

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

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Meeting Venue:

Committee Room 3 – Senedd

Meeting date: 19 June 2024

Meeting time: 09.30

For further information contact:

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Committee Clerk

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## Hybrid

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### Pre-meeting registration

(09.15 – 09.30)

### Public

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

(09.30)

#### 2 Welsh Government international relations: Scrutiny session with the First Minister of Wales

(09.30 – 10.30)

(Pages 1 – 62)

Vaughan Gething MS, First Minister of Wales

Andrew Gwatkin, Director International Relations and Trade, Welsh Government

Attached Documents:

Research brief

Welsh Government International Relations Annual Report 2023–24

#### 3 Paper(s) to note

(10.30)



**Senedd Cymru**  
**Welsh Parliament**

### **3.1 Welsh Government international relations**

(Pages 63 – 65)

Attached Documents:

Ministerial International Engagement – May 2024

Letter to the First Minister: Requesting information on the Rennes Declaration  
– 13 June 2024

### **3.2 Books Council of Wales magazine funding model**

(Pages 66 – 69)

Attached Documents:

Response from the Books Council of Wales: Providing the further information  
requested by the Committee with regard to the Magazine Franchise Tender –  
4 June 2024

### **3.3 Safeguarding the national collections**

(Pages 70 – 72)

Attached Documents:

Response from the Cabinet Secretary for Culture and Social Justice:  
Information in response to the Committee seeking reassurances from the  
Welsh Government around safeguarding the national collections – 5 June  
2024

### **3.4 Development of post-16 Welsh language provision**

(Pages 73 – 85)

Attached Documents:

Response from the Cabinet Secretary for Economy, Energy, and Welsh  
Language: Providing information in response to the Committee's questions  
relating to the development of post-16 Welsh language provision – 6 June  
2024

Annex A

### **3.5 Establishment and remits of committees**

(Pages 86 – 90)

Attached Documents:

Letter from Y Llywydd and Chair of the Business Committee: Inviting views on current committee remits – 22 May 2024

Annex

Letter to Y Llywydd and Chair of the Business Committee: Responding with the Committee's views on current committee remits – 13 June 2024

### **3.6 Six Nations rugby broadcasting rights**

(Pages 91 – 95)

Attached Documents:

Welsh Government response to the Committee's report on its inquiry into Six Nations Rugby Championship broadcasting rights – 10 June 2024

Annex 1

Annex 2

## **4 Motion under Standing Order 17.42 to resolve to exclude the public from the remainder of this meeting**

(10.30)

## **Private**

## **5 Welsh Government international relations: Scrutiny session with the First Minister of Wales: Consideration of evidence**

(10.30 – 10.40)

## **6 Public service broadcasting in Wales: Consideration of responses to the Committee's report**

(10.40 – 11.00)

(Pages 96 – 134)

Attached Documents:

Summary of responses

Welsh Government response

UK Government response

ITV Cymru Wales response

S4C response

BBC response

Ofcom response

**7 Forward work programme: Consideration of draft Terms of Reference for priority international relations work**

(11.00 – 11.10)

(Pages 135 – 138)

Attached Documents:

Draft Terms of Reference

**8 Welsh Government's Draft Priorities for Culture in Wales 2024–2030: Consideration of consultation**

(11.10 – 11.20)

(Pages 139 – 142)

[Draft Priorities for Culture in Wales 2024 to 2030](#)

Attached Documents:

Overview of consultation

**9 National contemporary art gallery: Consideration of draft correspondence**

(11.20 – 11.30)

(Pages 143 – 146)

Attached Documents:

Paper providing an overview of draft correspondence

Draft correspondence

**10 Scrutiny of the Arts Council of Wales: Follow on from scrutiny session on 6 December 2023: Consideration of draft correspondence**

(11.30 – 11.40)

(Pages 147 – 150)

Attached Documents:

Paper providing an overview of draft correspondence

Draft correspondence

## **11 Books Council of Wales magazine funding model: Functions of Books Council of Wales**

(11.40 – 11.50)

(Pages 151 – 154)

Attached Documents:

Research brief

## **12 The video games industry: Discussion following private stakeholder event on 2 May 2024 (2)**

(11.50 – 12.00)

(Pages 155 – 165)

Attached Documents:

Paper to support a discussion following private stakeholder event

Engagement findings

Document is Restricted



Llywodraeth Cymru  
Welsh Government

# International Relations Annual Report

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2023-24

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- Wales and Africa
- Wales' Relationship with Birmingham, Alabama
- Compound Semiconductors - the Wales Offer
- Bringing the World to Wales



# 1. Overview

Wales is an outward-looking and interconnected European nation, and this annual report provides an overview of our work at home and overseas to deliver our priorities, showcase our values and promote our nation in this globally connected world.

By building and developing connections to the wider world, we can showcase the very best of Wales by attracting jobs and investment whilst, at the same time, demonstrating our commitment to global responsibility. This means sharing learning and progressive values from a small nation and also our commitment to international sustainable development through work, including our Wales in Africa programme.

This year has continued to be impacted by global turbulence in terms of challenges including conflict, climate change and the cost-of-living crisis. Wales is not immune from these issues and, as an outward-looking nation, we have an important role to play through our international activity.

## International Strategy

Our activity is centred around the three aims of the [International Strategy](#); raise the profile of Wales, grow our economy, and demonstrate our commitment to global responsibility.

We work to *raise the profile of Wales* on the international stage. Over the last year, Wales has increasingly been seen as a thought-leader in issues such as our ambition to become the most LGBTQ+ friendly nation in Europe and to eradicate racism. Our innovative policy approaches in many areas - from the circular economy to basic income - are attracting international interest and stimulating connections. We are making important contributions to international priorities such as indigenous languages, through the UN Decade of Indigenous Languages, and through our partnerships with other regions across the world.

We have continued to develop and expand our relationships with regions by signing new agreements over the last year, including Silesia, Flanders, Birmingham (Alabama) and Baden-Württemberg, that cover areas where we can share learning and collaborate across many policies from energy and digital to culture and language.

Our Strategy sets ambitious plans to *grow the economy* in a challenging financial climate by attracting inward investment and supporting Welsh exporters to sell their goods and services overseas. Working with key partners, we are actively promoting Wales internationally as a prime destination for investment by highlighting areas of the economy where Wales has international class capabilities (including cyber, compound semiconductors, fintech, life sciences and renewable energy), showcasing these as opportunities for potential investors. Moreover, we maintain strong relationships with

existing investors, providing support to ensure their continued presence and growth within Wales.

In November 2023, we celebrated 50 years of Japanese investment in Wales by joining one of our global companies, Sony, at an event in Bridgend to mark this prestigious milestone which has been developed by Welsh Government teams in Wales and Japan for decades. Turning to exports, our Export Action Plan for Wales has supported Welsh companies to explore new markets overseas, identify new customers and grow their exports. Last year saw trade missions to a variety of markets including the USA, Middle East and Australia. We also undertook a trade mission to the Netherlands that was specifically aimed at companies who are new to exporting to show the practical support that Welsh Government can provide in terms of accessing a market and identifying customers. The USA, Germany, Ireland, France and the Netherlands all retained their positions as Wales' five largest export destinations.

The commitment to *global responsibility* remains at the forefront of our international activity. We have been sharing our ground-breaking Well-being of Future Generations approach with many parts of the world, as well as our progressive activity to support those in need, such as those fleeing conflict, or sharing our work on renewable energy innovation as part of efforts to tackle climate change.

In practice, this has seen us focus on activities which share Wales' values and learning. Last year, we shared the Urdd's Peace and Goodwill Message 2023 which plays an integral role in projecting Wales' values around the globe. This focussed on anti-racism and was available in over 50 languages. As part of this, we were also able to support reciprocal visits between Wales and Birmingham, Alabama bringing young people together to learn about each other's actions against inequality. We also worked with Academi Heddwch to develop international relationships - such as the one focussed on Peace and Health with the Norwegian Taiji Centre - reflecting our aim to promote peace through partnerships. Finally, we have responded to increasing global interest in our future generations approach, including welcoming a delegation of the Members of the Maharashtra Legislative Assembly to Wales for a range of discussions about how the Act is implemented and could be replicated elsewhere.

Our overseas network, in collaboration with colleagues in Wales, is vital to our aims at home and abroad. Through building networks and establishing enduring connections, we have raised awareness and secured influence. This is the first year that all of our offices have been able to operate without Covid-19 restrictions, which has allowed for events to take place across all of the corners of the globe where Welsh Government is represented.

We have also worked closely with the UK Government, specifically the FCDO, embassies and high commissions, to ensure that Wales is both understood and reflected in its activity. This approach respects that foreign affairs are not devolved but that the Welsh

Government has an important role in our international relations with others – something that has taken place for decades.

The next year’s activity will look to build on what has been achieved over the course of this year, with a particular focus on Wales in India 2024 and Wales in Japan 2025, also recognising the challenging financial context and continued global uncertainty.

## Prioritising International Engagement

Our profile is increasing. The pandemic placed a spotlight on devolution, as have some of our innovative approaches. Cultural and sporting successes have increased global awareness and understanding of Wales - from millions of people watching a television programme and knowing where Wrexham is to our appearance at a number of major international sporting tournaments.

The result of this spotlight has been an unprecedented demand for international engagement both at home and overseas.

More than 100 diplomatic and international visits took place in Wales – an increase on the number of visits we used to average before the pandemic. Every visitor, and every delegation, has been keen to learn more about our country, our approaches and our investment and business opportunities.

“More than 100 diplomatic and international visits took place in Wales.”

Ministers have welcomed leaders from our priority regional relationships, including the Minister-President of Flanders and the Marshal of Silesia. Ministers have also welcomed diplomatic representatives from across the globe, including the Ambassadors of France, Spain, Germany, Italy, Japan and the USA and High Commissioners from Australia and New Zealand amongst others. Having face to face engagement with international partners at home or abroad helps foster closer working relations and communicates ‘this relationship is important’.

There were many other significant international opportunities secured over the course of the year. We have attracted a number of high-profile events that have shown Wales as a global thought leader and outward-looking nation. The Future Generations Leadership Summit in Swansea, hosted by Swansea University and the Welsh Government, with President Bill Clinton and Secretary Hillary Clinton was an important opportunity to talk about Wales’ global influence and shine a light on this part of Wales. We welcomed leaders from across Europe who are members of the Atlantic Arc Commission - part of the EU Council of Peripheral Maritime Regions (CPMR) - to Cardiff, demonstrating our commitment to enduring links with Europe.

International ministerial visits took place where there were opportunities to add value and prioritise engagement. The creation of our Strategic Partnership Agreements with Wales Arts International, the office of the Future Generations Commissioner and the Urdd has added another layer to our stakeholder engagement and our impact during overseas events. Over the course of the year, they have been present at key events extending our reach to new audiences and helping to promote our key messages.

Sport, once again, has provided an opportunity to achieve high-level and high-impact engagement. The Deputy Minister for Arts, Sport and Tourism travelled to Paris and Bordeaux. She visited the new Aquatic Centre for the Paris Olympics, met with the Deputy Mayor for Sport, Olympics, Paralympics and Major Events to discuss the opportunities and legacy the Rugby World Cup and Paris Olympics 2024 will provide for the area. She spoke at the Tackle HIV launch event alongside former Welsh international and Lions rugby star Gareth Thomas, taking the opportunity to highlight Welsh Government's HIV Action Plan as well as visiting Musée d'Orsay to secure an art exchange between Wales and France.

The Minister for Finance and Local Government visited Lyon to undertake a programme of events to promote Welsh culture and showcase Welsh food and drink ahead of Wales' match against Australia.



The Minister visited Lyon's Rugby Village and attended a Wales Arts International showcase of Wales' diverse range of cultural talent, with performances by Qwerin, Carmarthenshire-based Urdd youth choir Côr Hafodwenog and Welsh soprano and BBC Cardiff Singer of the World finalist, Jessica Robinson. The Minister met with the CEO of Boccard, which recently opened its first UK operation in Broughton.

This was an opportunity to reaffirm the welcome that Wales has given to Boccard and reiterate the support that Welsh Government can provide to companies who are looking for opportunities to invest in Wales. She also hosted a food and drink showcase in partnership with Hybu Cig Cymru, Food Innovation Wales and Welsh food and drink companies.

France was recently named as Wales' number one export destination for food and drink, so this was an opportunity to bring together the best of Welsh cuisine, culinary and cultural talent at the home of French gastronomy - the *Cité Internationale de la Gastronomie* in Lyon.

The First Minister travelled to Paris and Nantes, which included a reception at the British Embassy and a visit to Louise Michel Elementary School to accompany the Urdd as it showcased its 'Chwarae yn Gymraeg'; a programme that introduces language and culture to children through play and activities.

All three ministerial programmes, when brought together, provided Wales with an incredible platform to highlight Welsh food, culture and language as well as reinforce important relationships with our economic and political partners.

The First Minister visited the Basque Country and Silesia. The purpose of his visit to Silesia was to sign a Memoranda of Understanding (MOU), setting out how we will work together to develop our relationships through economic, academic and cultural activities.



A Memorandum of Understanding was also signed with the German state of Baden-Württemberg, with the Minister for Economy travelling to Germany to sign the agreement in November. 2024 will see further work undertaken by the Welsh Government's team in Germany to develop this relationship further using the MOU as a basis. The Minister also travelled to the USA, visiting Alabama and Georgia in a programme that focussed on civil rights and unity.

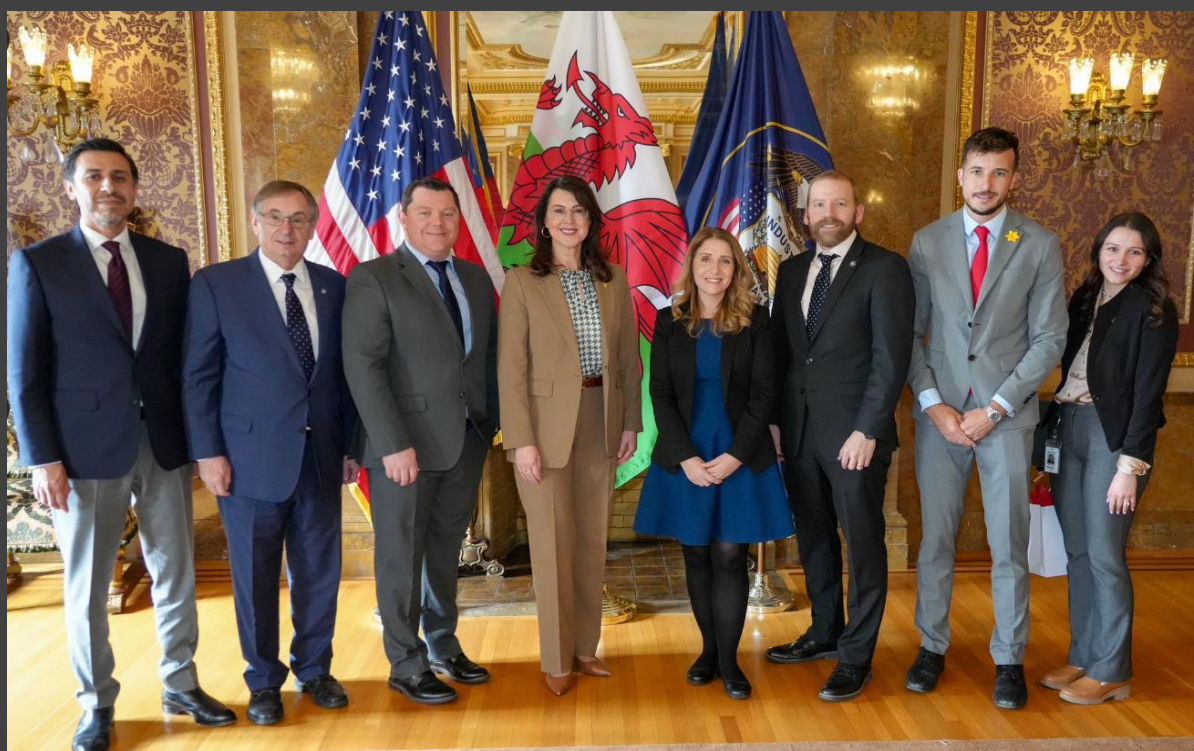
## Raising our profile through key moments

St David's Day was, once again, a focal point for the Welsh Government's work to raise Wales' profile on the global stage. Events took place across the overseas network, in London and in British Embassies, using this as an opportunity to highlight Wales' strengths to the world around the message 'do the little things' and how these little things can add up to make global impact.

The Minister for Social Justice travelled to Ireland to host the annual St David's Day reception, alongside a wider programme of engagements which featured meetings with a world leading clinical research company investing in Swansea, and with women leaders from commerce, government, cultural bodies and academia.

The Minister for Health and Social Services celebrated St David's Day in Mumbai, whilst also launching the year of "Wales in India 2024".

The First Minister once again travelled to Brussels for a programme of activities including speaking at an event on Wales' Future as a European Nation, meeting with the Minister President of Flanders to discuss progress on the MOU, meeting with Wind Europe to discuss the opportunities in Wales for the wind energy sector and hosting the annual St David's Day reception at the UK Ambassador's Residence, bringing together VIP guests from EU nations, regions and institutions.



St David's Day across North America continued to grow in its profile, helped along by the light currently shining on Wrexham. St David's Day receptions were held in Atlanta, Chicago, New York, Hartford, Salt Lake City, Washington DC and Montréal with guests from diaspora, US Cabinet members, business and alumni. Three events were held in Washington DC.

The first was a joint event with the Smithsonian showing the Welsh film, *Y Sŵn*, as part of “Mother Tongue Film Festival” and the promotion of the Welsh Government’s *Cymraeg 2050* ambitions; a reception with the Deputy Ambassador with Welsh food and drink and a performance from four Welsh singers from the Urdd; and a reception on Capitol Hill with the Friends of Wales Caucus in collaboration with Penderyn.

The Welsh Government’s office in Los Angeles hosted a series of events in Salt Lake City, marking the historical relationship between Wales and Utah and including a joint business event with Utah state government and stakeholders. We continued discussions with the state government on plans to bring a statue of Martha Hughes Cannon (the first female State Senator in the USA, and originally from Llandudno) to the National Statuary Hall at the US Capitol later in the year.

In Canada, a reception was hosted to celebrate St David’s Day in Montréal with attendance from diaspora, government, business and diplomatic contacts. In addition to celebrating Welsh culture and traditions, it provided an opportunity to discuss opportunities for future collaboration with key stakeholders.

In Dubai and Doha, the team organised St David’s Day receptions at the British Embassies during which Welsh food and drink were heavily promoted. Subsequently, Hybu Cig Cymru has developed some promising leads in the UAE and Qatar with potential distributors and supermarkets for exporting Welsh lamb.



The Dubai event also promoted the Welsh language, with an international school choir singing *Hen Wlad Fy Nhadau* and three songs by composer Robat Arwyn in Welsh. The main speech was also translated into Welsh. Both events featured key members of the Welsh diaspora, alumni and the local business community.

In China, St David's Day receptions were held in Shanghai, Beijing, and Wuhan, with HM Ambassador's attendance at the latter events supporting the impact.

In Japan, the team hosted a series of events across the country including a reception in Oita to celebrate the 2<sup>nd</sup> anniversary of the MOU between Wales and Oita and showcased a number of joint exchange projects in the arts, culture, education, tourism and business. A reception was held at the Ambassador's Residence in Tokyo for business contacts, diaspora and alumni from across Japan and highlighted a growing interest in Wales' Well-being of Future Generations Act.

We also took the opportunity to support other national and international days across the year including Diwali and St Patrick's Day in Cardiff building on our key priority relationships here in Wales.

## Office locations

The overseas network has undergone a slight change this year. In order to better align our overseas office locations with our objectives, we have changed the location of our West Coast USA office from San Francisco to Los Angeles. This gives greater access to a range of trade and investment opportunities that fully align to our priorities.

Asia	Europe	North America	Middle East
Beijing	Brussels	Atlanta	Doha
Chongqing	Berlin	Chicago	Dubai
Shanghai	Düsseldorf	New York	
Bangalore	Dublin	Los Angeles	
Mumbai	Paris	Washington DC	
New Delhi	London	Montréal	
Tokyo			



## 2. Global Network

Our overseas offices network is split into three regions: Europe, North America and the Middle East and Asia. Each region has a focus tailored to its strengths, and Wales' interests, as outlined in their international remits. This section sets out highlights of activity undertaken in each region during 2023-24.

### Europe

Europe remains a key focus for our international work. Our offices in Europe continue to proactively engage with European institutions, networks, nations and regions to demonstrate that Wales remains an active part of Europe and increase our reputation as a trusted partner.

There has been a significant ministerial presence across Europe over the past 12 months with Ministers travelling to France, Germany, Belgium, Poland and Ireland.

This year we have signed four new international agreements with European partners, which set out areas of cooperation and closer ties with those countries and regions where we have shared interests. This includes:

- A new Memorandum of Understanding (MOU) and action plan with Flanders - in June 2023, the Minister-President of Flanders visited Wales with the primary purpose of signing this MOU. The First Minister also met with the Minister-President during his St David's Day visit to Brussels.
- The re-signing of our longstanding MOU with Brittany marking 20 years of the Wales-Brittany relationship.
- The new 'Rennes Declaration' signed at the Celtic Forum by six partners to strengthen inter-celtic cooperation.
- A new Shared Statement and action plan with Baden-Württemberg, signed by the Minister for Economy during a visit to Stuttgart.
- A new MOU and action plan with Silesia, Poland – the First Minister travelled to Poland in order to sign the Agreement, which followed a visit to Wales by the Marshal of Silesia in March 2023.

In Brussels, we have seen increased engagement with EU institutions, strengthened by the engagement with the Welsh Government's Representative on Europe. Highlights include:

“ We have signed 4 new international agreements with European partners, which set out areas of co-operation and closer ties on our shared interests. ”

- Minister for Economy address to the European Parliament Regional Development Committee on Wales' approach to European regional engagement. Wider programme of meetings with MEPs, CPMR, and visit to IMEC research facility in Leuven.
- Deputy Minister for Social Partnership visit, which included meetings with the President of European Economic and Social Committee, MEPs and EU representatives to discuss the Social Partnership Act and how we can engage with EU institutions going forward.
- Addressing the European Parliament's Committee on Culture and Education as part of its inquiry on UK-EU mobility. The meeting provided the opportunity to highlight the Taith programme and to emphasise Wales' commitment to European engagement.
- Hosting the CPMR Atlantic Arc Commission General Assembly in Cardiff – bringing together ministers and senior officials from a range of EU regions, plus Québec, to discuss strengthened inter-regional cooperation in the Atlantic area. The event was jointly delivered by the Welsh Government Brussels and Cardiff offices and the Senedd.

With France as the dedicated country for our 'Wales in...' campaign, and the host of the Rugby World Cup, France was a strong focus for Wales in 2023-24. Three Ministers were in France for the RWC promoting Wales and widening our relations in Paris, Bordeaux, Lyon, Nantes and Marseille. There was a strong focus on food and drink promotion across the cities, following a Food and Drink trade mission earlier in the year, and a strong focus on company engagement. Our key partners – Wales Arts International and the Urdd - enabled us to also have a strong cultural element across key cities with the Wales in France year, establishing a new Wales in France Cultural Fund (jointly funded with the British Council). Six projects were funded to a value of £100,000. More information on the activity and outcomes of Wales in France is contained in the case study on page 29.

Our Paris office supported the Welsh presence at European Cyber Week in Brittany and the World Nuclear Exhibition in Paris. Other low carbon economy activity included engagement with Pays de la Loire and Hauts de France regions on green energy, and the team helped secure a French business delegation to the Marine Energy Wales Conference.

We have worked with food and drink companies entering the French market and with partners to support Welsh exporters experiencing difficulties with customs checks at the French border. The team's intervention prevented the destruction of a £200,000 value food export.

2024 is the 20-year anniversary of the Wales-Brittany relationship. Celebrations will include a visit by the President of Brittany to Wales, marine energy engagement and a joint project between BBC National Orchestra of Wales and Orchestre National de Bretagne.

In Germany, our activity has been focused on North Rhine-Westphalia and Baden-Württemberg, with the Minister for Economy visiting both states at the end of 2023 to support trade missions and strengthen trade and investment opportunities. Activity in North Rhine-Westphalia included meetings with industry and clusters around collaboration on German circular economy projects linked to Wales hosting the Circular Economy Hotspot in October 2024, as well as support to a Welsh delegation of 23 Welsh exhibitors at MEDICA in Düsseldorf - the world's largest medical trade fair.

The team also addressed the UK-North Rhine-Westphalia Parliamentary Group, discussing international student exchange, the German language in Wales, links with Germany post-Brexit and net zero. We are in discussion with the Parliamentary Group about a visit to Wales in 2024.

Teams in Germany and Cardiff have spent the last 12 months preparing the ground for Welsh Ministers to sign a Shared Statement of Cooperation with Baden-Württemberg (B-W). The Economy Minister signed the Statement on behalf of the WG and held bilateral meetings with B-W Ministers on life sciences and wider economic and shared interests.



We represented Wales at the Four Motors for Europe conference on e-mobility, as well as the Automotive Suppliers Day in Stuttgart, showcasing Wales' assets and expertise to experts from a range of European regions. We also attended the Battery Show in Stuttgart, planning next steps with the B-W mobility cluster around hydrogen, 5G research, market access workshops and the Stuttgart automotive suppliers' day.

Building on our sports diplomacy focus, we supported the Urdd (in partnership with the Football Association of Wales) to deliver a “Chwarae yn Cymraeg” activity with a partner school in Sinsheim in the lead up to a UEFA Nations League women’s football match. This activity helped to raise awareness of Cymraeg, and to show support to the Wales women’s team. The office also represented Welsh Government at the UK-German Cultural Commission at the German Foreign Office, co-chaired by the UK Minister for Europe and German Minister for Cultural Relations. This was the first meeting of this Commission since 1993.

Working with the Bavarian Representative to the UK, we brought together academics, industry and policy makers for a virtual AgriTech Roundtable between Bavaria and Wales. The meeting discussed some of the biggest challenges and interest areas in agritech to establish key shared interest areas. This engagement led to our presentation on Wales-Bavarian agritech links to the UK-Bavaria Steering Committee, chaired by the Bavarian Minister for Europe and the UK Parliamentary Under Secretary of State.

Engagement across other German states included supporting the trade mission of Welsh publishers at the 75th Frankfurt Book Fair and attendance at Semicon Europa, providing the opportunity to meet companies looking to engage with the Welsh cluster and the President of Semi, ahead of the launch of Semi UK in Cardiff, which brings leading decision makers to Wales from some of the world’s leading semiconductor companies.

Ministers and officials have continued to work together throughout the year to deliver the Ireland Wales Shared Statement and Joint Action Plan. The Ireland office has built on existing policy exchanges and established new areas of collaboration within fields such as agriculture, forestry and peatlands, enterprise and trade, education, innovation and finance. Throughout the year, the team has worked directly with Irish exporters and relevant policy teams in the Ireland and UK governments on the role of new border controls which impact trade channels from Ireland into Welsh ports.



The Dublin office has further celebrated the cultural links at the Other Voices Festivals in Dingle and Aberteifi, with the First Minister opening the Festival in Aberteifi, participating in a panel session and hosting a reception. Further opportunities were secured in Ireland for Welsh artists at key cultural events such as the Dublin Fringe festival and St Patrick's festival.

The Ireland team has supported visits across the year, including facilitating the International Relations Senedd Committee's two-day visit programme investigating the Wales Ireland relationship and Universities Wales' visit to establish connections with the British Council, Irish University Association, Trinity and University College Dublin. The office delivered a two-day visit for the Minister for Social Justice and Chief Whip in Dublin, which included two receptions for Ireland Wales stakeholders as part of St David's Day celebrations.

The Ireland team has focused strongly on trade and investment opportunities and supported Welsh businesses at the Dublin Aviation Summit, World Offshore Wind Conference, Dublin Tech Summit and ARVR conferences. Furthermore, the team has connected Welsh businesses to sector opportunities in Ireland around key sectors such as Life Sciences and Aerospace and attended Explore Export events in Wales.

The team has supported reinvestment projects by Irish businesses with an existing footprint in Wales throughout the year. The team celebrated Irish investment in Wales through events with the British Irish Chamber of Commerce and an investor dinner hosted by the UK Ambassador in Dublin. A direct result of the ongoing work has seen a world leading clinical research organisation headquartered in Dublin grow and create new roles at its Swansea base this year.

The 2023 Ireland Wales Ministerial Forum took place in Bangor in October with the First Minister, Minister for Rural Affairs, North Wales and Trefnydd, Minister for Economy and Minister for Climate Change hosting the Tánaiste and Irish Government's Simon Harris TD, then Minister for Higher Education and Skills, now Taoiseach. The two-day programme included site visits and roundtable discussions showcasing a variety of Wales' strengths.

The Forum continues to forge new connections and deepen the bilateral relationship across many themes and sectors.



This year, it enabled greater cooperation and engagement between respective organisations in the Maritime, Renewable Energy, Language, Agritech and Environment sectors and has led to further meetings and reciprocal visits between Ireland and Wales on shared challenges and policy exchanges.

## North America

In North America, our growing relationship with Alabama and sports diplomacy continued to provide a backdrop to some of the main strands of work over the past 12 months.

Our strengthening of cultural relations with Alabama saw the University of Alabama Birmingham Gospel Choir visit Wales in partnership with the Urdd, and a visit from the Minister for Economy to sign the Wales-Birmingham International Friendship Pact in the autumn. As a result of our developing relationship, our offices have held a series of meetings, including with the Mayor's Office on progressing the goals of the Pact, the University of Alabama at Birmingham - which is working with Cardiff University on medical student exchange - and meetings with industry leaders in Birmingham on investment opportunities focused on life sciences and tech. Economic partnerships are being explored and there is a potential visit to Wales by a Birmingham business and cultural delegation in Summer 2024. More information about the Minister for Economy's visit, and our relationship with Alabama can be found on page 36.

14 additional members were added to the Congressional Friends of Wales Caucus, increasing the Caucus by 70%. This achievement has been delivered following successful relationship building during the Minister for Economy's visit to Birmingham, and the wider team co-hosting an event with the House Chiefs of Staff Association, amongst others. This, and the 10-year anniversary of the Caucus, was celebrated at a 'State of the Whisky' event in the US Capitol before the State of the Union and in collaboration with Penderyn.

“...14 additional members were added to the Congressional Friends of Wales Caucus, increasing the caucus by 70%.”

Sports diplomacy was a strong focus for the team with the 'Summer of Welsh Soccer' taking place across the USA. Wrexham AFC played four games in the USA and the US Women's National Team invited Cymru to play in San Jose. The offices collaborated with Visit Wales to promote Wrexham and Wales as tourist destinations at the Wrexham games, whilst investors were hosted at all matches to showcase Wales as a destination to do business. Likewise, in collaboration with the FAW, we used the Cymru game to promote Wales as a business destination – a company attending one of these matches later invested substantially into Wales. In addition, the US team promoted two teams from Wales at the Homeless World Cup in Sacramento (the first iteration of the Cup took place in Wales). In October, we partnered with the Georgian and Portuguese Embassies in Washington DC on a Rugby World Cup event celebrating 'Group C' nations.

This year, we also advanced a number of educational partnerships. We worked with Global Wales to host an event to celebrate its renewed partnership with the Gilman Scholarship Program, the Welsh Government's Seren and Taith Schemes and supported

the signing of an MOU between Universities Wales and Universities Canada. The team also supported the new partnership agreement between the University of Illinois and Cardiff University, which creates a £200,000 per year joint mobility fund for 5 years. This was the culmination of more than 3 years of relationship building and marks the beginning of a significant new chapter of collaboration.

Over the course of the year, the North America team has maintained a presence at key conferences. Teams across the region supported a Welsh presence at the AI summit in Montréal, RSA Cyber and Game Developers conferences in California, MRO Americas in Atlanta and the Healthcare Information and Management Systems Society annual conference in Chicago, amongst others.

On the trade side, it was announced that the USA is now the No. 1 export destination for Welsh businesses. Throughout the year, the team has supported Welsh businesses in various ways - from 1:1 advisory meetings to support at conferences. The team provided export advice to Wales-based companies looking to expand into the Midwest and worked with US investors promoting Wales as a destination for business. This was celebrated on St David's Day when a joint reception was held with the Welsh Government and the company. The importance of trade conferences was reflected at Game Developers Conference (GDC) in 2024 where it was revealed that, as a direct result of the Welsh Government trade mission in 2023 to GDC, \$1.6m worth of trade deals had already been generated.

In support of the semiconductor industry, we attended the Semicon West Conference in San Francisco, holding meetings with key companies in the cluster, and meeting with the US Commerce Department to discuss areas of collaboration under the CHIPS Act. We co-sponsored an event discussing UK-USA collaboration in semiconductors at the University of Arizona and are exploring joint research programmes with Welsh universities.

On the investment side, the USA remained the largest inward investor into Wales. As a direct result of the semiconductor activities, we worked with a major design studio that is anticipating creating a presence in Wales. This work also enabled the team to manage relationships with major investors into Wales – for example Vishay, which has acquired Newport Wafer Fab for \$177m.



In gaming, this year Rocket Science chose Wales as its European HQ having begun conversations with the Welsh Government at Game Developers Conference in 2022. The company was welcomed as part of the Welsh delegation to the 2024 Conference. A more detailed account of Wales' journey to become a leader in the compound semiconductor industry can be found on page 39.

In the life sciences sector, we supported a Welsh delegation to BIO life sciences conference in Boston, facilitating and participating in conversations between NHS Wales and US companies, The North America team also travelled to Wales to meet with key stakeholders and priority clusters and held networking events providing 1:1 support for more than 20 companies looking to export to the USA and Canada.

The team also attended and supported the North American Festival of Wales. Through Welsh Government support, the Festival hosted the first ever free 'open air' street event celebrating Welsh music on the streets of Lincoln, Nebraska. We attended the Earthshot Innovation Summit and participated on a panel (with former US vice-president Al Gore) at New York Climate Week.

Welsh food and drink were promoted at the Summer Fancy Food show in New York City and a 'Taste of Wales' reception at the Consul General's residence in New York which connected producers with buyers.

On US soil, for Pride month, the offices joined local celebrations in Washington DC, New York City and Chicago, working to raise the profile of Wales and our ambition to be the most LGBTQ+ friendly nation in Europe.

Activity in Canada focussed on the creative sector during the second half of the year. The office partnered with FOCUS Wales to deliver an official 'Wales at BreakOut West' reception on the opening night of the music conference in October and a music showcase and Wales reception at M for Montreal in November. The events helped to strengthen our relationships, increase connections, showcase Wales and promote Welsh language music.



The office also jointly hosted a screening and reception of a Welsh film, 'Chuck Chuck Baby', at the International Film Festival of Ottawa with the Deputy High Commissioner. It was an opportunity to celebrate the art of film and to connect with fellow film enthusiasts – showcasing Wales at an International Film Festival. Under the direction of the Declaration of Intent, we continue to work closely with the Québec Government on our Joint Call for Proposals, which is now in its fourth year.



## Middle East North Africa and Asia (MENA)

Preparations for our presence at COP28 UAE started early, including regular meetings with UK and Welsh stakeholders to plan and support elements of Wales content and the promotion of Wales as a globally responsible nation. This involved engagement with representatives from business, innovation, the third sector, Future Generations Office, Climate Cymru, Size of Wales, several Welsh universities and the arts.

In the run up to, and during the Conference, the team helped promote renewables company Dulas, Respiratory Innovation Wales, Swansea-based EFT Consult, Infinite Renewables, Atlantic College, Swansea City Council, Swansea University and University Wales Trinity St David's partnership with KPMG/OSC/Augment City to develop a digital twin of Swansea, Bangor University and the Mbale biodegradable potting bag project. Assistance was also provided to Welsh Government Climate Change officials who took part in plenary sessions at COP28. The team engaged with the former Future Generations Commissioner, Sophie Howe, who participated in the Dubai Future Forum panel sessions, and, with the help of the office, the Dubai Future Foundation has reached out to the Office of the Future Generations Commissioner for Wales to invite him to participate in Dubai Future Forum 2024.

There are a number of established exhibitions and conferences across the UAE that were attended by Welsh companies on Welsh Government organised trade missions. These include Arab Health, Gulfood and ADIPEC.

The overseas office helped support 15 companies at ADIPEC energy show with a further 8 joining a concurrent multi-sector export market visit, 13 food and drink producers at Gulfood and 21 companies at the Arab Health and Dubai multi-sector export market visit. The team has assisted more than 100 companies in their export journeys over the past year across a variety of sectors throughout the region.



Networking events were organised for the trade missions, including a reception at HM Ambassador's Residence for the ADIPEC trade mission attended by the Ambassador, and a reception in Dubai for the Arab Health trade mission for Welsh diaspora and business contacts. The team also hosted a multi-sector export market visit to Qatar and a virtual tech export cluster trade mission to UAE, supporting 13 cluster members with local market intelligence and key contacts.

On investment, the team facilitated a presentation on the ARTHUR nuclear medical radio-isotope project by the Chief Scientific Advisor's Office to HM Ambassador Qatar, DBT investment teams in UAE and Qatar and the Office for Investment. This followed interest from the Qatar Investment Authority during the Economy Minister's World Cup visit in 2022. Support was also provided to 4 potential capital investment projects.

“ The team has assisted over 100 companies in their export journeys over the past year. ”

The team assisted visits by the Global Centre for Rail Excellence to UAE for meetings with potential investors and the development of an MOU with the UAE's national rail company.

To help expand our reach across MENA, and explore further opportunities for Wales, the office visited Saudi Arabia and Kuwait in November to scope both markets and develop a network of contacts.

Throughout the year the team has been instrumental providing support to Welsh Ministers and facilitating meetings regarding the possible re-establishment of the Doha-Cardiff route.

During the Destination Middle East promotion in the UAE and Qatar, the team supported Welsh food and drink launches at key supermarket retailers alongside a Chef's Table Dinner in Dubai targeting the hotel, restaurant and catering sectors. The British Embassy Qatar showcased Welsh food and drink at HM King's Coronation Party and Hybu Cig Cymru showcased Welsh lamb at Gulfood in Dubai. Daioni Organic milk re-entered the UAE market following a successful Gulfood trade show in Dubai last year; its organic milk range is now on sale in major Dubai retailers. Edwards of Conwy and Tŷ Nant water have also entered the UAE market with support from the office. The team is also helping companies tackle some market access barriers working with DEFRA colleagues in the region.

Work has continued building diaspora networks in the UAE and Qatar. The team regularly attended Global Welsh Middle East Hub networking events with diaspora in Dubai and new connections were made with Welsh diaspora at the Sharjah Performing Arts Academy. The team organised specific business networking events for Welsh diaspora and Welsh companies with a presence in the region throughout the year, including deploying our Welsh Government Envoy for the UAE to chair a business roundtable. The team also meet with the Envoy on a regular basis and refer new exporters to him for advice and contacts.

The offices in MENA have continued their work with Welsh Universities. The team provided support to IBERS regarding agritech research collaboration and student recruitment and assisted visits from Cardiff University to Qatar and Kuwait, as well as

Swansea University's to visit to UAE. The team has also provided on-going support to Bangor University's International Team and has been developing stronger alumni links.

The MENA team worked with Amgueddfa Cymru to host curators and educators from the Museum of Islamic Art Qatar in Wales - a legacy of the First Minister's visit to Qatar during the FIFA World Cup 2022 - and supported the Urdd's Rugby 7s women's team visit to UAE as it participated in the Dubai Rugby 7s.

Other cultural aspects included ongoing planning for a visit to Wales by Qatar's Katara Cultural Village to develop its partnerships with Amgueddfa Cymru and other cultural organisations and the facilitation of calls between the Welsh National Opera and the Abu Dhabi Music & Arts Foundation to explore potential collaborative projects. Ongoing support was also provided to Wales Arts International and Burum jazz band for a visit to Qatar to participate in a jazz festival.

In addition to the proposed inward visit by Katara Cultural Village, the team supported the inward visits of HM Ambassador to Qatar to Wales and the Crown Prince of Bahrain's visit to the UK, with the team briefing the Prince of Wales to raise opportunities in Wales. The team also led discussions with the UAE-UK Business Council and the UAE Embassy to discuss a potential visit to Wales by the UAE Embassy London team with an in-bound business delegation from the UAE.

We now have a fully staffed team in India who have dedicated substantial efforts to forging business and political connections, as well as launching the 'Wales in India' campaign, with 18 events having taken place in the first quarter of 2024. The campaign was launched by the First Minister and the Minister for Health and Social Services at simultaneous St David's Day events at the Indian High Commission in London and in Mumbai. It is a year-long campaign to promote ties between 'Two Nations of Culture and Innovation' with the objectives of fostering new trade and investment opportunities, promoting cultural, artistic, and educational ties, and supporting healthcare activities.



Throughout the year, a series of Welsh Government Investment Roundtables were organised, which drew more than 200 participants. These were held in key cities such as Mumbai, Bengaluru, Jaipur, and Thiruvananthapuram. The team also attended several exhibitions, including Bengaluru Tech Week, a cyber-security conference in New Delhi and several business events alongside the Department for Business and Trade (DBT). Notably, in Kerala, the Minister for Health and Social Services hosted the inaugural Welsh-Indo Med-Tech Conclave under the 'Wales in India' banner. Additionally, the Minister engaged with numerous pivotal partners who maintain a significant presence in Wales, further solidifying these crucial international links.

The team has supported several Welsh businesses with the potential to export to India across medtech, aerospace, renewables and food and drink, with plans launched for a trade mission to India in May 2024. The team also attended key global trade events that host a large presence of Indian companies including at ADIPEC, Gulfood and Arab Health. Alongside DBT, the team supported a delegation of 20 Indian businesses attending London Tech Week to visit Wales and see what Wales has to offer.

Throughout the year, a significant amount of effort has been made to raise Wales' profile across India and to promote education, culture, sports, and our values as a nation. A strong relationship has been formed with Maharashtra legislators around the Well-being of Future Generations Act, with two delegations visiting Wales on a fact-finding mission and a conference in Mumbai hosted by the Speaker of the Legislative Assembly alongside the Minister for Health and Social Services and the Future Generations Commissioner. Maharashtra legislators are now exploring their own version of the Act as a Private Members' Bill.



The team has worked closely with Global Wales and various educational institutions to enhance connections with India. Their efforts have spanned from aiding research projects to collaborating on curriculum developments and fostering relationships with key incubators. Notably, the Minister for Health and Social Services met with T-Hub, one of the world's largest start-up incubators. Global Wales secured an MOU with T-Hub, which also included a visit to Wales for business discussions, during which they joined the First Minister's Diwali celebrations.

With Wales Arts International, Literature Wales and the British Council, Wales took centre stage at one of the world's largest literature festivals in Kolkata where one of our poets laureate led discussions on language and identity. The team also supported the Wales

Over 60s Cricket Team during its participation in the Chennai World Cup and held several discussions with Glamorgan Cricket Club on in-market support. Wales also took part in Mumbai Pride, alongside diplomats from more than 10 different countries, and hosted an LGBTQ+ reception for community leaders during the Health Minister's visit. The Minister also supported the announcement between the Urdd and Her Future Coalition, an organisation that seeks to support women and girls who have experienced gender-based and sexual violence.

The team has worked extensively with Health colleagues to support and deliver on their objectives in India including the announcement of an MOU between Wales and Kerala on the recruitment of internationally educated clinical practitioners during 2024-25 consisting of up to 250 nurses, doctors and other healthcare professionals through the implementation of the MOU framework. During her visit to India, the Minister for Health and Social Services met with the Chief Minister of Kerala to sign the MOU and hosted a reception for families of nurses in Wales and for those soon to come to work in Wales. A recruitment event in Kerala is being planned for June 2024.

In Japan, over the year, activity has focused on strengthening relationships including those following the Oita MOU signed in 2022. The MOU included an Oita delegation visit to Wales in October for meetings with Welsh Government, the National Museum of Wales, WRU and Cardiff University and an Aquarium joint project between Umi-Tamago and Anglesey Sea Zoo.

There were a significant number of other inward visits into Wales from Japan covering inward investment, R&D links with universities, tourism and culture. Business visits included Marubeni Europower, the Executive Vice President Daiwa House, Honda, Toshiba, Rohm, Sumitomo Electric Industries, NEDO, JETRO and Kyushu Institute of Technology with many bringing wider delegations.

Trade and investment work has had a particular focus on renewable energy again this year, mainly around identifying business collaboration in the Celtic Sea Offshore wind projects and supporting investment into Welsh projects. In February and March, the team attended the Celtic Sea Floating Offshore Wind business seminar and promoted Wales at Wind Expo 2024. Marubeni was also chosen by Bridgend to deliver an AEMS (Advanced Energy Management System) utilising Green Hydrogen produced under a Japanese NEDO-funded project. This will bring investment worth £147 million into the region and

“ The establishment of the MOU between Wales and India will help recruit clinical practitioners consisting of up to 250 nurses, doctors and other healthcare professionals, over the course of the next year. ”

resulted in an MOU being signed between Welsh Government and NEDO for the first time.

Activity to promote Welsh strengths in compound semiconductors was another area of focus for the team, including participation at Semicon Japan in December 2023 and delivering a business seminar on power electronics in collaboration with DBT and SiC Alliance. The team also leveraged the UK-Japan Hiroshima Accords, signed in July, to forge links between Wales and Japan in cyber security, with the inauguration of Cyber Hiroshima (the Japanese branch of Cyber Wales) marking a milestone in the development of the Wales-Japan relationship in the Tech sector.

In October, we supported a multi-sector trade mission of 6 Welsh companies to Tokyo which included a reception for 60 guests at HM Ambassador's residence, and the annual food and drink trade mission to FOODEX in March.



Our investment into our relationships with existing Japanese investors has continued across the year and we were pleased that Panasonic cemented its ongoing commitment to Wales by announcing up to £20 million investment in its facility in Cardiff to roll out a state-of-the-art net zero power system, as part of its ambition to use the site as a centre of excellence for green technologies in the UK.

“ Panasonic cemented its ongoing commitment to Wales by announcing up to £20m investment in its facility in Cardiff. ”

Panasonic's self-sustaining system makes use of hydrogen fuel cell generators, photovoltaic generators, and storage batteries and will strengthen Panasonic as a key supplier in assisting customers achieve net zero.

The team continued to support the strengthening of links between individual regions of Wales and Japan. Aberystwyth University signed an MOU in 2023 with Oita University and renewed MOUs with Yosano town and Matsumoto college in Nagano to continue summer school programmes, whilst Yosano town in Kyoto also signed an MOU with Aberystwyth on peace and friendships. In September, Himeji welcomed a visit by the Mayor of Conwy to celebrate 30 years of UNESCO's World Cultural Heritage accreditation of its castle, which is twinned with Conwy Castle. The Mayor met Japanese travel agents, visited local elementary schools and joined our Japan office's business networking dinner involving the Himeji Chamber of Commerce and major Japanese companies focused on de-carbonisation projects.



An increasing focus of the team has been increasing awareness of Wales as a globally responsible nation. The team exhibited at an Earth Day Tokyo event with the Afan Forest Woodland Trust, founded in Japan by the late C.W. Nicol, and spoke about biodiversity. Meetings have also taken place with parliamentarians and NGOs who are keen to find out more about Wales' experience of implementing its Well-being of Future Generations Act.

In January and February, the team met with the Government of Hokkaido and organisations representing Japan's indigenous community - the Ainu - to highlight our support for minority languages and discuss opportunities for collaboration.

Part of the year has also been preparing for Wales' presence at Osaka EXPO 2025 and the Wales in Japan 2025 campaign.

In China, it was the first year after the lifting of Covid-19 lockdowns, and 2023-24 was mainly driven by the market requirements of the education sector in Wales. There has been significant year-round support to promote Welsh universities and colleges on various joint programmes, sister schools, student recruitment partnerships, research projects, and alumni network development.

Meanwhile, a lot of effort has been put in place in preparing for meeting the demands by the emerging middle class, such as premium consumer products, medtech and public health care and services, as well as tourism promotion, plus the fields of new energy vehicle and consumer electronics.



In reflecting the requirements set by the education organisations, there were a lot of visits to China related mainly to the education sector. The team supported all visits and delivered education promotion events in market. Some highlights include:

- Neath Port Talbot College: two market visits to Northern China and Shanghai - 30 meetings were held, and 8 MOUs were signed. One regional centre of NPTC's Centre of Excellence for British Vocational Education in China (CEBVEC) was set up in Shanxi, and a Sino-British Centre for Industry-Driven Vocational Education was set up at NPTC by a partner (First Landing) from Beijing, building a good foundation and platform for NPTC to continuously conduct revenue-generation activities in the future, including teacher training, student exchange, curriculum mapping, and joint programme development.
- Cardiff and Vale College visited Chengdu in March and June for the MOU signing with the Fan-Mei Education Group. Their joint education programme on aircraft engineering is due to be approved soon.
- Four higher education promotion events were organised in Chongqing and Kunming in May, building up a platform for 8 Welsh universities to engage with agents, education authorities and universities in the region.



Opportunities generated include an MOU between Wrexham Glyndwr University and Southwest Forestry University on joint education programmes in Renewable and Sustainable Engineering.

- Cardiff University visited Shanghai and Beijing for Alumni events resulting in alumni database increasing by 120 and WeChat followers increasing to 5,000.
- Cardiff University conference on 'Biodiversity Protection and Poverty Alleviation through Urban Planning and Design' in Guizhou to present Welsh advances in sustainable development and biodiversity protection.

There were several inbound visits into Wales, including Yunnan Provincial Education Department to Wrexham Glyndwr University, a delegation from Southwest Jiaotong University to Cardiff University. The team also supported the first summer school from Chongqing No.1 Secondary School with Gower College, funded through Taith.

On the trade side, notable success includes Health & Her signing its first contract and Green Earth reaching an exclusive distribution agreement. During the year, the team attended the 7<sup>th</sup> World Intelligence Congress in Tianjin, the China International Senior Service Expo in Beijing, the China Medical Equipment Fair in Shanghai, Smart China Expo in Chongqing, Food and Hotel China in Shanghai, Alcoholic Expo in Guizhou, and DRiNK Awards in Xiamen, to promote and identify trade opportunities. The team also attended the China International Fair for Trade in Services in Beijing. Export support was provided to Welsh companies across a variety of target sectors including medtech, greentech, IT, consumer products, food & drink and TVET. The team also recruited 4 Chinese buyers for attendance at BlasCymru in November.

“Significant support was provided to the higher education sector helping to establish cooperation agreements, joint programmes and visits. 2023 also saw the first summer school to Wales from Chongqing, funded through Taith.”

On investment, the team maintained the relationship with existing investors including HKC and ABClonal to explore reinvestment opportunities. The team also proactively identified new inward investment leads. Six new leads were generated, with two from the automotive sector. With automotive replacing real estate as China's no. 1 pillar industry, the team sees big potential for Wales in the automotive and electrical vehicle sectors. Good relationships with China Association of Automobile Manufacturers (CAAM) and China Society of Automotive Engineers have been developed to lay the foundation for future work.

The team also attended the Greater Bay Area Conference in Shenzhen, MedTech FDI Roundtable in Chongqing, and Investment Salon on Tech & Innovation in Chengdu, to promote Wales as an investment destination, and worked with DBT to bring a Consumer Electronics & Service Robotics delegation to Cardiff in March.

As China removed its Covid-related travel restrictions, the team re-started promoting tourism and highlighted outdoor adventure resources in Wales as a unique selling point. The team worked with Kendal China and Visit Britain on several offline events. This resulted in Kendal China bringing a business delegation on a 7-day exploration and business-matching tour to North Wales in October. A new trekking tour to the UK, including a 3-night stay in Snowdonia is being developed and promoted by Kendal China.

In terms of regional relations, the team was involved in Cardiff City Council's visit to Xiamen to celebrate the Cardiff-Xiamen 40<sup>th</sup> Anniversary of Sister City Relations and the 5<sup>th</sup> anniversary of sister city relations between Swansea and Wuhan was also promoted. Exchange visits were made from Xiamen to Cardiff and Wuhan to Swansea to strengthen the regional relations.

Other activities to raise profile of Wales included attendance at the King's Coronation and King's Birthday Party in Beijing, Shanghai, Chongqing, Guiyang, Kunming, and Chengdu, where the team hosted Welsh diaspora, alumni and key business contacts.

# 3. Case Studies

## Wales in France 2023-24

Wales in France was a collaborative initiative convened by the Welsh Government to spotlight resource and focus on France.

The year sought to utilise the profile-raising opportunities of the Rugby World Cup and work with partners within and outside of government to raise Wales' profile both in France and on the world stage, furthering economic and international relations objectives by delivering strategic activations with focal cities and priority sectors where long-term, equitable and sustainable partnerships could be catalysed.

The promotion of contemporary Welsh values on an international stage was at the heart of all activities, with young, ethnically diverse, female and LGBTIQ+ voices platformed throughout the programme as well as consistently raising awareness of the Welsh language, history and culture. From a business perspective, we maintained our commitment to deliver economic growth and net zero through green energy, decarbonisation and sustainable policies for future generations.

France is an economic powerhouse for Wales; there are 80 French companies operating in Wales, employing more than 10,000 people. France is also the number one export destination for Welsh food and drink.

Overall, the year supported five trade missions to France, four inward delegations and seven strategic activations in the green energy and marine renewables space. This included a Welsh-French organised and First Minister-led symposium which built on a year of focused engagement with the eleven French companies and Welsh delegation present.

Many of the culture, sports and education-based projects of the year were also enablers that provided an



engagement or profile-raising opportunity targeted to high-priority economic stakeholders. Early figures indicate that at least £30 million of investment into Wales has been secured, supporting more than 1,000 jobs.

Welsh culture is a huge strength in terms of promoting Wales on the world stage. Artists were vital in supporting the year's international relations aims – we had Tredegar beat-boxer Dean Yhell delighting Ambassadors and titans of industry at the British Embassy, National Dance Company Wales doing a half time performance at a packed Stade de France and Hijinx sharing expertise in disability theatre in Lille. Welsh culture has been a vital mechanism in profile raising and establishing new networks.

The Wales in France open-call cultural fund was an innovative partnership between the British Council in France and Wales, Wales Arts International and Welsh Government which:

- Invested in the development of Welsh artistic and cultural networks in France, this including a first-time partnership between the National Eisteddfod with Lorient Festival Interceltique.
- Showcased our culture, heritage, and language to new audiences, supporting NoFit States performances in Lyon and Gruff Rhys's debut of his new album in Paris.
- Facilitated skills-sharing and outreach work, enabling Newport theatre company Dirty Protest to work with young asylum seekers in rural France.

The year drew to a close with a reciprocal loan of paintings by Renoir and Van Gogh between Wales and France, enabled by a new partnership between Amgueddfa Cymru and Musée d'Orsay.

Several projects facilitated by the Wales in France year are being further supported by the British Council UK France Spotlight, including supporting the BBC National Orchestra of Wales to further collaborate with the Orchestre National de Bretagne in Rennes.

Communicating Wales' commitment to youth mobility and providing reciprocal intercultural experiences to young people in both Wales and France was a vital workstream for the year.

Throughout the Wales in France year, the Urdd Gobiath Cymru was able to engage more than 800 young French people in Welsh language activity across Lorient, Nantes and Lyon. The British Council has successfully developed 29 new schools' partnerships between Wales and France, as well as confirming a new school twinning between Nantes and Cardiff. Welsh Government's Cymraeg2050 team facilitated open-access Welsh lessons for 70 children and young people in Nantes.

The legacy for this work continues. Using Taith funding, the Urdd will support 100 Welsh children to attend Lorient Festival Interceltique this year, with a reciprocal visit of Breton children to Llangrannog.

UNESCO and OECD are headquartered in Paris, offering an opportunity to utilise the Wales in France concept as a springboard for profile raising engagement in areas of mutual interest. The year was kicked off with a First Minister-led 15-strong Welsh delegation heading up a learning and exchange networking with UNESCO secretariat and Member States to identify new relationships in the youth, arts, heritage, social values and language revitalisation spheres.

The Future Generations Office led on engagement with the OECD on well-being economies and is continuing to develop this work through a formal partnership with French think-tank '*Villes et territoires durables*' to facilitate policy learning exchanges with Welsh and French public bodies.

An extensive programme with Brittany celebrated Wales' historic and cultural links and included an enhanced Wales presence at Lorient Festival Interceltique, Welsh language activities and an official signing of a revised action plan for continued cooperation at the year close event in Amgueddfa Cymru. The year aimed to develop new cooperations in the green energy and innovation sphere, an area which has significant economic and social potential for Wales.

The Rugby World Cup provided opportunities to capture the profile-raising opportunities of sport to create new links with strategic focus cities in France. The resulting sports diplomacy programme prioritised relationship development, as-well as showcasing and profile-raising activity underpinning the formal engagement from three Ministerial visits.

Scoping visits and multiple engagement points through the year linked Welsh partners with French counterparts for activations at all levels of society from policy dialogues between local authorities, to music showcases and commercial partnerships.

Wales Arts International continued to innovate in the sports diplomacy space, leading an extensive cultural programme that coordinated with the Urdd activity and delivered public showcasing in fanzones of major Welsh artists, relationship building delegations of visual arts and dance and business showcasing at B2B congresses in Lyon and Paris.

Nantes is a city of art and culture with a progressive sustainability agenda and the rugby outreach here delivered two larger-scale showcase events, alongside an extensive programme of strategic activations and partner delivered activity in both Brittany and Nantes that included schools' outreach with over 800 children, Welsh language events, rugby hospitality, delegations, fanzone performances and business roundtables.

A highlight was Cardiff Council, Welsh Government and Nantes Métropole together supporting Clwb Ifor Bach and French venue Stereolux to collaborate on hosting a live music showcase where Welsh hip-hop and punk played alongside bands from Brittany, Bordeaux and Nantes. The opportunity also catalysed a first-time partnership between national broadcasters in Wales and France, S4C and France3 (French national free-to-air TV broadcaster), who partnered on filming and broadcasting the gig in Welsh, Breton and French.

Illustrating the commitment to working collaboratively, Wales adopted a local venue Maison de l'Europe as a Wales House for the tournament, operating as a temporary diplomatic hub. Through the partnership, the venue hosted a month of activity including open-access Welsh lessons, an exhibition and a networking event and cultural showcase. Six months later, our contacts there are still fielding enquiries from Nantes partners for engagement with Wales.

As the second city of focus for the Rugby World Cup's sport diplomacy activities, Lyon shared Welsh values on inclusion, diversity and sustainability which, along with a focus on food showcasing, were the touchpoints Wales used to build engagement. Welsh Government worked collaboratively with Hybu Cig Cymru, Food Innovation Wales and Cité Internationale de la Gastronomie on a Minister-hosted food and culture showcase to celebrate France being the number 1 export destination for Welsh produce.

The Urdd supported a 35-strong Welsh youth choir from Carmarthen to perform across the city with celebrated soprano Jessica Robinson and led outreach workshops in local secondary schools. The Wales Arts International cultural programme also platformed Querin, contemporary dancers who weave Welsh folk-dancing with Queer nightlife, to showcase at the famed Lyon Biennale and perform in fanzones.

As a global example of multiculturalism and diversity in the arts, Welsh engagement with Marseille included a performance by Butetown-based Welsh breakers Jukebox in the Vieux Port and a visit by the Arts Council Wales Agent for Change, opening the doors to more work together understanding opportunities to support diversity in the arts.

The Wales in France year opened and closed with Wales hosting a delegation of French business and diplomatic contacts at the Six Nations, illustrating the importance of capturing the profile-raising opportunities of sport to the wider programme. The team has commissioned an evaluation of the year to take place to inform, and evidence, future policy and further our understanding and expertise of sports diplomacy and cultural relations practice and policy at a variety of scales and ambitions.

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Image Credit

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Van Gogh Self Portrait at Cardiff National Museum - Credit: Matt Horwood

## Wales and Africa

One of the key ambitions in our International Strategy was to establish Wales as a globally responsible nation. The Welsh Government's Wales and Africa programme aims to fulfil this ambition by developing sustainable partnerships in sub-Saharan Africa, supporting the UN's Sustainable Development Goals. For almost 20 years, Wales has been developing and deepening community or institution-based links and partnerships with sub-Saharan Africa. Partnerships characterise the Welsh approach to international development, sharing experiences and knowledge in a spirit of mutual respect and reciprocity.

The Wales and Africa Action Plan (2020-25) set out a number of key actions that supports Wales in delivering the ambition of being a globally responsible nation.

Several key achievements were made against these actions during 2023-24, including working closely with Fair Trade Wales, Scottish Fair Trade Forum and the Scottish Government to develop new criteria for nations to use when working towards and maintaining their Fair Trade Nation status. An event to highlight the new criteria and celebrate 15 years of Wales' being a Fair Trade Nation was held in the Senedd in July 2023.

The Wales and Africa team also arranged 9 successful International Learning Opportunities (ILO) placements during 2023-24 – one in Uganda, three in Namibia and five in Lesotho. Welsh professionals from different sectors and at different stages in their careers were able to share their expertise and help organisations in Africa to effect positive changes. Participants felt the benefits too, returning home with new skills and fresh perspectives that make them more effective in their everyday roles.



The UN's Sustainable Development Goals include a strong commitment to gender equality - a recognition that women are entitled to the same rights and opportunities as men, and to lives free from violence and discrimination. The Wales and Africa Action Plan commits to taking action on gender and equality in Uganda and Lesotho.

In the Mbale and Masaka districts of Uganda, women often find themselves marginalised in political, economic and social life. In a year-long pilot project, Size of Wales aimed to strengthen the role of women and girls in tackling climate change and managing natural resources sustainably – helping them to become agents of change. With funding from a Wales and Africa Gender Empowerment Grant, Size of Wales co-designed the project with three partner organisations: Mount Elgon Tree Growing Enterprise, Masaka District Landcare Chapter Leadership, and the International Tree Foundation. Their work included a range of initiatives to make a positive impact on the lives of women, their households and their communities.

One of the most effective activities was the training of 44 gender champions – 25 women and 19 men. They were able to improve their communication, teamwork, coordination and networking skills. In addition, 40 women were trained in leadership and decision making, and were able to pass their training on to a further 664 women. The project has produced sustainable and climate-resilient livelihood opportunities, helping women to generate income by setting up kitchen gardens, growing cashew nuts and keeping bees. The participants were provided with seed funding, training and essential equipment. In providing easier access to clean water, the project also helped to improve quality of life for women in rural Uganda – some of whom had previously needed to walk for up to four hours to collect water. These absences from the home had been identified as a frequent pretext for domestic violence. Nineteen local savings and loans associations received training support, tackling topics including financial literacy, management, record keeping and loans recovery.

The project challenged and changed attitudes to gender in Ugandan rural communities. Women are now able to buy land in their own names – a practice not previously permitted. Participants have reported increased confidence in making decisions, both at family and community level. A number of women are now planning to stand in local elections. Within Wales, these stories have been widely shared to raise awareness of the impact that climate change has on women, and their role in tackling the crisis. Presentations were held during Wales Youth COP27 events, the Hub Cymru Africa summer summit, events to mark International Women's Day, and visits to schools and community groups. Size of Wales has engaged with more than 700 young people and other members of the public, including many from the African diaspora living in Wales.

A number of Welsh organisations received funding through the Wales and Africa programme to work in close collaboration with their African partners, to deliver life-changing projects: providing better livelihoods for women, promoting gender integration to fight the effects of climate change, and helping girls complete their education. For



example, working with partner organisations in Uganda, Size of Wales designed a project that empowered rural women to tackle climate change and sustainability issues in their communities. This project also helped worked towards the tree planting commitment set out in our Action Plan, to support the distribution of over 3m trees every year in Uganda, working towards Size of Wales' target of 50 million trees by 2030.

In March, the Wales and Africa programme supported Hub Cymru Africa to hold an extremely successful and vibrant celebratory event in the Senedd. This event recognised the hard work, dedication and achievements of the international development and solidarity community in Wales, who work tirelessly towards the UN Sustainable Development Goals.

## Wales' Relationship with Birmingham, Alabama

Wales has a relationship with the city of Birmingham, Alabama, which spans decades. The relationship was born out of the response by the people of Wales to the tragic events that took place on 15 September 1963, when the 16<sup>th</sup> Street Baptist Church was bombed in an act of white supremacist terrorism committed by the Ku Klux Klan. The explosion at the church killed four girls attending Sunday School and injured a further 22 people. The church itself suffered significant damage, a gaping hole was blown into its side, all of the windows were shattered and the face of Jesus in the church's main stained-glass window was destroyed.

The bombing was a significant moment in US history, altering forever the course of the civil rights movement and became, according to many, a catalyst for the Civil Rights Act of 1964 and the Voting Rights Act of 1965. The bombing was reported internationally. As a gesture of solidarity with the African American community in Birmingham, the people of Wales raised funds for the creation of a stained-glass window for the church, designed by Welsh artist John Petts. The Wales Window depicts the crucifixion of a black Christ, the right hand pushing away hatred and injustice, the left offering forgiveness. The Window was dedicated in 1965 and is still a central part of the 16<sup>th</sup> Street Baptist Church community.

Building from the historic link between Wales and the 16<sup>th</sup> Street Baptist Church, there has been ongoing activity between organisations in Wales and Birmingham, with a focus on education and culture. The Welsh Government's Atlanta office has worked to develop relationships and facilitate connections since 2018. Stakeholders have expressed interest in growing the relationship with Wales, given this natural connection, and contacts on both sides of the Atlantic have been welcoming and enthusiastic.



Former Education Minister Kirsty Williams visited in 2019. The University of Alabama at Birmingham (UAB) developed an annual study abroad programme at Aberystwyth University, signing an MOU in 2020 and in 2022, a choir from Urdd Gobaith Cymru, Wales' largest national youth organisation, visited the city before a reciprocal visit to Wales by the UAB Gospel Choir in summer 2023.

2023 saw the 60<sup>th</sup> anniversary of the bombing and a series of events took place in Wales and Alabama to mark this occasion. One of the cultural partnerships that has grown over the years is between the University of Alabama at Birmingham (UAB) and the Urdd. In June 2023, UAB's Gospel Choir performed across Wales including at the Urdd Eisteddfod in Llandovery and live on S4C. In Cardiff, the UAB Gospel Choir held a performance event at the Senedd hosted by the First Minister and in the presence of John Petts – the Wales Window designer's - two sons.

In September, the Minister for Economy travelled to Alabama to sign an International Friendship Pact between Wales and Birmingham and commemorate the 60<sup>th</sup> anniversary of the bombing. In addition, he undertook a wider programme, meeting with businesses and economic institutions from the region, prominent US, State and City officials and leaders from Alabama's civil rights movement. The Minister spoke alongside US Supreme Court Justice, Ketanji Brown Jackson, at the invitation of the 16<sup>th</sup> Street Baptist Church as it commemorated the 60<sup>th</sup> anniversary of the bombing.

The Minister's contribution to the ceremony also gave Wales the opportunity to pay tribute to the enduring legacy of the campaign for racial justice that Birmingham has championed, which has inspired people of colour across the world, including here in Wales. He was able to meet with friends and families of the victims and deliver a message of solidarity and friendship on behalf of the people of Wales. In a moving moment of the visit, the Minister was welcomed at the home of Lisa McNair and Kimberly Brock McNair, whose 11-year-old sister Denise was among those killed in the bombing, and presented them with a gift from Wales. He also heard about their father's efforts to document the Civil Rights Movement and life as an African American during the 1960s through photography.

Over the last six decades, Wales and Birmingham have forged a long-standing and meaningful relationship based on friendship. The Minister's visit was an opportunity to formalise this friendship through the signing of an International Friendship Pact, between Wales and the city of Birmingham, with Mayor Randall Woodfin signing the agreement on behalf of Birmingham. It is hoped that, in coming years, the Pact will build on these connections by fostering greater collaboration, enhancing cultural exchanges, supporting opportunities for stronger economic growth, and creating mutual benefits for both regions across the key areas of Arts and Culture, Life Sciences and Healthcare, and Education.

To symbolise this friendship, the Minister took part in a tree dedication ceremony in Kelly Ingram Park, alongside Mayor Woodfin. They dedicated four trees symbolising the

memory of the four girls who were murdered - Addie Mae Collins, Cynthia Morris Wesley, Carole Robertson and Denise McNair. A commemorative plaque was unveiled to mark the 60 years of friendship between Wales and Birmingham. The plaque contains text in Welsh and English – “Mewn undod mae nerth – Strength in unity” – this important Welsh phrase was central to the Minister’s remarks at the ceremony, the Friendship Pact itself and was reflected throughout the entire visit.

The Minister took part in a panel session with leading activists from the Birmingham civil rights movement at the historic Sloss Furnaces. This was an opportunity to discuss lived experiences and the actions that we are taking in Wales and Alabama to combat racism. Conversations around the publication of the Anti-Racist Wales Action Plan demonstrated Wales’ commitment to equality. The session was also attended by young people from the Urdd, who were in Birmingham to learn about civil rights and promote the 2023 Peace and Goodwill message about anti-racism.

Finally, there was an opportunity to bring together partners who had supported the visit and developed the Friendship Pact. Birmingham Sister Cities hosted a traditional Southern cookout reception for key stakeholders across business, education, and culture in the Birmingham and Wales partnership. The event was an opportunity to spend time with young volunteers from the Urdd alongside civil rights activists and the partners responsible for delivering our collaborative activities.

This was a visit of solemnity and commemoration, but also one that looked ahead to a better tomorrow. In addition to prompting future exchanges, a roundtable with the business ecosystem in Birmingham identified promising opportunities to take forward links with Wales in fields ranging from oncology and automation in manufacturing. The International Friendship Pact reaffirmed joint commitment at both the political and community level to drive the relationship forward.

Just a few days after this visit, the US Ambassador to the UK, H.E. Jane D. Hartley, came to Wales. Ambassador Hartley discussed the Birmingham Commemoration and expressed interest in supporting efforts to strengthen the bonds between both communities to help sustain a positive legacy for people in Wales and the USA, cementing this friendship at all levels.

## Compound Semiconductors - the Wales Offer

Wales is home to the first compound semiconductor cluster in the world. The cluster is home to highly innovative companies, skilled workers, and university-led advanced research & development (R&D).

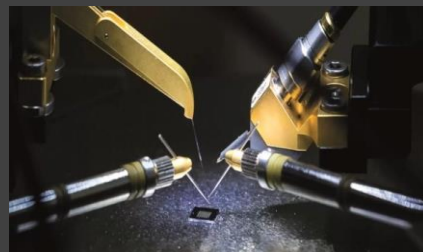
The cluster has been identified by the Welsh and UK governments as an area for high potential growth. In south Wales, the cluster is dominated by US investors that provide the region with high quality, well-paid jobs. Given this, and the high potential for growth that has been identified, there has been a focus on promoting what Wales has to offer in this sector, primarily within the USA, but also globally at events in markets such as South Korea, Taiwan, Japan, and Germany.

This focus on the compound semiconductor sector has already promised to deliver more than \$300m in new investment into Wales from the USA alone – supporting more than 600 jobs this year and over the next couple of years. Further investments to grow the sector are also in the pipeline. Many of the American investments are as a result of relationship building between the CEOs of major companies in the USA and Welsh Government officials in Wales and overseas.

There have also been a number of outward facing activities during the year to promote the sector on a global scale.

### USA

In March 2023, the Minister for Economy visited KLA in California to discuss plans to invest \$100 million and create 200 jobs at its Newport facility. Commercial confidentiality, and the timing of the meeting, meant that this was not included in the 2022-23 annual report. KLA's investment includes a new research, development and manufacturing facility.



The new state-of-the-art innovation centre will provide over 25,000 square feet of cleanrooms for R&D and more than 35,000 square feet of bespoke manufacturing assembly halls, whilst also including offices, cleanrooms, storage and support facilities to accommodate up to 750 employees.

Commitment from Ministers, supplementing the day-to-day relationship developed between our US and Wales-based teams and the company resulted in a substantial investment into Wales from a global leader in the sector. KLA's CEO has spoken highly of the sector in Wales saying that the investment can take advantage of the "region's attractive talent pool and benefit from an appealing quality of life with access to many international sporting events, historic parks and outdoor activities".

Working with our partners, CS Connected, the US team attended the CS ManTech conference in California in May 2023. This conference allows us an opportunity to reflect the innovation within Wales' compound semiconductor supply chain.

In July 2023, a delegation from the Welsh Government attended the Semicon West conference in California. During this conference, discussions were had with existing investors, new investors and the US Department of Commerce. Based on the UK Government's endorsement of Wales' compound semiconductor capability, we worked with the Department for Business and Trade in San Francisco – taking part in some of the visits and meetings arranged by DBT, alongside our own programme. As a direct result of attendance at this event, one US investor could announce an investment in Wales in 2025 creating 50 jobs. This is a unique private-public sector partnership involving the company, the CS Catapult and local universities, bringing high value jobs to our graduates.

In October, the US team visited Arizona with the British Consulate General in Los Angeles to learn about the semiconductor sector in Arizona and to raise the profile of the sector in Wales. The Welsh Government sponsored a reception on collaboration opportunities between both sides of the Atlantic

Working with Space Forge US (a Welsh company which has expanded into the USA) and the UK Government, in January 2024 we supported an event which explored space manufacturing – including semiconductor manufacturing. The event was attended by industry, NASA and federal government leaders.

SEMI is a California-based organisation that promotes the semiconductor sector. SEMI UK was launched in January 2024 in Cardiff Castle with KLA and the Minister for Economy. It has been created to promote the UK's semiconductor sector and is made up of senior decision makers from across UK and international companies.

In February 2024, the US team attended Photonics West conference in California with CS Connected. This provided another opportunity to promote the cluster on the West Coast and specifically to users of semiconductors.

The year ended where it was announced that California-based Vishay had purchased Newport Wafer Fab. This will see a \$200m investment being made to the Fab and 400 jobs safeguarded. Vishay announced it is ready to work with local universities on R&D opportunities. Given the success of the cluster, we will continue to promote the cluster at appropriate events in the USA and further our discussions with pre-identified investors.

Globally, it has been identified that there is a skills shortage within this sector. Universities in the cluster have a number of training opportunities as well as advanced R&D capabilities.

Throughout the year, officials from the Welsh Government in Wales and overseas have worked closely with CSConnected and relevant universities on the needs of businesses. Working together, we have been able to work directly with businesses on bespoke training packages which, in turn, creates jobs in Wales.

The CHIPS Act in the USA provides an opportunity for Welsh universities to be funded to undertake R&D with American partners. We have been undertaking scoping work with universities in the USA (primarily in Arizona) on potential areas of collaboration between Welsh and US universities. Working with CS Connected we are arranging a future mission for Welsh universities to visit Arizona to further develop potential research collaborations.

We are also working with Study in Wales and Global Wales on potential exchange and R&D opportunities in the field of advanced manufacturing and materials and semiconductor production. This would involve funding from the US Federal Government with discussions on this progressing.

The focus of the work on compound semiconductors has, primarily, been in the USA. However, a significant amount of work has been undertaken in other markets to showcase Wales' capability in this sector. A selection of activities is below:

### AsiaPacific

- Australia - Visit from the Australian High Commissioner to Wales Tech Week to explore collaboration opportunities with the Australian compound semiconductor cluster.
- Japan - Swansea University is currently in dialogue with Japanese companies on collaboration programmes. Japanese investors have visited Wales to explore links for power electronics and high-power photonics as a result of work undertaken by the Welsh Government's Tokyo office. JETRO (the Japan External Trade Organisation) visited London and met with Welsh Government officials. In December, we attended

Semicon Japan where we had a stand presence at the show and hosted a reception at the UK Embassy with a focus on Power Electronics, which was attended by more than 100 guests.

- Taiwan - In September, we attended Semicon Taiwan, supporting a UK trade mission of 18 companies and CSConnected, to promote Wales' offer.
- Malaysia - the Sarawak government (region of Malaysia) visited Wales three times, along with semiconductor cluster members, to discuss collaboration opportunities resulting in the signing of an MOU with CSA Catapult.
- South Korea - In February, we attended Semicon Korea to showcase Wales' offer.

## Europe

- Spain - Wales has signed an MOU with Catalonia which includes a focus on compound semiconductors. Catalonia is seeking to develop its own cluster. Wales Tech Week was attended by representatives from the Basque Country who had with a programme of meetings with Wales' compound semiconductor cluster.
- Belgium - Wales signed the European Silicon Regions Alliance (ESRA) in Brussels in September, which was attended by Derek Vaugan who signed on behalf of the Welsh Ministers. Wales was the only UK region to be invited to sign the partnership with 26 other regions across Europe. This has resulted in the first meeting of the Sherpa Working Group which took place in Munich to explore collaboration opportunities through Horizon and IPCE.
- Norway – working with CSConnected, officials took part in Oslo Tech Week in September, presenting the Wales offer and collaboration opportunities to companies as well as attending workshops on AI and Energy.
- Germany - MOUs have been signed with Baden-Württemberg and Saxony with semiconductors included as potential areas for collaboration. In addition, a Declaration of Intent has been signed with the Bavarian government in November. The signings were attended by the Minister for Economy, who then visited Semicon Europa where he met with companies including KLA. Semicon Europa also resulted in a meeting with an investor who is keen to explore opportunities in Wales as it plans to open another centre in the UK to complement an existing UK facility.



## Bringing the World to Wales

Our increasing international profile is being reflected in the number of diplomatic and international visits to Wales – more than 100 last year. We use these opportunities to showcase our strengths and share our aim to be a globally responsible nation.

As well as an increasing number of visits, we have been able to attract and support impactful events which offer important opportunities for engagement, whilst also demonstrating our commitment to be an outward-looking nation. These offer moments for Wales to share our learning and to learn from others.

### Maintaining connections with Europe

Welcoming international and diplomatic visitors from Europe has been a key part of our activity over the last year. Many of which have made important statements about who we are, our shared beliefs and values and a commitment to continue to collaborate.

In May 2023, we facilitated the CPMR Atlantic Arc Commission General Assembly which was held in Cardiff – bringing together ministers and senior officials from a range of EU regions, plus Québec, to discuss strengthened inter-regional cooperation in the Atlantic area. This was the first time the General Assembly had been held in the UK after Brexit and offered an important opportunity to demonstrate that we can continue to cooperate on shared interests following the UK's withdrawal from the European Union. Wales was able to take a central role in the Assembly which was attended by Ministers and the Welsh Government's Representative on Europe.

### Wales – an innovating and listening nation

We have supported a number of visits to Wales that have discussed a range of innovative approaches here, including our groundbreaking Well-being of Future Generations Act and other activity such as our Anti-Racist and LGBTQ+ Action Plans.



In November 2023, we supported the 'Leadership for Future Generations' summit at Swansea University with Secretary Hillary Rodham Clinton, who was accompanied by former US President Bill Clinton. The First Minister also participated in the summit speaking as part of the panel. The event offered an opportunity to talk to an audience, which included young people and international attendees online, about a number of issues that show our commitment to global responsibility such as peace, community resilience, climate change and changing technologies.

### Using our international partnerships to showcase our strengths

We signed a number of new international agreements this year including Flanders, Baden-Württemberg, Silesia and Birmingham, AL in addition to taking forward our existing agreements. We have taken the opportunity to welcome delegations from our partner regions to Wales sharing our innovations and thinking.

In October 2023, we welcomed a delegation from our priority regions to Wales Tech Week in Newport. The event creates opportunities to connect people and businesses in Tech.

By focussing on digital, cyber and artificial intelligence, we invited representatives from Silesia, Catalonia, the Basque Country, Flanders, Baden-Württemberg and Québec to attend the event and an international reception hosted by the Health Minister.

We also developed a bespoke programme beyond the event that included site visits to key industries in South Wales.



**MINISTERIAL INTERNATIONAL ENGAGEMENT**

**MAY 2024**

**INWARD VISITS**

- 02 May **Visit to Wales by King Letsie III of Lesotho**  
The First Minister met with King Letsie III of Lesotho during his visit to Wales. The delegation visited Wales to explore Wales' experience of progressing renewable energy, as well as reaffirming existing links spanning 40 years.
- 14 May **Visit to Wales by the Palestinian Head of Mission**  
The First Minister met with the Palestinian Head of Mission in Cardiff. The main item of discussion was the situation in Gaza.

**OUTWARD VISITS**

- 09 May **First Minister visit to India**  
The First Minister travelled to Mumbai to hold discussions with TATA.

Vaughan Gething MS  
First Minister  
Welsh Government

13 June 2024

## **The Rennes Declaration**

Dear Vaughan,

I write with regard to the Rennes Declaration that was agreed in August 2023.

You will be aware that the Committee has undertaken regular monitoring of the Welsh Government's **international bi-lateral agreements**. I note that the Rennes Declaration has recently been added to the webpage which lists all international bi-lateral agreements.

The Committee has sought to improve the availability and transparency of information on international relations which is in the public domain, and we have welcomed the positive approach taken by the Welsh Government when information has been shared with us. It is somewhat disappointing, therefore, that we were not proactively informed of this international agreement, especially given the number of priority international partners involved, and the breadth of areas covered that fall within this Committee's remit.

To inform the Committee's understanding of the Rennes Declaration, I would be grateful if you could please:

- Provide a copy of the agreement to this Committee;
- Outline the Welsh Government's priority areas of delivery;
- Confirm what actions are being taken by the Welsh Government as a result; and

- Provide an explanation to us as to why all of the Welsh Government's international bilateral agreements, such as its Memorandum of Understanding with the Government of Kerala or its International Friendship Pact with the city of Birmingham, Alabama, are not listed on the webpage.

Finally, I hope that, in response, you will commit to notify the Committee of all future international bilateral agreements concluded by the Welsh Government. This would both assist us to better understand the tangible outcomes of the Welsh Government international activities, and to celebrate Wales's new international connections.

I look forward to receiving your response by 11 July 2024.

Yours sincerely,



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

Croesewir gohebiaeth yn Gymraeg neu Saesneg.

We welcome correspondence in Welsh or English.

# Agenda Item 3.2



CYNGOR LLYFRAU CYMRU  
BOOKS COUNCIL of WALES

HK/MLW

4 June 2024

Committee Chair and Members  
Culture, Communications, Welsh Language, Sport, and International Relations Committee  
Welsh Parliament  
Cardiff Bay  
CARDIFF  
CF99 1SN

Dear Chair and Members of the Culture, Communications, Welsh Language, Sport, and International Relations Committee,

Thank you for your letter of 23 May 2024.

We are pleased to be able to provide further information regarding the Magazine Franchise Tender and we are answering your questions as follows:

**When it comes to the appeals process for unsuccessful applicants (that is, following the tendering process in 2023), you noted that the appeals were heard by the Chair of the Magazine Panel and the Head of the Publishing Development Department. Could you confirm what role, if any, either of those persons had in the initial decision-making for awarding grants?**

The complaints we received from *Planet* and *New Welsh Review* were reviewed by the Chair of the Magazine Panel (who is also Vice Chair of the independent English-language Subcommittee), and the Head of Publishing Development of the Books Council.

As a member of the English-language Subcommittee the Chair of the Magazine Panel has full voting rights with regards to awarding grants and tenders. He was part of the unanimous decisions reached by the full panel during the magazine franchise round. The entire process is coordinated by the Publishing Development Officer, who also provides the secretariat. Other members of Books Council staff attend meetings in observing roles and may answer questions by panel members but have no voting rights. In short, the Head of Publishing Development was present during all interviews but did not take part in the decision-making process.

**When, and why, did the Books Council decide to retain a portion of money from the 2023 tender process? Why wasn't this funding (approx. £85,000 in 2024) distributed in 2023?**

There was no decision as such to retain any money, but rather it was the end result of the process which took place over two days on the 9<sup>th</sup> and 10<sup>th</sup> of November 2023. A total of 9 franchise applications were evaluated against all relevant criteria; five applications did not meet these criteria and weren't funded at all, three were funded, but to a lesser extent than they applied for, and one was funded in full. Once these individual decisions were reached, and mindful of the stated purpose of the Magazine Franchise Grant, the panel then considered the funding that remained unallocated and the thematic gaps that remained in the portfolio. It concluded that a proposal for one new literary magazine would be the best way of fulfilling the

requirements of the grant, and the most effective use of public money. This, in turn, led to the current tender, which was advertised in March 2024. The tender is for a brand-new magazine with unsuccessful applicants from the previous round welcome to apply. However, none of the unsuccessful applicants decided to take up this new opportunity.

**What evaluation process has the Books Council undertaken of its tendering processes over the past three years?**

As a small organisation experiencing standstill funding for over a decade, resources are limited. Determined to keep administration costs to a minimum, we believe in an agile approach to evaluating our grant awarding processes which take place throughout the year. This means ongoing internal review of grant guidelines and terms and conditions, collecting feedback from participants and external experts, and asking subcommittees to review and discuss them regularly.

In our earlier letters to this committee, dated 20 December 2023 and 29 April 2024, we outlined the entire process undertaken during 2022 to review the funding procedure for magazines in advance of the next magazine tender period in Summer 2023.

This included independent external advice which informed the internal report we shared with this committee in April which included current funding models; the eligibility, criteria, and rationale for funding magazines; funding levels; working conditions at funded magazines; publishing formats; and readership accessibility. Also included in scope was to improve fair representation of diverse backgrounds and experiences at funded magazines, following the BCW's report on this area, and to make recommendations on how the BCW could better support the industry to make it fairer and more diverse.

The considerable hours spent on external review of all aspects of our process and subsequent discussions in both the Magazine Panel and full Subcommittee meant that the preparation for this tender round was robust. We are confident that our guidelines and process set out for this funding round were in line with the commitments we have made in our strategic plan and our obligations as a registered charity. All our processes acknowledge our fiduciary responsibilities as a funder who is dispensing Welsh Government grants; take account of the capacity and pressures of applicants with regarding to time and administration; and ensure that the language used is accessible and jargon free.

**What effect have levels of Welsh Government funding in recent years had on the range and volume of services that the Books Council can fund?**

In January of this year, we wrote to this Committee and several ministers to request support to avert, or at least reduce, the proposed cuts of 10.5% in 2024/25 alas to no avail. These cuts came on top of a decade of standstill funding during which time rising costs and severe inflationary pressures have exacerbated the very challenging financial situation. We laid out in detail the impact of those cuts both on the sector we support and on our organisation. Please find below some examples of the inevitable consequences of those cuts:

- A decade of standstill funding against rising cost and severe inflationary pressures meant that grants to the publishing sector have effectively been decreasing. These grants are currently at the level they were in 2004. Every effort has been made to sustain the numbers of books and magazines produced but that has not been possible and is becoming increasingly difficult as publishers are squeezed between cuts on the one hand and inflationary price increases on the other.
- Examples of these pressures were presented by the campaign to safeguard Welsh periodicals in an open letter to the Books Council, Creative Wales and the Welsh



Government Officers last summer. The letter emphasised that grant conditions and levels of grant funding the Books Council is able to provide had “...led to a race to the bottom in working conditions for magazine and website employees, and low contributor fees.”

It is inevitable, therefore, that publishing models will have to adapt and / or fewer titles will be supported from an ever-shrinking pot of money as we seek to support fair and sustainable business models and working conditions.

- As well as the pressures on English-language magazines, we will inevitably support fewer Welsh-language books and while the Welsh-language magazines were spared a cut in this financial year, thanks to a £100,000 one-off grant from Welsh-Government, a saving of 10.5% will have to be found for April 2025.
- This cut in Books Council funding happened against unprecedented increases in paper, print and postage costs, making already small margins shrink further. These increases are expected to continue throughout this financial year.
- The Books Council support a number of editorial and marketing posts at English-language publishers. The grants originally aimed to support 75% of salary costs. However, due to inflationary pressures and increased competition in the labour market this is now often closer to 30%. Compared to the rest of Europe, retail prices of books in the UK have been largely stagnant leading to an ever-decreasing profit margins. With challenging economic conditions and flat year-on-year sales, many publishers have been unable to retain staff they trained and invested in, or to recruit at the needed level of experience.
- Fair and open competition is an essential principle of awarding public sector grants. Maintaining a healthy balance between providing continued support to established publishers whilst giving opportunities for new entrants to flourish means increased competition. Coupled with the severe cost pressures the sector has been experiencing it inevitably leads to less money available to individual publishers, illustrators and authors.
- A core function of the Books Council of Wales is to fund the publishing industry in Wales on behalf of Welsh Government. We have a long-standing commitment to keeping administration costs as low as possible whilst also raising income via our self-funded Distribution Centre. The integrated nature of our organisation means that we can add extra value and make limited funding go further, or as is the case at the Distribution Centre, provide indirect subsidies to publishers by providing services which, on the open market, are typically charged for. Another strength of the organisation is that we are able to take a strategic overview, liaising with schools, libraries and readers to ascertain the needs of the market which do not necessarily align with the most profitable ventures. This means that we can utilise the grant for important strategic interventions such as the hugely successful learners’ series Amdani, which we developed in partnership with the National Centre for Learning Welsh.
- Over the past ten years BCW staff numbers have reduced from 50 to 36, and the most affected by redundancies were field-based sales representatives, schools’ officers and administrative staff. As a result, much larger areas are now covered by fewer people leading to less support and services for schools, libraries and booksellers; administrative tasks have either been reduced or automated which severely reduced capacity to absorb project administration.
- Added to the inevitable impact this has on the support we provide to the book sector in Wales, the jobs lost at the Books Council were Welsh speaking, fairly remunerated roles and based in rural Wales; at a workplace which invests in training and skills and has proactively supported several non-Welsh-speaking staff to become confident and able to conduct business through the medium of Welsh.

Notwithstanding the challenges we have outlined, we would like to acknowledge and express our thanks for a number of inspiring projects Welsh Government have supported in recent years, such Schools Love Reading, Iechyd Da (scheme to support children's health and well-being), Rhyngom, Reading Well, New Audiences Fund as well as emergency support during COVID and the cost-of-living crisis. All of this investment had a positive impact and was very much needed.

It does not however address the key issues our sector, like all creative industries, face. With long development and lead-in times, baseline security is necessary to plan and invest in projects, skills and new talent. By its very nature one-off annual project funding with quick turnaround times does not address these challenges in any meaningful way and, in this particular context, can only be described as a sticking plaster however welcome it is in other ways.

In fact, we would argue that it exacerbates the situation by opening the door to much-needed new talent, yet we don't have the resources in place to provide them with ongoing support as well as continuing to support businesses providing core outputs. Inevitably this will lead to difficult decisions and disappointments as competition increases for the limited funds available.

Thank you for the opportunity to provide further information on this matter.

Yours sincerely,



HELGARD KRAUSE  
Chief Executive

# Agenda Item 3.3

Ysgrifennydd y Cabinet dros Ddiwylliant a Chyfiawnder  
Cymdeithasol  
Cabinet Secretary for Culture & Social Justice



Llywodraeth Cymru  
Welsh Government

Ein cyf/Our ref: AL1501

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

5 June 2024

Dear Delyth

Thank you for your letter of 8 May regarding protecting the national collections.

The national collections cared for by Amgueddfa Cymru, the National Library of Wales and the Royal Commission on the Ancient and Historical Monuments of Wales (the Royal Commission) belong to us all. They are an integral part of our heritage and I take their safety very seriously.

Since being appointed as Cabinet Secretary at the end of March, I have met with the Chairs and Chief Executives of Amgueddfa Cymru, the National Library and the Royal Commission. I have been assured the collections in their care are currently safe. However, I fully appreciate urgent planning is needed to address the long-term maintenance issues. I have visited National Museum Cardiff and the National Slate Museum and intend to visit the other Amgueddfa Cymru sites as soon as I can. I have also committed to visit the National Library and the Royal Commission during the summer recess. These visits allow me to meet the specialist staff who care for our national collections so diligently, to see for myself any maintenance work needed and discuss areas of concern.

### ***Maintaining an aging estate***

Amgueddfa Cymru and the National Library face significant challenges in maintaining their iconic and historical buildings. In recent years, my predecessors have increased their capital budgets significantly. This financial year Amgueddfa Cymru is receiving £5,000,000 capital Grant in Aid (GiA), £4,731,000 of which is for maintenance. This is a significant increase from the £600,000 it received in 2015/16. In total, Amgueddfa Cymru has received £22.5m in GiA capital maintenance funding in the five years up to and including 2024/25. The National Library continues to receive £2,000,000 capital GiA this financial year, of which £1,695,000 is for maintenance. During the five years up to and including 2024/25, the National Library has received £11,765,000 in GiA capital maintenance funding.

In addition to their GiA, we also provide Amgueddfa Cymru and the National Library with other grant funding to address priority maintenance, improve their estate and for storage. In recent years, this has included:

Canolfan Cyswllt Cyntaf / First Point of Contact Centre:  
0300 0604400

Bae Caerdydd • Cardiff Bay  
Caerdydd • Cardiff  
CF99 1SN

[Gohebiaeth.Lesley.Griffiths@llyw.cymru](mailto:Gohebiaeth.Lesley.Griffiths@llyw.cymru)  
[Correspondence.Lesley.Griffiths@gov.wales](mailto:Correspondence.Lesley.Griffiths@gov.wales)

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.

- £2,000,000 in 2023/24 to tackle long-term maintenance issues at Amgueddfa Cymru sites and to progress the redevelopment of the National Slate Museum.
- £500,000 in 2022/23 for a new fire system at the National Library to ensure the safety of its collections and a further £250,000 in 2023/24 for priority maintenance work. This is in addition to the £1,500,000 the National Library is receiving between 2023 and 2025 for collections storage redevelopment.
- £1,250,000 for Amgueddfa Cymru and £920,000 for the National Library between 2022 and 2025 for decarbonisation work.

However, even with the increased capital funding we have provided in recent years, further support is needed. Given the size of the work required and the importance of these institutions to the people of Wales, I believe this issue now needs to be addressed through co-operation across Government, rather than by a single department. This is something you also referenced in your letter and is in line with one of the central goals of the Well-being of Future Generations (Wales) Act, to create 'A Wales of Vibrant Culture and Thriving Welsh Language'. This is a goal which is embedded in policy portfolios across the Welsh Government.

I acknowledge the significant maintenance backlog Amgueddfa Cymru has across its estate. As part of the increased capital funding we have provided, condition surveys were updated to give us, and Amgueddfa Cymru, more up-to-date information on the condition of the estate as well as the associated backlog of works required. In 2022, the total backlog and future maintenance requirement for Amgueddfa Cymru was £66.8m. Whilst discussions regarding the maintenance issues across the wider estate are ongoing, the priority is National Museum Cardiff (NMC). Between 2020 and 2023, £3,000,000 of GiA has funded two major roof projects at NMC which have addressed significant leak sites. However, there remains serious concerns regarding its aging mechanical, electrical and plumbing infrastructure and the impact of water ingress due to further issues with the roof. Colleagues at the Amgueddfa believe an additional £30,000,000 over six years would address the problem and they are working with my officials to develop a formal business case to be submitted to the Welsh Government requesting this funding. In preparation for this, my officials have been working with their Finance colleagues to identify all available funding options.

The National Library also has significant issues with its roof and it needs an additional £3,000,000 to address this. Again, my officials are working with colleagues there to develop a plan to address this issue as well as developing a greater understanding of the wider maintenance needs of the National Library over the coming years.

Culture can contribute, and add value, to the delivery of wider policy aims, including health and well-being, education, tackling the climate and nature emergencies and the economy. I have therefore also began having discussions with my Cabinet colleagues.

### ***Retaining expert staff***

From my visits, I have seen first-hand the expertise and skills of the staff at our institutions which are instrumental in ensuring our national collections are safe and accessible. The 2024/25 budget settlement was the most challenging we have seen since devolution. We acted to mitigate the full scale of the budget pressures on the culture sector, however, our budget is up to £700m less in real terms than when it was set in 2021. We have had to take extremely difficult decisions to focus funding on core public services, including the NHS. Amgueddfa Cymru, the National Library and the Royal Commission received a 10.5% reduction in their revenue GiA for 2024/25. Following the draft budget announcement on 19 December 2023, colleagues at each of the arm's length bodies have had to make difficult

decisions about how to deploy their workforce to make sure they can operate within their revised budget and continue to serve the people of Wales.

Our priority must now be on retaining jobs. We have reprioritised revenue funding allocated to delivering the Culture Strategy in 2024/25 to mitigate against job losses, including at Amgueddfa Cymru and the National Library. Since the draft budget was published, additional funding has also been found for the Royal Commission.

### ***Digitisation***

Digitisation is key to making the national collections more accessible to people in Wales and beyond. I have been inspired by the discussions I have had with Amgueddfa Cymru, the National Library and the Royal Commission on this matter. We are investing around £1.3m over three years in digital projects, including supporting the Wales Broadcast Archive at the National Library and digitising the National Aerial Photographic Collection at the Royal Commission. In addition, by April 2025, Celf ar y Cyd will contain the fully digitised national contemporary art collection, accessible to anyone, anywhere, at any time. The opportunities which come with digitisation is something I will continue to discuss and explore with our culture organisations.

I am fully aware of the challenges our culture arm's length bodies face. The financial pressure under which we are working is set to continue and there are no easy solutions to addressing these challenges. The UK Government intends the squeeze on public spending to continue over the next few years and, based on their plans, our budget will be lower per person in real terms in 2028/29 than it was in 2022/23. We must therefore work together across government and with our national institutions to find a way forward.

Our national collections are an integral part of our heritage. I will continue to play my part in ensuring they are safe for future generations.

Yours sincerely

A handwritten signature in black ink that reads "Lesley Griffiths". The signature is written in a cursive style with a large, sweeping flourish at the end of the name.

**Lesley Griffiths AS/MS**

Ysgrifennydd y Cabinet dros Ddiwylliant a Chyfiawnder Cymdeithasol  
Cabinet Secretary for Culture & Social Justice

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

Llywodraeth Cymru  
Welsh Government

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

6 June 2024

Dear Chair,

### **Development of post-16 Welsh language provision**

Thank you for your letter of 30 April 2024 regarding the development of post-16 Welsh language provision. I am pleased to provide the following information in response to the questions you have raised in your letter.

#### Potential impact of 2024-25 funding decisions

In the first instance I wanted to provide an update on the recommendation arising from the scrutiny of the Draft 2024-25 Budget, namely that:

*“The Welsh Government, as part of an exercise to collate information on the impact of budget cuts on Cymraeg 2050 targets, should provide an assessment of the potential impact of funding decisions on the number of learners able to access Welsh language post-16 provision, and in particular, apprenticeships.”*

The Coleg Cymraeg Cenedlaethol has submitted additional information about the impact of the 24-25 Budget on its post-16 work. A copy of this submission is attached at Annex A for information.

I am pleased to report that Coleg has confirmed that the decision to maintain budgets at 2023-24 levels will not result in any job losses amongst its staff. However, it has confirmed that a number of activities it originally planned for 2024-25 will no longer take place. What this means for learners is proving to be a more challenging assessment; not least because of the number of budgets which directly impact on provision in the post-16 sector.

As I am sure you are aware, the allocations for the Coleg and the National Centre are only a small part of the overall picture. The main source of funding being the mainstream allocations for FE colleges, apprenticeship providers and school sixth forms.

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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.

The current financial settlement is one of the toughest we have faced since the start of devolution. In spite of this we have protected provision for 16-18 year olds in colleges as well as creating a Change Management Fund to ensure that no FE college will see more than a -1% reduction in their mainstream funding in 2024/25, when compared to 2023/24. Similar arrangements have also been put in place for school sixth forms, albeit some local authorities may still see a reduction in their allocations due to a falling demography.

Acknowledging the concerns raised during the Draft Budget scrutiny, the previous Minister for Economy reversed the planned £5.25m cut to the apprenticeship programme in 2024-25 – meaning we will invest over £143m next year in the apprenticeship programme. This budget should enable us to maintain the number of targeted apprenticeships starts for young people during this Senedd Term.

Whilst we are reasonably confident that we can maintain current levels of Welsh-medium delivery, what is more difficult to determine is the potential loss of momentum as a result of maintaining budgets at 2023-24 levels.

As a result of our additional investment in 2022-23 and 2023-24, the Coleg has provided funding for 62 practitioners in the FE sector as well as 21 assessors in priority apprenticeship sectors including Health and Social Care, Childcare, Business, Creative Arts and Hospitality. We have also introduced an innovative funding model which applies an uplift for apprenticeship provision delivered bilingually or through the medium of Welsh. We are hopeful therefore that the additional posts the Coleg is funding and the new funding model will lead to a continued growth in the numbers of apprenticeship learners accessing Welsh-medium or bilingual provision as part of their apprenticeship programme.

We will be regularly monitoring the number of apprenticeships starts and delivery in the FE sector during this financial year to better understand the impact of maintaining budgets for 2024-25; albeit we do not expect to have a full picture until year end. We will also work with the Coleg to identify priorities for Welsh-language skills development and to identify ways to increase capacity for Welsh-medium and bilingual apprenticeships in these areas.

#### Commitment to re-profile budget allocations

Our initial intention was to reprofile beyond the term of the 3 year Co-operation Agreement as a way to manage the challenging financial situation we have found ourselves in. With the Agreement having been brought to an end, I am not able to make any decisions on budgets for 2025-26 at this point in time.

I want to build on the recent successes of the Coleg and the National Centre and, like yourself, I do not want any loss of momentum. That said, final funding decisions for 2025-26 and beyond will depend on our funding settlements from Westminster and these may not be sufficient to meet all pressures and allow us to do all the things that we want to do.

I am also mindful that the budgets for the Coleg and the National Centre are the largest budgets in the Welsh Language BEL. Spending more in some areas means that there is less to spend in other areas and we may need to adopt a pragmatic approach to support our other key partners, including the Eisteddfod, Mentrau Iaith, the Urdd and Mudiad Meithrin to name but a few.

### Mitigating for loss of momentum

We greatly value the work of the Coleg and the National Centre and the contributions they make to our Cymraeg 2050 goals. It was a difficult decision to maintain funding at 2023-24 levels and naturally we are concerned about the potential impact this may have on providers and learners. However, as outlined above, I am not able to give any funding commitments at this point in time.

I am pleased that the Coleg and the National Centre have developed a Memorandum of Understanding as this will help to avoid duplication and to facilitate effective collaboration between the two organisations.

I am also pleased that the National Centre has already taken steps to review its mainstream delivery in order to maintain current delivery levels and to ensure that its grant funding to providers is put to best use. We have also provided an additional £500k for 2024-25 to support the development of the education workforce. This additional funding will fund a range of additional provision, including face-to-face courses, residential courses and provision for those about to start their initial teacher education (ITE) programmes. The funding will also support the ongoing development of the Centre's digital platform which will expand the on-line offer available to the education sector.

The Commission for Tertiary Education and Research will be responsible for funding and overseeing post-16 education and research from August 2024. The Commission will need to work effectively with the Coleg Cymraeg, the National Centre for Learning Welsh, post-16 providers, and others to ensure adequate provision is available and increase the number of post-16 learners studying through the medium of Welsh.

In establishing the Commission, we bring together responsibility for the strategy, planning and oversight of tertiary education within a single body. This will strengthen the framework for planning and funding post-16 provision, ensuring a more coherent approach for developing and maintaining Welsh-medium provision. The aim is that the Commission will do more than just meet the current demand for Welsh-medium provision; it will also build the demand for Welsh tertiary education and encourage individuals to participate in Welsh-medium education.

In June 2023, the Coleg was appointed to be the designated body to provide advice to the Commission on its duties relating to the Welsh language. During 2024-25, the Coleg and the Commission will work together to establish a strong partnership and framework for offering and receiving advice; the Commission will then be expected to take account of the College's advice as it prepares its first Strategic Plan.

I am confident that the Commission will benefit from the Coleg's extensive expertise and experience in supporting and developing Welsh-medium tertiary education.

### Supporting post-16 workforce development

Welsh Government is supporting the post-16 sector to develop a bilingual workforce through its funding allocations to the Coleg and the National Centre. Additional incentives are also provided for those undertaking the PGCE FE course.

The Welsh in Education Workforce Plan focuses solely on the school workforce and teachers who teach (or plan to teach) in school sixth forms are supported under the various strands of the Plan including the Iaith Athrawon Yfory Incentive Scheme.



The Coleg leads on the development of FE and Apprenticeships workforce and has a number of training schemes in place to develop the language and pedagogy skills of staff, ranging from those fluent and confident in their Welsh skills to staff embarking on their journey of learning Welsh.

The Coleg's schemes include the Sgiliaith National Development Programme, the Academic Staff Development Programme, the Gwreiddio Scheme, and they also fund PhD research scholarships that increase the capacity of Higher Education establishments to offer Welsh-medium courses. The Coleg also arranges annual conferences and staff awards all of which aim to embed bilingualism by fostering a community of bilingual staff across the sector.

The Coleg provides support for ITE partnerships as well as running two specific projects to develop the confidence of students to be able to teach through Welsh, and to attract students back to Wales to teach through the medium of Welsh.

The Coleg also received additional funding in 2023-24 to run a mentoring scheme to strengthen and encourage the Welsh language skills of students on FE PGCE courses at Welsh universities.

Our funding to the National Centre supports a range of interventions for the post-16 workforce, including the Cymraeg Gwaith scheme which is delivered in conjunction with the Coleg. The scheme supports around 700 practitioners annually in the FE sector to improve their language skills.

We also provide an incentive grant for FE PGCE students to improve their Welsh language teaching and learning skills. Under the scheme, students studying any subject (with the exception of Welsh) can apply for an additional grant of £1,000 and providers of ITE providers have committed to provide opportunities (up to 40 credits) on the course to develop Welsh language skills.

### Review of Vocational Qualifications in Wales Report - Recommendation 18

Recommendation 18 is a specific recommendation for the new Commission to work with Coleg Cymraeg to develop a way in which staff able to speak Welsh can, if willing, support a variety of learning providers.

With the Commission not set to become fully operational until August 2024 it is too soon for us to answer this question. We will be meeting regularly with the Commission during the 2024/25 academic year and will provide an update on this as soon as possible.

### Progress on Recommendations in the Review of Vocational Qualifications in Wales Report

Qualifications Wales and Welsh Government officials have been engaging regularly to discuss the response to the recommendations in the Report. We have provided Qualifications Wales with additional funding of £50k for 2024-25 in order to respond more quickly to some of the recommendations.

Qualifications Wales has already started to implement some of the recommendations, and is currently in the process of agreeing, through its Board, the approach it can take to implement all the recommendations from the review that are relevant to its work. It intends to publish its approach in Autumn 2024.

In relation to Welsh-medium qualifications, Qualifications Wales' [Choice for All](#) strategy clearly sets out its commitment to the Welsh language and to increasing the number of Welsh-medium qualifications that are made available to learners in Wales. Awarding bodies must already make all their [Approved](#) qualifications available for assessment in Welsh.

From September 2027, qualifications offered to 14–16-year-olds will be required to be available for assessment in Welsh.

For post-16 Designated qualifications, Qualifications Wales requires that awarding bodies take all reasonable steps to increase the availability of assessment through the medium of Welsh. It works closely with awarding bodies and stakeholders to target post-16 Designated qualifications to be made available in Welsh and provides grant funding to awarding bodies to increase the number of Welsh-medium vocational qualifications that they offer. During the 2023-24 financial year Qualifications Wales provided grant funding of almost £226k to eight awarding bodies to support qualifications and assessments relevant to around 90 qualifications.

Alongside its Welsh Language Support Grant, Qualifications Wales has taken several other steps over the past five years to support the qualifications system and increase the availability of Welsh-medium qualifications. It continues to undertake its series of [phase 2 sector reviews](#) that focus on ensuring that a suitable range of Welsh-medium qualifications are available. It meets regularly with the awarding bodies who award high numbers of vocational qualifications to prioritise areas in need for additional Welsh-medium qualifications. It has also established an awarding body Welsh language group to share best practice in the delivery of Welsh-medium qualifications and a strategic partnership with the Coleg Cymraeg Cenedlaethol.

Qualifications Wales is currently developing a new strategy that will replace its Choice for All strategy. The new Cymraeg strategy, which it intends to publish in 2025, will bring together all our work in relation to Cymraeg and Welsh-medium qualifications. Later this year we will be engaging with stakeholders to seek their views on our proposed strategy.

### Funding Commitments

Our funding commitments for the 2024-25 financial year are set out below.

#### *Coleg Cymraeg Cenedlaethol*

Core Grant	£7,063,000
Additional Co-operation Agreement Funding	£2,825,000
Y Gymraeg fel Pwnc (Supporting schools to offer Welsh as an A-level subject)	£125,000
Y Fframwaith Cymwyseddau Iaith (to support the delivery of the Language Competency Framework across ITE providers)	£25,000
Additional funding for educational resources	£150,000
Total	£10,118,000

#### *National Centre for Learning Welsh*

Elements of the National Centre's budgets support the development of post-16 skills, albeit we are not able to disaggregate the exact amounts spent on post-16 skills. The Centre's budget for the 2024-25 financial year is as follows.

Cymraeg Gwaith (Work Welsh)	£2,500,000.00
Ymlaen Gyda'r Dysgu (Additional funding supporting provision for 16-25 year olds and the education workforce)	£1,675,000.00
Operational Grant (running costs of the Centre)	£1,900,000.00
Recurrent Grant (grants for Learn Welsh providers)	£8,810,000.00

Camau Scheme (a scheme for Childcare practitioners)	£45,000.00
Education Workforce funding	£570,000.00
Total	£15,500,000.00

*Additional WM/B uplift grants funded through the mainstream allocations for FE colleges and school sixth forms<sup>1</sup>.*

FE Colleges	£3,900,000
School Sixth Forms	£2,996,000
Total	£6,896,000

*Additional WM/B uplift funding for Apprenticeship Providers<sup>2</sup>*

2022/23 Academic Year	£920,085
2023/24 Academic Year (to date August 2023 – April 2024)	£762,281

### Datasets and data sources

There are six main datasets used by Welsh Governments and its delivery partners. These are:

- Lifelong Learning Wales Record (LLWR) - data collected by the Welsh Government via the Lifelong LLWR underpins many aspects of our work, including the planning, funding, monitoring and quality assurance of post-16 provision in FE colleges and for Apprenticeship providers. The data also provides the official source of statistics on post-16 learners in Wales.
- Post-16 Data Collection – data collected by Welsh Government is used to derive local authority school sixth form funding allocations and to monitor delivery including calculating post-16 achievement measures which look at the retention and achievement of pupils undertaking A level, vocational and Welsh Baccalaureate programmes.
- Higher education data – which is collected and published via the Higher Education Statistics Agency (HESA).
- Learn Welsh data – data on Learn Welsh provision collected and published by the National Centre for Learning Welsh.
- Education Workforce Statistics – information about the education workforce in Wales, including staff in FE and work-based learning settings, collected and published by the Education Workforce Council.
- Qualifications in Wales (QiW) database – which contains details of all qualifications that are approved or designated for teaching in Wales for learners aged under 19, including their Welsh language availability.

<sup>1</sup> Via the new Commission for Tertiary Education and Research

<sup>2</sup> Potentially fundable values which may be drawn down against providers' contract values.

Individual awarding bodies also collect information on the learners who register for their qualifications.

It is true that there are challenges with the data submitted by colleges and apprenticeship providers via the LLWR, both in terms of how providers submit data and with the accuracy of the data which is submitted. This in turn, impacts on our ability to set targets and to measure performance against these targets. This is a concern which is also shared by the Coleg, which uses LLWR data to set targets and monitor delivery for its provider grants.

One of the major challenges we face is the sheer size of the datasets and the breadth of different learning activities submitted annually to the LLWR. The size and complexity of the data sets means that achieving a consistent approach across colleges and Apprenticeship providers is challenging and considerable analytical resource is required for data analysis. Introducing new data fields is also costly and requires considerable lead in times for software companies and providers; as well as impacting on the workload of staff in the post-16 sector.

Another challenge is in identifying the language skills of FE and apprenticeship learners as, out of necessity, this information is provided by learners themselves. It simply is not feasible to ask providers to assess the linguistic ability of some 45,000 full-time FE learners or the 46,000 learners on Apprenticeship programmes, which means that we rely on information from learners who often underestimate their Welsh language skills.

Officials have been working with FE and apprenticeship providers to improve the accuracy of data submitted to the LLWR and this work will continue after August when responsibility for data collection via the LLWR moves to the Commission. We are also working to improve our capacity to analyse link data, which will give us a better understanding of learners' choices at aged 16 and future demand for post-16 Welsh language provision.

Officials have also developed proposals for a new learner level measure for FE and apprenticeship learning. Currently statistics for learning delivered through the medium of Welsh or bilingually at FE institutions and on Apprenticeship programmes are calculated on a learning activity basis. This new measure will give us a learner level output which takes into account differences in size between activities and will allow us to compare data on apprenticeship and FE delivery on a like for like basis.

Initial proposals for a learner level measure have been shared with providers and work on refining the new measure will continue in 2024-25. We will work closely with Coleg to better understand and respond to their data requirements.

### Sharing good practice

As part of its remit, the Coleg supports a number of networks aimed at sharing good practice in developing post-16 Welsh-medium provision. The Coleg's Post-16 Strategic Board brings together representatives from FE institutions, apprenticeship providers and employers to share good practice and advise on priorities for delivery. The Coleg also runs the Gwreiddio scheme for staff in the FE and Apprenticeships sector who either work bilingually or want to work bilingually. It provides staff with the latest information about new resources and training and networking opportunities.

The Coleg's Resource Portal is an online library full of Welsh and bilingual digital teaching resources for staff and students at FE colleges and universities. It also includes a number of resources to support apprentices. The Welsh Government's Hwb platform also allows post-16 providers to share resources to support Welsh medium and bilingual delivery.

The Coleg also has a course finder on its website which allows prospective students and students to easily identify Welsh-medium learning opportunities in HE institutions across all subjects. The course finder also allows students to identify which courses have scholarship opportunities linked to them.

Qualifications Wales have also established a Stakeholder Group to consider the Welsh language and to expand the offering in the post-16 sector. The Group includes membership in the colleges, apprenticeships and school sectors.

#### Existing and future demand for Learn Welsh provision

The National Centre continues to monitor the uptake of its Ymlaen gyda'r Dysgu provision for young people aged 16-25 and has prepared marketing and communication campaigns which specifically target young people from that age group. The Centre also works in partnership with FE colleges and HE institutions, apprenticeship providers, and other organisations such as the Duke of Edinburgh Award to ensure that young people are aware of the Learn Welsh offer.

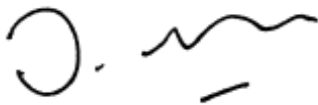
The Centre has also formed a partnership with the Duke of Edinburgh Award to ensure that young people can use learning Welsh as a recognised skills achievement.

To encourage a sustainable workforce of tutors, the Centre also runs an annual "Tiwtoriaid Yfory" course to attract more young undergraduates to become Learn Welsh tutors.

I have asked the Centre to prepare an evaluation of the Ymlaen gyda'r Dysgu programme, which should include recommendations for mainstreaming the provision in future years. This is due to be presented at the end of the 2024-25. This evaluation and the uptake and progress of the programme is discussed regularly as part of the grant management process.

During the 2022/23, 2,170 learners aged 16-25 accessed Learn Welsh provision with the National Centre. 1,790 learners aged 16-25 have enrolled with the National Centre during 2023/24 - these enrolments cover the period August 2023 to March 2024.

Yours Sincerely



**Jeremy Miles AS/MS**

Ysgrifennydd y Cabinet dros yr Economi, Ynni, a'r Gymraeg  
Cabinet Secretary for Economy, Energy, and Welsh Language

*Translation of Submission by the Coleg Cymraeg Cenedlaethol – received March 2024*

## **Information for Welsh Government officials: in response to a request from the Senedd's Culture, Communications, Welsh Language, Sport and International Relations Committee for further information on the impact of the 2024-25 budget on the Welsh language in the post-16 sector**

### **1. Background**

In February 2024, following a scrutiny session with the Minister for Welsh Language and Education, the Culture Committee published a report: Scrutiny of the Welsh Government's Draft Budget for 2024-25.

Recommendation 4 of the report by the Committee to the Government states:

- Recommendation 4. The Welsh Government, as part of an exercise to collate information on the impact of budget cuts on *Cymraeg 2050* targets, should provide an assessment of the potential impact of funding decisions on the number of learners able to access Welsh language post-16 provision, and in particular, apprenticeships.

Welsh Government officials have asked the Coleg Cymraeg Cenedlaethol to provide information to assist them in responding to the Committee's recommendation.

Since receiving this request from officials, the Coleg has received an invitation from the Clerk of the Culture Committee to present oral evidence on the same subject on 17 April 2024 and the Coleg has accepted the invitation.

### **2. Impact of the Government's 2024-25 budget on the Coleg's work in the post-16 sector**

[In a letter from the Minister for Education and Welsh Language, Jeremy Miles MS, to the Chair of the Senedd's Children's Committee, Jayne Bryant MS](#), in December 2022 (pp 38-39) the Government confirmed that, in accordance with what had been agreed with Plaid Cymru, through the Co-operation Agreement, the Coleg would receive an increase to its budget over a three-year period (2022-23, 2023-24 and 2024-25). The increase was welcomed by the Coleg, and also the assurance of a three-year budget, as this enabled the Coleg to sustainably plan for the growth of Welsh in the post-16 sector.

The additional funding to the Coleg over three years was mainly for the extension and maintenance of new Welsh and bilingual provision in the further education and apprenticeship sectors. These are sectors that desperately need to be developed as set out in a recent report by the Welsh Language Commissioner, [Post Compulsory Education and the Welsh Language - the Learners' Voice](#), and are absolutely key to the Government's *Cymraeg 2050* Strategy.

The Coleg received the expected increase for 2022-23 and 2023-24. This allowed the Coleg to invest in the following projects:

#### Apprenticeships

- Funding was provided for apprenticeship providers to appoint 21 assessors in the Business, Health and Social Care, Childcare, Creative Industries and Hospitality sectors.
- Support for apprenticeships infrastructure was provided to ACT and also Neath Port-Talbot College.
- Grants to promote and facilitate provision were provided to the apprenticeship providers and sponsorship was provided for the establishment of a Welsh language award for apprentices.

#### Further Education

- Funding was provided to support 62 practitioners and tutors within the Health and Social Care, Childcare, Sport, Agriculture, Business and Creative Industries sectors.
- Grants to promote and facilitate provision were provided to colleges and sponsorship was given for the establishment of a Welsh language award for learners.

#### The Education Workforce

- Funding was provided to Gower College and Cardiff and Vale College to develop a project for teaching assistants. An end of project report will be available shortly.

The Draft Budget for the 2024-25 financial year published on 19 December stated that the Coleg would not receive the anticipated increase of £840,000 for the third year of the Co-operation Agreement. This was confirmed by the Minister for Education and Welsh Language at a scrutiny session with the Senedd's Culture, Communications, Welsh Language, Sport and International Relations Committee in January 2024 where he noted that the Coleg would receive a flat budget in 2024-25.

A flat budget for the Coleg for 2024-25 enables the Coleg to continue to support the projects outlined above and that is welcome.

But, as a result of not receiving the expected increase of an additional £840,000 in 2024-25, activities which were intended to take place and receive support during 2024-25 will now no longer happen. These include:

- It will not be possible to expand on Welsh-medium and bilingual provision in the priority areas of Health and Social Care and Childcare, where there is a significant shortage of bilingual workers.
- It will not be possible to develop Construction provision in all further education colleges as planned.

- The Coleg will not be able to invest further to appoint apprenticeship assessors and consequently the provision will not extend beyond the small number of areas already supported.
- The Coleg will not be able to host a national conference this year for staff in the further education and apprenticeship sectors.

As set out in the table below, the data published by the Government in its *Cymraeg 2050* annual reports shows a promising increase in learning activities with an element of Welsh since the Coleg accepted responsibility for the post-16 sector in 2018.

Table 1 – Learning activities with at least an element of Welsh

Year	Further Education	Work-based Learning
2017/18	9.6%	13.4%
2018/19	11.9%	15.4%
2019/20	11.8%	14.6%
2020/21	14.7%	20.8%
2021/22	18.2%	25.3%

Source: <https://www.gov.wales/cymraeg-2050-annual-reports>

Whilst not receiving the additional expected budget of £840,000 in 2024-25 is worrying, the fact that the Government and Plaid Cymru published a [paper on the Government's website](#) setting out an intention to reprofile funding to the Coleg during the 2025-26 financial year is some consolation that the extension of provision can be resumed at that time. A delay of more than 12 months would be a significant risk to the success and momentum of the Action Plan and the ability of the Coleg to make further progress in the post-16 sector.

### 3. A note on post-16 data

The post-16 education data situation is extremely challenging as providers currently submit data in inconsistent ways. While some measure the percentage of their apprentices and learners pursuing some Welsh and bilingual provision, others submit the number of learning activities, others submit framework data and others record a figure for each apprentice/learner. There is also a discrepancy with recording the language skills ability of apprentices and further education learners as this is reported by the learners themselves, resulting in a tendency to underestimate skill levels.

The [Further Education and Apprenticeship Wales Action Plan](#) was published in January 2019. As the Coleg reviews the Plan over the coming months, and as we proceed to present advice to the new Tertiary Education and Research Commission on its duties relating to the Welsh language in light of our designation by the Welsh Ministers to advise the Commission, the Coleg will develop clear recommendations on how to improve the quality of data collected for this area.



For more information please contact the Coleg's Director of Policy,  
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# Y Pwyllgor Busnes Agenda Item 3.5

## Business Committee

### Senedd Cymru

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Chairs of Senedd committees

22 May 2024

### Committee remits

Dear Chair,

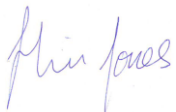
During the Business Committee's meeting on 14 May, we considered a letter from the Chair of the Climate Change, Environment, and Infrastructure Committee regarding challenges in relation to that Committee's remit which have arisen from recent changes to ministerial portfolios.

The Business Committee agreed to write to other Senedd committees to invite you to provide any views that you have on current committee remits, in order that we can consider any issues that have arisen in a coordinated manner.

I intend for the Business Committee to return to consider these matters further ahead of the summer recess and would therefore be grateful to receive any views or reflections that your Committee has by Friday 21 June 2024. Please let me know if you anticipate having any difficulty responding in this timeframe.

I enclose a copy of the correspondence sent from the Chair of the Climate Change, Environment, and Infrastructure Committee concerning their remit for context.

Kind regards,



**The Rt Hon. Elin Jones MS**

Y Llywydd and Chair of the Business Committee

Croesewir gohebiaeth yn Gymraeg neu Saesneg | We welcome correspondence in Welsh or English.



Elin Jones MS

Llywydd

Chair of the Business Committee

10 May 2024

Dear Llywydd,

### **Committee Remits following the recent reconfiguration of the Welsh Government Cabinet**

I am writing to request that the Business Committee consider the remits of policy committees following the appointment of the First Minister and subsequent reconfiguration of cabinet portfolios.

You will be aware that the recent changes to ministerial roles resulted in a significant redistribution of responsibilities, particularly those of the former Minister for Climate Change. The Climate Change, Environment and Infrastructure Committee's remit now covers the portfolios of four cabinet secretaries, encompassing diverse and substantial policy areas, as follows:

#### **Cabinet Secretary for Economy, Energy & Welsh Language**

- Energy policy, including renewable energy
- Circular economy
- Ports policy, including freeports
- Oversight of Cardiff Airport
- Digital connectivity infrastructure

#### **Cabinet Secretary for Climate Change & Rural Affairs**

- All matters relating to climate change and the environment.

#### **Cabinet Secretary for North Wales and Transport**

- Rail services through the Wales and Borders franchise
- Bus services
- Active travel
- Roads policies

- Transport for Wales

### Cabinet Secretary for Housing, Local Government & Planning

- Planning, including Future Wales: The National Plan 2040
- National Infrastructure Commission
- Coal tip safety
- National Parks

I do not believe it is realistic to expect the CCEI Committee to scrutinise such a wide range of portfolios effectively. I am concerned that certain significant areas of Welsh Government policy will likely go without scrutiny because of the challenges presented by the changes to cabinet portfolios. Scrutiny of the Welsh Government's draft budget, in particular, is likely to prove difficult, especially considering the time constraints under which committees already operate.

I would be grateful, therefore, if the Business Committee would consider a reconfiguration of committee remits to streamline the number of Cabinet Secretaries the CCEI Committee is required to scrutinise. This could include the transfer of planning and related matters, as set out above, to the Local Government and Housing (LGH) Committee. This could also include transferring the matters that fall within the portfolio of the Cabinet Secretary for Economy, Energy & Welsh Language to the Economy, Trade and Rural Affairs (ETRA) Committee.

These changes would decrease the number of Cabinet Secretaries requiring scrutiny by the CCEI Committee from four to two. However, they would not affect the number of Cabinet Secretaries requiring scrutiny by the ETRA or LGH committees.

Of course, given the overlapping nature of Senedd policy committee remits, I recognise that changes to the CCEI Committee's remit would not prevent the Committee from looking at a matter through the lens of the environment or climate change. However, these changes would mean that the CCEI Committee would not be the Committee with primary responsibility for scrutiny in that policy area.

I recognise the Business Committee will wish to consult other committees as part of this process and would be happy to discuss any issues with the Committee.

Yours sincerely,



Llyr Gruffydd MS,  
Chair, Climate Change, Environment and Infrastructure Committee

Croesewir gohebiaeth yn Gymraeg neu Saesneg | We welcome correspondence in Welsh or English.

Rt Hon Elin Jones MS

Llywydd

Chair of Business Committee

13 June 2024

## **Committee remits**

Dear Llywydd,

I write in response to the Business Committee's letter dated 22 May 2024, relating to the remits of committees. I am grateful for the opportunity to share the views of the Culture, Communication, Welsh Language, Sport, and International Relations Committee ("the Committee") about this issue.

The Committee understands the rationale for the proposed changes as outlined by the Climate Change, Environment, and Infrastructure Committee. The Committee does not, however, feel that any changes are required to our own remit, as the redistribution of ministerial responsibilities does not have the same degree of effect.

The Committee has identified only one change that affects its remit - that being the transfer of responsibility for the creative industries from the broader culture and arts policy portfolio to the Minister for Social Partnership. Whilst the Committee is still somewhat unclear about what the Welsh Government's rationale is for this change, it is not so significant that it would affect the Committee's ability to scrutinise government decision making effectively.

The current remit allows the Committee to look at a plurality of inter-connected issues across different sectors, and any significant change to that would impoverish the Committee's understanding and ability to undertake our work. We would request that no change is made to our remit.

Yours sincerely



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

Croesewir gohebiaeth yn Gymraeg neu Saesneg.

We welcome correspondence in Welsh or English.



Lesley Griffiths AS/MS  
Ysgrifennydd y Cabinet dros Ddiwylliant a Chyfiawnder  
Cymdeithasol  
Cabinet Secretary for Culture and Social Justice

Agenda Item 3.6  


Llywodraeth Cymru  
Welsh Government

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

10 June 2024

Dear Delyth,

Thank you for your letter of 23 April regarding the publication of the Culture, Communications, Welsh Language, Sport and International Relations Committee report entitled *Six Nations Rugby Championship Broadcasting Rights*.

I enclose a copy of the Welsh Government's written response to the above report.



**Lesley Griffiths AS/MS**  
Ysgrifennydd y Cabinet dros Ddiwylliant a Chyfiawnder Cymdeithasol  
Cabinet Secretary for Culture and Social Justice

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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.

## **Welsh Government response to the Culture, Communications, Welsh Language, Sport, and International Relations Committee's 'Six Nations Rugby Championship Broadcasting Rights' report**

The Welsh Government welcomes the findings of the report and offers the following responses to the four recommendations contained within.

### **Recommendation 1.**

The Secretary of State for Culture, Media and Sport should move the Six Nations Championship from being a Group B event to being a Group A event as part of the listed events regime under the Broadcasting Act

**Response:** This is not a recommendation for the Welsh Government.

The Welsh Government has always been clear the Six Nations Rugby Championship should remain free-to air. Whilst we recognise this is a complex matter and television rights form an important part of the sport's income, this should not be at the expense of depriving audiences and eroding the base of the sport's grassroots support in Wales. We also acknowledge the unique cultural position which rugby and the Six Nations Championship holds in Wales, an intrinsic part of the fabric of the country.

### **Recommendation 2.**

The Welsh Government should ask the Secretary of State for Culture, Media and Sport to move the Six Nations Championship from being a Group B event to being a Group A event as part of the listed events regime under the Broadcasting Act 1996

**Response:** Accept

The Welsh Government has already written to the UK Government on this matter, most recently to Julia Lopez MP, Minister for Media, Tourism and Creative Industries on 11 March 2024 requesting a review of listed events and the movement of the Six Nations Rugby Championship from Group B to Group A. We received a response from Rt Hon Stuart Andrew MP, Minister for Sport, Gambling and Civil Society and Julia Lopez MP, Minister for Media, Tourism and Creative Industries on 13 May. The response stated the UK Government has no current plans to undertake a review of the list. It noted the devolved nature of sports policy and it would be open to the Welsh Government to comprehensively evaluate whether there is currently the right balance between Welsh rights-holders' ability to generate sufficient income to invest in Welsh sport, and access for Welsh sports fans to those sporting events. Should the Welsh Government put a recommendation to the UK Government, they remain 'open to taking those considerations into account following any evaluation, in balance with any wider views, such as would be the case for events with pooled rights including the Six Nations'. The Cabinet Secretary for Culture and Social



Justice has provided a response to this letter reenforcing the Welsh Government position, a copy of which is attached for your convenience.

### **Recommendation 3.**

In the event of the Six Nations Championship being broadcast on pay-to-view platforms, the UK Government should introduce protections for the hospitality industry including a compulsory contractual clause which allows for reduced pay-to-view subscriptions for pubs and clubs with a rateable value below a specified amount. This should be done following consultation with the hospitality industry to determine the most appropriate approach.

**Response:** This is not a recommendation for the Welsh Government.

The public broadcast of sporting events such as the Six Nations Rugby Championship in pubs and clubs brings much needed revenue to these establishments and provides a financial lifeline to many sporting clubs in Wales. The act of collectively supporting the national rugby team in these establishment also plays an important role in bringing together communities and strengthening national identity.

However, the cost of paywall broadcast subscription can be prohibitive, particularly in the context of the economic difficulties facing the hospitality industry related to increasing costs coupled with a decrease in footfall.

Detail of contractual agreements between broadcasters and custodians of sporting competing are a matter for individual parties, outside of the usual broadcast regulations, with decisions on subscription price points decided by market value. However, given the importance, both culturally and financially, of allowing the Six Nations Rugby Championship to be broadcast in hospitality venues, we agree the UK Government should explore all levers to make broadcast subscriptions as affordable as possible to pubs and clubs across country.

### **Recommendation 4.**

The UK Government must take steps to protect full Welsh language coverage of the Six Nations tournament.

**Response:** This is not a recommendation for the Welsh Government.

The Six Nations Rugby Championship holds significant importance for audiences in Wales, serving as a powerful cultural and social touchstone which fosters national pride and unity. It is essential audiences are able to enjoy the tournament in their language of choice and Welsh language coverage is protected and easily available.

The Championship plays a crucial role in promoting the Welsh language, particularly in relation to increasing the use of Welsh, one of the three strategic themes set out in *Cymraeg 2050: A Million Welsh Speakers*. Welsh language coverage of the Six Nations Championship provides a crucial platform for the Welsh language to be featured in media coverage. The championship is deeply embedded in the cultural fabric of Wales and the use of Welsh during broadcast reinforces the language as a vital component of national identity, whilst ensuring its relevance in a modern Welsh society. Welsh coverage increases access to the language to a wider audience and encourages its use among both fluent and new speakers. For new speakers, following the game in Welsh can often be a first step in their learning journey, providing an easier to follow narrative linked to the game play. The excitement surrounding the championship can also be leveraged into educational settings as a means of engaging students.

The protection of Welsh Language coverage of the Six Nations Championship will contribute to a sense of community and belonging, helping to bridge linguistic barriers in encouraging non-Welsh speakers to embrace the language as part of a collective Welsh Identity. The Welsh language belongs to all in Wales, regardless of where they are on their language journey. Exposing everyone to the language sends a clear signal that the language is there for whoever wishes to embrace it. It must be readily and easily available without barriers.

Lesley Griffiths AS/MS  
Ysgrifennydd y Cabinet dros Ddiwylliant a Chyfiawnder  
Cymdeithasol  
Cabinet Secretary for Culture and Social Justice



Llywodraeth Cymru  
Welsh Government

Eich cyf/Your ref INT2024/03645/DC  
Ein cyf/Our ref IM/LG/05255/24

Rt Hon Stuart Andrew & Julia Lopez  
Department for Culture, Media and Sport,

[ps.andrew@dcms.gov.uk](mailto:ps.andrew@dcms.gov.uk)

07 June 2024

Dear Stuart and Julia,

Your letter of 13 May addressed to the First Minister regarding the broadcast of Welsh Six Nations rugby matches has been passed to me to respond as broadcasting falls within my Ministerial portfolio.

The Welsh Government's position is very clear. The Six Nations competition should be broadcast free to air given the importance of rugby to our cultural identity as a nation. This was explored recently by the Senedd's Culture Committee and there was further cross-party agreement in the Senedd supporting this position.

I am extremely disappointed you are not planning to undertake a review of the listed events in recognition of the position in Wales. Making sport accessible is a clear priority for both our governments and we will continue to make the case for the Six Nations in this context.

Yours sincerely,

**Lesley Griffiths AS/MS**  
Ysgrifennydd y Cabinet dros Ddiwylliant a Chyfiawnder Cymdeithasol  
Cabinet Secretary for Culture and Social Justice

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# Agenda Item 6

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

Document is Restricted

Lesley Griffiths AS/MS  
Ysgrifennydd y Cabinet dros Ddiwylliant a Chyfiawnder  
Cymdeithasol  
Cabinet Secretary for Culture and Social Justice



Llywodraeth Cymru  
Welsh Government

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

17 May 2024

Dear Delyth,

Thank you for your letter of 21 March addressed to Dawn Bowden MS as Deputy Minister for Arts, Sport and Tourism regarding the publication of the Culture, Communications, Welsh Language, Sport and International Relations Committee report entitled *State of Play: Public Service Broadcasting in Wales*. This has been passed to me to reply as this issue now falls within my Ministerial portfolio.

I enclose a copy of the Welsh Government's written response to the above report. While the majority of the recommendations set out in the report are not for the Welsh Government, the responses set out our views on the current situation and provide information on the work being taken forward by Creative Wales to support the broadcasting sector in Wales. The Welsh Government remains committed to supporting a fit for purpose broadcasting framework for Wales, supported by the work of the Broadcasting and Communications Advisory Body for Wales.

Your sincerely,

**Lesley Griffiths AS/MS**  
Ysgrifennydd y Cabinet dros Ddiwylliant a Chyfiawnder Cymdeithasol  
Cabinet Secretary for Culture and Social Justice

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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.

**Welsh Government response to the Culture, Communications, Welsh Language, Sport, and International Relations Committee's 'State of Play: Public Service Broadcasting in Wales' report**

The Welsh Government welcomes the findings of the report and offers the following response to the 17 recommendations contained within.

**Recommendation 1**

The UK Government should make it clear that it supports Ofcom entirely in defending the rights of public service broadcasters in the event of disputes with other media platforms which arise from the Media Bill.

**Response:** Not a recommendation for the Welsh Government.

Both industry and governments have widely acknowledged the regulatory framework governing media in the UK requires modernisation to allow the industry to evolve, meet the needs of changing audience behaviours and effectively operate in an increasingly global market. As such, the Media Bill and its proposed reforms have been broadly welcomed by the Welsh Government. However, we recognise the measures set out in the Media Bill will only be effective if Ofcom's oversight and intervention role once the legislation is in place is robust. In particular, our engagement with stakeholders in Wales has highlighted the importance of ensuring Ofcom is adequately equipped to adjudicate on any disputes between public service broadcasters and other media platforms on matters of prominence and fair terms.

The Welsh Government agrees Ofcom should have the full support of the UK Government in defending the rights of public service broadcasters in the event of disputes with other media platforms which arise from the Media Bill. We look forward to working closely with Ofcom in this area in future to support the implementation of changes to regulatory responsibility brought about by the Media Bill, to ensure interests in Wales are served with a fit for purpose system.

**Financial implications:** No financial implications.

**Recommendation 2**

The UK Government should amend the Media Bill to change references to "appropriate" prominence of public service content to "significant" prominence of public service content.

**Response:** Not a recommendation for the Welsh Government.

Stakeholders in Wales have cited the Media Bill provisions around prominence as essential to supporting the future sustainability of public service broadcasting. The primary driver for these measures is ensuring public service content is carried and easily available and discoverable for audiences on platforms. In order for these measures to be effective in practice the definition of prominence must be clear and unambiguous.

The Welsh Government is aware of the ongoing debate regarding the definition of prominence in the Media Bill, where some stakeholders have called for the reference to 'appropriate' prominence to be changed to 'significant'. In its examination of the draft legislation, the House of Commons Culture, Media and Sport Committee has suggested 'appropriate' prominence is insufficient in the context of the advanced user interfaces of today's platforms and the use of 'significant' would be 'less open to interpretation and better meet the aims of the Bill'.

A clear definition of 'prominence' for the purpose of implementing the related provisions in the Bill is essential to enable Ofcom to effectively issue clear guidance for broadcasters and platforms and enforce the regulation. The Welsh Government agrees 'significant' would be a more suitable description and better reflects the importance of public service broadcasting.

**Financial implications:** No financial implications.

### **Recommendation 3**

The UK Government should amend the Media Bill to increase Ofcom's powers in relation to the Welsh language on commercial radio in order to protect Welsh language content in areas with a significant Welsh-speaking population.

**Response:** Not a recommendation for the Welsh Government.

Commercial radio stations play an important role in the provision of media services in Wales, in particular the provision of Welsh news, considering the weakness of the print media in Wales and the lack of coverage of Welsh affairs in UK newspapers.

While a number of the provisions in the Bill will undoubtedly have a positive impact on broadcasters and audiences in Wales, the Welsh Government has expressed concerns regarding provisions in the Bill related to further deregulate radio services and local content. The Welsh Government has historically emphasised to Ofcom and the UK Government how we would not wish to see further relaxation or removal of the current localness rules on commercial radio. We have called for due consideration of the bilingual nature of Wales and the importance of the Welsh language when radio licenses for stations in Wales are awarded or reviewed. The Welsh Government continues to raise the matter of sufficient provision of Welsh language content on radio in our discussions with the UK Government and with Ofcom.

**Financial implications:** No financial implications.

#### **Recommendation 4**

The UK Government should significantly increase S4C's funding. This should include indicative funding for a number of years to enable S4C to adequately plan for the future.

**Response:** Not a recommendation for the Welsh Government.

The Welsh Government notes the cut in S4C's budget over recent years. There is a consensus for continued, adequate, long-term public funding to ensure the future sustainability of S4C. This needs to be sufficient to enable S4C to deliver its critical role serving the needs of audiences in Wales, in the context of increasing costs and an evolving global marketplace. The Welsh Government is aware S4C commissioning budgets are challenging, with productions often having to seek additional funding from other broadcasters on a co-commissioning basis or from third parties.

The Welsh Government has raised the importance of a fair and steady funding settlement with the UK Government. This has highlighted how S4C must have sufficient funding, as well as editorial and managerial independence, for it to maintain its ability to serve the Welsh audience. Funding arrangements must protect essential services and provide the sustainable funding which allows broadcasters to fulfil their public purposes and objectives.

This has highlighted how, for Welsh language broadcasting, the challenges associated with the shift in the broadcasting landscape from traditional broadcast to more online content are compounded by an even greater fragmentation of the audience, linked to different models of Welsh language use. In order to effectively serve audiences, in addition to considering different content consumption habits, S4C must be adequately funded to cater for different levels and types of language fluency and use across and within households.

**Financial implications:** No financial implications.

#### **Recommendation 5**

The UK Government should consider funding S4C according to a formula, to give S4C greater certainty over future funding. This formula could include linking S4C's funding to measures of inflation such as CPI or RPI, or have reference to overall licence fee revenue. It should include a ratchet mechanism to ensure that funding for S4C does not fall in real-terms.

**Response:** Not a recommendation for the Welsh Government.

In evidence to the UK Government on the BBC Funding Model Review, the Welsh Government has highlighted the need to ensure the review fairly considers the broadest range of models for both the BBC and S4C.

**Financial implications:** No financial implications.



## **Recommendation 6**

The UK Government's BBC Funding Model Review must take evidence from S4C. The review must make specific reference to the public funding of S4C as the broadcaster is primarily funded from the licence fee.

**Response:** Not a recommendation for the Welsh Government.

The Welsh Government has also raised the lack of specific reference to S4C in the review with the UK Government. In evidence to the UK Government on the BBC Funding Model Review, the Welsh Government has stressed any potential change to existing arrangements will have a fundamental impact on S4C's services and programming. This highlighted, given the significant potential impact of changes to the funding model, genuine engagement and consultation is needed throughout the review process with stakeholders in Wales. The Welsh Government understands the UK Government is engaging with S4C on this matter.

**Financial implications:** No financial implications.

## **Recommendation 7**

The BBC's spend on English-language television content in Wales should grow year-on-year until it approaches parity with the BBC's spend on English language content in Scotland. The BBC should outline to this Committee how it will achieve this.

**Response:** Not a recommendation for the Welsh Government.

Adequate BBC spend on English-language television content in Wales is important not only to meet audience requirements in Wales but to the Welsh creative economy. The Broadcasting Expert Panel report referenced how 'non-Welsh-speaking Welsh audiences continue to be under-served by Wales-specific content, and the funding gap in this area of service, compared to Scotland, persists' and the 'non-Welsh speaking population of Wales should not be deprived of an appropriate amount of relevant local content'.

The Welsh Government, through Creative Wales, remains committed to working with the BBC to support an increase in spend on English-language television content. Its Memorandum of Understanding (MOU) with the BBC sets out how Creative Wales and the BBC will strategically work together to invest in Welsh content. The MOU arrangements have been integral to strengthening relationships with the BBC supporting more direct and effective access to commissioners, joint-working on productions and co-commissioning to increase the number of genuinely Welsh productions available to both Welsh and wider UK audiences. This saw 2023 hailed as the biggest year of BBC drama production in Wales, with six drama series in production across Wales, all of which received support from Creative Wales. However, the commissioning landscape has been difficult in Wales as is the case across the UK in 2024. This is in part being driven by the challenging BBC budget position and the number of commissions for our independent production sector.

The Welsh Government recognises the extremely challenging financial situation facing public service broadcasters, including the BBC. Increasing costs and inflation, coupled with a lack of clarity on the BBC's funding arrangements post 2027, may result in a consolidation of activity and a reduced appetite (and ability) to invest in the nations. Evolving digital and online trends and increased competition from global streaming platforms are also risks to ongoing sustainability, which could impact on the BBC's spend in Wales. Creative Wales is committed to working with BBC to explore options to target further investment to Wales and this will be a consideration as we review our MOU arrangements this year.

The Welsh Government welcomes the BBC's commitment to a target of year-on-year's growth and the Committee's recommendation for the BBC to outline how it will achieve this, to ensure transparency and effective monitoring of this target.

**Financial implications:** No financial implications.

### **Recommendation 8**

Ofcom should be ambitious in using its regulation of the BBC to drive improvements to the BBC's representation and portrayal of people in Wales. The BBC and Ofcom should report back to this Committee before the end of the Sixth Senedd to report on its progress.

**Response:** Not a recommendation for the Welsh Government.

The Welsh Government, through Creative Wales, continues to work with public service broadcasters to help support improvements to representation and portrayal of people in Wales. This includes working through our MOUs with both the BBC and S4C, which include a specific ambition for growing the profile and portrayal of Wales. Its work in this area is recognised by the Broadcasting Expert Panel which highlighted, while this is a positive development 'Panel continues to be concerned about decision-making around public service broadcast funding as it relates to Wales, the total levels of spend, and whether that serves audiences well in Wales'.

Ofcom has a critical role ensuring public service broadcasters comply with requirements. In communications with Ofcom, the Welsh Government has stressed the need to use all levers to drive improvements in delivery. This will become increasingly important as the public service broadcaster remit is simplified through the Media Bill.

**Financial implications:** No financial implications.

### **Recommendation 9**

S4C should ensure more even distribution of content spend across Wales. It should report to back to the Committee outlining how it will do this.

**Response:** Not a recommendation for the Welsh Government.

A key priority of Creative Wales is supporting the growth of the creative industries across Wales and replicating the creative success story of south Wales in other regions. Creative Wales, through its MOU with S4C, remains committed to working with the broadcaster and the independent production sector to target investment in an equitable way.

The Welsh Government played an integral role in the establishment and funding of Aria Studios on Anglesey in 2022, working with S4C. Its aim is to support indigenous productions such as Bariau for S4C as well as attracting large scale, big-budget productions to the region.

**Financial implications:** No financial implications.

### **Recommendation 10**

Ofcom should include a requirement for the Channel 3 licence in Wales to produce a greater proportion of network content in Wales. It should report to back to the Committee outlining how it will do this.

**Response:** Not a recommendation for the Welsh Government.

The Welsh Government recognises the importance of the Channel 3 licence in supporting plurality of content and to the sustainability and growth of the creative industries in Wales. ITV Cymru Wales continues to play a vital role as an alternative to the BBC for both news and non-news programming and provides an essential democratic news service for the people of Wales. Creative Wales has developed a positive working relationship with ITV Cymru Wales and ITV Studios since its launch. However, the Welsh Government agrees the channel should invest more in Wales. This has been raised in ministerial level quarterly meetings with the broadcaster. Creative Wales recently met with ITV to discuss its commissioning strategy and opportunities for Wales. As a result of the meeting, ITV will be holding a session with the industry in Wales in July to facilitate relationships between ITV commissioners and the independent production sector in Wales and to raise awareness in ITV centrally of Wales' production offer.

**Financial implications:** No financial implications.

### **Recommendation 11**

Network news providers, including the BBC and ITN, should keep driving improvements in their reporting of devolved policy issues.

**Response:** Not a recommendation for the Welsh Government.

Ofcom's News Consumption Survey 2023 Wales notes TV remains the most-used platform for news by adults in Wales (71%), with BBC One the most-used source for accessing news about Wales by people in Wales. 55% of adults in Wales use BBC One for news and 40% use ITV1/ITV Wales. These statistics highlight the importance of broadcasters to the reporting of devolved issues and the need to ensure reporting is accurate and correctly reflects our unique circumstances in Wales. We note the work undertaken on behalf of Ofcom by Professor Stephen Cushion of Cardiff University and Dr Richard Thomas of Swansea University on the reporting of devolved policy issues. While the findings note enhanced coverage of devolved issues compared to previous studies, it also identified missed opportunities to explain differences in decisions across UK governments. As such, the Welsh Government agrees network providers should seek to continue to drive improvements in their reporting of policy issues.

**Financial implications:** No financial implications.

### **Recommendation 12**

Ofcom should continuously review UK network news coverage of devolved policy issues. It should report to back to the Committee outlining how it will do this.

**Response:** Not a recommendation for the Welsh Government.

The Welsh Government would welcome ongoing review of UK network news coverage, following on from the work undertaken on behalf of Ofcom by Professor Stephen Cushion of Cardiff University and Dr Richard Thomas of Swansea University on the reporting of devolved policy issues. The Welsh Government is committed to working with the UK Government, Ofcom and broadcasters to identify opportunities to support improvements in the provision of media content for audiences in Wales. This includes exploring opportunities for ongoing review of provision, for example through Ofcom's planned review of public service media, scheduled to commence in 2024/25.

**Financial implications:** No financial implications.

### **Recommendation 13**

Ofcom should use existing regulatory powers to improve network news coverage of devolved policy issues. It should report back to the Committee outlining how it will do this.

**Response:** Not a recommendation for the Welsh Government.

The Welsh Government has highlighted the limited coverage of Welsh public life and society by UK broadcast services to Ofcom. We have repeatedly called for greater accountability to Wales on media issues to ensure media provision remains fit-for-purpose in a devolved context and in view of the unique and distinct situation in Wales. We agree Ofcom should use all available levers to improve network coverage of devolved policy issues.

**Financial implications:** No financial implications.

### **Recommendation 14**

Ofcom should improve its analysis of media provision in Wales, including by increasing staffing levels in Wales.

**Response:** Not a recommendation for the Welsh Government.

The need to keep pace with developing markets, business models, changing technologies and consumer habits and understanding the impact these have on service delivery in Wales is essential for the effective operation of the regulation. In the context of Ofcom's evolving remit as the organisation takes on significant new responsibilities, the Wales office must have the capacity to respond to changes in a timely and effective way.

The Welsh Government has responded to Ofcom's proposed plan of work 2024/25 stating our interest in working with Ofcom to identify opportunities to increase the number of individuals based in Cardiff to ensure the office is sufficiently resourced and to increase its visibility in Wales. Noting changes at both Director and Board Member for Wales level, the Welsh Government is keen to build on its relationship with Ofcom in Wales in 2024/25 and strengthen links with policy leads centrally. Ofcom's plan of work highlights the variety of ways in which Ofcom obtains evidence, intelligence and insights, including market research and intelligence; data engineering and analytics; and technology and we look forward to working with Ofcom in this area. The Welsh Government is committed to working with Ofcom as any action is taken to evolve its research plans in response to changing markets and the increasing convergence of the sectors it regulates. This includes exploring options to supplement Ofcom data with targeted Wales level research and information gathering through the work of the Broadcasting and Communications Advisory Body.

**Financial implications:** No financial implications.

### **Recommendation 15**

The UK Government should set out how it will improve the provision of media content for audiences in Wales.

**Response:** Not a recommendation for the Welsh Government.

The Welsh Government concurs with the Committee's view regarding the improvements needed in the provision of media content for audiences in Wales. This view is reflected in the Welsh Government's Co-operation Agreement with Plaid Cymru and the Broadcasting Expert Panel's report. Media plurality is the backbone to any functioning, democratic society and its safeguarding is paramount to ensuring informed, balanced news provision. The ever-changing media landscape, prevalence of media outlets and platforms as well as evolving consumption habits requires a comprehensive consideration of how best to ensure Wales has the media it needs as the sector continues to evolve. The Welsh Government would be happy to work with the UK Government on this matter.

**Financial implications:** No financial implications.

### **Recommendation 16.**

The Welsh Government should only agree to appointments to the roles of Ofcom and BBC members for Wales once a Senedd committee has been offered the opportunity to hold a pre-appointment hearing with the preferred candidates.

**Response:** Accept in principle

The Welsh Government recognises the importance of Ofcom and Board member for Wales appointments to Wales and the value of a Senedd committee holding a pre-appointment hearing with the preferred candidate. However, while the Welsh Government has clearly defined roles and responsibilities in these appointments, broadcasting is a non-devolved matter, with broadcasting generally and the BBC specifically reserved under paragraphs 158 and 159 (respectively) of Schedule 7A of GoWA. With regard to the BBC, as it is a body reserved by name, it is also excluded from the Minister of the Crown consent procedures. As such, further work is needed to understand the extent to which the Welsh Government is able to implement the recommended changes to these appointment processes. This work will be undertaken in consultation with the Welsh Government's Legal Services.

**Financial implications:** No financial implications.

### **Recommendation 17**

The UK Government appointment of the S4C Chair should require the agreement of the Welsh Government. This should be accompanied by offering a Senedd committee the opportunity to hold a pre-appointment hearing with the preferred candidate.

**Response:** Not a recommendation for the Welsh Government.

The Welsh Government has written to Lucy Frazer KC MP, the Secretary of State for Culture, Media and Sport to seek a stronger role in S4C Board appointments, as is the case for BBC and Ofcom Board member for Wales appointments. The Welsh Government highlighted the support in Wales for this change.

**Financial implications:** No financial implications.

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

***State of play: Public Service Broadcasting in Wales, March 2024***

**Response from the Department for Culture, Media & Sport, May 2024**

**Introduction:**

HM Government welcomes the publication of the Senedd Culture, Communications, Welsh Language Sport and International Relation Committee's report into public service broadcasting in Wales. We are grateful to the Committee for its consideration of this important issue.

Whilst broadcasting policy is reserved to the UK Government under the terms of the Government of Wales Act 2006 (as amended by the Wales Act 2017), we are committed to ensuring the interests of all nations and regions are reflected in the development of broadcasting policy. The Department for Culture, Media and Sport has regular discussions with the Welsh Government on a range of matters, including issues relating to broadcasting. We also welcome the ongoing contributions of Welsh authorities, including Creative Wales.

The incredibly valuable role that Wales plays both in the UK's broadcasting landscape and the wider creative economy is clear, and we are proud of our strong record of support for the creative industries in Wales. The UK Government will continue to work with the Welsh Government and stakeholders in the broadcasting sector to ensure that the sector serves all audiences of the UK nations and regions.

The following response focuses on the recommendations made to the UK Government.

***Recommendation 1. The UK Government should make it clear that it supports Ofcom entirely in defending the rights of public service broadcasters in the event of disputes with other media platforms which arise from the Media Bill.***

**UK Government response:**

The UK Government agrees with the importance of ensuring the future sustainability of our public service broadcasters (PSBs). That is why we are legislating via the Media Bill to introduce a new online prominence framework to ensure our public service broadcasters continue to benefit from prominence on major TV platforms. PSBs receive this benefit in exchange for the additional obligations put on them; and this exchange is known as the 'PSB compact'.

As part of this new framework, we want to encourage healthy and effective negotiations between PSBs and platforms where both parties can explore mutually beneficial arrangements. To support these negotiations, and provide additional legislative direction to Ofcom, the Bill provides "agreement objectives" setting out expectations for the sorts of deals the UK Government wishes to see reached. This includes a clear objective which



seeks to ensure that arrangements do not adversely affect PSBs' ability to fulfil the public service remit.

Ofcom will ultimately enforce the new prominence regime, and in the event parties are unable to reach an agreement voluntarily, Ofcom will have the necessary powers to intervene via a 'backstop' dispute resolution mechanism. Ofcom guidance will also set out further detail on what they would deem to be "appropriate terms" which they will consult industry on before publication which will give stakeholders further opportunity to input.

***Recommendation 2. The UK Government should amend the Media Bill to change references to "appropriate" prominence of public service content to "significant" prominence of public service content.***

**UK Government response:**

The UK Government agrees with the need to ensure that PSB content is available and easy to find as viewers increasingly shift online. This includes prominence for valued S4C content in Wales.

Careful consideration has gone into the exact wording used in the Bill and we believe "appropriate" strikes the right balance between securing prominence for PSB services and ensuring the regime is sufficiently flexible, operable and proportionate. How prominence is delivered will look different depending on the TV platform. As such, requiring "significant" prominence raises operability concerns and would be too inflexible to, for example, account for regional variation which is crucial for S4C.

The term "appropriate" is already used under the linear prominence regime which has proven incredibly effective in delivering prominence for PSB content. The UK Government believes "appropriate" prominence, with further detail set out in a Code of Practice, is fundamentally the right approach.

***Recommendation 3. The UK Government should amend the Media Bill to increase Ofcom's powers in relation to the Welsh language on commercial radio in order to protect Welsh language content in areas with a significant Welsh-speaking population.***

**UK Government response:**

The UK Government believes that the proposed changes to commercial radio licensing requirements set out in Part 5 of the Media Bill, including the specific changes to Ofcom's remit with regard to localness, will help to reduce the burdens on commercial radio whilst ensuring that local news continues to be protected. By giving commercial stations more freedom and flexibility to adapt their services, these changes will help support the long-term viability of commercial radio across Wales.

The UK Government agrees there is a need to look at whether there is sufficient plurality of Welsh language programming, noting the BBC's proposals to expand its programming on BBC Radio Cymru 2. However, introducing new powers that require Ofcom to increase requirements on existing commercial stations to provide Welsh language programming could

affect the viability of commercial stations in Wales and reduce the choice of services available to Welsh listeners on both FM or DAB.

We agree with a number of witnesses who provided evidence to the House of Commons Welsh Affairs Select Committee report into broadcasting in Wales (published on 27 October 2023) who argued that community radio could play a greater role in providing choice for listeners in Wales. We plan to work closely with the Welsh Government and with Ofcom to explore options for supporting more community radio services in Wales, including the scope to help support new services that cater for Welsh language speakers. This will include looking at the possible role that new FM licences may play, though decisions on whether to offer new FM licences to community radio stations in Wales is a matter for Ofcom to ultimately determine.

***Recommendation 4. The UK Government should significantly increase S4C's funding. This should include indicative funding for a number of years to enable S4C to adequately plan for the future.***

**UK Government response:**

In January 2022 the UK Government announced the Licence Fee Settlement to the end of the current Charter period. This was a strong settlement for S4C, which saw S4C become fully funded by the licence fee for the first time, providing it with financial certainty over a 6 year period which supports it to plan its service effectively.

The Licence Fee Settlement provided S4C with £88.8 million per annum of licence fee funding in 2022 and 2023, and annual inflation-linked uplifts to its licence fee income for the subsequent four years. It also included a new commitment of an additional £7.5 million per annum to support S4C's digital development, ensuring S4C's offering remains sustainable in the digital age. Overall, this settlement delivered a 9% increase in funding for S4C following a five-year funding freeze prior to 2022.

S4C is vital to the people of Wales, and this settlement helps enable S4C to continue to support the Welsh economy, culture and society. It will also help S4C to reach more Welsh language speakers, including younger audiences, and deliver on the UK Government's commitment to support the ambition of 1 million Welsh speakers by 2050.

Looking further ahead, we are seeing a rapidly changing media landscape. The UK Government has therefore launched a review of the licence fee funding model, to ensure it is fair to licence fee payers, sustainable for the long term, and supports the BBC and S4C's vital roles in growing our thriving creative industries. The review will explicitly consider the funding arrangements of Welsh Language Broadcasting.

***Recommendation 5. The UK Government should consider funding S4C according to a formula, to give S4C greater certainty over future funding. This formula could include linking S4C's funding to measures of inflation such as CPI or RPI, or have reference to overall licence fee revenue. It should include a ratchet mechanism to ensure that funding for S4C does not fall in real-terms.***

**UK Government response:**

The UK Government agrees that it is important that S4C has certainty over future funding. This is why S4C is now funded by a formula linked to CPI inflation for the rest of this Charter period, until 2028. The final determination of the 2022 Licence Fee Settlement confirmed that S4C would be fully publicly funded by the licence fee for the remainder of the current Royal Charter period, fixed in cash terms for the first two years before rising in line with CPI inflation from 2024 onwards. Decisions for S4C's funding beyond 2028 will be taken alongside Charter Review.

***Recommendation 6. The UK Government's BBC Funding Model Review must take evidence from S4C. The review must make specific reference to the public funding of S4C as the broadcaster is primarily funded from the licence fee.***

**UK Government response:**

The Terms of Reference of the UK Government's Funding Model Review, published in December 2023, set out a specific commitment to exploring the funding arrangements of Minority Language Broadcasting. S4C's funding arrangements are a key part of that work. The Secretary of State for Culture, Media and Sport invited S4C to provide evidence to support the Review, and S4C has responded to that request. We will use all relevant evidence, including evidence laid out in S4C's response, to support the findings of the Review in relation to minority language broadcasting, taking into account S4C's position as a recipient of public funding via the licence fee.

***Recommendation 15. The UK Government should set out how it will improve the provision of media content for audiences in Wales.***

**UK Government response:**

Internet access and streaming services have fundamentally changed how audiences access broadcast content, but our public service broadcasters and radio services are governed by laws written 20 and more years ago. As recognised by the Committee's report, the Media Bill is needed to enable our PSBs to compete in this digital new world, so they can produce great content for the audiences of the future. These reforms will ensure that Welsh audiences, as well as those in other parts of the UK, continue to have access to a wide range of media content.

The Bill modernises the 'mission statement' for public service broadcasting, replacing the current system of purposes and objectives with a streamlined remit that will ensure that our PSBs continue to focus on serving audiences across the UK. The new remit also gives the PSBs the flexibility to fulfil the remit on a wider range of platforms. This will ensure that viewers in all nations of the UK are able to access high quality media content in the way that works best for them, be that live, or on-demand.

The remit focuses on the distinctive role that PSBs play in our broadcasting landscape - producing a wide range of high quality content that reflect the needs of different audiences. This includes a commitment to produce comprehensive news coverage of international, national and local issues.

The remit is underpinned by a robust set of quotas, requiring PSBs to produce particular types of content, including independent and original productions, and content that is made in different areas of the UK. These regional quotas will ensure that great programmes continue to be made in all areas of the country including Wales, and should ensure that the Welsh production sectors continue to flourish.

Furthermore, in recognition of the important role our public service broadcasters - including S4C - play in the wider PSB system and the vital content they provide for Welsh audiences, the Bill will also introduce a new online prominence regime which will require major TV platforms to carry and give regional prominence to designated S4C services in Wales. This will ensure viewers in Wales can continue to find the content they value online.

The Media Bill will also update S4C's public service remit to include digital and online services, which will allow S4C to broaden its reach and offer its content on a range of new platforms. In addition, the Bill sets out changes that make qualifying for the listed events regime a PSB-specific benefit. This means S4C will qualify for the first time, and enshrine the important role our PSBs, including S4C, play in distributing important and valuable content to UK audiences.

***Recommendation 17. The UK Government appointment of the S4C Chair should require the agreement of the Welsh Government. This should be accompanied by offering a Senedd committee the opportunity to hold a pre-appointment hearing with the preferred candidate.***

**UK Government response:**

The UK Government recognises the Welsh Government and Senedd's interest in matters concerning S4C given the important role it plays in Wales and in the promotion of the Welsh language. Public appointments to S4C, including the Chair, are made in compliance with the Broadcasting Act 1990, which provides that appointments are made by the Secretary of State for Culture, Media and Sport. Whilst broadcasting policy is not a devolved matter, the DCMS Concordat with the Welsh Government states that 'DCMS will consult with the Minister for Heritage on "Welsh appointments" to the Boards of the BBC and S4C.'

In accordance with this, as has been standard for previous S4C appointments, the Welsh Government is invited to appoint a representative to the Advisory Assessment Panel, which is responsible for assessing which candidates are appointable for the role. The Welsh Government is consulted on the role specification prior to the launch of the campaign, and asked to suggest potential candidates to approach for the role. The responsible Welsh Government Deputy Minister is formally consulted for views at the final appointment decision stage. The S4C Chair role is also subject to a pre-appointment scrutiny hearing by a House of Commons Select Committee before an appointment can be confirmed. For the process that is currently underway to appoint a new Chair, this will be conducted by the House of Commons Welsh Affairs Select Committee. As confirmed in previous correspondence with the Senedd Committee and Welsh Government, the UK Government considers that the above measures already provide the Welsh Government with a formal role in the upcoming appointments process for the Chair of S4C and does not consider any changes to be required at this time. The UK Government remains committed to ensuring the future success of S4C and Welsh-language broadcasting.

It is also important to note that a reciprocal arrangement is currently in place for the appointment of a Welsh Member to the Board of Ofcom, a role for which Welsh Government Ministers are responsible. The UK Government is consulted on this appointment, but there is no requirement for UK Government Ministers to agree to the appointment.



Delyth Jewell MS  
Chair of the Senedd's Culture, Communications, Welsh Language, Sport, and International Relations Committee  
Senedd Cymru  
Bae Caerdydd  
CF99 1NA

9th May 2024

Annwyl Chair,

I am writing to respond to the committee's recent report "State of play: Public service broadcasting in Wales". As ever, we were very grateful for the opportunity to give oral evidence to the committee in November 2023, and we appreciate the members' ongoing interest in ITV Cymru Wales and the important role that Public Service Broadcasting plays in Wales.

Public Service Broadcasters are at the heart of the creative economy - boosting the television production sector, creating jobs and nurturing talent all across Wales and the rest of the UK. Together with the ITV Studios company Boom, we are a significant employer here in Wales with some 400 staff operating from various locations across the country, telling Welsh stories for audiences in Wales and across the UK for all the leading broadcasters.

ITV makes a vital contribution to broadcasting and public life in Wales, including providing plurality to the BBC in news and current affairs in both English and in Welsh, and bringing a mass audience to it. We are making huge efforts to serve that audience on air, online and across social media with trusted content which continues to reach substantial proportions of the Welsh population on a daily and weekly basis.

But this contribution should not be taken for granted. We are operating in the most challenging economic environment since the financial crisis of 2008/09. The EBITA of our Media & Entertainment division - the part of ITV which holds our PSB licences, our other TV channels and ITVX - more than halved in 2023. As a result, we have announced a further £30m in cost reduction measures on top of the £150m we have already delivered in recent years.

This challenging context is directly relevant to the sustainability of commercial PSB. Linear advertising revenues - ultimately our key revenue source for funding our PSB obligations - were down 15% last year, driving the decline in EBITA. DTT spectrum has historically been one of the benefits that helps fund PSB obligations like regional production, but changing viewer behaviour and rapidly inflating DTT costs mean this benefit will almost certainly become a cost in the not-too-distant future.

In this context, we are pleased to see the Committee recognising the importance of the Media Bill and in particular Ofcom's role in the event of disputes with platforms. Ofcom's

implementation of the new regime for PSB will be key to its effectiveness, and we have been urging parliamentarians to ensure that a clear mandate is given by the UK Parliament to Ofcom for muscular implementation of the Bill, particularly regarding prominence and dispute resolution, and that Parliament holds Ofcom to account. Only if this is delivered can we be assured that PSBs will achieve the required level of prominence on global online platforms, and that they can strike commercial deals on fair terms with those platforms, at least not undermining the PSBs ability to deliver their remits.

As the Members know, there is a pressing need for legislative reform. Without the changes outlined in the Bill, the future of PSB is at serious risk. Today we compete in a global market which is intensely competitive for both viewing and revenue and where major online platforms increasingly determine what UK audiences see on their TVs. It's not an exaggeration to say that without the Media Bill PSB content will begin to disappear from view on global online platforms.

Another recommendation in the committee's report calls on Ofcom to require ITV to produce a greater proportion of its content in Wales. We recognise that Ofcom's data shows that ITV's spend in Wales in 2022 on network productions meeting Ofcom's demanding criteria for regional productions was low. However, this is a network quota which reflects only part of ITV's overall contribution in Wales (for instance, it takes no account of our nations and news and current affairs output) and so we would welcome the opportunity to inform members about our wider efforts in this area. We would also like to note that an annual snapshot doesn't always reflect the full story in terms of production investment, and that they can differ from year to year.

In terms of ITV's current network productions in Wales, its new crime drama *Out There* starring Martin Clunes is currently being filmed in Wales in association with Creative Wales. *Until I Kill You* is an upcoming drama from World Productions, part of ITV Studios, and is also in association with Creative Wales. And a new six part thriller that is currently being aired on ITV1 & ITVX, *Red Eye*, has been produced by award winning Cardiff based production company Bad Wolf. ITV also works hard to ensure that Wales is regularly represented across the entire schedule, including its Daytime, Entertainment, Reality and Factual programmes. We are also delighted that a Welsh language version of ITV's global, multi-award winning hit TV series *The Voice*, will be produced by Boom Cymru - part of ITV Studios- and will air on S4C in 2025.

We are also pleased to be in current discussions with Creative Wales about facilitating an industry and producer networking day here in Cardiff for some of ITV's key Commissioners to encourage greater collaboration between ITV and the vibrant screen sector in Wales. Continuing to commission from outside of London at scale is important to ITV as it provides the opportunity to inclusively reflect the society within which we all live - that's why we have substantially exceeded our Out of London quota in recent years.

As part of ITV's commitment to deepening its relationships with independent production companies in Wales and across the UK's Nations and regions, we unveiled a new development initiative in September 2023, *Amplify: The Regions*. We're very pleased that Welsh production company *Hello Deer* is one of 5 companies that have been chosen to be

matched with a genre commissioner at ITV, receive a brief and take part in a pitch, with each chosen company given £5,000 to develop potential ideas.

ITV's coverage of sport in Wales should also be highlighted and celebrated in the context of this discussion. Sport is a vital part of Welsh national identity and ITV is proud to play a valuable part in the cultural moments that bring people together. ITV's commitment to and coverage of the Six Nations rugby championship is a clear example of ITV's contribution to Welsh audiences. It's also worth noting that ITV's informal but longstanding arrangement with S4C has allowed them to broadcast live sporting events of global importance through the Welsh language - an unique and vital offering to viewers in Wales.

Together with the programming that ITV Cymru Wales makes and sells to S4C, ITV Cymru Wales also produces programmes outside of its licence commitments for the ITV Network and BBC Wales. In the last 4 years there have been 10 series and programmes from ITV Cymru Wales that have made it on to the ITV network. That doesn't include programmes for BBC Wales, BBC One and BBC Three. In total, over 41 hours of primetime TV made in Wales and seen around the UK has been produced by the ITV Cymru Wales team.

It's also important to highlight the vital contribution ITV makes in Wales in terms of its news provision for audiences in Wales. ITV is the only commercial broadcaster in Wales to provide high quality national news, as well as delivering a range of current affairs and factual content for viewers. Our spend on news and current affairs in Wales costs many millions of pounds each year, part of a huge commitment across ITV Nations & Regions news and over the past 3 years we have invested heavily in news gathering and digital production technology linking up all our operations across the UK.

In 2022, ITV extended its commitment to national and international news and audiences across the UK with the extension of the evening news programme to an hour, with even more focus on reporting from outside of London feeding into the programme, to reflect the whole of the UK. The programme airs directly after ITV's nations and regional news 30 minute programmes made by teams across 18 different ITV regions, including our 6pm ITV Wales news programme. Our dedicated Wales Correspondent Rhys Williams works closely with the team here in Wales to ensure accurate reporting of devolved policy issues.

We hope that the Committee recognises the important contribution ITV Cymru Wales makes to the cultural, economic and political life of Wales, and we very much hope that members can continue to amplify the urgent need to reform the regulatory media framework, ensuring that ITV can play its vital role in the Welsh media landscape for years to come.

Yn gywir,



Phil Henfrey  
Head of News and Programmes  
ITV Cymru Wales





Delyth Jewell AS  
Chair  
Culture, Communications, Welsh Language, Sport, and International Relations Committee  
Senedd Cymru  
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9 May 2024

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## Public Service Broadcasting in Wales: S4C's Response to the Committee's Report

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Annwyl Delyth,

The Committee's interest in public service broadcasting in Wales is welcome and we appreciate the cross-party support for a sustainable future for S4C. As you mention in your '[State of Play](#)' report, it is vital that we are able to meet challenges and opportunities as the media world transforms, to continue to serve the needs of our audiences. And whilst the broadcasting landscape is changing rapidly, there is still an important place for public service media and for S4C as a unique service in that landscape.

We agree with the key findings of your report: that upcoming legislative changes through the Media Bill and sufficient powers for Ofcom to enforce the regulatory regime are greatly needed, that public service broadcasting needs sustainable funding for the future, and that we must be bold as we adapt, evolve and take on the challenges of the digital age.

### S4C Funding

Today, S4C exists in an extremely competitive market. It is important, therefore, that S4C's content is available on a wide range of platforms, and is high-quality content that demands attention and offers something unique to its viewers.

The financial certainty and additional investment we received at the 2022 Licence Fee Settlement until 2027-28 has been absolutely essential in enabling us to plan for the next few years in the context of constant digital developments and a challenging economic picture. The award of additional funding, for example, has been key in allowing S4C Clic to be offered on new platforms, in growing short- and medium-form online content for younger audiences, and in developing S4C's digital news service, while protecting our core TV service and programming budget.

It is encouraging to see that this investment and strategy is succeeding, as S4C maintains its weekly reach in Wales well and has regained some of the younger audience as S4C's digital viewership continues to increase significantly.

Since 1982, S4C has been funded through various formulae and sources, however, the statutory provisions have always outlined the financial requirement to enable S4C to provide a high-quality Welsh-language service.

The Department for Culture, Media and Sport has invited S4C to contribute evidence to their review of the TV Licence model. Through that evidence and as core principles, we are emphasising that S4C requires sufficient, predictable, and sustainable levels of funding. The way in which S4C is funded after 2028 will directly affect how well it can meet future challenges and the demands of its audiences, and the cultural, economic and social value it can create in Wales over the decades to come.

### Economic impact of S4C

Since its launch, S4C has recognised that it has an important role and responsibility to contribute to the future of our language, culture, society and economy. We are very proud of the part we have played in the success of the creative industries in Wales and of the strong chain of independent production companies established here.

S4C's first priority is to provide a high-quality service on TV and digital platforms that meets the demands of its audience. To this end, we commission programmes based on the best idea and strive to reflect the whole of Wales through that provision. The tendency is that we therefore invest and commission our content from production companies across Wales and our supply chain companies in turn play an important role in their local economies.

A [recent report by Wavehill on](#) the economic and social impact of S4C's activities shows that S4C supports 1,900 jobs across Wales and creates £1.53 for the Welsh economy for every £1 it receives from Licence Fee income.

It is undoubtedly important that S4C's economic and social contribution is felt in every corner of Wales. We report annually on our expenditure on content and specify the distribution of that expenditure based on the office location of the production companies that create our programmes in the S4C Annual Report and Accounts.

It should be noted that, in any given year, the distribution of this expenditure will vary according to S4C's range of commissions and annual broadcast schedule. It should also be noted that this is one yardstick, and that the distribution is not necessarily a true reflection of the expenditure of S4C productions across the country, nor of on-screen representation of Wales' diverse communities.

Towards the end of last year, we noted the fifth anniversary of Canolfan S4C Yr Egin in Carmarthen and our *Bariau* drama series was filmed at the new Aria Studios, Llangefni. These are prime examples of direct investments S4C can make to support local communities and economies in west and north Wales.



We recognise that investment, partnerships and facilitating collaboration are key in contributing to regional development. For example, S4C's presence in Carmarthenshire generates a total of £730,000 in GVA per year and supports over 10 full-time jobs outside of S4C. With S4C acting as an anchor organisation at Yr Egin, over 15 businesses are also tenants which enables greater collaboration, connections and sharing ideas within the digital and creative industries.

S4C has committed to commissioning a report on the economic and social impact of its activities next financial year, and we look forward to being able to update the Committee in due course on areas of progress. We also collect and report on our audience's views on how well S4C manages to reflect the diversity of people living in Wales through our programmes.

S4C's value has always amounted to more than just a television channel, and it is our priority to ensure a firm and sustainable future for S4C, the production sector in Wales, and the important impact on our language, economy and culture.

Yours sincerely,

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

Guto Bebb  
**Interim Chair, S4C**

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

Sioned Wiliam  
**Interim Chief Executive, S4C**



British Broadcasting Corporation  
Broadcasting House, London W1A 1AA

From the Director-General

9 May 2024

Delyth Jewell  
Chair, Culture, Communications, Welsh Language,  
Sport and International Relations Committee  
Senedd Cymru  
Cardiff Bay  
Cardiff CF99 1NA

Dear Delyth,

Thank you for your letter dated 21 March 2024 and for a copy of the Culture, Communications, Welsh Language, Sport, and International Relations Committee's report, "State of play: Public service broadcasting in Wales", laid on 25 March 2024.

We are grateful to you and the Committee for the report which highlights the BBC's continued commitment to audiences in Wales and to the Welsh creative economy. We acknowledge and welcome your comments which highlight the commendable progress made by the BBC as part of the Across the UK programme. We also note the recommendations made by the Committee in relation to funding and reporting on devolved policy issues.

As you highlight in your report, the corporation has increased investment in content which is made in Wales following the decision to move more production out of London. Last year, for example, the BBC doubled its investment in network radio produced in Wales and we've seen the biggest drama slate ever commissioned by BBC Wales. The BBC is also proud to have seen a significant year-on-year increase of audiences to BBC Wales's content on the iPlayer, BBC Sounds and News online, and to have supported extended hours of broadcasting in recent months on Radio Cymru 2. The BBC in Wales has demonstrated clear ambition and its content strategy has borne fruit as demonstrated by this year's audience impact.

On our network news coverage, the BBC is committed to reporting on the devolved nations across our network provision of News and Current Affairs, and throughout our nations-specific output. As devolved powers have increased, we have sought to be clearer in

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signposting to audiences across network news where stories are applicable to each nation and how it impacts them. As part of our coverage, we also routinely explain the differences in policy across the nations to aide audience understanding of the policies and the democratic level of decision-makers behind them. We will continue to innovate across BBC News and seek new ways of telling devolved stories in order to enhance audience understanding across our output.

Yours sincerely,

A handwritten signature in black ink, appearing to be 'T. Davie', written over a horizontal line.

**Tim Davie**  
**Director-General**

14 May 2024

Lord Michael Grade  
Chair

Email: [michael.grade@ofcom.org.uk](mailto:michael.grade@ofcom.org.uk)

**By email**

Dear Delyth,

[Ofcom response to the Senedd Cymru Culture, Communications, Welsh Language, Sport, and International Relations Committee report 'State of Play: PSB in Wales.'](#)

Thank you for the committee's report '**State of Play: Public Service Broadcasting in Wales**' published on 25<sup>th</sup> March 2024 and for the opportunity to appear before the committee last Autumn. We read the report with interest and are grateful for the Committee's continued scrutiny of and views on Public Service Broadcasting and Ofcom's work in Wales.

Before responding to the specific recommendations made in the report relating to Ofcom's work, I wanted to draw your attention to some recent work that will be of interest to the Committee. First, we are looking at how local media is evolving and what audiences need and value from local services. We plan to publish an initial report next month that will include the findings of qualitative research we have undertaken with audiences across the nations and regions of the UK, including a focus group in Llandeilo. We will then publish a final report, including our view on the BBC's impact on local news sectors, before the end of this year.

In addition, we will publish terms of reference for our latest review of Public Service Media (PSM) before the summer recess. Our review will build on the wealth of information we have about what audiences value from PSM – including trusted and accurate news and programming that brings us together and resonates with UK audiences, reflecting the diversity across the nations and regions of the UK. We will examine how the PSBs have delivered for audiences over the past five years and what we can do to support the universal delivery of PSM content over the next decade and beyond, in light of the ongoing rapid changes in consumption and technological advances. In particular, we note that the increasing proportion of content consumed online and the breadth of services available has put significant pressure on the advertising funding PSB model and the need for all PSBs to compete with global services. It will be important to consider any future additional requirements on the PSBs in this context.

We will also look at how PSM providers deliver for audiences in the nations and regions, how PSM content reflects and represents the diversity of the UK and that the benefits are spread across the UK. We expect to publish the findings from our review of past performance later this year, followed by our recommendations in Spring 2025. Our team in Wales look forward to engaging with the committee on these important issues later in the year.

'**State of Play: Public Service Broadcasting in Wales**' contains five recommendations for Ofcom and our response is set out below. Should the Committee require further information please do not hesitate to get back to me.

**Recommendation 8.** Ofcom should be ambitious in using its regulation of the BBC to drive improvements to the BBC’s representation and portrayal of people in Wales. The BBC and Ofcom should report back to this Committee before the end of the Sixth Senedd to report on its progress.

Ofcom’s Operating Licence is a key tool in how we regulate the BBC’s UK Public Services. Following consultation, we issued a new licence on 23 March 2023. It contains the regulatory conditions Ofcom considers appropriate for requiring the BBC:

- to fulfil its Mission and promote four of its Public Purposes;<sup>1</sup>
- to secure the provision of distinctive output and services; and
- to secure that audiences in England, Scotland, Wales and Northern Ireland are well served.

The Operating Licence sets specific requirements in relation to Public Purpose (4), namely:

*To reflect, represent and serve the diverse communities of all of the United Kingdom’s nations and regions and, in doing so, support the creative economy across the United Kingdom.*

These include quantitative quotas along with more general requirements relating to specific genres in both Welsh and English on radio, television and online. For example, [licence condition 4.51](#) requires the BBC to provide content of interest and relevance to audiences in Wales, including a broad range of content which reflects Wales’s culture, across BBC TV, radio and online services. Further details are set out in section A6 of the Annex of the [Modernising the BBC’s Operating Licence Statement](#). As you will be aware, in January, we published our [final determination](#) on the BBC’s request to expand the output of BBC Radio Cymru 2. As a result of our analysis, we decided that the BBC could proceed with its proposal to extend the hours of BBC Radio Cymru 2 so that it becomes a UK Public Service in its own right and Ofcom updated the Operating Licence with new conditions for the service.

Ofcom also reviews the BBC’s performance against the requirements of the Operating Licence on an annual basis in our Annual Report that we publish each year in late Autumn (as set out in our Plan of Work). Last year we also included additional information on each of the nations, including Wales and we plan to do this in future Annual Reports on the BBC as well. We expect both the 2023-24 and 2024-25 Annual Reports on the BBC to be available to the committee before the end of the Sixth Senedd. In addition, in November 2023, we published our [BBC Audiences Review](#) to better understand what factors may drive lower satisfaction levels in the BBC among D and E socio-economic groups. We conducted new research with D and E audiences, including in-depth interviews and focus groups across the UK (Cardiff and Welshpool in Wales), and carried out further analysis on the extensive information and data we currently collect in relation to the BBC. This was a thematic review on a particular aspect of the BBC’s performance and we undertake these reviews when we consider it necessary. Other thematic reviews will follow in due course.

**Recommendation 10.** Ofcom should include a requirement for the Channel 3 licence in Wales to produce a greater proportion of network content in Wales. It should report to back to the Committee outlining how it will do this.

The Channel 3 licence for Wales imposes obligations on the licence holder to produce and broadcast given amounts of specific regional content in and for Wales. The licence also includes a requirement

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<sup>1</sup> Four of the Public Purposes are focused on UK audiences while the fifth one is aimed at international audiences.

that at least 35 per cent of originated network content is made outside of the M25 area. However, we do not have a power to specify, as part of that condition, particular geographic locations outside of the M25 area where such production should take place.

**Recommendation 12.** Ofcom should continuously review UK network news coverage of devolved policy issues. It should report to back to the Committee outlining how it will do this.

As the Committee will be aware Ofcom commissioned Professor Stephen Cushion of Cardiff University and Dr Richard Thomas of Swansea University in 2021 to analyse how well UK network news providers report devolved policy issues on television and online. Professor Cushion supplemented detailed content analysis of broadcasts in June and July 2021 with interviews with senior editors from each broadcaster to better understand the editorial choices they made.

The report concluded that network news providers had enhanced their coverage of devolved issues compared to 2015 and 2016. It says that *“This was largely as a result consequence of Covid-19, which brought devolution to the fore of UK politics”*. However, the content analysis demonstrated that around 40% of items did not include any signposting about the relevance of devolution, such as stating if a policy related to England only. The analysis also found that BBC TV news reporting supplied far more references to devolved powers than other network news providers, while BBC online news more explicitly signposted the relevance of devolved issues than television news.

As mentioned earlier, we will be looking at audience consumption and attitudes to local, national, UK and international news in our reviews of local media and Public Service Media, drawing on our extensive research. We also engage regularly with the PSBs to discuss how they connect with audiences, including our research on devolved news reporting and audience satisfaction.

**Recommendation 13.** Ofcom should use existing regulatory powers to improve network news coverage of devolved policy issues. It should report to back to the Committee outlining how it will do this.

Our review of Public Service Media and the Local Media Review are informed by our research into audience satisfaction and perceptions of how well PSBs deliver content and services that meet their needs and interests (including within the nations and regions).

Individual editorial decisions regarding the content of network news programmes sit with the broadcasters, not Ofcom. It is for them to decide what to include in their programmes and how it should be presented. Compliance with the standards in Ofcom’s Broadcasting Code is an important aspect of the performance of PSBs. These include rules in relation to the due accuracy and due impartiality of news. We consider all complaints that we receive about these matters in line with our published procedures.

**Recommendation 14.** Ofcom should improve its analysis of media provision in Wales, including by increasing staffing levels in Wales.

Ofcom undertakes regular and extensive research and analysis into media provision across the UK. For example, Ofcom’s Media Nations reports are published on an annual basis. The reports highlight key trends in the media sector and set out how audiences are served in the UK by a range of broadcast TV and radio services, as well as online video and audio streaming services. Our separate reports for Wales, Northern Ireland and Scotland cover specific themes and issues relevant to those nations.



Other annual research Ofcom conducts include: the BBC Performance Tracker and the BBC Children's Tracker which look at attitudes towards the BBC in the context of wider media provision; the PSM Tracker which looks at audience perceptions of the PSB providers; the News Consumption Survey which tracks audiences' attitudes and cross-platform use of news providers; and Audio and VoD surveys which provide greater insight on online media providers.

We also regularly commission bespoke research. For example, as part of the local media review, we published quantitative findings research in December 2023 and will publish the findings of qualitative research in June. In addition, we have specialists who analyse industry data sources including [Barb](#), [RAJAR](#) and [Ipsos Iris](#). Research projects are managed by Ofcom's Research and Intelligence team, some of whom are based out of London, including in the nations' offices, with additional support and input from other colleagues in the nations and as such are not dependent of staffing levels in any of the nations' offices, including Wales.

The committee will be aware that the Ofcom Wales team manages all aspects of Ofcom's remit and provides input and advice on issues as they apply to Wales to policy and project teams across Ofcom. This function is replicated in Scotland and Northern Ireland and the teams are broadly the same size across the nations. Ofcom has continued to drive towards our goal of 30% of colleagues employed outside of London by 2026 and has seen the number of colleagues based in Ofcom's Cardiff office grow in recent years. Colleagues from a wider range of teams are now based in Cardiff, including colleagues from teams across Ofcom – Network and Communications, Market Research and Market Intelligence, Strategy and Online Safety. Two new early careers graduates are also based in Cardiff. We have sufficient capacity in our office to grow the size of our Welsh workforce, which we plan to achieve incrementally through a mix of location neutral recruitment, targeted recruitment, and support for relocations. We would of course be happy to keep the committee updated on progress made in growing our presence in Wales.

I hope you find this response to the Committee's recommendations helpful. Please do get in touch if anything remains unclear.

Yours sincerely,

A handwritten signature in black ink, appearing to read 'Michael Grade', with a long horizontal line extending to the left.

MICHAEL GRADE

(Lord Grade of Yarmouth)

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