BBC*



<sup>20</sup> Centre for the Creative Economy, October 2023.

<sup>21</sup> Ibid.

### 3.3 BBC commissions, Roath Lock and investment in Wales

“Work creates work, you know, and that has happened. The more crews get to work on stuff, more young people get trained in this stuff. So it’s more crucial for the future, and the more writers are pitching ideas. And you know, the whole thing comes over to attracting not only other international productions, [but] great regional shows as well.”

*Russell T Davies, showrunner of Doctor Who (Series 1-4, the anniversary specials and forthcoming Season 1).*

The BBC increased drama commissioning for network TV made in Wales with more content produced by or co-produced with independent production companies working in Wales. This included big BBC commissioned shows such as Merlin (produced by Shine TV), Atlantis (Urban Myth Films), Sherlock (Hartwood Films and BBC Wales) and . Wizards vs Aliens (BBC Cymru Wales). Development of the production sector in Wales also resulted in shows relocating their existing production base. For example, BBC Three comedy-drama Being Human produced by Touchpaper Television relocated at the start of its third series in 2011 from Bristol to Barry, Wales. The BBC also transferred production of Casualty from Bristol to Cardiff in 2011.

More broadly, Doctor Who played a direct role in transferring high-end drama production skills to other parts of the Welsh scripted screen sector.<sup>22</sup>

More companies in the TV supply chain also began to set up in Wales, such as 4WOOD (set construction) and Real SFX (special effects), servicing the production companies with specialist skills set grown in Wales.



## CASE STUDY REAL SFX

Real SFX, a multi award winning practical special effects company based in Cardiff, grew out of Doctor Who. Its founder Danny Hargreaves has worked on Doctor Who since its regeneration and established his own company, Real SFX, that’s provided the show’s special effects since Series 5. Doctor Who was critical in providing the opportunity for Hargreaves, originally from London, to set up his own company in 2008 and become part of Wales’s growing screen sector.

“I then had an ambition because I saw the growth in Wales and the opportunity coming through... Doctor Who gave me an opportunity to set up my own business, as I was working for another company before based in London, travelling every week. Imagine a 29 year old to set up a company and run one of the Nation’s biggest shows. It was such a great opportunity”

*Danny Hargreaves, Founder, Real SFX*

The company has developed alongside Doctor Who, showcasing its expertise which has enabled it to work on productions around the world including Peaky Blinders, Outlander and films such as The Expendables 4. An active partner in Screen Alliance Wales, they’re committed to recruiting locally

and upskilling their workforce by encouraging entry, for example, by offering two apprentice placements a year which they put through a four year development scheme.

“Now we live here, we need to establish a business, and bring people in from the local community and train them up or upskill them. Previously all our crew travelled from London and other parts of England. We started bringing in apprentices with the growth of Doctor Who. One of our very first apprentices is now running the floor on set. It is great to see them becoming technicians and supervisors growing with the company. Danny has always wanted to have a local, talented, trained crew to save production money on hotels etc, and the money goes onto the screen. I think we’re now a 100% Welsh crew... All this began with the success of Doctor Who coming to Wales.”

*Carmela Carrubba, Company Director, Real SFX*

Real SFX continue to work on the forthcoming Doctor Who seasons, including the 60th anniversary special and future seasons which will be produced in Wales in partnership by BBC Studios Production, Bad Wolf and Disney Branded Television.

<sup>22</sup> Ibid.



By 2011 Matt Smith had become the Eleventh Doctor, and Wales was becoming a centre of excellence for drama for the BBC. Roath Lock opened its doors – Wales's first production studio which is situated in the heart of Cardiff Bay and consists of nine studios, three external filming lots and post-production facilities of over 3,700 square-metres. Roath Lock Studios became operational in 2012 and housed Doctor Who alongside continuing-dramas *Pobol y Cwm* – relocated from the BBC's former broadcast centre in Llandaff – and *Casualty*, which relocated from the BBC's studios in Bristol. The studios were also used for filming the BBC's *Upstairs Downstairs*, *Class*, *A Midsummer Night's Dream*, *Wizards Vs Aliens* and *Under Milk Wood*, and many other new BBC Wales commissions.



“I think we're probably fair in saying that outside London, Wales is a key location for high end drama in the UK... We want to own the high-end TV drama space. And I think you can track that back [to Doctor Who] and *Casualty* coming here as well, obviously having that long running series alongside *Pobol y Cwm*. So, you've got people coming through the industry being trained almost on those shows that have also had a number of spin outs, so more opportunities. So I think absolutely fundamental, that decision, to where we are now.”

*Gerwyn Evans, Deputy Director, Creative Wales*

Moreover, Roath Lock created a hub around which production and post-production suppliers could base themselves and a consistent base for local crew offering a more stable employment and skills pipeline. In the three years to 2014, total spend at Roath Lock Studios exceeded £185m.<sup>23</sup>

These commissions and the BBC's investment in studio space, co-locating *Doctor Who* and other drama series, demonstrated the BBC's confidence in Welsh drama production and local creative talent. This became a catalyst for PSBs and later streamers commissioning high-end TV and film from Wales and the subsequent growth in independent production companies and studio facilities.

“It started with Roath Lock and the success of *Doctor Who*, and then it just got other people interested. You got brilliant shows that started coming [to Wales], and then you had these other studios popping up.”

*Carmela Carrubba, Company Director, Real SFX*

In 2019, BBC Cymru Wales moved to its new headquarters at Central Square next to Cardiff Central train station. Central Square acts as a hub for the creative sector and is home to BBC Wales and BBC Network teams, the National Film and Television School and while S4C's headquarters is in Carmarthen, it has a hub at Central Square. It is projected to contribute £1.1bn in GVA to the city in the ten years to 2028 and to create an additional 1,900 FTE jobs.<sup>24</sup> BBC Wales is the largest media employer in Wales.<sup>25</sup>

A report by Clwstwr noted that, by 2019, the presence of BBC Cymru Wales and the Roath Lock Drama Village in Cardiff city centre (including Cardiff Bay), alongside several other major creative firms, had resulted in the highest concentration of employees in creative enterprises across Wales.<sup>26</sup>

BBC Central Square has recently become home to a number of network teams as a result of the BBC's Across the UK initiative. The Across the UK initiative was launched in March 2021. It involves moving a significant level of roles, creative spend – around £700m – and decision-making outside London and across the UK.



The aim is to better reflect, represent and serve all parts of the country and ensure every household receives value from the BBC. It means the BBC is getting closer to audiences, telling stories that matter, better reflecting lives across our content and providing better value from the BBC.

Approximately, 70 roles have moved to Cardiff as a result of the Across the UK strategy across TV, Radio and News. These include teams in Network News digital growth and social, climate and science journalism and network radio and audio. The majority of these roles have moved over since late 2022 and with an expectation that further roles relocate in future.

<sup>23</sup> BOP Consulting for BBC, *The Economic Impact of BBC Wales: Roath Lock Studios and new BBC Wales Broadcasting Centre in Central Square, Cardiff* – Final report. December 2015.

<sup>24</sup> BOP Consulting for BBC, [Economic Impact of the new BBC Wales broadcasting centre in Central Square, Cardiff](#). April 2018.

<sup>25</sup> Clwstwr, [Creative Industries Report No 1.3: Report Update: The size and composition of the Creative Industries in Wales in 2020](#). July 2023.

<sup>26</sup> Clwstwr, [Creative Industries Report No 1.2: Report Update: The size and composition of the Creative Industries in Wales in 2019](#). January 2021.

### 3.4 Impact of other stakeholders

The success of the Cardiff cluster and growth of creative industries across Wales cannot solely be attributed to Doctor Who or the BBC. There has been a shared and continued ambition amongst industry stakeholders that has “helped create a virtuous circle where confidence, ambition and tangible sectoral growth interacted to change perception both within and outside Wales.”<sup>27</sup>

“What [Doctor Who] brought was a high, long form, multi-million pound production to the doorsteps of Cardiff, and it made people realise that there’s a career here. [Doctor Who] was the catalyst of what was the beginning of what still is a fantastic industry here in Cardiff, in Wales.”

*Donny Hargreaves, Founder, Real SFX*

Proactive policies and investments by Welsh Government have been critical as has the growth of independent production companies – in particular Bad Wolf – universities and other bodies representing the Welsh screen industry. In addition, Wales has significantly benefited from the UK Government’s screen sector tax relief, available for filming from 2007 and for high-end television (HETV) in 2013 and 2014. Analysis by Clwstwr finds that every £1 spent due to tax relief resulted in £8.80 return in terms of GVA on film production value chain in Wales and £1.5 across the HETV value chain.<sup>28</sup>

The Welsh Government’s creative sector team has been a strategic partner to the BBC and other stakeholders in supporting the screen sector in Wales. Its proactive investment in high-end TV drama helped supercharge the industry in Wales, and funding major TV dramas such as Atlantis (produced by Urban Myth Films for the BBC), Hinterland Series 1 to 3 (Fiction Factory for S4C/BBC), and Da Vinci’s Demons (Tonto Films and BBC Worldwide Productions for Starz, USA) amongst others. Creative Wales, established by the Welsh Government in January 2020, has continued with this mission and has awarded £18 million of production funding to 37 projects to date, estimated to have generated more over £208 million of production spend into the Welsh Economy.

All Creative Wales funding is contingent on productions offering a training package across entry level, upskilling and high level shadowing to provide better opportunities for those already in the industry and to create entry-level opportunities and provide sustainable careers in the Welsh screen sector. This is further supported by Creative Wales’s creative skills action plan<sup>29</sup> developed with local industry to promote education, training and placements, improved diversity and inclusive recruitment, and support Welsh creative talent in the Screen and other Creative Industries sub-sectors.

“We must support our creative workforce and develop the next generation of talent... that’s what we focus on, and every production we support now has to have a training element.”

*Joedi Langley, Head of Sector Development, Creative Wales*



<sup>27</sup> Centre for the Creative Economy, October 2023.

<sup>28</sup> Clwstwr, [Clwstwr Policy Brief No 3, The Impact of Screen Sector Tax Relief on Wales](#), January 2022.

<sup>29</sup> Creative Wales, [Creative Skills Action Plan 2022-2025](#).

Creative Wales continues to work strategically with the production industry and commissioners to identify talent, skills and industry needs to maximise opportunities for the Wales screen industry. Increasingly, this includes working with global streamers to further build the Welsh reputation for high-end drama. However, the Welsh Government's most significant investment has been in Wolf Studios with Bad Wolf.

"Obviously we had S4C and BBC in Wales for 30 years, and this provided an ecosystem of independent production companies producing drama and doing different things. But I think, having Doctor Who here moved us to that next level, and then Bad Wolf came in. And it's always been that progression since, so definitely I think it was the stimulus for the industry in Wales, really."

*Gerwyn Evans, Deputy Director, Creative Wales*

Bad Wolf is one of the UK's most successful independent production companies and the largest independent production company based in Wales. Founded by Jane Tranter and Julie Gardner in 2015, Bad Wolf has invested heavily in Wales, bringing in big budget productions such as *A Discovery of Witches* for Sky/AMC and the BBC/HBO commissioned series *His Dark Materials* and *Industry*. In turn, these high-end productions provided opportunities for the creative and production communities to further upskill.

"Some of the people who were once on Doctor Who as trainees, then went on to work with us on *Da Vinci's Demons* in slightly bigger roles. When Bad Wolf then moved into production on *A Discovery of Witches* and then *His Dark Materials* – they worked with us again. The effect of this gave me a sense that Wales would benefit from the starting point of the then parameters of Doctor Who being expanded into bigger and bigger high-end television productions. And that if Bad Wolf could keep supplying those titles and opportunities – we could continue to grow and supply that talent in Wales."

*Jane Tranter, Controller of Drama Commissioning / Head of Fiction, BBC (2000-2008), Executive VP Programming and Production, BBC Worldwide (2009-2015), Founder, Bad Wolf (2015-)*



And that I'm sure would not have happened had Doctor Who not come in [to Wales]."

*Sue Jeffries, Managing Director, Sgil Cymru*

Doctor Who has had significant impact on the recruitment of students, and its reputation has drawn UK and international students to study in Wales. Interviewees of Cardiff University's research notes that this reputation extends to China and India, and that Wales is considered a major place to work:<sup>32</sup> "Students coming to Wales, for instance, they're coming here with a sense, an expectation that this is somewhere to happen. Designers coming in, international postgraduates, they come here thinking that Wales is a place where serious, largescale things happen".

The University of South Wales was noted as being particularly quick in recognising the skills demand in the early years of Doctor Who's return.

"The University of South Wales was very progressive, and The Royal Welsh College of Music and Drama was very, very hot on production design. So there were a number of institutions in the Cardiff area who were able to lean in very quickly, developing the right technical and creative skills that we needed. We were in a hurry too. We had a huge skill shortage for 6 or 7 years... There was such a fight for skills and such a shortage of talent. So we needed our educational institutions to really step up and focus on skills development in certain areas."

*Rhodri Talfan Davies, Director Nations, BBC*

Bad Wolf itself has created substantial economic activity and employment in Wales and opportunities for local freelancers and suppliers. Bad Wolf's production activities in its first 5 years, from 2015 to 2020, were estimated to generate more than £110 million in GVA and more than 2,200 FTE jobs for the Welsh economy.<sup>30</sup> Furthermore, 81% of local suppliers to Bad Wolf reported that they'd experienced higher turnover since 2015, in part due to Bad Wolf and the Wolf Studios location in Cardiff.<sup>31</sup>

"Having a huge company like Bad Wolf come in to Wales has made a huge positive difference, obviously, and you know they eat up not just freelancers but facilities houses that sit around them as well... set builders and VFX companies and all the rest of it, meaning that there's more work for everyone, and a genuine need for constant training.

<sup>30</sup> Bad Wolf, Saffery Champness and Nordicity, [The Economic Impact of Bad Wolf – The first five years: 2015-2020](#). November 2021.

<sup>31</sup> Ibid.

<sup>32</sup> Centre for the Creative Economy, October 2023.



Scaling up the formal training offer from universities and other further education providers has helped support a pipeline of required entry-level skills into the Welsh screen sector.

In 2021, the National Film and Television School, in partnership with BBC Cymru Wales and Creative Wales, opened a hub at BBC Central Square in Cardiff.

The base has provided hundreds of training opportunities for those wishing to develop their television skills in subjects such as production accounting and script editing.

Sgil Cymru is one of the learning providers the BBC uses to deliver Production apprenticeships in Wales. This includes early careers training, coordinating apprentices to partners by skillset and providing on-going professional development for freelancers as well as apprenticeships and placements. Sgil Cymru is the local training provider for BBC Studios' apprentices in Wales. Its own apprentice scheme aims to address challenges of the streaming age by directly employing apprentices and hiring them out to different production companies. This approach overcomes some of the difficulties from short-term contracts and provides a year-round employment safety net, and training apprenticeship with an industry recognised qualification, to entry-level professionals that would otherwise not be offered by the industry.

Screen Alliance Wales is one of several organisations that have supported training and entry-level placements to ensure sustainable

talent pipeline. Established as a not-for-profit organisation in 2018, its mission is to invest in training and education and to promote talent, crew and services of the film and TV industry in Wales. Bad Wolf and the University of South Wales are lead partners, and its supporters include Welsh firms 4WOOD set construction, post-production company Gorilla, and Real SFX amongst others and PSBs including the BBC, S4C and Channel 4.<sup>33</sup>

Over time, this has transformed the workforce in Welsh screen sector by developing a skilled, indigenous workforce through formal training and on-set experience as well as attracting workforce from outside Wales. As two Cardiff University interviewees note: "... It is so easy, now, to get people to travel to Wales to work, that's what I see, and that's changed over the last 15 years", and "What Doctor Who did was show that there is a crew here, or we can use people coming in to train up, build up, and just keep everything in Wales rather than flying people in".<sup>34</sup>

Furthermore, the University of Cardiff and University of South Wales have both worked closely with government and industry stakeholders to support and further grow the South Wales cluster. The Clwstwr programme<sup>35</sup> was established in 2018 with support from the Welsh Government and UK Research and Innovation (UKRI) and ran until 2023. Its objective was to enhance innovation in the screen industry cluster by bringing together screen industry businesses, organisations, professionals and stakeholders in adjacent sectors, and supported by academic research.

It awarded £3.4m of funding directly to local creative industries and supported over 100 projects. Clwstwr was estimated to directly contribute £1 of every £13 of annual turnover growth in the Welsh creative industries between 2019 and 2022.<sup>36</sup>

Subsequently, the Media Cymru Consortium launched in early 2023 and brings together 23 partner organisations from the Cardiff Capital Region including BBC Cymru Wales. Media Cymru projects focus on four main themes: economic growth, environmental sustainability, global reach, and equality, diversity and inclusion. Media Cymru's innovation pipeline provides target funding rounds and training opportunities with the aim to develop companies and individuals in order to "increase their capacity to carry out meaningful research, development and innovation (R&D). This can be from early-stage development through to scale up activity, to result in more ideas, diversity and growth to the industry."<sup>37</sup>

<sup>33</sup> Further detail on [Screen Alliance Wales partners and supporters](#).

<sup>34</sup> Ibid.

<sup>35</sup> Clwstwr programme [further details](#)

<sup>36</sup> As quoted on [Clwstwr website](#) (accessed 12 October 2023)

<sup>37</sup> Media Cymru, [Innovation Pipeline](#) (accessed 12 October 2023)

# 4 WIDER ECONOMIC IMPACT ON WALES

The economic impact of Doctor Who extends beyond that of the show's production activity and development of the (scripted) screen sector with a number of additional spillover effects.

Screen tourism, where visitors take part in activities related to a specific film or television series or to see locations that have appeared on-screen, is a spillover effect that can offer significant economic impact. VisitBritain estimates that 5% of all international visitors to the UK include a visit to a notable TV and film, music or literary location, delivering UK spending of approximately £2.1 billion per annum.<sup>38, 39</sup> Tourism contributes around £3.4bn in GVA to the Welsh economy.<sup>40</sup> Evidence from our research suggests that Doctor Who's strong links to Wales has influenced local tourism.

Wales has also frequently featured as the backdrop for iconic Doctor Who scenes and became a draw for tourists. Whovians were drawn to the Doctor Who Experience in Cardiff Bay, not far from Roath Lock Studios, during its five year run. The Cardiff Bay area, in particular, became recognised as part of the show's key filming locations, featuring prominently in both Doctor Who and Torchwood. The Water Tower, often referred to as "Torchwood Tower", features as the exterior of the fictional headquarters of the Torchwood Institute. Today, numerous companies offer walking tours to take in key filming sights around Cardiff Bay, the National Museum Cardiff, the Wales Millennium Centre and Ianto's Shrine, a fan shrine dedicated to fictional character Ianto Jones who appeared in the Torchwood series.



<sup>38</sup> Visit Britain, [Activities undertaken in Britain](#) (accessed 12 October 2023). Note, latest survey data for 2019 – 2020 and 2021 omitted due to Covid-19 pandemic.

<sup>39</sup> Visits to notable TV, film, literary and music locations excluded sightseeing famous monuments/buildings or visiting historic or heritage buildings.

<sup>40</sup> Welsh Government, [Wales Visitor Economy Profile: 2021](#) (last updated 28 April 2022).

The tourism impact extends across Wales and the UK. The Visit Wales website features a list of prominent Doctor Who filming locations across Wales including St Donat's Castle, Cold Knap Bay, and Southerndown Beach.<sup>41</sup> Similarly, the National Trust has also published a list of its properties and locations across the UK that have featured in the show ahead of the show's 60th anniversary.<sup>42</sup>

Other cultural spillovers include the relationship between Doctor Who and the BBC National Orchestra of Wales. The Orchestra had its first special concert, Doctor Who: A Celebration for Children in Need in 2006, which was broadcast live from the Wales Millennium Centre on BBC Radio Wales. This paved the way for 'Doctor Who at the Proms', where the Orchestra would perform at the Royal Albert Hall in London as part of the annual BBC Proms concert series in 2008, 2010 and 2013. Using Doctor Who to bring classical music to a wider audience, each performance was broadcast on BBC Radio Three as part of the Proms series, and had special appearances from the Doctor and other cast members. The BBC National Orchestra of Wales also toured the UK in 2015 with its live show Doctor Who Symphonic Spectacular.



<sup>41</sup> Visit Wales, [Follow the TARDIS to top Doctor Who locations](#) (accessed 12 October 2023).

<sup>42</sup> National Trust, [Doctor Who filming locations](#) (accessed 19 October 2023).

# WHAT 5 NEXT?

Doctor Who returns to screens with three special hour-long episodes for the 60th anniversary, airing this November 2023. This will be audiences' first glimpse of the show since Russell T Davies' return was announced.

The 60th anniversary specials and the forthcoming Season 1 has been commissioned by BBC and Disney Branded Television under a shared creative vision that will deliver this quintessentially British show on an unprecedented scale, with Disney+ as the exclusive home for new seasons of Doctor Who outside the UK and Ireland.

The show will continue to be produced in Wales in upcoming years, retaining the strong sense of Welsh identity and with production of the new series continuing the economic contribution (GVA) to the Welsh screen sector.



# Annex I

## Industry stakeholders interviewed by BBC

**Carmela Carrubba**, Company Director, Real SFX

**Clare Hudson**, freelance producer, previously BBC Wales Head of Productions.

**Danny Hargreaves**, Founder, Real SFX

**Gerwyn Evans**, Deputy Director, Creative Wales

**Joedi Langley**, Head of Sector Development, Creative Wales

**Professor Justin Lewis**, Director of Media Cymru and Professor of Communication and Creative Industries at Cardiff University, School of Journalism, Media and Culture.

**Jane Tranter**, Founder and CEO, Bad Wolf

**Joie Gardner**, Founder, Bad Wolf and Bad Wolf America

**Rhodri Talfan Davies**, Director of Nations, BBC

**Russell T Davies**, showrunner of Doctor Who (Series 1-4, the anniversary specials and forthcoming Season 1).

**Professor Sara Pepper**, Deputy Director of Media Cymru and Director of Creative Economy at Cardiff University.

**Sue Jeffries**, Managing Director, Sgîl Cymru

**Tracie Simpson**, freelance producer





## Annex II

### Economic impact modelling and data sources

This annex sets out the approach assessing the economic impact of Doctor Who production activities. We measure economic impact via gross value added (GVA), calculated on the basis of income approach.<sup>43</sup> GVA, in simple terms, is an economic productivity metric that is the value of goods and services less the cost of all inputs and raw materials.



We estimate three main components of GVA:

- **Direct** – first round effects of the production that generate business activity and output. Consistent with prior analyses of the BBC GVA, this includes employment costs of staff and freelancers as well as value-added (profit) captured as production fees.
- **Indirect** – second round effects generated in the supply chain as a result of the production's procurement of goods and services that become inputs to the production. These include goods and materials bought directly by production (e.g. materials and items for set and costume design) as well as services procured as part of the production (e.g. hiring on-set caterers and other hospitality, contacting companies to provide specialised services such as security, SFX or VFX).
- **Induced** – multiplier effects that arise in the wider economy as a result of the production's direct employees and those employed in the supply chain spending their wages. This spending generates additional economic activity for those businesses from which these employees buy goods and services as well as their wider supply chains.

The production activity may also generate spillover effects for those not directly involved in Doctor Who production – i.e. benefits (or costs) to businesses, society and government. These can be disparate and are harder to quantify. We therefore do not quantify spillover effects. However, we qualitatively acknowledge some of the spillover effects of Doctor Who in Section 4.

To estimate the economic impact of Doctor Who, we first construct a representative production budget time series and which is then used as an input to the BBC's in-house GVA model.<sup>44</sup>

This is done for Wales only, and then UK overall. These are explained in further detail below.

### A.1 Building representative time series of production spending

We construct a representative time-series of production spend for Series 1 to 13 (2004 to 2021), which we use as a data input to our GVA model. The representative timeseries relies on:

- Wales Screen tracking data (Series 1 to Series 12), provided to BBC by Creative Wales. For each series, this data includes production spend in Wales (£m), total budget (£m), number of Welsh crew, and total number of crew as well as series filming dates and number of filming dates in Wales. Note, we estimate total budget for Series 1-4 and 9 based on Wales spend for these series and average ratio between Welsh spend v total budget from series with full data.
- Equivalent data from BBC Studios for Series 13 to complete the time series. We estimate filming days in Wales based on previous series, cross-checked with total Series 13 filming days.
- In-depth analysis of the Series 12 and 13 general ledgers, which include itemised production spend by location (i.e. Wales, rest of UK and foreign) and by category (i.e. direct staffing costs and production fees, or (indirect) supplier spend tagged with the relevant industry SIC classification).



The production budgets do not include any depreciation or amortisation costs and do not adjust for taxes and subsidies. In the in-depth analysis Series 12 and 13 general ledgers, we exclude any tax items expensed (e.g., council tax as part of accommodation expenses and any apprentice levy contributions). We are unable to separately identify tax contributions in employee or freelancer pay. Production subsidies are shown as negative payments in the general ledgers; subsidies excluded from our analysis of production budget spending (actual production spend is underestimated if included).

<sup>43</sup> This is consistent with the approach taken in KPMG, [Assessment of the Economic Impact of the BBC](#), March 2021.

<sup>44</sup> The in-house model has been adapted to assess economic impact (GVA) of Waterloo Road and Green Plant. The model was developed by BBC economists and applies the principles of the input-output modelling used by KPMG (March 2021) to assess overall economic impact of the BBC in FY2019/20. Refer to KPMG (March 2021) annexes for further details.

We used actual data for Series 12 and 13. For Series 1 to 11 we estimated the proportion direct spending and pipeline spend (by SIC code) for Wales and UK overall as an average of Series 12 & 13. These break downs are shown in Figures 3 and 4 below, and have been sense checked against the Wales Screen actual data. The production spend figures are an estimate of actual (nominal) production spend for the 10 series; i.e. spending figures are not adjusted for inflation.

Figure 3: Direct value (staff costs and production fee) by location

Series	Wales	UK (inc Wales)	Non-UK
Series 12 (actual)	56.3%	97.8%	2.2%
Series 13 (actual)	46.2%	98.5%	1.5%
Series 1 -11 (Series 12-13 average)	51.3%	98.2%	1.8%

Figure 4: Supplier spend by location

Series	Wales	UK (inc Wales)	Non-UK
Series 12 (actual)	48.9%	89.7%	10.3%
Series 13 (actual)	51.0%	99.5%	0.5%
Series 1 -11 (Series 12-13 average)	50.0%	94.6%	5.4%

Note, the representative time series uses averages and therefore does not accurately capture fluctuations in production spend by location of individual series that results from storylines and filming locations, etc.

Furthermore, Series 13 production was impacted by Covid-19 restrictions and this is reflected in lower non-UK spend compared to Series 12 and previous series. We acknowledged this as a limitation of our approach; while we can be confident that the UK wider figure is reflective of turnout, we cannot say whether the approach under or over estimates the impact within Wales.



## A.2 Approach to estimating GVA of production activities

The Series 1 to 13 total direct value and total supplier spend are used as inputs to the model. This is a simplification meaning that we do not calculate the GVA of production for individual series that require aggregation. The inputs are nominal – i.e. not adjusted for inflation – and reflect the total nominal economic impact of Series 1 to 13 production activities, from July 2004 to October 2021.

The BBC's in-house GVA model uses the income approach<sup>45</sup> and provide an estimate of direct, indirect and induced GVA. As a simplification the model does not contain subnational multipliers. This means that the GVA contribution in Wales is driven by the location of the spend alone and not by specific GVA multipliers for Wales. The GVA contribution in Wales would be higher (lower) where the productivity in the relevant sectors is higher (lower) in Wales than the national average.

The model also estimates the employment impact of Doctor Who production activities. The model calculates employment figures by taking the GVA estimate and dividing this by estimate of GVA per FTE in the sector.

The model's employment outputs reflects the number of FTE jobs generated over 13 series, Series 1 to 13. The report presents the average indirect and induced employment impact per series as this is more intuitive to understand. The 'per series' average is calculated by dividing the employment figures from the model by 13 (series).

<sup>45</sup> Note, modelling approach consistent with Consistent with the approach taken by KPMG (March 2021). Uses ONS (2019), input-output supply and use tables for 2013-2018. Note: latest release is February 2023 provides revised multipliers for 2015 to 2020. To be consistent with previous BBC GVA modelling, we rely on previous ONS release.

The Rt Hon Sir John Whittingdale OBE MP  
Minister of State for Media, Tourism and  
Creative Industries  
Department for Media, Culture and Sport  
HM Government

8 December 2023

## **Public Service Broadcasting in Wales**

Dear Minister,

Thank you for appearing at the Committee's meeting on Thursday, 19 October 2023, to give evidence for our scrutiny on Public Service Broadcasting in Wales. It was valuable to be able to welcome you to the Senedd, and for you to share your views with us in person.

Thank you as well for your [follow-up letter](#) of 14 November 2023, and please accept our apologies for our delay in replying. We welcome the fact that further discussions are planned with the Welsh Government relating to gaps in the provision of Welsh language programming by community radio stations and the longer-term options to support new stations in the parts of Wales that are not currently served by community radio.

With reference to your evidence session, we also welcome the UK Government's willingness to hear from the Committee about matters including the renewal of the channel 3 licence, and free to air sports rights. Given the importance of the Six Nations to Welsh cultural life and its ability to unite Welsh audiences in national 'shared moments', we are keen to explore the merits of adding the competition to the list of sporting events of national interest. We plan to undertake further work on this early in 2024.

We also discussed the fact that smaller public service broadcasters ("PSBs"), like S4C, may find it more difficult to broker prominence online as viewing behaviour shifts from linear TV towards online services. It is vital that prominence for regional PSBs is secured, recognising the social and economic contribution of the services they provide. We were reassured to hear that the regulatory framework will protect the prominence of PSB services to ensure that content remains easily discoverable for



audiences, and that you would be happy raise any future difficulties that PSBs may experience with Ofcom.

During the meeting, we also discussed Project Gigabit funding to improve access to broadband in harder-to-reach areas of Wales. You agreed to provide us with some further detail about the benefits of that initiative to Wales, and we would be grateful to receive that information.

Thank you again for sharing your views with us on these vitally important issues. As a Committee, we appreciate that you are keen to champion these issues, and to remain in contact with us.

Yours sincerely,



**Delyth Jewell MS**  
**Committee Chair**

Croesewir gohebiaeth yn Gymraeg neu Saesneg.

Correspondence in Welsh or English.

**Pwyllgor Diwylliant, Cyfathrebu, y Gymraeg,  
Chwaraeon, a Chysylltiadau Rhyngwladol**

**Culture, Communications, Welsh Language,  
Sport, and International Relations  
Committee**

Magnus Brooke  
Group Director of Strategy, Policy and  
Regulation, ITV  
Phil Henfrey  
Head of News and Programmes  
ITV Cymru Wales

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11 December 2023

**Public service broadcasting in Wales**

Dear Magnus and Phil,

Thank you for appearing at the Committee's meeting on 16 November 2023 to give evidence to inform our scrutiny of public service broadcasting in Wales. We are grateful for the evidence you provided during the session, and for your valuable contribution to our work.

We welcome the news that ITV Wales content will soon be made available on ITVX, and we were pleased to note the plans for developing ITV's contribution to the Welsh creative economy through the 'Amplify the Regions' programme, as well as the fact that the Producers Forum will be held in Cardiff next year.

Thank you again for sharing your views with us.

Yours sincerely,



**Delyth Jewell MS**  
**Committee Chair**

Croesewir gohebiaeth yn Gymraeg neu Saesneg.



We welcome correspondence in Welsh or English.

Dawn Bowden MS  
Deputy Minister for Arts, Sport, and Tourism  
Welsh Government

By email

15 December 2023

Dear Dawn,

### **Scrutiny of Public Service Broadcasting**

You will be aware that the Committee has been undertaking general scrutiny of public service broadcasting in Wales. Having taken evidence from a wide range of stakeholders, during which we asked questions about the Welsh Government's proposals, we would also like to give you an opportunity to contribute to our deliberations. We would be interested in hearing your views on the following issues:

- When will the Welsh Government make public a decision about the establishment of a Shadow Broadcasting Authority?
- If the Welsh Government does not set up a Shadow Broadcasting Authority, will it re-allocate the specific budget allocations intended for that purpose directly to other policies to improve the provision of media for Wales?
- What is the Welsh Government's view on the sufficiency of the provision of broadcast media for Wales?
- What, if any, key policy changes would the Welsh Government like to see made at either the Wales or UK level to improve the provision of broadcast media for Wales?
- What is the Welsh Government's view on the devolution of broadcasting?

We look forward to your response in due course and would be happy to receive any additional information you may wish to share which would be of relevance to our work.

Yours sincerely,



**Delyth Jewell MS**

Committee Chair

Croesewir gohebiaeth yn Gymraeg neu Saesneg.  
We welcome correspondence in Welsh or English.







Department for  
Science, Innovation  
& Technology

Rt Hon Sir John Whittingdale OBE MP  
Minister for Data and Digital Infrastructure  
Department for Science, Innovation  
& Technology  
100 Parliament Street  
London SW1A 2BQ

[www.gov.uk/dsit](http://www.gov.uk/dsit)

Delyth Jewell MS

18<sup>n</sup> December 2023

Chair of the Culture, Communications, Welsh  
Language, Sport, and International Relations  
Committee

Welsh Parliament  
Cardiff Bay  
Cardiff  
CF99 1SN

*Dear Delyth,*

Thank you for the invitation to attend the Senned Culture, Communications, Welsh Language, Sport, and International Relations Committee on 19 October. I am writing to confirm the update I provided on Project Gigabit in Wales.

Currently, 96.9% of premises in Wales have access to Superfast broadband and 66.5% have access to a gigabit-capable connection. This is up from 6.6% in January 2019.

Building Digital UK (BDUK) is the executive agency of DSIT responsible for delivering Project Gigabit, the UK Government's £5 billion mission to roll out fast, reliable broadband to premises that are not included in suppliers' commercial plans.

I am pleased to confirm that in July 2023, BDUK launched a cross regional procurement covering North West Wales, Mid Wales and South East Wales, inviting suppliers to bid for a contract to build full fibre broadband to hard-to-reach areas that would not normally be commercially viable to connect.

Cross regional procurements are designed to reach premises in areas where, following engagement with suppliers, we have established there is insufficient market appetite to support a smaller local or regional intervention.

We aim to award a contract under this cross regional framework in summer 2024. I can also now confirm that North Wales and South West Wales will be included within a further cross regional procurement once the contract is in place. In the meantime, proposals for voucher projects in South West Wales are currently being considered by BDUK ahead of this process beginning.

In addition, we have already provided 100,000 premises in Wales with access to gigabit-capable broadband through the Superfast Cymru programme delivered by the Welsh Government with BDUK.

I hope this information is useful.

Yours ever  
John

Rt Hon Sir John Whittingdale OBE MP  
Minister for Data and Digital Infrastructure

# Agenda Item 9.14

For the attention of the Culture, Welsh Language and Communications Committee.



12 December 2023

Dear Member of the Senedd/Member of Parliament/Council Leader,

The Welsh Executive Council of the National Union of Journalists is writing to every MS, Welsh MP and Welsh council leader to draw their attention to serious concerns we have about the latest developments at Reach plc, the largest newspaper publisher in Wales.

Reach, as you know, publishes the *WalesOnline* and *North Wales Live* news websites, the *Western Mail*, the *Daily Post*, the *South Wales Evening Post*, the *South Wales Echo*, and *Wales on Sunday* as well as weekly papers in the south Wales Valleys and in north Wales.

In January this year, Reach announced plans to cut jobs resulting in the loss of over 80 jobs across its workforce.

Barely two weeks after the conclusion of that redundancy process, in March, Reach announced plans to cut a further 192 editorial roles from the workforce – including 6 roles at *WalesOnLine*. At *North Wales Live* they cut 4 out of 9 Reporters and 2 out of 3 Content Editors.

You will have seen the announcement made on 8 November that Reach is seeking job losses of 450 across its workforce with 320 editorial roles.

Proposed job losses at *North Wales Live* are cuts in Reporters from 7 to 4 including 1 sports reporter plus 1 Content Editor.

This latest round of cuts will take the editorial content operation down from 21 staff at the beginning of the year to just 8 members of staff and it will no longer be viable to produce a comprehensive news service, 7 days a week for the region, which will seriously impact the content in the *Daily Post* and *North Wales Live*.

At *WalesOnline*, 4 roles have been cut and existing vacancies have been closed.

We are deeply concerned that redundancies and job losses over the last year have left staffing cut to the bone and further cuts will threaten both the quality and quantity of news coverage in Wales and Welsh democracy.

It is vital for Wales as a devolved nation to have a healthy and vibrant diverse media covering all the issues affecting Wales. It is also important for all politicians of all parties to be able to have their views represented and questioned by a healthy, democratic media. London based media without reporters in Wales do not cover Wales in depth or on any regular basis.

An increasing proportion of the content of Reach titles is already produced centrally. In many instances, such generic feature material relating to education and health matters,

for example, does not take account of devolution and is therefore unsuitable for publication in Wales.

With less Welsh specific content, there is a danger that Reach journalists will lose their well-deserved and recognised reputation as a strong, authoritative, and reliable voice in reporting Wales. Reach's "customer value strategy" necessitates its journalists reliably informing people about the community they live in. The more the workforce is eroded, the harder it is to serve the country and communities.

While we appreciate economic pressures and the effects of Facebook algorithms, Reach's only clear response seems to be to cut and cut staff.

On a human level, the effect of more cuts and constant job uncertainty is having a devastating impact on people's mental health and wellbeing. Reach journalists take their jobs seriously and believe in the quality of their work but by creating such job uncertainty, Reach risks losing journalists at all levels as they feel forced to look elsewhere for work. Our members feel they are constantly being asked to take on greater workloads as jobs are shed, with no clear and transparent plan as to how the company plans to address the challenges it faces.

The NUJ Reach Group Chapel passed a motion of no confidence in Reach's chief executive and senior management team and has called on independent directors and shareholders in an open letter to use their influence to seek a radical rethinking of the current approach of the board which we believe is endangering the economic health of the company and the livelihood of workers.

The NUJ was also a leading member of the Public Interest Journalism Working Group who produced the [report](#) "Of and for Wales: towards a sustainable future for public interest journalism" and while we wait for a formal response from the Welsh Government the industry in Wales continues to decline.

In the circumstances, we ask you to make urgent representations to the Chair of the Reach board, Nick Prettejohn, who can be contacted at Reach plc, [nicholas.prettejohn@trinitymirror.com/reachplc.com](mailto:nicholas.prettejohn@trinitymirror.com/reachplc.com) One Canada Square, Canary Wharf, London E14 5AP.

Thank you.

**Welsh Executive Council**  
**National Union of Journalists**

Delyth Jewell MS  
Chair, Culture, Communications, Welsh Language, Sport, and International Relations  
Committee  
Welsh Parliament  
Cardiff Bay  
Cardiff  
CF99 1SN

13 December 2023

Dear Delyth,

Thank you for your letter as Chair of the Culture, Communications, Welsh Language, Sport, and International Relations Committee requesting an update on support for Ukraine and Ukrainian refugees plus further information regarding the cultural support to Ukrainian children.

The Welsh Government has continued to offer its support to Ukrainians following the full-scale invasion of Ukraine last year. As a Nation of Sanctuary, we aim to ensure all Ukrainians seeking sanctuary in Wales are welcomed from day one of their arrival and receive the necessary support to help them to settle within local communities. To date, sponsors in Wales have welcomed over 7,000 Ukrainians under the Homes for Ukraine scheme to the UK, including more than 3,200 under our super sponsor route.

For Ukrainians arriving in Wales, the priority remains supporting them to find longer term accommodation which can provide independence and opportunity to help re-build their lives within our communities. This includes using hosting offers, the private rented sector and other forms of good quality transitional accommodation which the Welsh Government is helping to support through our Transitional Accommodation Capital Programme (TACP). The programme was established to deliver more good quality accommodation at pace to help everyone with their housing needs.

The Welsh Government recognises the critical role local authorities play in supporting Ukrainians to settle and integrate into the community. The funding decision by the UK Government to reduce the year 1 Integration tariff was significant and the absence of year 2 integration and education tariffs, has placed additional pressures on local authorities to provide this support. The confirmed lack of a year 3 integration tariff will exacerbate these pressures during 2024/25.

Canolfan Cyswllt Cyntaf / First Point of Contact Centre:  
0300 0604400

Bae Caerdydd • Cardiff Bay  
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CF99 1SN

[Gohebiaeth.Jane.Hutt@llyw.cymru](mailto:Gohebiaeth.Jane.Hutt@llyw.cymru)  
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Rydym yn croesawu derbyn gohebiaeth yn Gymraeg. Byddwn yn ateb gohebiaeth a dderbynnir yn Gymraeg yn Gymraeg ac ni fydd gohebu yn Gymraeg yn arwain at oedi.

We welcome receiving correspondence in Welsh. Any correspondence received in Welsh will be answered in Welsh and corresponding in Welsh will not lead to a delay in responding.

To help address this, we have utilised the £8.22 million share of the UK Government's £150 million Homelessness Prevention Fund which Wales receives to provide funding for move on and integration support in areas such as education, language lessons and employability programmes.

We continue to work with our key partners in the public and voluntary sectors to support our Ukrainian guests to find employment. This includes ESOL provision through existing Welsh Government-funded programmes, as well as the time-limited STEP Ukraine intensive online opportunity. There is also support with the recognition of qualifications so they can utilise their skills to gain employment in their chosen vocation.

For Ukrainian students wishing to study a higher education course in Wales, we have amended the existing student support regulations so they can be eligible for student support, home fee status, and the undergraduate tuition fee cap when starting or continuing a course on or after 1 August 2022.

Ukrainians have access to the Welcome Ticket transport scheme which provides free travel on Transport for Wales services and local bus services in Wales until 31 March 2024. We also extended our existing Wales Sanctuary Service for 2022/23 and 2023/24 to ensure access to expert advice, support and advocacy provision.

We continue to provide updated information and guidance to Ukrainians residing in Wales via the Wales Sanctuary Service, a dedicated information pathway within the Sanctuary website and via monthly newsletters.

During my recent visits to Ukrainians in Caerphilly and the Safe Haven community group in Maesteg, I have been inspired by the willingness and effort of Ukrainians to integrate within local communities. While welcoming this, the Welsh Government also recognises the importance of Ukrainians to remain connected to their language and culture during their time in Wales. My officials have met regularly with social media group administrators to identify emerging issues and ensure they are able to access and disseminate the right information to our Ukrainian community.

Last November we marked the start of the 90th anniversary of the Holodomor and last month we held a commemoration at the Senedd led by the First Minister. An incredibly important date of remembrance for Ukrainians, it was attended by leaders from Ukrainian religious communities, the Deputy Ambassador of Ukraine, the Association of Ukrainians in Great Britain, and many Ukrainian guests who have found sanctuary in Wales.

This is one of a number of important cultural dates or events for Ukrainians that we continue to raise awareness of through our social media channels and regular communications with guests and hosts across Wales.

For Ukrainian children arriving in Wales, we are engaging with both Plast (Ukrainian scouting organisation) and Scouts Cymru to see how they can join a recognised youth organisation and get support from them, without losing their own identity and culture.

We continue to work with local authorities to ensure Ukrainian children have access to schools and to offer the same high-quality education and support available to existing pupils. This includes resources related to the conflict which have been published on [Hwb](#) with the aim to support students understanding and manage their feelings about it.

We also acknowledge that Ukrainian families and pupils may also want to access Ukrainian learning materials. The Ukrainian Ministry of Education and Science (MoES) has published the [Ukrainian curriculum including educational materials](#). Schools may share this with

Ukrainian pupils and families to complement pupils' education either at home or in supplementary schools for example. However, they should not be used to substitute for schools' usual curriculum.

The MoES has also published [guidance](#) for learners to continue with Ukrainian Curriculum assessments outside of Ukraine. This includes learning and assessment options for school students from Ukraine, references to e-learning available via the All-Ukrainian Online School and the application process for parents to enrol their children in distance learning via the International Ukrainian School.

For students who are due to complete primary, basic secondary, or complete general secondary education, the guidance also offers advice on how graduates can obtain the relevant school graduation certificates from their Ukrainian educational institutions.

I hope this information provides the Committee with the necessary update on the support we are delivering to Ukrainians in Wales.

Yours sincerely,

A handwritten signature in black ink that reads "Jane Hutt". The signature is written in a cursive style with a long horizontal line above the first letter of "Jane".

**Jane Hutt AS/MS**  
**Gweinidog Cyfiawnder Cymdeithasol a'r Prif Chwip**  
**Minister for Social Justice and Chief Whip**

# Agenda Item 9.16

## Supporting Shared Learning – Ireland and Wales

October 2023

### Introduction

This note is to inform Ministers on the experience and lessons learned from the secondment of a Welsh Government official to the Irish Department of Foreign Affairs, which arose from a commitment in the [Ireland-Wales Shared Statement and Joint Action Plan 2021-25](#).

The secondment was designed to promote shared learning between the two administrations, in this case in the area of diaspora policy. Such shared learning helps to foster cooperation and collaboration, through sharing experience, approaches and skills in areas of common interest.

At the 2022 Forum in Cork, Ministers discussed opportunities to build on the success of the initial secondment and to introduce more formal policy exchange on a regular basis. Following scoping since completion of the secondment, plans to facilitate more regular policy exchange in priority areas are set out below.

### Diaspora Secondment 2022-2023 – Summary Overview

Recognising the importance of diaspora communities globally for both the Ireland and Wales, the [Ireland-Wales Shared Statement and Joint Action Plan 2021-25](#), included a commitment to facilitate a secondment from the Welsh Government to the Government of Ireland in order to '*intensify our exchange of knowledge and expertise in both direct and indirect diaspora engagement*'.

Following an internal competition, Welsh Government undertook a one year secondment to the Department of Foreign Affairs (DFA) between May 2022 and May 2023. An extensive report on the work undertaken during the secondment period has been prepared.

In summary, the secondment facilitated the officer to gain first-hand experience of the breadth of Irish diaspora policy; to work directly on administering grant schemes to support Irish communities globally, and to gain clear insights on how supports and outreach to communities abroad have – and continue - to evolve to meet the changing needs of the Irish diaspora.



## **Key Learning from Secondment Period and Future Learning Framework**

Critically, the year-long secondment gave the Welsh officer direct insight into the different historical and cultural factors impacting on Irish and Welsh diaspora communities abroad. This will be of particular value in considering which aspects of Irish diaspora policy and support may be most applicable to the Welsh government approach into the future.

Importantly, the secondment also facilitated an increasing range of contacts between Irish and Welsh officials. This is vital in supporting implementation of the wider Shared Statement. That increased engagement included ensuring official level consultations on diaspora policy, as well as active engagement by Welsh government officials in the Global Irish Civic Forum in Dublin Castle in 2023. On a more social level, the Welsh secondee played a key role in organising a group visit of young diplomats from Ireland to Wales to the *Other Voices* festival in Cardigan – a key strategic partnership under the Shared Statement, showcasing Irish and Welsh music, language and ideas. Based on the lessons learnt from the secondment period, officials have worked in recent months to identify how best to build on this shared learning approach. Specifically, the Ireland Wales Shared Statement and Joint Action Plan commits to direct official level co-operation across a range of policy areas, reinforcing collaboration and exchange across social, cultural, education and economic spheres at all levels.

Building on this and in view of the focus championed by Ministers at Ireland Wales For over the last two years, it is proposed that shared Ireland Wales learning over the coming year will be undertaken in a number of specific policy areas. Specifically, this will include a focus on: renewable energy; education and green skills development; culture to include exploration of support schemes for arts practitioners; language-related policy; and facilitating trade and investment linkages.

This learning will be undertaken in a variety of different ways, to include regular Ministerial engagement; the facilitation of official level consultations; and the organisation of joint site or study visits, including with relevant business partners. A report will be prepared for the Ireland Wales Forum 2024 on progress to this end.

*October 2023*

ENDS

## **MINISTERIAL INTERNATIONAL ENGAGEMENT**

### **NOVEMBER 2023**

#### **INWARD VISITS**

- 03 Nov**      **Visit to Wales by the Head of the Palestinian Mission to the UK**  
The First Minister met with the Head of the Palestinian Mission to the UK to discuss the conflict in the middle east.
- 09 Nov**      **Visit to Wales by Japanese Ambassador to the UK**  
The Ambassador visited Wales to attend an event celebrating 50 years of Japanese investment in Wales. The First Minister held a bilateral meeting with the Ambassador to discuss Wales/Japan relations and the Minister for Economy met with the Ambassador at a business dinner in the evening.
- 16 Nov**      **Visit to Wales by Hillary & Bill Clinton (Swansea University)**  
The First Minister met with both Hillary and Bill Clinton when they all took part in the Hillary Rodham-Clinton Global Challenges Summit in Swansea. The event discussed some of the most important global issues, including health and social inequality, the climate emergency and leadership for future generations.
- 26 Nov**      **Visit to Wales by Indian High Commissioner**  
The First Minister met with the Indian High Commissioner at an event organised by the Sikh Council of Wales at Cardiff University. The 2024 Wales in India campaign was discussed and plans for a reception at the High Commission around St David's Day next year.

#### **OUTWARD VISITS**

- 16 Nov**      **Minister for Economy Visit to Germany**  
The Minister for Economy recently undertook a three-day visit to Germany, travelling to Düsseldorf, Stuttgart and Munich to promote economic ties and strengthen unique cultural bonds. The visit included the signing of a Statement of Cooperation between Wales and the German state of Baden-Württemberg, a visit to MEDICA to support Welsh life science companies exhibiting at the world's largest medical trade fair, a visit to Semicon Europa 2023 and meetings with businesses and political representatives from each of the German states.  
[Press release](#)
- 23 Nov**      **First Minister Visit to Dublin for BIC Summit**  
The First Minister attended the 40th meeting of the British-Irish Council on 23 and 24 November, which was hosted by the Government of Ireland.

The meeting was chaired by the Taoiseach Leo Varadkar TD on behalf of the Government of Ireland. Other attendees included Tánaiste Micheál Martin TD, the First Minister of Scotland the Rt Hon Humza Yousaf MSP, the Chief Minister of Jersey Deputy Kristina Moore, the Chief Minister of the Isle of Man Hon Alfred Cannan MHK, Secretary of State for Levelling Up, Housing and Communities, and Minister for Intergovernmental Relations the Rt Hon Michael Gove MP, and the Secretary of State for Northern Ireland the Rt Hon Chris Heaton-Harris MP. The First Minister took the opportunity to hold a series of bi-laterals, including a meeting with the Irish Government Finance Minister, Paschal Donohoe, to find ways to take forward joint mechanism funding, in the post-Brexit era. A joint Communiqué was issued after the Summit, which is available here: [40th BIC Summit - Communique](#)

# Agenda Item 9.17

By virtue of paragraph(s) vii of Standing Order 17.42

Document is Restricted



1 December 2023

Annwyl Gyfaill,

We are writing to you in response to a letter that has been sent to the Secretary of State for DCMS, The Rt Hon Lucy Frazer KC MP by the former chief executive of Welsh language broadcaster S4C. It was also shared on her X, formerly twitter, account. The letter contains a number of allegations and statements which are very troubling.

Cwmni Da is a production company that employs 51 full time staff, located in the north west of Wales, which is classed as a socially deprived area. We are unique in Wales in being an Employee Owned Trust – our company is owned by a trust for the benefit of our staff. We have immense pride in our highly skilled and dedicated team and the fantastic content that they create for S4C and other broadcasters. We pride ourselves on being able to offer a number of pathways into the industry and a high level of training and development.

This publicly shared letter yesterday is a direct threat to the media production industry in Wales. We believe that the current situation at S4C has to be resolved as soon as possible, for the sake of the service that S4C provides to viewers in Wales and across the UK, to S4C itself and the wide range of production companies – large and small across Wales. We fully support the Chairman and the Board in the present situation, and any discussion about their future at this point in time is not helpful. We condemn in the strongest possible manner the alleged actions of the previous chief executive.

There are proper and recognised channels for raising concerns and pursuing complaints. It is not social media. Promoting this narrative, is not helpful, especially in the week when £500million of cuts is being announced by the BBC.

The accompanying narrative that everything in the last 18 months has been a success and the previous years were a failure is at best misleading.

Content produced in Wales has been sold for years on the international market, very successfully, with drama series such as Hinterland and Byw Celwydd only two such successes. This has resulted in money being channelled back into the industry in Wales. We are only one of a number of companies that have been working internationally for years, with success. It provides value for money for content for the viewers, provides challenges and valuable learning opportunities for the staff, and helps raise the profile of Wales on the international market.

Ms Doyle also makes public her plan, executed successfully according to her, of reducing work to companies with a high turnover. Under Ms Doyle's plan, successful production companies appear to be punished, for no reason other than their relative success. We have been assured by S4C that this personal plan has never been approved by the S4C Unitary Board nor discussed with the channel's commissioners.

If the channel's Board or content commissioners were not aware of this policy, how was it possible that such a secret policy led to 'increased creativity and transparency'? It is a very, very troubling admission and serious questions remain about the business policies implemented by S4C over the previous 18 months.

We felt it was important to raise these issues with you as the allegations by the individual concerned are shared and inevitably discussed. It is with a great deal of sadness and disappointment that we must reflect that the damage inflicted upon S4C over the last two years risks discrediting the reputation of an important national public service broadcaster.

Yours faithfully,

Llion Iwan (Managing Director)  
Bethan Griffiths (Operations Director)  
Sioned Wiliam (Non-Exec Director)  
Phil Williams (Non-Exec Director)

*Cwmni Da Doc Fictoria Caernarfon Gwynedd LL55 1SR*

