

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

Meeting Venue:

Committee Room 2, Senedd

Meeting date: 19 November 2025

Meeting time: 09.30

For further information contact:

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Hybrid

Private pre-meeting

09:15–09:30

1 Introductions, apologies and substitutions

09:30

2 Scrutiny of the Welsh Government's Draft Budget 2026–27:

Evidence session with the Minister for Culture, Skills and Social Partnership

09:30–11:00

(Pages 1 – 72)

Jack Sargeant MS, Minister for Culture, Skills and Social Partnership

Jason Thomas, Director – Tourism, Marketing, Events and Creative

Elin Burns – Director of Culture, Heritage, Sport and Welsh Language

Paul Kindred – Deputy Director, Culture, Heritage, Sport and Welsh Language

Attached Documents:

Research brief

Written Evidence: Welsh Government

3 Papers to note

11:00



3.1 Scrutiny of Sport Wales

(Pages 73 – 74)

Attached Documents:

Letter to Sport Wales following the evidence session on 25 September – 10 November 2025

3.2 Inter-institutional Relations Agreement

(Page 75)

Attached Documents:

Copy letter from the Deputy First Minister and Cabinet Secretary for Climate Change and Rural Affairs to the Chair of the Legislation, Justice, and Constitution Committee: Informing that the Independent Intergovernmental Relations secretariat has now published its annual reports for 2022–2023 and 2023–2024 – 11 November 2025

3.3 Scrutiny of the Arts Council of Wales

(Pages 76 – 79)

Attached Documents:

Letter from the Arts Council of Wales providing the additional information requested in the Committee's letter of 5 November, following the recent scrutiny session – 12 November 2025

3.4 Funding pressures facing the Welsh publishing sector

(Page 80)

Attached Documents:

Letter from Lucent Dreaming on the funding pressures facing the Welsh publishing sector – 13 November 2025

3.5 Forum on EU–UK Culture and Media Relations

(Pages 81 – 98)

Attached Documents:

Correspondence from the Forum on EU–UK Cultural & Media Relations: Informing that Cultural and Creative Sectors have published joint policy recommendations to strengthen EU–UK relations – 13 November 2025

3.6 UNESCO City of Literature

(Pages 99 – 100)

Attached Documents:

Letter from the Chair congratulating Professor Mererid Hopwood and all involved in Aberystwyth's successful bid to become the first UNESCO City of Literature – 14 November 2025

3.7 Review of Public Bill and Member Bill processes

(Pages 101 – 103)

Attached Documents:

Letter to the Llywydd: Providing views on the practice of publishing pre-introduction versions of Bills – 14 November 2025

4 Motion under Standing Order 17.42 (ix) to resolve to exclude the public from the remainder of this meeting and for the start of the meeting on 27 November

11:00

Break

11:00–11:10

5 Scrutiny of the Welsh Government's Draft Budget 2026–27 – Consideration of evidence and key issues

11:10–11:40

6 Scrutiny of the Welsh Government's Draft Budget 2026–27: Research briefing on the budget for international relations

11:40–12:10

(Pages 104 – 125)

Attached Documents:

Research brief

Written evidence: Welsh Government

Document is Restricted

Jack Sargeant AS/MS
Y Gweinidog Diwylliant, Sgiliau a Phartneriaeth Gymdeithasol
Minister for Culture, Skills and Social Partnership



Llywodraeth Cymru
Welsh Government

Our ref: MA/JS/2607/25

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

3 November 2005

Dear Delyth

Thank you for your letter of 21 August on the scrutiny of the Welsh Government's 2026-27 draft budget which was published in two stages. The Outline Draft Budget 2026-27 (Stage 1) on 14 October 2025 and the Detailed Draft Budget 2026-27 (Stage 2) on 3 November 2025.

The enclosed paper provides detail on the plans set out in draft budget and information on the specific areas requested by the Committee.

I look forward to providing an update to the Committee at our oral evidence session on 19 November 2025.

Yours sincerely,

Jack Sargeant AS/MS
Minister for Culture, Skills and Social Partnership
Y Gweinidog Diwylliant, Sgiliau a Phartneriaeth Gymdeithasol

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

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



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

Welsh Government Draft
Budget 2026-27

19 November 2025

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

A breakdown of the 2026-27 Draft Budget allocations (as relevant to Arts, Culture, Heritage, Communications, Creative Industries and Sport) by MEG, Spending Programme Area, Action and Budget Expenditure Line (BEL).

1. The table below provides an overview of the budgets allocated to Arts, Culture, Heritage, Creative Industries and Sport that are within the Economy, Energy and Planning MEG as published in the Draft Budget 2026-27 on 3 November.
2. This confirms a total allocation of £216.0m which includes £148.1m resource funding and £67.9m capital funding. The resource funding includes £135.9m revenue and £12.2m non-cash. The capital funding includes £68.9m traditional capital and financial transactions capital repayments of £1.0m.
3. There is also Annually Managed Expenditure (AME) funding of £33.0m included for pension adjustments relating to Arm's Length Bodies (ALBs) and provision for Cadw debts which has not been utilised to date.
4. A full breakdown of this funding by BEL is provided at annex A.

| | Plans as per 2025-26 Final Budget February 2025 | Baseline Adjustments for 2026-27 | 2026-27 Revised Baseline | Changes | 2026-27 Draft Budget October 2025 |
|-------------------------------------|--|---|--------------------------------|--------------|---|
| £'000 | | | | | |
| Fiscal Resource (Revenue) | 122,467 | 10,725 | 133,192 | 2,709 | 135,901 |
| Non-Fiscal Resource (non-cash) | 12,190 | - | 12,190 | - | 12,190 |
| Total Resource | 134,657 | 10,725 | 145,382 | 2,709 | 148,091 |
| Capital | 73,787 | - 7,352 | 66,435 | 2,477 | 68,912 |
| Capital - FT | - 500 | 500 | - | - 1,000 | 1,000 |
| Total Capital | 73,287 | - 6,852 | 66,435 | 1,477 | 67,912 |
| Total Resource & Capital | 207,944 | 3,873 | 211,817 | 4,186 | 216,003 |
| Resource AME | 33,000 | | 33,000 | | 33,000 |
| Total AME | 33,000 | - | 33,000 | - | 33,000 |
| Total | 240,944 | 3,873 | 244,817 | 4,186 | 249,003 |

5. Our cultural, heritage and sport sectors, particularly our ALBs and Cadw, have been critical in supporting local, regional and national economies, communities and supporting our agenda to tackle inequalities, particularly racial inequalities and enabling greater access to communities across Wales. They provide great places for people to live, visit, work and study. Funding

through our cultural and sporting bodies benefits the lives of children and young people, who are active consumers and contributors to arts, heritage and the cultural sector. Through this Draft Budget, funding to ALBs has increased to £125.4m which consists of £99.5m revenue; £6.7m non-cash; and £19.2m capital. Further information is provided later in this paper on the funding of the ALBs.

6. The remaining funding of £90.6m remains within Welsh Government to provide funding to Cadw (£17.5m revenue, £5.5m non-cash and £9.2m capital), Creative Wales (£8.4m revenue, £0.01m non-cash and £7.5m capital), the National Botanic Garden of Wales (£0.6m revenue and £0.2m capital, and also to drive forward our priorities for Culture and Sport (£9.9m revenue and £32.8m capital). There are no FT allocations in this budget and the £1.0m reduction reflects the agreed repayment profiles in respect of a loan issued in prior years to the Welsh Rugby Union.
7. The Draft Budget total allocations for Support for Local Culture and Sport are £9.9m revenue and £32.8m capital which enables us to maintain our investment in this area. This funding enables us to support local museums, archives and libraries in line with our responsibilities as the development agency for those sectors. We will work strategically with key sector support bodies to build capacity and resilience of the sectors, ensuring that statutory obligations are met, and professional standards maintained for the benefit of users. We support collaborative initiatives to provide efficiency, value for money, service resilience and ensuring equality of access to collections across the sectors. We will continue to support the sector to put in place the infrastructure to support the delivery of digital services.
8. Through funding partnerships with our key sector support bodies, training and workforce development and discrete projects and programmes, we will ensure the management, preservation, protection, accessibility of and engagement with both physical and digital assets within archive, museums and library collections.
9. Within the libraries sector, in addition to monitoring delivery of library services in line with the Welsh Public Library Standards, we will continue to support digital access to electronic resources through the National Digital Library Service and [Libraries.Wales](https://www.libraries.wales).
10. The Transformation Capital Grants programme will continue to fund capital developments and improvements, including digital projects, to support

decarbonisation and promote equalities. Further rounds of the Priorities for Culture Capital Grant Scheme are also planned. These will, for example, enable local museums and archives and libraries to improve their collections storage and invest in improving local infrastructure. All this activity will be aligned to the Priorities for Culture.

Final out-turns for 2024-25 and forecast out-turns for 2025-26.

11. Final out-turns for 2024-25 and forecast out-turns for 2025-26 are provided at annex A.

An analysis and explanation of changes between 2025-26 and 2026-27.

12. There have been changes to the baseline totalling £10.725m for revenue and a reduction of £6.852m capital as part of the Draft Budget for 2026-27. There have also been revenue allocations of £2.709m and £0.977m capital allocations as part of the budget. Detailed tables with the changes are included at annex A.

Revenue

13. The primary change to the revenue baseline results from a capital to revenue swap for Cadw (£7.352m), which reflects the change in the accounting policy for conservation. This expenditure previously classified as capital, now appears as revenue and there is a corresponding reduction in the capital allocation.
14. Other changes to the baseline include an allocation of £1.97m to Medr to support performance-based music and drama conservatoire provision, an increase for staff pay (£0.439m) and employer National Insurance contributions (£1.164m) for ALBs and to Welsh Government Programme staff to reflect changes in 2025-26 and a reduction of £0.2m for the Wyeside Arts Centre.
15. Total allocations of £2.709m have been made as part of the budget which includes an additional allocation of £1.4m to NDR Studios. The revaluation will not be completed by April 2026 which means additional revenue to support the 3rd year of the NDR grant will be required and confirmed prior to business planning stage. The funding will enable studios in Wales to remain competitive and not be disadvantaged compared to other studios also receiving rates relief across the UK.

16. As well as the additional funding baselined in 2025-26 for public sector pay, as part of the 2026-27 budget we have allocated a pay award of £1.117m and National Insurance Costs of £0.192m to our ALBs and to Welsh Government Programme staff.

Capital

17. As outlined above, the main change to the capital baseline reflects the change in the accounting policy for conservation.

18. We have increased the capital allocations in grant in aid by £2.477m to Amgueddfa Cymru (£0.500m); the National Library of Wales (£0.250m); Sports Wales (£0.500m) and the Arts Council of Wales (£0.500m), to enable them to continue investment in their core estates, facilities and in their capital investment grant programmes. There has also been an allocation to Cadw of £0.227m to support investment and grants to the wider heritage sector.

19. An increase of £0.500m from 2025-26 has been made to the Creative Wales BEL which supports Wales-based production and games development companies who are looking to develop productions intended for international audiences and create jobs also for those productions from outside of Wales that are seeking to film in Wales.

Financial Transactions Capital

20. There has been a change to the financial transactions capital budget to add back the repayments for 2025-26 to the baseline.

21. There are no FT allocations in this budget and the £1.0m reduction reflects the agreed repayment profiles in respect of loan issued in prior years to the Welsh Rugby Union.

2. Other information

Information on how the delivery of the Arts, Culture, Heritage, Communications, Creative Industries and Sport portfolios and their associated outcomes are monitored and evaluated to demonstrate value for money.

22. Since being appointed the Minister for Culture, Skills and Social Partnership last year, I have continued to be pleased with the positive developments we have taken forward, including the launch of the Priorities for Culture in May. Effective resource management remains key to advancing our work and the Programme for Government.

23. The policy areas within my portfolio reach across many aspects of Government. They have the potential to make profound and lasting change to the lives of people and communities across Wales. They are the things people enjoy doing and that attract people to visit Wales.

24. We want to be ambitious about ensuring people have access to, benefit from and are represented by our culture, heritage and arts organisations. We all recognise that these have been tough times and that years of austerity have damaged our cultural as well as our social fabric. As we build the foundations of recovery, we must remember the benefits of delivering growth should be done inclusively.

25. We have well-established processes in place to ensure that resources are used effectively for the purposes intended. For example, there are governance and monitoring procedures in place for our national organisations which reflect the nature of our relationships with them.

26. Key priorities for each ALB are set out in their remit letters, which they use as a basis for their operational plans and key performance indicators. I meet at least biannually with each of the organisations, and officials formally monitor progress against their operational plans at quarterly meetings and more regularly through close working relationships with the senior executive teams at the ALBs. At the invitation of the bodies, officials also attend Board meetings as observers, allowing Welsh Government to maintain a good overview of potential issues. Monthly grant in aid claims are scrutinised to ensure that progress is being achieved against specified lines of expenditure.

27. Major projects are monitored using Welsh Government's Business Information Report Tool. Each major project has governance arrangements in place related to the specific project. These are frequently reviewed to ensure they reflect the stage of the project. Major capital investments are supported by business cases which are scrutinised to ensure they are robust and provide value for money. This includes a range of Welsh Government officials and independent gateway reviews.

28. Smaller capital and revenue grants and contracts are awarded based on either an open application process or a direct commission. They are monitored by officials throughout the project life cycle, with agreed deliverables and check-in points.

29. All funding provided to support projects and programmes which deliver against the Priorities for Culture are tracked in line with our grants and procurement processes. Officials will maintain close contact with those in receipt of funding, meeting regularly for updates on progress, challenging where necessary, ensuring spend is aligned with the original plans and delivering the intended outcomes.

30. The Culture Division's Evidence Plan presents the research, evaluation, and data collection projects that the Division is either undertaking or committed to. It is updated yearly, based on discussions with staff and wider stakeholders, to ensure activity is supporting key divisional priorities and Programme for Government commitments.

31. All complex high value capital projects are subject to project governance in line with Treasury guidance, which includes key gateway decisions and project assessment reviews. Cadw operates a Capital Programme Board which actively monitors the delivery of its capital projects including managing changes and post-completion assessment reviews. Individual projects must demonstrate value for money as well as deliver measurable benefits and economic objectives aligned with Cadw and Welsh Government aims.

32. Cadw's business plan and operations are also subject to scrutiny by an independent advisory Board comprising members with the necessary expertise to provide constructive challenge. The Board meets quarterly to scrutinise Cadw's performance against its business plan and financial reporting.

33. There are processes in place for Creative Wales funding schemes, to assess applications against criteria covering economic impact as well as delivery against broader thematic priorities. Monitoring arrangements are in place, during delivery and post completion, to assess achievements against intended outputs. Creative Wales's business plan is also scrutinised and noted by the Creative Wales Non-Executive Board who meet up to four times annually and review progress against its performance and delivery. Independent evaluations of Creative Wales production and development funding are underway to assess their impact.

Details of specific policies or programmes within the relevant MEGs (relevant to Arts, Culture, Heritage, Communications, Creative Industries and Sport) that are intended to be preventative and how the value for money and cost benefits of such programmes are evaluated.

34. These budget proposals reflect my continuing commitment to protect and prioritise investment that supports preventative measures as far as possible. The spending decisions have not only considered how best to meet the current demand for services but have also focused on supporting interventions that are able to prevent problems arising in the future. This preventative approach is an important part of our planning for public services, both now and in the future.

35. Arts, culture, sport and heritage play an important role in tackling disadvantage and preventing poverty. Participating in cultural activities such as volunteering at a museum can boost skills, self-esteem, learning and aspiration, particularly in areas experiencing economic disadvantage.

36. Culture, the creative industries, the historic environment and sport are essential components of our national life and an integral part of our individual and collective mental and physical well-being. Museums, archives, libraries, arts and sports clubs, facilities and historic sites are the focal point for many communities throughout Wales.

37. Cadw delivers a range of opportunities to support positive mental health and wellbeing including an award-winning volunteering programme across the sites in its care. Cadw also funds community archaeology and heritage projects managed by Heneb the Trust for Welsh Archaeology that provide opportunities for communities to engage with the experience of excavation and exploration of local heritage. New initiatives include Cadw's participation

in the Wild Sounds of Wales pilot working with residents at care homes so they can also experience the sounds and 360 images of nature at Castell Dinefwr, and intergenerational projects such as the tapestry project at Caernarfon with Rhosgadfan Young Custodians and ladies from Age Cymru. Cadw also provides free school visits and support towards transport costs to historic sites to encourage outdoor learning.

38. The culture, sport, creative and heritage sectors play a vital role in creating jobs and supporting the economy of Wales. They demonstrate strong economic benefits in terms of the visitor economy, regeneration and place-making and strong environmental benefits through decarbonisation and support for biodiversity and the natural environment. Cadw has an extensive and perpetual programme of gentle maintenance for the 132 historic monuments in state care across Wales, supported by its own in-house specialist craft team that includes trainees. All work is tendered to ensure value for money and cost effectiveness.

39. Cadw is engaged in a programme of work to fundamentally improve the management of the greenspace at its monuments in favour of biodiversity in support of the Welsh Government's commitment to combat the nature emergency risks associated with climate change. All investments and programmes are assessed for the impacts on climate change and how they can contribute to resilience of the historic environment. A research project led by Professor Carolyn Hayles and funded by the UK Research and Innovation concluded this year and is supporting development of a strategic pathways approach to climate change adaptation.

40. The creative industries play an important role in supporting health and wellbeing and positive outcomes. The Books Council of Wales' Reading Well scheme and its work on the promotion of reading and the provision of books and educational resources plays an important part in improving literary standards and educational attainment in both Welsh and English languages. In the screen sector, Creative Wales' support for the broadcasting and independent sector makes an important contribution to social cohesion and inclusion, connecting people from different backgrounds, as well as building a sense of national identity and belonging. Creative Wales is working with priority sectors to improve health and wellbeing in creative workplaces, through the Wellbeing Facilitators project and the alignment of funding mechanisms to the Economic Contract wellbeing pillar, as well as supporting a range of projects to develop skills and talent, in an inclusive, open and accessible way.

41. The Priorities for Culture are clear on how we view the importance of participation in cultural activity as being important for individual and community well-being.

42. In 2025-26, we invested significant capital funding in museums, libraries, archives, heritage sites and arts venues across Wales, with much of this support coming from funding ringfenced to deliver the Priorities for Culture. The drivers for decision-making focused on enabling people to access culture more easily; supporting the culture sector to become more resilient to things like the effects of climate change; caring for our collections, and supporting the needs of children, young people and families.

43. We also recognise the preventative nature of sport in supporting the health and wellbeing of the nation. Our investment in sporting facilities, for example, with a £10.5m capital investment to Sport Wales next year will help drive participation in sport and physical activity.

44. Other capital investment has included funding for the nine partner galleries for Celf, the sharing of the national collection of contemporary art across Wales, making more of this available to people much closer to where they live, work, study and visit. I would argue that the funding has all been focused on addressing prevention – preventing exclusion, lowering risks, and preventing harms.

45. Revenue schemes, such as funding for the Group for Education in Museums' bursary scheme to enable schools to visit local museums, funding for the Welsh Books Council to deliver the Stars on the Shelves scheme in libraries, and funding for Arts Council of Wales to run targeted rounds of funding for schools in poorer communities or learners with additional learning needs all focus on addressing exclusion. All these schemes will include an evaluation of impact.

46. Other projects focus on supporting well-being, preventing ill-health, loneliness and isolation. For example, the long-standing Reading Well scheme is a joint initiative to help people understand and manage their health and well-being using helpful reading recommended by health experts. Our continued investment in House of Memories Cymru has improved the quality of life of people living with dementia. Over the past two years we have provided additional funding to this project to build packages within the Welsh content

that represent LGBTQ+ and Black, Asian and Minority Ethnic communities in Wales.

Information on allocations (and their location) in your portfolio to provide for legislation which has the potential to impact in the financial year 2026-27 as relevant to Arts, Culture, Heritage, Communications, Creative Industries and Sport.

47. Assessing the costs of legislation and the impact on those it affects is an essential part of the policy development process. I recognise there cannot be a blank cheque for legislation and that every new commitment in this area will have to be paid for by a cutback somewhere else.

48. This is why every bill is subject to a robust assessment of costs and benefits, achieved through consultation and engagement with our stakeholders in the development of the regulatory impact assessments prepared for Government Bills. This is to ensure our decisions are informed by the people who will be affected by them.

49. Steps are being taken to improve the clarity and consistency of RIAs but changes to the bill during scrutiny and other factors will inevitably result in some variances between estimated costs at the published RIA stage and actual costs during implementation. In accordance with the commitment given by the Cabinet Secretary for Finance and Welsh Language to the Finance Committee, a table showing the cost of implementing legislation proposed by the Welsh Government is included in the Budget Narrative document published on 3 November. There are no implementation costs associated with any legislation in this area for 2026-27.

Implications of the ongoing effect of the UK exit from the EU and the cost of living crisis on the Arts, Culture, Heritage, Communications, Creative Industries and Sport portfolios and how the Welsh Government will manage ongoing impact.

50. One of the priorities for culture is to create opportunities for all. At the reopening of the Great Hall at Caerphilly Castle, I announced the new £1 ticket for those on Universal Credit to enjoy the staffed historic sites, making heritage more inclusive and accessible to everyone. The majority of Cadw sites are already free. Since the launch on 17 July 5,051 people have used the ticket, of which 4,454 are new visitors to the monuments. This initiative also supports Cadw's ambition to attract new audiences.

51. Energy costs continue to cause significant concern. Since the cost-of-living crisis started, officials have been made aware of impacts such as local museums and heritage attractions reducing opening hours, closing throughout the winter period, significantly decreasing heating levels on site, and museums increasing charges for services. On the sport side, Sport Wales has invested in sports clubs and sporting facilities through its Energy Saving Grant that support its decarbonisation agenda but also reduces overheads for those organisations.

52. Concerns are also being expressed regarding knock-on impacts on the mental health and well-being of staff, volunteers, community participants and visitors (many of whom are vulnerable) not being able to spend time at some sites due to cold or the cost of travel.

53. The Creative Europe programme has been superseded by the Global Screen Fund (GSF) which has run since 2021. While a small number of Welsh businesses have benefited from this programme, the overall benefit to Wales is limited. The UK Global Screen Fund continues to provide updates on regional activity and awards and have also held briefing session in Wales. However, the devolved nations have raised concerns about their limited involvement in the programme delivery. There has been no direct replacement to date for the Creative Europe cultural sub-programme and that the Welsh Government continues to engage with DCMS and other devolved nations to raise issues and identify options for support for the sector.

54. Sectors across the creative industries continue to be affected by increasing costs and decreasing budgets. This includes broadcasters and Film and TV productions concerned that increased costs and inflationary issues are adding to existing budget challenges and wider impacts on trainees on screen productions who are struggling with the cost of living. The publishing sector is also being affected by increasing costs related to energy prices and the cost of materials, as is the music sector, which is also being hit by reducing revenues linked to changing trends in audience behaviour and reduced rates relief for venues.

Information on allocations in your portfolio to deliver the new Priorities for Culture.

55. The Draft Budget maintains the level of investment in culture, heritage and the arts in 2026-27, with small increases for pay, national insurance

contributions and capital requirements in our ALBs. Funding to deliver the Priorities for Culture will include specific grant programmes, commissioned work and investment in our ALBs. The relevant ALBs will be required via their grant in aid, strategies and operational plans to ensure that they are delivering on the Priorities for Culture.

56. There was a strong level of interest in the arts and the museums, archives and libraries capital grants schemes in 2025-26, suggesting there will be continued demand for significant capital funding across the sectors. In 2026-27, we will continue to deliver these grant schemes, repeating the call outs and seeking to award funding earlier. During 2026-27, work on the review of infrastructure will complete, with the findings informing a long-term strategic plan for capital investment, starting from 2027-28.

57. Revenue funding will enable local authorities, via a grant scheme established in 2025-26, to support their own local cultural priorities, aligned with the Priorities for Culture. We will seek to also extend funding to our independent sector providers. We will continue to focus on improving equality and diversity of access, with a focus on access to cultural experiences for children and young people; delivering workforce improvements, supporting the sector in its approaches to the climate and nature emergencies; building good digital practice, and ensuring our intangible cultural heritage is recorded and supported to thrive. Funding will also support existing national programmes such as People's Collection Wales and Fusion, with a focus on delivering activities aligned with the ambitions of the Priorities for Culture, such as cultural inclusion.

3. Cadw

Allocations and commentary in respect of Cadw including revenue generation targets, and recent annual income generation figures (including net profit).

58. Income generation is key to the financial sustainability of Cadw. In 2026-27, Cadw estimates that total income will reach £10.880m based on an inflationary increase in admission prices and against the current trend of flat visitor number trends. The 2025-26 income target of £11.402m is unlikely to be reached due to economic climate and industry trends. It is a challenging environment in the tourism attraction sector. The [Tourism Barometer: summer wave 2025](#) reported that, 45% of tourism businesses had the same level of customers and 26% reported a decrease. Currently Cadw forecasts £10.664m which is still an increase of 2% on income compared to £10.455m in 2024-25.

59. The conservation of the monuments, health and safety measures and visitor facilities is an important priority in enhancing the Cadw offer and ability to generate income. The capital budget of £9.196m includes provision for a new welcome centre and developing Caerphilly Castle as a world class heritage destination supporting the **Caerphilly Town 2035** regeneration. This will contribute to growing audiences and promoting wellbeing through widening access to, enjoyment and understanding of the historic environment for everyone.

Allocations towards funding for owners of historic assets.

60. In 2026-27 capital of £3m grant funding is allocated to support historic buildings and monuments, making provision for existing grant projects and pipeline projects in development. There are more than 30,000 listed buildings and 4,200 scheduled monuments in Wales, the majority of which are in private ownership. These heritage assets range from prehistoric monuments to 20th century buildings. All play a role in defining our cities, towns, villages and landscapes today and collectively are a legacy of our history to pass to future generations.

61. Cadw's grants are based on significance of the historic assets, community benefits, contribution against objectives of the Priorities for Culture and wider benefits of the project at local and national level. All funding is subject to rigorous due diligence appraisal and internal scrutiny. Cadw grants are targeted to support projects which would not go ahead without public

funding and cannot attract funding via traditional routes due to market failure or conservation deficit. The projects funded by Cadw grants have the following positive benefits:

- **Economic Development:** attracting tourism and creating jobs in the sector
- **Economic Regeneration:** the adaptive reuse of historic assets can help revitalise local economies and communities.
- **Educational Opportunities:** offering valuable learning experiences, allowing people to engage with history and culture firsthand. Historic buildings serve as physical reminders of past eras, offering insights into the lives, values, and craftsmanship of previous generations.
- **Maintaining Identity:** Historic assets can be a vital part of a community identity, reflecting its unique history and character.

62. To support historic asset owners to care for their monuments and buildings Cadw also provides specialist advice, publishes an extensive range of guidance and provides signposting to sources of available grant funding which can be downloaded without charge from the Cadw website.

63. **Listed Building Regeneration Grant Scheme** supports the repair, conservation, and sustainable reuse of listed buildings in Wales and aims to safeguard heritage assets while contributing to local regeneration and community benefit.

64. **Historic Monument Grants:** support owners of monuments to carry out conservation, manage and provide public access to monuments and archaeological sites ranging the prehistoric to buildings of the industrial revolution.

65. **Urgent Works for Buildings at Risk:** for local authorities to meet the costs of preparing and serving Urgent Works Notices to secure the condition of at risk and vulnerable listed buildings.

66. Cadw also funds the Architectural Heritage Fund (AHF) which can provide advice and support for community organisations looking to promote the conservation and sustainable re-use of historic buildings for the benefit of communities across the UK, they are able to offer support to local communities at every point in the life-cycle of a project – from start-up advice and grants for early development work and project planning, through to loans for acquisition and as working capital for project delivery.

4. Amgueddfa Cymru and National Library of Wales

Allocations and commentary in respect of Amgueddfa Cymru and the National Library of Wales, including any revenue generation targets.

67.The Draft Budget 2026-27 allocation to Amgueddfa Cymru is £28.504m revenue and £5.5m capital. The allocation to the National Library for Wales (NLW) is £12.364m revenue and £2.25m capital.

68.Whilst I appreciate that this remains a challenging time for culture sector, the increase to their revenue grant in aid in 2026-27 will help Amgueddfa Cymru and the NLW deliver Programme for Government commitments, such as Celf, and increase pay in-line with the rest of the public sector. This will support staff whose specialist skills help to care for our national collections and help to deliver the Priorities for Culture.

69.In line with the arm's-length principle, it is for Amgueddfa Cymru and NLW to set their income generation targets. Free access to the national collection remains the Government's policy to encourage a diverse range of visitors. Whilst this limits Amgueddfa Cymru's options to raise income, it sets annual income generation targets, and it continues to trial options for further income-generation.

70.NLW does well in attracting charitable donations and bequests but finds the commercial income generation target challenging, with less on-site options for generating revenue when compared to Amgueddfa Cymru for example. It is not appropriate for the NLW to charge for most of its services, and it has limited means of generating additional funds except through donations, commercial activity or for project activities, although it does fundraise.

71.All 16 Priority for Culture ambitions are relevant to Amgueddfa Cymru and NLW's work, and they both continue to deliver a range of activities to support them.

An assessment of the capital needs of Amgueddfa Cymru (including the redevelopment of the National Slate Museum and ongoing work at the Cardiff site) and the National Library of Wales, and how relevant funding allocations relate to this need.

Amgueddfa Cymru

72. We acknowledge the challenges that Amgueddfa Cymru is facing in caring for historic buildings and keeping our national collections safe. Amgueddfa Cymru estimates some £68m of essential work is required to its estate over 10 years. The increase in its capital grant-in-aid, which will be £5.5m for 2026-27, reflects this. Subject to affordability and robust business cases being provided, Amgueddfa Cymru may also receive additional capital funding towards specific projects at its venues, particularly National Museum Cardiff.

National Library of Wales

73. The National Library's increased capital grant-in-aid of £2.25m in 2026-27 will help ensure the safety of the collections as well as support it meet its objective to be carbon neutral by 2028. Subject to affordability and a robust business case being provided, NLW may also receive additional capital funding to take forward development of critical projects to help with its sustainability.

5. Arts and Arts Council of Wales

Allocations and commentary in respect of the Arts Council of Wales.

74. Welsh Government funding for the arts is channelled through the Arts Council of Wales (ACW), who operate under the arms-length funding principle, within the strategic framework we provide. The Draft Budget revenue allocation in 2026-27 is £33.522m, and the capital allocation is £0.9m.

75. As the development agency for the arts sectors in Wales, ACW distributes over 90% of its annual funding to the arts sector through multiyear funding, to 81 organisations across Wales as well as project support. Allocations made to ACW directly supports the arts sectors as well as impacting people's access to the arts across Wales.

Allocations and commentary in respect of funding to promote access to the arts.

76. ACW supports arts activity based in every local authority across Wales and the allocations in 2026-27 will continue to support and promote the vital contribution that the arts make to Wales. Increasing and diversifying levels of access and participation in the arts continues to be a priority in the Government's Remit letter to ACW. ACW uses the majority of its Grant in Aid to core fund strategic arts organisations, and we expect them to continue to prioritise access and engagement work.

77. Widening Engagement continues to be a strategic priority for the Welsh Government and ACW, requiring all funded organisations and projects to actively reach underrepresented communities, including those facing socio-economic deprivation. It supports organisations such as Disability Arts Wales, Hijinx, and Valleys Kids, and is developing Memoranda of Understanding with local authorities in areas of low arts activity.

78. ACW's initiative Hynt, a Wales wide access scheme that works with theatres and arts centres, will continue to make accessing arts experiences easier and fairer for disabled people and carers in 2026-27.

79. Investment in major culture capital projects, especially Theatr Clwyd and the National Contemporary Art Gallery, is designed to tackle inequalities and provide better access, including particularly in north and mid Wales.

Allocations and commentary in respect of funding aimed at encouraging/enabling arts organisations to generate more of their own income.

80.ACW actively encourages applicant arts organisations to generate more of their own income. ACW expect organisations to contribute toward the cost of any project or grant award, usually through its own earned income or external fundraising. Future opportunities for the sector to receive support in the form of training and workshops is likely to include business resilience as one of the major themes.

81.ACW encourage and support investment in organisations in the form of capital investment. In 2025-26, an £8m Arts Sector Strategic Capital Programme has supported 40 organisations across Wales, we are looking at whether the scheme could be extended into 2026-27 and, if so, at what level. In most cases, capital improvements made have an impact on ability to attract audiences and raise additional income.

An assessment of the extent to which audiences have returned to pre-pandemic levels, and how this is factored into allocations.

82.Audiences have not returned to pre pandemic levels. Across ACW multi-year funded organisations, the figures show that in 2024-25 there were 3.5m attendances to events compared to 4.0m attendances in 2019-20.

83.There are also variations in attendance at specific events. For example, attendances at film screenings are down by 37.7% when compared to 2019-20 figures and attendances at presenting venues is up by 16.8% from the same year.

84.Funding priorities in this difficult environment have seen a demand for live Theatre and Music as drivers for returning audiences.

Total capital investment in the National Contemporary Art Gallery since the project began, and an estimate of ongoing revenue costs, and where these will come from.

85.Since the 2017-18 financial year, the Welsh Government has made capital payments totalling £7.36m in support of Celf.

86. The three partner organisations (Arts Council Wales, Amgueddfa Cymru and National Library Wales) have submitted estimates for the ongoing revenue costs for Celf. In this, a request was made for Welsh Government to provide a contribution of £350k per annum for the first two years, towards the annual revenue costs of £2.6m. Funding will be provided from a number of sources including external funders and the partners themselves.

87. An estimate of proposed revenue costs for Celf in 2026-27, and where these will come from, is provided in the table below.

Celf Cost Contribution Table 2026-27: In Principle Agreement

| Income | 2026-27 |
|--|----------------------|
| Arts Council of Wales (Lottery) | £40,000.00 |
| Amgueddfa Cymru Grant in Aid | £197,558.50 |
| National Library of Wales Grant in Aid | £75,084.50 |
| Arts Council of Wales Grant in Aid | £1,985,330.00 |
| Trust & Foundations | £52,957.00 |
| Welsh Government Revenue Contribution | £350,000.00 |
| Welsh Government Capital Contribution | £45,000.00 |
| Total | £2,745,930.00 |

88. Amgueddfa Cymru is now leading on delivery through the partnership. The focus for 2026/27 will be to further embed and strengthen the existing operating model. In due course, as the lead organisation, it will be for Amgueddfa Cymru to work with the other partners to develop and submit future proposals for further investment in the network, for the Welsh Government and other funders to consider.

6. Media and Broadcasting – Creative Industries

Allocations and commentary in respect of Creative Wales (including funding to be distributed by Creative Wales).

89. In 2025-26 Creative Wales total budget allocation is £7.008m revenue & £7m capital (£14,008m). In addition, £1,367m was transferred from HLG MEG to support the second year of the NDR (Non-Domestic Rates Relief) grant for eligible studios in Wales. This increased the total revenue allocation to £8,375m.

90. The focus of our investment is on the priority sectors of screen (Film & TV), music, digital and publishing alongside broadcasting and journalism commitments, as well as delivering on the Programme for Government commitments in improving skills for the industry.

91. Through providing capital support to creative production, Wales is now considered as a very favourable location to produce major film and television shows. Our production funding is supporting an important pipeline of opportunities. Since 2020, Creative Wales has provided £30.8m of production funding to 64 productions (signed offer letters) with another two recommended by Panel (66 in 6 years) on the condition that £376.7m will be spent back in the Welsh economy.

92. We have supported 540 paid entry level and upskilling trainee placements within Creative Wales' funded projects, including 67 paid apprenticeship placements. This is helping to support both new entrants as well as existing crew to gain valuable skills and experience and build their careers.

93. Since April 2025, we have invested in 8 capital production projects totalling £1.9m and these projects are expected to generate over £26m in projected Welsh spend. The aim of the scheme is to support the growth of Wales as a destination to produce world class content. The funding supports Wales-based production and games development companies who are looking to develop productions intended for international audiences and for productions from outside of Wales that are seeking to film in Wales.

94. Working with Ffilm Cymru (FfC) £3.475m has been allocated to 14 feature film projects from July 2022 to March 2026 on the condition that £30m will be spent back in the Welsh economy. A planned review of the programme is underway in order to allow for appropriate scrutiny of the economic impact of the

previously funded productions and to consider the most appropriate route to maximise the impact of the new IFTC for film production in Wales.

95. In 2025-26 we launched the second year of the NDR Studios fund, which was established in 2024 to support studios that are impacted by the Non-Domestic Rating Re-evaluation. The latest UK Government NDR (Non-Domestic Rating) Revaluation came into effect on 1 April 2023 and assigned revised business rates to reflect changes in rental market conditions. As a result of this change some sectors, including studios, have seen significantly increased rates. Continuation of the fund means that Welsh Government support is available via Creative Wales to help mitigate the impact of these increases. Three of the four eligible studios have been awarded grants to date to the value of £914,707 grant under this scheme.

96. We continue to provide funding to support the commercial music sector. Our recent agreement to award over £731k of capital funding to 22 innovative Music projects in 2025/26 takes Creative Wales total support for music venues and businesses to over £11 million since its inception in 2020. This is in addition to over £400k in revenue via strategic support to programmes such as Focus Wales, PRS Momentum, Pyst and Beacons programme delivery.

97. We continue to prioritise skills development in the sector in line with the Programme for Government Commitment, through our Creative Skills Action Plan and Creative Skills Fund. Round 2 of the Skills Fund was launched in Spring 2024 and supported a further 17 projects to the value of £1.5m. Many of these projects have a particular focus on ensuring greater diversity and inclusion within the creative sector in Wales.

98. This financial year 51 trainees to date have completed paid placements on Creative Wales funded productions with an additional 95 currently on placements.

99. In addition to this, Creative Wales is continuing to work in partnership with Sgil Cymru to deliver over £900,000 of funding from the BFI for the delivery of the Skills Cluster for Wales programme. This funding is directly allocated from the BFI to Sgil Cymru to deliver the programme until March 2026 and requires the match funding from Creative Wales of £150,000 in 2025/26 which takes our budget commitments on skills to over £1m per year.

Allocations and commentary in respect of any funding for the media, journalism broadcasting.

100. In 2025-26, £200,000 has been set aside to run a Public Interest Journalism Fund, which launched in July 2025. Options are currently being explored to commit a further £150,000 on activity to support the media sector in Wales.

101. A total of £3,760,000 revenue and £30,000 capital funding has been awarded to the Books Council of Wales in 2025-26 to support the publishing sector. This includes annual revenue funding for the Welsh Language Digital News Service. In addition, £150,000 has been awarded to secure Wales' representation at the London, Bologna and Frankfurt Book Fairs as well as additional capital of £270,000 for an essential IT project.

102. Our work with the screen sector and broadcasters, including through our Memorandums of Understanding with the BBC and S4C has continued to support production to film in Wales in 2025-26. The full list of productions supported to date is included in Annex D.

103. The budget to support media, journalism and broadcasting for 2026-27, including for the Books Council of Wales will be agreed as part of the formal budget process.

7. Support for film and television production

The latest figures for production funding provided by the Welsh Government including total investment and Welsh spend (broken down by project).

104. In summary, since 2020, £30.8m in production funding (which now also includes games investment as a result of amended criteria) has been provided to 64 projects, generating over £376.7m into the Welsh economy. On these funded productions, Creative Wales has supported a total of 540 paid placements.

The latest figures regarding the Welsh Government's loan to Bad Wolf Studios including total repayments and Welsh spend (benchmarked against Welsh Government targets).

105. Total interest due on the loan arrangement is £1.064m and repayments commenced in 2020-21. Bad Wolf has now repaid in full.

Details of any ongoing grant arrangement between the Welsh Government and Great Point Studios.

106. Great Point Studios is run as a private business. An award for capital funding was issued to Great Point Studios in 2023. Building work is planned for end of 2025 and will see this site expanded to a total of 257,000 sq ft.

107. In addition to this, as part of the Creative Wales NDR Studio grant launched in 2024, GPS has received grant support in 2024 and 2025.

A description of the strategy and targets for investments in screen productions made by Creative Wales.

108. The refreshed Production Funding which was launched in May 2023 continues to be the main mechanism for supporting screen activity in Wales. The aim of the scheme is to support the growth of Wales as a destination for the production of world class content. The funding supports Wales-based production and games development companies who are looking to develop productions intended for international audiences and also for those productions from outside of Wales that are seeking to film in Wales. Whilst one of the main outputs continues to be the impact on the Welsh economy through spend on crew, facilities, locations etc, the fund also seeks to maximise

the amount of training and skills development opportunities available on funded productions. The fund prioritises content that shows the best of Wales in Culture, language and geography, with this successfully being demonstrated by some of recent Creative Wales supported productions such as *The Guest*, *Cleddau / The one that got away*, *Hafiach*, and *Death Valley*; all of which showcased an authentic portrayal of Wales to network audiences. The Fund also prioritises the development of a sector that provides equal and diverse opportunities for a long term, skilled employment base and one that looks after the wellbeing of existing staff.

An assessment of the impact of production funding provided via Ffilm Cymru, and allocations for the coming financial year.

109. Across the initial 3-year programme, 14 feature films have received production funding totalling £3.5m generating an expected boost to the Welsh economy of over £30m.

110. The SAG-AFTRA actors' strike of 2023 led to delays in principal photography for some of the funded productions, with some productions also collapsing and funding re-allocated to other projects. Due to the delays caused by the strikes, 2025 was the year where the first funded productions were eligible for festival entries and subsequent commercial release. Examples of Creative Wales funded productions succeeding in 2025 include the feature film *Brides* which premiered in the World Cinema Dramatic Competition of Sundance before succeeding at Munich Film Festival and Edinburgh Film Festival later in the year; the *Man in My Basement* which premiered at Toronto International Film Festival in the Discovery category and *H is for Hawk* which was Wales' first ever showcased film at the prestigious Telluride Film Festival 2025 (In 2024 this festival launched the award season success of *Conclave*, *Emilia Perez* and eventual Best Picture Oscar winner – *Anora*). In addition, *Madfabulous*, the Ynys Môn based story of the 5th Marquess of Bute Henry Paget, was showcased as part of the UK's Great8 Showcase at Cannes Film Festival and is scheduled for a January 2026 premiere and cinematic release.

111. Commercially, cinemas have seen the cinematic release of Creative Wales funded productions *Mr. Burton*, *Brides* and *Man in My Basement* in 2025. *Mr. Burton*, released in April 2025 and co-produced by Wales-based Severn Screen and LA production company Brookstreet Pictures of Oscar-winning *The Brutalist*, is in the top 10 independent films in the UK for 2025 in terms of box office sales and was released in Australia and New Zealand in August, charting at number 3 in Australia and number 1 in New Zealand. A US release is planned

for November to coincide with what would have been Richard Burton's 100th birthday and discussions are underway with the Welsh Government's US office to maximise exposure for this launch. Brides and Man in My Basement both released in September 2025.

8. Sport

Allocations and commentary in respect of Sport Wales.

112. In this Draft Budget we have provided an allocation of £23.239m revenue and £10.5m capital to Sport Wales to continue to support key programmes, such as capital investment in facilities, and the development of grassroots and elite sport.

Details of spend from other departments that contributes to sport and physical activity.

113. Other budgets which contribute to sport and physical activity include Education (Sustainable Communities for Learning programme), Communities and Social Justice (Community Facilities Programme), Health (Healthy Weight, Healthy Wales) and Local Government, through its investment in leisure services and facilities. It is not possible to quantify the exact allocations on sport and physical activity from these areas of spend from other departments.

What work the Welsh Government is undertaking to “make sport the nation’s greatest preventative health tool”.

114. Our Programme for Government commitments are to promote equal access to sport, support young and talented athletes and grassroots clubs, and invest in our world-class sporting facilities and in new facilities. This recognises that sport is of vital importance to both our economy, to health, and to our national life. The funding we provide to Sport Wales to deliver the Vision for Sport seeks to make Wales an active nation where everyone can have a lifelong enjoyment of sport and reap the associated health benefits, both physical and mental.

115. With an enhanced capital grant of £10.5m in 2026-27, Sport Wales will continue to invest in new and refurbished sporting facilities that is key to supporting increased participation in sport, with the positive health and wellbeing benefits they provide.

Allocations relevant to preparations for major sporting events (e.g. Tour de France Grand Depart and EURO 28)

116. The funding will be used to support readiness preparations for the successful delivery of these major events. For example, the Welsh Government, in

partnership with the other home nations, UK and Ireland Ltd and UEFA are working together to stage the best-ever EUROS tournament in 2028. These events will engage and excite fans worldwide and inspire positive change through sport – delivering meaningful benefits for local communities across all the nations.

117. Funding will be used to ensure these major events are delivered to the highest operational and governance levels – in line with international event management best practices - in the interest of fans, teams, the wider public and all stakeholders.

9. Programme for Government commitments

Funding allocations for commitments outlined in the Programme for Government under the heading ‘Push forward towards a million Welsh speakers, and enable our tourism, sports and arts industries to thrive’.

Ensuring that Black, Asian, and Minority Ethnic histories are properly reflected throughout our cultural and heritage sectors including in National Museums

118. Targeted funding has been provided to national, regional, local, and grassroots organisations to authentically tell these stories and reflect contributions. These investments focus on widening access and participation, while building sector capacity to recognise, address, and dismantle institutional and systemic racism.

119. In 2025-26 we extended this scheme to include other forms of diversity, building on progress and strengthening impact through sustained targeted initiatives and sector wide capability development and investing in community-led cultural projects. We particularly focused on supporting grassroots organisations, which we know often feel excluded from culture funding streams. Going forward, we are considering how best to mainstream this work within our wider grant programmes.

Creating a Creative Industry Research and Development Fund

120. Creative Wales has facilitated a number of R&D funding initiatives since inception. R&D was included as a key priority area as part of the Creative Wales Development Fund (CWDF) which was launched in 2021-22. Development funds have been fully allocated for delivery throughout 2021-22 and 2022-23 to the value of £1.1m to 51 creative companies. In July 2023, a second round of development funds was launched and 35 projects totalling over £0.980m for spend in 2023-24 and 2024-25. In 2025-26 the third round of CWDF fund was launched with Games with over £628k being awarded 13 projects. A further fund for screen/animation will be launched in the Autumn with a total budget of £500k. The TV and Digital Development Funding is designed to provide focused support to aid the growth of indigenous companies across TV and Digital, supporting companies to develop new products and IP and secure new business.

121. The £50m media.cymru programme being delivered between 2022 and 2026 is funded through £22m from UK Research and Innovation's (UKRI) flagship Strength in Places Fund, £3m from Cardiff Capital Region, £500k from Welsh Government, through Creative Wales, and £23m match funding from industry and university partners. The Media Cymru programme, supported by Creative Wales, includes a work package to deliver a Wales wide R&D fund for the Creative Industries. The full funding award of £500k has been claimed. Creative Wales is currently in exploring opportunities for supporting R&D programmes for 2026-27.

Establishing a National Music Service

122. The National Music Service was established in 2022, in line with a Programme for Government commitment to support children and young people to benefit from opportunities to play a musical instrument, to sing, and to engage in music-making activities. The new phase of the National Music Service programme (2025-2028) is supported under the Curriculum for Wales Grant Support Programme, with funding of £12 million over this three-year period.

Investing in Theatr Clwyd

123. The capital investment and works at Theatr Clwyd will be completed shortly and will not continue into the 2026-27 financial year and therefore it does not feature in the Draft Budget for that period.

124. The Welsh Government will have contributed £24.5m towards the total redevelopment project cost of over £47m, in addition to an earlier contribution of £3m in the project feasibility stage.

Establishing a Football Museum

125. The capital contribution toward the construction works at the Welsh Football Museum in Wrexham Museum will conclude at the end of the 2025-26. No further capital investment is planned through 2026-27 at present.

126. The Welsh Government has contributed £5.5m towards the £11.8m construction cost covering both elements of the museum i.e. the creation of a Football Museum and redevelopment of Wrexham Museum.

Establishing a National Contemporary Art Gallery

127. Information in relation to the National Contemporary Art Gallery is provided above.

Explore the creation of a shadow Broadcasting and Communications Authority for Wales and provide additional investment to develop enterprises to improve Welsh-based media and journalism

128. The commitment to explore the creation of a shadow Broadcasting and Communications Authority for Wales was fulfilled in March 2024, when the Welsh Government responded to the Expert Panel to Explore the Establishment of a Shadow Broadcasting and Communication Authority for Wales' report.

129. In 2025-26, £200,000 has been set aside to run a Public Interest Journalism Fund, which launched in July 2025. The Wales Public Interest Journalism Working Group updated its terms of reference in 2025 and continues to meet and play an important role in helping to identify options to support actions to improve Welsh-based media and journalism.

Pursue the case for devolution of broadcasting and communication powers

130. Work is underway with a view to supporting a research project to explore, in more detail, the five devolution pathways set out in the expert panel's report.

131. In 2025-26, Creative Wales has continued to work with broadcasting stakeholders including the UK Government Department for Culture, Media and Sport, Ofcom, public service broadcasters, TAC and Pact to ensure Wales' needs are considered in the development of relevant regulation, policy and interventions. This has included discussions on Ofcom's PSM review, the Future of TV Distribution project and the BBC Charter Review.

132. In addition, the activities undertaken by the Books Council of Wales deliver against a number of Programme for Government priorities and demonstrate links with all ten of its wellbeing objectives. It supports activity over and above its creative industries remit related to the Welsh Government's ambitions for the Welsh language, cultural identity, education, health and wellbeing and promoting Wales to the world.

| RESOURCE BUDGET | | | £'000 | | | | | | |
|--|---------|---|-----------------------|--|---|----------------------------------|--------------------------|--------------|-----------------------------------|
| Action | BEL No. | BEL Description | Final Outturn 2024-25 | Forecast Outturn 2025-26 September 2025 (Period 6) | Plans as per 2025-26 Final Budget February 2025 | Baseline Adjustments for 2026-27 | 2026-27 Revised Baseline | Changes | 2026-27 Draft Budget October 2025 |
| | 3762 | Creative Wales | 7,632 | 8,376 | 7,008 | 1 | 7,009 | 1,400 | 8,409 |
| | 3762 | Creative Wales - Non-cash | 50 | 10 | 10 | | 10 | 0 | 10 |
| Total Promote and Protect Wales' Place in the World | | | 7,681 | 8,386 | 7,018 | 1 | 7,019 | 1,400 | 8,419 |
| Support for Culture and the Arts | 5800 | Arts Council of Wales | 32,235 | 33,467 | 33,314 | 153 | 33,467 | 55 | 33,522 |
| | 5800 | Arts Council of Wales - Non cash | 131 | 119 | 119 | | 119 | 0 | 119 |
| | 5540 | Amgueddfa Cymru - National Museums of Wales | 23,668 | 27,978 | 27,222 | 756 | 27,978 | 526 | 28,504 |
| | 5540 | Amgueddfa Cymru - National Museums of Wales - Non cash | 3,515 | 3,300 | 3,300 | | 3,300 | 0 | 3,300 |
| | 5660 | National Library of Wales | 11,879 | 12,102 | 11,862 | 240 | 12,102 | 262 | 12,364 |
| | 5660 | National Library of Wales - Non cash | 2,446 | 2,368 | 2,368 | | 2,368 | 0 | 2,368 |
| | 6170 | Support for Local Culture and Sport | 6,243 | 9,676 | 8,135 | 1,777 | 9,912 | 24 | 9,936 |
| Total Support for Culture and the Arts | | | 80,117 | 89,010 | 86,320 | 2,926 | 89,246 | 867 | 90,113 |
| Support the Historic Environment | 2700 | Cadw | 17,339 | 17,672 | 9,501 | 7,633 | 17,134 | 348 | 17,482 |
| | 2700 | Cadw - Non cash | 1,704 | 5,532 | 5,480 | | 5,480 | 0 | 5,480 |
| | 2710 | National Botanic Garden of Wales | 569 | 587 | 587 | | 587 | 0 | 587 |
| | 6200 | Royal Commission on the Ancient and Historical Monuments for Wales | 1,732 | 1,815 | 1,773 | 42 | 1,815 | 43 | 1,858 |
| | 6200 | Royal Commission on the Ancient and Historical Monuments for Wales - Non cash | 158 | 134 | 134 | | 134 | 0 | 134 |
| Total Support the Historic Environment | | | 21,503 | 25,740 | 17,475 | 7,675 | 25,150 | 391 | 25,541 |
| Sports and Physical Activity | 5900 | Sport Wales | 22,889 | 23,188 | 23,065 | 123 | 23,188 | 51 | 23,239 |
| | 5900 | Sport Wales - Non cash | 611 | 779 | 779 | | 779 | 0 | 779 |
| Sports and Physical Activity | | | 23,500 | 23,967 | 23,844 | 123 | 23,967 | 51 | 24,018 |
| TOTAL RESOURCE BUDGET | | | 132,801 | 147,103 | 134,657 | 10,725 | 145,382 | 2,709 | 148,091 |

| CAPITAL BUDGET | | | £'000 | | | | | | |
|--|---------|--|-----------------------|--------------------------|---|----------------------------------|--------------------------|--------------|-----------------------------------|
| Action | BEL No. | BEL Description | Final Outturn 2024-25 | Forecast Outturn 2025-26 | Plans as per 2025-26 Final Budget February 2025 | Baseline Adjustments for 2026-27 | 2026-27 Revised Baseline | Changes | 2026-27 Draft Budget October 2025 |
| | 3762 | Creative Wales | 8,149 | 7,000 | 7,000 | | 7,000 | 500 | 7,500 |
| Total Promote and Protect Wales' Place in the World | | | 8,149 | 7,000 | 7,000 | 0 | 7,000 | 500 | 7,500 |
| Support for Culture and the Arts | 5800 | Arts Council of Wales | -1,115 | 400 | 400 | | 400 | 500 | 900 |
| | 5540 | Amgueddfa Cymru - National Museums of Wales | -22 | 5,000 | 5,000 | | 5,000 | 500 | 5,500 |
| | 5660 | National Library of Wales | 3,329 | 2,000 | 2,000 | | 2,000 | 250 | 2,250 |
| | 6170 | Support for Local Culture and Sport | 23,621 | 32,800 | 32,800 | | 32,800 | 0 | 32,800 |
| Total Support for Culture and the Arts | | | 25,814 | 40,200 | 40,200 | 0 | 40,200 | 1,250 | 41,450 |
| Support the Historic Environment | 2700 | Cadw | 5,161 | 6,250 | 16,321 | -7,352 | 8,969 | 227 | 9,196 |
| | 2710 | National Botanic Garden of Wales | 292 | 200 | 200 | | 200 | 0 | 200 |
| | 6200 | Royal Commission on the Ancient and Historical Monuments for Wales | 46 | 50 | 50 | | 50 | 0 | 50 |
| Total Support the Historic Environment | | | 5,500 | 6,500 | 16,571 | -7,352 | 9,219 | 227 | 9,446 |
| Sports and Physical Activity | 5900 | Sport Wales | 10,306 | 10,016 | 10,016 | | 10,016 | 500 | 10,516 |
| | 6013 | Sports Capital Loans Scheme | -974 | -500 | -500 | 500 | 0 | -1,000 | -1,000 |
| Sports and Physical Activity | | | 9,332 | 9,516 | 9,516 | 500 | 10,016 | -500 | 9,516 |
| TOTAL CAPITAL BUDGET | | | 48,795 | 63,216 | 73,287 | -6,852 | 66,435 | 1,477 | 67,912 |

| RESOURCE BUDGET - Annually Managed Expenditure | | | £'000 | | | | |
|--|---------|---|-----------------------|--------------------------|---|-----------------|-----------------------------------|
| Action | BEL No. | BEL Description | Final Outturn 2024-25 | Forecast Outturn 2025-26 | Plans as per 2025-26 Final Budget February 2025 | 2026-27 Changes | 2026-27 Draft Budget October 2025 |
| Museums and Libraries Pensions | 5641 | Amgueddfa Cymru - National Museums of Wales Pension Provision - AME | -4,511 | 15,000 | 15,000 | 0 | 15,000 |
| | 5781 | National Library of Wales Pension Provision - AME | -583 | 9,000 | 9,000 | 0 | 9,000 |
| Total Museums and Libraries Pensions | | | -5,094 | 24,000 | 24,000 | 0 | 24,000 |
| Support for Culture and the Arts | 5801 | Arts Council of Wales Provision - AME | 0 | 3,000 | 3,000 | 0 | 3,000 |
| Total Support for Culture and the Arts | | | 0 | 3,000 | 3,000 | 0 | 3,000 |
| Support the Historic Environment | 2702 | Cadw Provisions - AME | 0 | 1,000 | 1,000 | 0 | 1,000 |
| Total Support the Historic Environment | | | 0 | 1,000 | 1,000 | 0 | 1,000 |
| Sports and Physical Activity | 5901 | Sport Wales Pension Provision - AME | 261 | 5,000 | 5,000 | 0 | 5,000 |
| Total Sports and Physical Activity | | | 261 | 5,000 | 5,000 | 0 | 5,000 |
| TOTAL RESOURCE AME BUDGET | | | -4,833 | 33,000 | 33,000 | 0 | 33,000 |

Annex B - WELSH SCREEN FUND INVESTMENT (as of 29th September 2025)

| Financial Year of Offer | Name of Production Company (SPV) | Production Title (Wales Screen Fund) | Value of Offer £m | Anticipated Spend £m |
|--------------------------------|--|---|--------------------------|-----------------------------|
| 2012/13 | Tonto Films and Television Ltd | Da Vinci's Demons Series 1 | 0.495 | 3.823 |
| 2012/13 | Urban Myth Films | Atlantis Series 1 | 0.25 | 4.026 |
| 2012/13 | Pesky Productions Ltd (Boj & Buddies) | Boj & Buddies | 0.2 | 1.003 |
| 2012/13 | Fiction Factory (Hinterland Films Ltd) | Hinterland Series 1 | 0.215 | 3.691 |
| 2012/13 | Tonto Films and Television Ltd (DVDS2) | Da Vinci's Demons Series 2 | *0.99 | 15 |
| 2013/14 | Avanti Media Group | Wonder World | 0.127 | 0.763 |
| 2013/14 | Urban Myth Films | Atlantis Series 2 | 0.25 | 4.026 |
| 2013/14 | Lime Pictures Limited | Rocket's Island | *0.143 | 0.966 |
| 2013/14 | Mirror Productions | Petroleum Spirit | 0.051 | 0.358 |
| 2013/14 | Modern Television | A Poet In New York | 0.053 | 0.855 |
| 2013/14 | Adastra Creative and Shrinking Cap Productions Ltd | Grandpa in my pocket | 0.129 | 1.612 |
| 2013/14 | Three Stones Media (The Rastamouse company) | Rastamouse Series 4 | 0.145 | 0.885 |
| 2013/14 | Pure Grass Films Ltd (Drake Equation Ltd) | The Drake Equation | *0.74 | 5.208 |
| 2014/15 | Lime Pictures Limited | Rocket's Island Series 4 | 0.07 | 0.7 |
| 2013/14 | Lupus Films | Toot the Tiny Tugboat / Ethel & Ernest | 0.55 | 3.034 |
| 2013/14 | Green Bay Media Ltd | Castle Builders | 0.045 | 0.32 |
| 2013/14 | YJB Films (From a Jack to a King Ltd) | From a Jack to a King | 0.1 | 1.229 |
| 2013/14 | Hartwood Television Ltd | Lady Chatterleys Lover | 0.125 | 0.813 |
| 2014/15 | Gritty Realism Productions Ltd | Heart of Darkness | 0.15 | 1.794 |
| 2014/15 | TCFTV UK Productions | The Bastard Executioner | 2.5 | 10 |
| 2014/15 | Cwmni Da Cyf | Country Fair | 0.125 | 1.019 |
| 2014/15 | Animortal Studio (Trampires Ltd) | Trampires | 0.674 | 6.738 |
| 2014/15 | Tiger Aspect Productions (Tiger Aspect (D&F) Ltd) | Decline and Fall | 0.1 | 1.8 |

| | | | | |
|---------|---|--------------------------------|-------|--------|
| 2014/15 | RF Movie Productions Ltd | Robin Friday - The Movie | *0.2 | 1.95 |
| 2014/15 | Touchpaper Television Ltd | Coming up | 0.08 | 0.809 |
| 2014/15 | Fiction Factory Films Ltd (Hinterland Films 2 Ltd) | Hinterland 2 | 0.304 | 5.3 |
| 2014/15 | Fiction Factory Films Ltd (Hinterland Films 3 Ltd) | Hinterland 3 | 0.25 | 4.21 |
| 2015/16 | Bad Wolf Ltd | Bad Wolf Productions | 9 | 133 |
| 2015/16 | Hartswood Films (Sherlock TV Ltd) | Sherlock Season 4 | 0.24 | 2.409 |
| 2015/16 | Heel Stone Pictures Ltd | Crossing the Border | 0.202 | 2.519 |
| 2015/16 | Ninth Floor UK Productions Limited | Will Season 1 | 1.5 | 18.761 |
| 2015/16 | Lookout Point Ltd (Pinewood Films 14) | The Collection | 0.6 | 5.5 |
| 2015/16 | Red & Black Films (Don't Knock Twice Ltd) | Don't Knock Twice | 0.075 | 0.63 |
| 2015/16 | Vertigo Television Ltd | Britannia VFX | 1.1 | 11.149 |
| 2016/17 | Beakus Ltd | Toggle Top | 0.076 | 0.944 |
| 2016/17 | Cloth Cat Animation Ltd (Clothcat LBB Ltd) | Luo Bao Bai | 0.225 | 3.183 |
| 2016/17 | Riverstone Pictures (Showdogs Ltd) | Showdogs | 0.362 | 4.737 |
| 2016/17 | Vox Pictures (Keeping Faith Ltd) | Keeping Faith | 0.328 | 4.25 |
| 2016/17 | Green Bay Media | Mountains and Life | 0.03 | 0.54 |
| 2016/17 | New Pictures (Requiem Productions Ltd) | Requiem | 0.4 | 5.016 |
| 2016/17 | Severn Screen Ltd (Apostle Films Ltd) | Apostle | 0.385 | 5.767 |
| 2017/18 | World Productions (BTK 2016 Ltd) | Born to Kill | 0.2 | 2.5 |
| 2017/18 | The Forge Entertainment Ltd | Kiri | 0.2 | 2.382 |
| 2017/18 | Coracle Pictures Limited (Denmark) | Denmark | 0.085 | 1.383 |
| 2017/18 | Rondo Media Cyf | The Wall | 0.045 | 0.363 |
| 2017/18 | Touchpaper Television Ltd | 4Stories | *0.04 | 0.631 |
| 2017/18 | Illuminated Productions Ltd | The Rubbish World of Dave Spud | 0.09 | 0.906 |
| 2018/19 | Eleven Film Ltd | Schooled | 0.485 | 3.879 |
| 2018/19 | Boom Cymru | 15 days | 0.089 | 1.074 |
| 2018/19 | Dream Horse Films Limited, Popara Films Ltd and Popara Films (DH) Limited | Dream Horse | 0.35 | 4.384 |
| 2018/19 | JJ Productions Ltd (Short Form Film) | Jamie Johnson Series 4 | 0.156 | 1.927 |

| | | | | |
|---------|---|--|-------|--------|
| 2018/19 | Mad as Birds Ltd and Reliance Entertainment Productions Six Ltd | Six Minutes To Midnight | 0.4 | 3.879 |
| 2018/19 | Keeping Faith (Series 2) Productions Ltd (Vox Pictures) | Keeping Faith Series 2 | 0.3 | 4.654 |
| 2018/19 | Hat Trick Productions | Warren | 0.109 | 1.304 |
| 2018/19 | Monterey Productions Ltd (HBO) | Brooklyn | 0.22 | 2.412 |
| 2018/19 | GOL Production Ltd (Pulse Films) | Gangs of London | 0.35 | 4.209 |
| 2018/19 | Iele Productions | Merched Parchus | 0.041 | 0.444 |
| 2018/19 | Blacklight TV | 4Stories series 2 | 0.102 | 1.574 |
| 2019/20 | All That Limit | Brave New World | 2 | 20 |
| 2019/20 | Joio | Bang Series 2 | 0.19 | 2.3 |
| 2019/20 | JJ Productions Ltd (Short Form Film) | Jamie Johnson Series 5 | 0.06 | 1.827 |
| 2019/20 | Vox Pictures (Keeping Faith Series 3) | Keeping Faith Series 3 | 0.24 | 3.965 |
| 2019/20 | WP Productions Ltd (World Productions) | The Pembrokeshire Murder | 0.2 | 2.135 |
| 2020/21 | Hartswood TV Ltd | Roald & Beatrix: The Case Of The Curious Mouse | 0.225 | 2.247 |
| 2020/21 | Illuminated Productions Ltd | The Rubbish World of Dave Spud Series 2 | 0.14 | 1.407 |
| 2020/21 | Joio Cyf (Joio (Bang 2) Ltd) | Bang Series 2 | 0.19 | 2.302 |
| 2020/21 | Lupus Films (Kensukes Kingdom Ltd) | Kensukes Kingdom | 0.1 | 0.841 |
| 2020/21 | Little Door Productions Ltd (Little Door (The Pact) Ltd) | The Pact | 0.595 | 5.953 |
| 2020/21 | One Tribe TV Limited | Wonders of the Celtic Deep | 0.077 | 0.618 |
| 2020/21 | Eleven Films (Starco TV 3 Ltd) | Sex Education Series 3 | 0.432 | 5.186 |
| 2020/21 | WOTW2 Ltd- Urban Myth films | War of the Worlds Series 2 | 0.75 | 7.344 |
| 2020/21 | Barking Lion Productions | The Trapper Keeper | 4 | 40.159 |
| 2020/21 | Bad Wolf (HDM3) Ltd | His Dark Materials Season 3 | 2 | 21.075 |
| 2020/21 | Havoc Film Ltd | Havoc | 2.15 | 25.004 |
| 2020/21 | Short Form Film (JJ Productions) Ltd. | Jamie Johnson Series 6 & 7 | 0.335 | 4.651 |
| 2021/22 | REP Productions SF Limited | The Almond and the Seahorse | 0.1 | 0.935 |
| 2021/22 | Cwmni Da Cyf | Rain Stories | 0.042 | 0.337 |
| 2021/22 | The Light Ltd/Y Golau Cyf | The Light/ Y Golau | 0.528 | 5.289 |
| 2022/23 | Eleven Film | Sex Education S4 | 0.45 | 6.169 |

| | | | | |
|---------|---------------------------------|--------------------------------------|-------|-------|
| 2022/23 | Hartswood | Wolf | 0.5 | 6.004 |
| 2022/23 | Little Door | The Pact S2 | 0.33 | 5.502 |
| 2022/23 | Yeti | The Truth About My Murder | 0.25 | 0.342 |
| 2022/23 | Wildflame | American Doomsday / Super Volcano | 0.07 | 0.416 |
| 2022/23 | CBS UK Productions/Kapital Ent. | Black Cake | 0.75 | 10 |
| 2022/23 | Blacklight TV | 4 Stories: On the Edge S4 | 0.07 | 0.882 |
| 2022/23 | Afanti Media | Un Nos ola o Leuda/One Moonlit Night | 0.12 | 0.959 |
| 2022/23 | Severn Screen | Steel Town Murders (aka Kappen) | 0.4 | 5.2 |
| 2023/24 | Ceidiog | Newffion | 0.4 | 0.24 |
| 2023/24 | Fiction Factory | Pren ar a Bryn / Tree on a Hill | 0.5 | 6.262 |
| 2023/24 | Little Door / Red Seam | The Way | 0.51 | 5.282 |
| 2023/24 | Duck Soup Films | Lost Boys and Fairies | 0.5 | 5.148 |
| 2023/24 | Boom Cymru | Creisis | 0.169 | 2.038 |
| 2023/24 | World Productions | Until I Kill You aka Delia | 0.2 | 2.615 |
| 2023/24 | Illuminated Productions Ltd | The Rubbish World of Dave Spud S3 | 0.12 | 1.148 |
| 2023/24 | Boom Cymru | Men Up | 0.15 | 1.95 |
| 2023/24 | Bad Wolf Productions | Bad Wolf Slate Funding | 4 | 60 |
| 2023/24 | Bumpy Box (*repayment) | Mini Buds | 0.13 | 0.47 |
| 2023/24 | HBO | House of the Dragon S2 | 0.58 | 5.801 |
| 2023/24 | Buffalo Pictures | Out There | 0.31 | 6.446 |
| 2023/24 | Little Bird | Ty Gwydr / The Greenhouse | 0.06 | 0.359 |
| 2023/24 | Blacklight TV | Cleddau / The One That Got Away | 0.27 | 2.715 |
| 2023/24 | Wales Interactive | Maid of Sker 2 | 0.15 | 1.166 |
| 2023/24 | BBC Studios | Death Valley | 0.4 | 4.818 |
| 2024/25 | Afanti | World's Biggest Cruise | 0.014 | 0.1 |
| 2024/25 | Vox Pictures | Hafiach | 0.09 | 1.272 |
| 2024/25 | Whisper Cymru | Whisper Slate | 0.781 | 6.248 |
| 2024/25 | Quay Street Productions | The Guest (aka Let Me In) | 0.415 | 4.981 |
| 2024/25 | Playground Entertainment | The Undeclared War S2 | 0.5 | 7.411 |
| 2024/25 | Yeti | All the Burtens | 0.035 | 0.267 |

| | | | | |
|---|------------------|---------------------------------------|----------------|-----------------|
| 2024/25 | Telesgop | The Peace Particle | 0.03 | 0.18 |
| 2024/25 | Motive | Young Sherlock | 2.5 | 30 |
| 2024/25 | Little Door | Under Salt Marsh | 0.5 | 13 |
| 2024/25 | Triongl | Y Golau: Dwr (Still Waters) | 0.405 | 5.671 |
| 2024/25 | Whisper North | Pictionary | 0.05 | 0.403 |
| 2024/25 | Binocular | Prisoner | 0.5 | 10 |
| New offers since 27 November 2024 to 29th September 2025 | | | | |
| 2024/25 | Somersault | Gareth Malone: Handel's Messiah | 0.08 | 0.45 |
| 2024/25 | HBO | House of the Dragon S3 | 0.68 | 6.75 |
| 2024/25 | Little Bird | Boom Town: How Merthyr Made the World | 0.03 | 0.21 |
| 2024/25 | Rondo | Y Wal / The Wall S2 | 0.08 | 0.55 |
| 2024/25 | Beastly Media | Golden Cobra S2 | 0.04 | 0.44 |
| 2025/26 | Mammoth Pictures | The Rapture | 0.47 | 7.50 |
| 2025/26 | Etta Pictures | Believe Me | 0.40 | 4.86 |
| 2025/26 | Potato | Celebrity Puzzling | 0.03 | 0.27 |
| 2025/26 | Clerkenwell | Deadpoint | 0.45 | 6.80 |
| 2025/26 | Pixie Films | The Langham | 0.03 | 0.24 |
| 2025/26 | Carlam | Athrawon | 0.09 | 0.68 |
| 2025/26 | Ty'r Ddraig | Wild Reckoning with Bear Grylls | 0.14 | 0.87 |
| 2025/26 | BBC Studios | Death Valley S2 | 0.30 | 4.80 |
| Total since 27th November 2024 to 29th September 2025 | | | £2.81 | £34.43 |
| Total All Production | | | £61.22m | £727.71m |

*offers withdrawn

Annex C – BAD WOLF STUDIOS INVESTMENT (September 29th 2025)

| Investment | Investment Value (£) | Drawn down to date (£) | To be drawn down in future years (£) | Accrued interest @ 7.52% to date (£) | Paid interest @ 7.52% to date (£) | Bad Wolf match funding (£) | Expected Welsh Spend (£) | Achieved Welsh Spend (£) |
|---|----------------------|------------------------|--------------------------------------|--------------------------------------|-----------------------------------|----------------------------|--------------------------|--------------------------|
| Repayable Advance | 4,500,000 | 4,500,000 | - | 1,063,937 | 1,063,937 | - | 54,000,000 | 54,000,000 |
| Further Grant | 4,500,000 | 4,500,000 | - | N/A | N/A | - | 79,000,000 | 79,496,087 |
| Purchase of Buildings 1 and 2, Trident Park | 6,000,000 | 6,000,000 | - | N/A | N/A | - | N/A | N/A |
| Acquisition fees | 30,000 | 30,000 | - | N/A | N/A | - | N/A | N/A |
| Studio Fit out Works | 2,650,000 | 2,650,000 | - | N/A | N/A | 2,800,000 | N/A | N/A |
| Pinewood Studio Wales Fit out Works | 667,588 | 667,588 | - | N/A | N/A | 692,412 | N/A | N/A |
| SAWS | 80,000 | 40,000 | - | N/A | N/A | - | N/A | N/A |
| Deposit | N/A | N/A | N/A | N/A | N/A | 250,000 | N/A | N/A |
| Youth Drama Network | 20,000 | 20,000 | - | - | N/A | - | N/A | N/A |
| His Dark Materials Season 3 | 2,000,000 | 2,000,000 | - | - | - | - | - | - |
| Total | 20,447,588 | 20,407,588 | 0 | 1,063,937 | 1,063,937 | 3,742,412 | 154,074,843 | 133,496,087 |

Brian Davies OBE, Chief Executive
Baroness Tanni Grey-Thompsons, DBE, DL, Chair
Sport Wales

10 November 2025

Annual Scrutiny of Sport Wales

Dear Brian and Tanni,

We are grateful to Sport Wales for attending the Committee's meeting on 25 September 2025 for annual scrutiny. We would like to thank you for your time and for the evidence that you shared with the Committee. As we mentioned during the session, there are one or two further issues we wanted to raise with you, which we didn't have time to raise during the session, and these are dealt with below.

Sport as a preventative tool

We were surprised and disappointed to hear that the Welsh Government had not discussed the contribution that Sport Wales can make to Wales's new status as a Marmot Nation with you. The link between sport and the Marmot principle of ill health prevention is clear. We know that it is far cheaper to invest in prevention than it is to deal with the consequences of ill-health.

We believe that the Welsh Government should work with Sport Wales to increase the role of sport in ill-health prevention, to make good on the commitment the Welsh Government has made by declaring itself a Marmot Nation.

We will continue to pursue this with the Welsh Government, and I have copied this letter to the Minister for Culture, Skills and Social Partnership.

Evaluation of the new Sport Wales investment approach

We note in your 2023-24 Annual Report that you:

"...began a full evaluation of our 'data driven' investment approach which was implemented from 2020 onwards."

In Committee, you described the review of your investment model as an “ongoing piece of work”. You also explained that the change in investment model has “been a real transition”, with differing effects being seen on the funding of national governing bodies.

We think that, given this impact, the sector would benefit from the transparency provided by a published review into Sport Wales’s investment model.

The Committee will continue to pursue this with the Welsh Government.

Budget constraints

We noted your comments on the low level of funding for Sport Wales compared with other sports councils:

“The top-line figure to put us in a comparable state to the other home country sports councils would be about £20 million a year. To put us in line with the average for European countries, it would be £200 million.

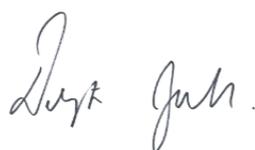
Previous analysis by Senedd Research (which we drew on in our [Impact of funding reductions on culture and sport](#) inquiry) showed that public funding of sport in Wales is among the lowest levels in Europe. We called for the Welsh Government to increase funding for culture and sport until they are comparable (in terms of spending per head) with those of similar nations.

We will raise this issue as part of our scrutiny of the Welsh Government draft budget in the coming weeks.

Thank you once again for your attendance at Committee and for your valuable insights.

As noted previously, I am copying this letter to the Minister for Culture, Skills and Social Partnership.

Yours sincerely,



Delyth Jewell MS
Committee Chair

Croesewir gohebiaeth yn Gymraeg neu Saesneg.

We welcome correspondence in Welsh or English.

Huw Irranca-Davies AS/MS
Y Dirprwy Brif Weinidog ac Ysgrifennydd y Cabinet dros
Newid Hinsawdd a Materion Gwledig
Deputy First Minister and Cabinet Secretary for Climate
Change and Rural Affairs

Ein cyf/Our ref: HID-PO-575-25

Mike Hedges MS
Chair
Legislation, Justice and Constitution Committee
Senedd Cymru

11 November 2025

Dear Mike,

I am writing to inform you that the Independent Intergovernmental Relations (IGR) Secretariat has now published its annual reports covering the periods 2022–2023 and 2023–2024. These reports have been prepared using existing published information drawn from supporting documents; published Communiqués and quarterly transparency reporting on the [gov.uk web pages](#). As these are independent reports, we have reviewed them solely for factual accuracy. These reports can be accessed [here](#).

As previously notified, the Welsh Government previously published its own IGR Overview reports covering the same periods, in line with the [Inter-Institutional Relations Agreement](#) as laid before the Senedd on 18 November 2021. These reports can be accessed [here](#).

I have copied this letter to the Chairs of the following Senedd Committees: Children, Young People and Education; Climate Change, Environment, and Infrastructure; Culture, Communications, Welsh Language, Sport, and International Relations; Economy, Trade and Rural Affairs; Equality and Social Justice; Finance; Health and Social Care; and Local Government and Housing.

Yours sincerely,



Huw Irranca-Davies AS/MS

Y Dirprwy Brif Weinidog ac Ysgrifennydd y Cabinet dros Newid Hinsawdd
a Materion Gwledig
Deputy First Minister and Cabinet Secretary for Climate Change and Rural Affairs

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

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Gohebiaeth.Huw.Irranca-Davies@llyw.cymru
Correspondence.Huw.Irranca-Davies@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.

Agenda Item 3.3

This document provides a translation of correspondence received from the Arts Council of Wales.



11 November 2025

Delyth Jewell MS

Chair of the Committee
The Culture, Communications, Welsh Language, Sport and International Relations
Committee,
Welsh Parliament
Cardiff Bay
CF99 1SN

Dear Delyth,

Thank you for your letter regarding our recent appearance before the Culture Committee. You are asking for additional details regarding our Strategic Interventions, so I enclose a summary of where we are at the moment.

Strategic interventions September 2025

In 2023 the Arts Council of Wales conducted an Investment Review. Subsequently a series of strategic interventions were launched to develop focus, innovation and change structures where appropriate in the fields of dance, theatre and traditional music.

This is the current situation –

Traditional music

- Funding the post of Traditional Music Development Manager, at Tŷ Cerdd
Tŷ Cerdd hosts Wilia - meetings with the sector to guide the creation of a value fund of £200,000 to support traditional music with a focus on community/grassroots opportunities across the country.
- Financially support Tŷ Cerdd to extend its artist development program, CoDI, to music/traditional music creators (£15,000).
- We have increased our funding to Tŷ Cerdd's small grants program to fund various traditional music projects (£20,000.)
- We continue to fund key projects and initiatives via the Lottery including Gwerin Gwallgo (Trac) and Wyth (Menter Maldwyn, traditional dance).

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Gwefan: www.celf.cymru



Local Offices/Swyddfeydd Lleol:

Cardiff/Caerdyddm Colwyn Bay/Bae Colwyn, Carmarthen/Caerfyrddin
Registered Charity Number/Rhif Elusen Gofrestredig: 1034245

Page 76

We welcome correspondences in Welsh and English, corresponding in Welsh will not lead to a delay.

This document provides a translation of correspondence received from the Arts Council of Wales.

Rydym yn croesawu gohebiaeth yn y Gymraeg a'r Saesneg, ni fydd gohebu drwy gyfrwng y Gymraeg yn arwain at oedi.

- The Council's new lottery community fund responds to demand for small one-off grants for community/voluntary groups which is a means of providing traditional music.
- Developing a proposal with Youth Arts Wales for a traditional music residency in collaboration with the musical services.

The theatre

- Appointing new positions in the field of theatre: Head; Relationship Manager; A new fund for major productions to support ambition. Applications open for up to £300,000 (Lottery funding) Total fund £600,000.
- A new professional development fund for individuals (in the new year, Lottery money).
- Working with partners including Creu Cymru and AM to improve access to research and development.
- Continue to evaluate Wales in Edinburgh considering other international opportunities in 2026 (but continuing with Edinburgh as a minimum).
- Continue to support and develop Craidd in its second year. It is a collaboration between Theatr Clwyd, Sherman Theatre, Pontio in Bangor, Torch Theatre in Milford Haven and the Welsh College of Music and Drama. The aim is to drive sustainable change in the mainstream of our theatre sector for Deaf and disabled people by offering accessibility and inclusion.
- Continue to discuss the other recommendations with other

production theatres

Dance

- Recruitment in the field of dance: Head and Relationship Manager to increase the work on the recommendations.
- Discussing training opportunities in Wales CAT (Training Centre - Extended) and what can work for Wales in the short and medium term

We have committed to:

- A review of art in the outdoors in quarter 4 but it will be informed by the Articulture report which is already underway and was funded by our business development fund
- Reviewing the visual arts - in quarter 4 we will finish the brief. It will include and evaluate Perspective(s), our partnership with Amgueddfa Cymru and our experiences with Wales in Venice and CELF

Other commitments:

Local authorities

We will sign agreements to co-fund the post of Arts Development Officer and collaborate with Neath Port Talbot and Blaenau Gwent. The appointed individual will start a 5-year programme of work in the local authorities here that usually do not

receive and seek financial support from us. We will also develop our work with Anglesey.
(£50,000 per annum with match funding from the local authority)

Business development

We are increasing our ability to support businesses and develop partnerships with other organisations such as Arts and Business

Information is also requested regarding our Capital strategy for the future. The work on preparing a new strategy is already underway and we aim to complete this by February/March 2026 in the hope of being able to invite proposals for the new fund (if it comes) soon in the new financial year.

Kind regards



Dafydd Rhys
Chief Executive

Agenda Item 3.4



Lucent Dreaming
103 Bute Street
Cardiff
CF10 5AD

13 November 2025

Dear Chair and Members of the Culture Committee,

Please note I have copied in the clerk for the Equality and Social Justice Committee to keep them informed.

Ahead of the Culture Committee's scrutiny of the Welsh Government's Draft Budget 2026-27, and following on from the Committee's previous work on the funding pressures we face in the Welsh publishing sector, I would like to share this article publicised by The Bookseller earlier this morning: <https://www.thebookseller.com/news/cardiff-indie-lucent-dreaming-restructures-and-urges-welsh-government-to-realign-funding>

My email to you today offers an introduction to the issues I have experienced since setting up as a publisher in Wales, for Wales. In the Bookseller article, and the original blog post published yesterday on the Lucent Dreaming website linked here: <https://lucentdreaming.com/thoughts-on-the-future-of-publishing-by-jannat-ahmed/>, we share that the inadequate core funding provision from Books Council Wales (funded by Creative Wales) has led to an existential crisis for creative workers, especially working class writers and staff, and writers and staff of colour, where the infrastructure we have inherited doesn't offer the best chances of success, nor a fair, living wage, for publishers and writers Cymreig.

I write in my post 'As is already happening, writers will be made to take Wales out of their work, and worse, to exoticise themselves and to fetishize their lived experiences, for a culture that prioritises profit, not cultural health. Our stories deserve to be treated with integrity, not as a trend. Unless fair, living wages are made a priority for independent authors and publishers, this will not change.'

I would like for the Committee to look again at the impact of standstill funding on the publishing sector; the Draft Budget 2026-27 shows Creative Wales' increased funding will be directed towards business rates relief for the film and TV sectors. Costs are increasing across all industries, so why has the Welsh Government's additional investment not been fairly distributed across all cultural sectors, including publishing? In the expectation that funding will not be increased enough for BCW to meet the needs of the industry, I believe anything less than a full inquiry on funding provision for the publishing sector in Wales will be insufficient to address systemic issues. I suggest in my post that the Future Generations Act should prioritise investment in the culture we share (literature, music, events, networks, etc.) for future generations to enjoy, as a culture that is accessible to them, both as audiences, and producers themselves.

I understand that the Minister for Culture, Skills and Social Partnership stated in response to a question on funding allocation to the publishing sector in previous draft budget (2025-26) that he would be working with BCW 'to mitigate any further impact on the sector and to preserve this important industry'. We anticipate a similar question will be presented to the Minister for Culture during your proceedings next Wednesday.

I would welcome a further conversation either to present oral evidence to the committee, and to meet the Chair and relevant members outside formal proceedings.

Please also expect further correspondence from me after the meeting on Wednesday which I will endeavour to follow.

Many thanks.

Jannat Ahmed
Co-founder and Director of Lucent Dreaming

Agenda Item 3.5

Dear Member of the Senedd Committee responsible for Culture and International Relations,

The creative industries and cultural communities – internationally often referred to as Cultural and Creative Sectors (CCS) – are crucial to the political, societal and economic relations between the United Kingdom and the European Union, which – as we all know – have been suffering post-Brexit.

To improve the UK-EU cultural & media relations and overcome multiple barriers that limit cross-Channel cooperation, more than 200 stakeholders from the UK and the EU – i.e. organisations, networks, projects, companies, including some from Wales – have just released a document with concrete Policy Recommendations.

Please find the Policy Recommendations at <http://recommendations.forum-uk.eu/> as well as attached to this email.

The over 200 signatories call on UK and EU policymakers to commit to practical measures across four priority areas:

- Transnational Funding of the CCS across the UK and the EU
- Cross-Border Collaboration across the UK and the EU
- Individual Cross-Border Mobility between the UK and the EU
- Cooperation of the UK and the EU in Regulation and Innovation

Suggested measures include:

- Full UK participation in the EU's Creative Europe programme and its proposed successor AgoraEU (2028-2034)
- Remove barriers to cross-border mobility of CCS professionals, making it easier to work between the UK and the rest of Europe
- Establish a structured CCS dialogue, giving CCS representatives from both the UK and the EU the opportunity to highlight and address barriers to ensure stronger UK-EU collaboration
- Joint efforts to address the impact of emerging technologies on the CCS, such as Generative AI

Among the over 200 signatories are major Welsh and UK stakeholders, such as Wales Arts International / Arts Council of Wales, Wales Literature Exchange, Centre for Advanced Welsh and Celtic Studies, UK Music, British Screen Forum, PRS for Music, and the Musicians' Union, as well as European and international organisations and networks, e.g. Culture Action Europe, European Music Council, On the Move, or European Coalitions for Cultural Diversity.

What you as member of the Senedd Cymru could do to support this initiative to improve UK-EU cultural and media relations:

- Discuss the measures proposed in the Policy Recommendations with industry stakeholders and cultural organisations, particularly those from Wales
- Reach out to your colleagues in the UK Parliament, especially the [Members of the UK-EU Parliamentary Partnership Assembly \(PPA\)](#), and remind them of the importance of the creative industries, their cross-Channel nature, and the post-Brexit barriers they are faced with
- Reach out to your colleagues in the EU Parliament, especially the [Members of the Committee on Culture and Education \(CULT\)](#), to discuss the measures proposed in the Policy Recommendations
- Consider the measures proposed in the Policy Recommendations in any future parliamentary papers of the Senedd Cymru related to the international dimension of the creative industries and cultural communities

Who is behind this initiative?

- The Forum on EU-UK Cultural & Media Relations is a pan-European grassroots initiative started and led by Prof Mafalda Dâmaso (London) and Benjamin Feyen (Brussels), both of whom have been professionally involved with the creative industries for over a decade in various roles, in academia and politics respectively.
- The inaugural Forum took place on 20 October 2025 in Brussels at MEDAA (the European House of Authors) with around 50 participants – industry representatives from the UK and the EU as well as governmental and parliamentary observers from both sides of the Channel – who developed the Policy Recommendations.
- For more details, see our press release (attached and at <http://press.forum-uk.eu/>) and our social media channels: [Linkedin](#) / [Instagram](#) / [Bluesky](#).

Thank you for your time. We are available if you have any questions.

Kind regards,
Mafalda Dâmaso and Benjamin Feyen



1st Forum on EU-UK Cultural & Media Relations

Brussels/London, 11 November 2025

PRESS RELEASE

FOR IMMEDIATE RELEASE

Cultural and Creative Sectors from the EU and UK publish joint Policy Recommendations to strengthen EU-UK relations

More than 200 stakeholders from the EU's and the UK's **Cultural and Creative Sectors (CCS)** – often referred to in the UK as “creative industries” – today published joint [Policy Recommendations](#) developed at the inaugural [Forum on EU-UK Cultural & Media Relations](#), held on 20 October 2025 in Brussels. Around 40 CCS representatives from the EU and the UK as well as governmental and parliamentary observers from both sides of the Channel contributed to the development and drafting of the document.

The Policy Recommendations emphasise that culture and creativity are vital to the political, societal and economic relationship between the EU and UK, particularly at a time of growth of the CCS, rapidly evolving technologies and new regulatory challenges.

The signatories – including many organisations and networks such as *British Screen Forum*, *Culture Action Europe*, the *European Music Council*, *On the Move* and *UK Music* – call on EU and UK policymakers to commit to practical measures, including:

- Full UK participation in the EU's *Creative Europe* programme and its proposed successor *AgoraEU* (2028-2034)
- Remove barriers to cross-border mobility of CCS professionals, making it easier to work between the UK and the rest of Europe
- Establish a structured CCS dialogue, giving CCS representatives from both the EU and the UK the opportunity to highlight and address barriers to ensure stronger EU-UK collaboration
- Address the impact of emerging technologies on the CCS, such as Generative AI, with joint efforts

The [Forum on EU-UK Cultural & Media Relations](#) is an independent pan-European grassroots initiative led by [Prof Mafalda Dâmaso](#) (London) and [Benjamin Feyen](#) (Brussels).



Press contact: press@forum-uk.eu

www.forum-uk.eu

Initiators & Co-Chairs: **Mafalda DÂMASO** (London), **Benjamin FEYEN** (Brussels)



Further information / notes to editors

- The contribution of the CCS (or “creative industries”, as commonly referred to in the UK) to the EU’s and the UK’s GDP is estimated to be around 4-7% by different sources, with overall more than 10 million people working in it. ([UK source](#))
- The UK, since 2024, [participates in Horizon Europe](#), the EU’s research and innovation cooperation funding programme, and there have been sustained calls for it to participate again in *Erasmus+*.
- *Creative Europe* is the EU’s cooperation and funding programme aimed at the CCS. Non-EU countries can participate – currently there are 14, including Norway, Serbia, Iceland, Tunisia, Georgia and Ukraine.
- Several campaigns and open letters have previously called for improved EU-UK conditions for the sectors:
 - [Face the Music](#) campaign on artist mobility
 - [BOZAR recommendations](#) (2018)
 - [Open letter from UK arts sector](#) (2020)
 - Open letter from European sector representatives (2020)
 - High-profile artists have [campaigned](#) for change
- Culture is a devolved matter in the UK. The Scottish Government has [set out its desire](#) for renewed association with the Creative Europe programme and the Welsh Government has also [expressed support](#).



1st Forum on EU-UK Cultural & Media Relations

Brussels, 20 October 2025

Policy Recommendations from the Cultural and Creative Sectors

– Published on 11 November 2025 –

The Cultural and Creative Sectors (CCS) are crucial to the political, societal and economic relations between the European Union and the United Kingdom.

The CCS are spaces of experimentation and creative freedom that pioneer new ways of cultural exchange, work in ways that transcend borders, innovate, support health and wellbeing, bridge the pillars of sustainability (economic, social, and environmental), encourage peace and prosperity, and build positive narratives for the future. The CCS have been experiencing strong growth and are significant contributors to the EU and UK economies and their competitiveness.

The EU and the UK are strategically important partners in the CCS with historically aligned approaches to cultural engagement and regulation. However, cooperation – and thus, the sectors' continued growth – is currently limited by multiple barriers. Moreover, fast-moving developments in new technologies mean that close collaboration – beyond what was agreed in the *Trade and Cooperation Agreement* (TCA) – is now essential.

The undersigned organisations call on all institutions of the European Union and the United Kingdom, including the EU-UK Parliamentary Partnership Assembly (PPA), to commit to the following measures:

I. Transnational Funding of the CCS across the EU and the UK

- Commit to full UK participation in the successor to *Creative Europe* within *AgoraEU* – the proposed EU funding programme for 2028-2034 – to enable structured, multilateral and efficient transnational cooperation, creative collaboration and innovation, and explore the potential of UK participation in the current *Creative Europe* programme in 2027 as a pilot phase;
- Support independent creative collaborations and co-productions between the EU and the UK by creating additional paths to transnational funding;
- Invest in knowledge exchange and best practice sharing between the EU and the UK on cultural diversity, accessibility, sustainability, cultural rights, and culture in development cooperation;

II. Cross-Border Collaboration across the EU and the UK

- Establish a structured dialogue for the CCS as a formal knowledge sharing framework to ensure stronger collaboration between the EU and the UK;

- Strengthen mechanisms for EU-UK cultural collaboration in domestic policy and future strategies, including in the EU's upcoming *Culture Compass for Europe* and the implementation of the UK's *Creative Industries Sector Plan*;
- Expand on existing and previous frameworks for cultural mobility to support and prepare reciprocal transnational CCS collaboration and partnerships in the future, including enabling knowledge exchange between EU and UK partners;
- Deepen cooperation between UK organisations for cultural relations (such as the British Council) and those of the EU, including delegations of the European External Action Service (EEAS) and representations of the European Commission, and create new frameworks for EU-UK global cultural and media cooperation around shared challenges;

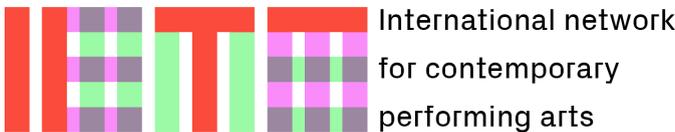
III. Individual Cross-Border Mobility between the EU and the UK

- Remove common barriers (to be identified by a dedicated mobility working group) to cross-border mobility of CCS professionals;
- Commit to participation of UK CCS professionals in EU mobility programmes and to the establishment of reciprocal arrangements for EU CCS professionals, in particular young and emerging creatives;
- Introduce interim measures to ease financial and administrative burdens in relation to visa costs;
- Harmonise and simplify short-term visa and work permit arrangements for CCS professionals with the aim of introducing an exemption or waiver agreement;
- Develop an EU-UK long-term visa scheme for CCS professionals and establish a committee to define the terms thereof;
- Harmonise and reduce the costs of EU-UK ATA (“Admission Temporaire – Temporary Admission”) carnets;
- Expand the number of Mobility Info Points (MIP) across the EU and the UK with updated signposting and tailormade information;
- Support the mutual recognition of professional qualifications in the CCS, and of creative skills and competences, in the EU and the UK;
- Reinforce overall opportunities for people-to-people cultural exchange;

IV. Cooperation of the EU and the UK in Regulation and Innovation

- Address the impact of emerging technologies on the CCS, such as Generative AI, by working together through the formal knowledge sharing framework recommended in (II);
- Ensure the involvement of the CCS during future EU-UK Digital Dialogues;
- Promote greater collaboration between the EUIPO, the UK IPO and the CCS on initiatives to improve the quality of metadata and promote awareness among CCS professionals, recognising that complete and accurate metadata is essential for creators and rightholders to be credited and paid;
- Promote greater cooperation and collaboration between the EU and the UK in cultural, artistic and media research and innovation.

Signing CCS organisations represented in the
1st Forum on EU-UK Cultural & Media Relations



Artsadmin – <https://artsadmin.co.uk>

Association of European Performer Organisations (AEPO-ARTIS) – <https://aepo-artis.org>

British Screen Forum (BSF) – <https://britishscreenforum.co.uk>

Culture Action Europe (CAE) – <https://cultureactioneurope.org>

D6 Culture Limited and D6 Culture EU Ltd (D6 Culture in Transit / D6:EU) – <https://d6culture.org>

European Coalitions for Cultural Diversity (ECCD) – <https://europeancoalitions.eu/>

European Composer and Songwriter Alliance (ECSA) – www.composeralliance.org

European Music Managers Alliance (EMMA) – emma.community

European Producers Club (EPC) – www.europeanproducersclub.org

European Visual Artists (EVA) – www.eartists.org

Federation of European Screen Directors | Fédération Européenne des Réalisateur de l'Audiovisuel (FERA) – www.screendirectors.eu

IETM international network for contemporary performing arts – www.ietm.org

Independent Music Companies Association (IMPALA) – <https://impalamusic.org/>

International Federation of Reproduction Rights Organisations (IFRRO) – <https://ifrro.org/>

Musicians' Union (MU) – www.themu.org

New Contemporaries – <https://newcontemporaries.org.uk>

Newcastle Circus Arts CIC (NCA CIC) – <https://www.newcastlecircusarts.com/>

On the Move (OTM) – www.on-the-move.org

Pearle*-Live Performance Europe (Performing Arts Employers Associations League Europe aisbl) – www.pearle.eu

PRS for Music – www.prsformusic.com

The Mighty Creatives (TMC) – www.themightycreatives.com

UK Music – www.ukmusic.org

Other signatories

[Foreign Affairs] – <https://www.foreignaffairs.org.uk/>

14/48 UK CiC – www.1448uk.com

1927 Productions Limited – www.19-27.co.uk

A Quiet Word (AQW) – www.aquietword.com

ACEY Europe - Arts & Culture Community (ACEYEUACCO) – www.aceyeurope.eu

albaKULTUR - Office for Global Music Cultures – www.albakultur.de

Amateo, The European Network to Promote and Advocate for Active Participation in Arts & Culture – <https://amateo.org/>

Anamot Press – anamotpress.com

Apparel and Textile Manufacturers Federation (ATMF) – www.atmf.co.uk

Art27 Scotland – www.art27scotland.org

Arte Urbana Collectif (AUC) – www.arturbanacollectif.com

Artng Around CIC – www.artngaround.co.uk

Artists Union England (AUE) – <https://www.artistsunionengland.org.uk>

Asociación Amigos de Europa (ADE) – www.amigosdeeuropa.eu

Association Européenne des Conservatoires, Académies de Musique et Musikhochschulen (AEC) – <https://aec-music.eu>

Association of British Choral Directors (ABCD) – abcd.org.uk

Association of Independent Promoters (AIP) – <https://www.aiporg.com/>

Associazione Topi Dalmata APS – <https://topidalmata.it>

Attenborough Centre for the Creative Arts (ACCA), University of Sussex – www.attenboroughcentre.com

Be a Place, LDA (Bússola) – www.bussola.com.pt

Blank Productions – www.mchblank.co.uk

Border Crossings Limited – www.bordercrossings.org.uk

Boulouki. Greece – info@Boulouki.org

Bureau of Silly Ideas – Bureauofsillyideas.com

Bureau Ritter gUG (haftungsbeschränkt) – <https://bureau-ritter.de/>

C.I.F.A.S (Cifas) – www.cifas.be

C8 Associates – www.c8associates.com

CAA Contemporary Art Archipelago – <https://contemporaryartarchipelago.org>

Caerbladon CIC – www.caerbladon.co.uk

Cape Farewell (Ocean) – www.capefarewell.com

CCD Productions Ltd – <https://chrisbaldwin.eu>

Center for Music Ecosystems (CME) – <https://www.centerformusicecosystems.com>

Centrala CIC – www.centrala-space.org.uk

Centre for Advanced Welsh and Celtic Studies (CAWCS) – <https://www.wales.ac.uk/cawcs>

City of Women, Association for the Promotion of Women in Culture (CoW) –
<https://mestozensk.org/en>

Climate Museum UK CIC – <https://climatemuseumuk.org/>

Cloud Artisans Ltd – <https://cloudartisans.co.uk>

Company of Others (CO) – www.companyofothers.org.uk

Contemporary Visual Arts Network England (CVAN) – cvan.art

Cooperativa Sociale il Visconte di Mezzago (BLOOM) – www.bloomnet.org

Council Higher Education Art and Design (CHEAD) – www.thead.ac.uk

Counterpoints Arts – <https://counterpoints.org.uk>

Creative Communities Group (CCG) – <https://www.ccguk.org>

Culture Declares Emergency (CDE) – <https://www.culturedeclares.org/>

Culture Derby (CD) – <https://culturederby.co.uk/>

Culture in Flux (CIF) – <https://cultureinflux.com/>

Curated Place Limited (CP) – www.curatedplace.com

Dachverband Tanz Deutschland (German Dance Association) (DTD) – www.dachverband-tanz.de

Dance North Scotland CIC – dancenorth.scot

DanceGRiST – DanceGRiST.com

Dante or Die Theatre Ltd – danteordie.com

Digitales Limited – www.digi-tales.org.uk

Dirty Protest Theatre Ltd – <https://www.dirtyprotesttheatre.co.uk/>

Drama & Theatre Education Alliance (DTEA) – www.dtealliance.co.uk

EarthH – earthhackney.co.uk

Ethical Business Exchange (EBE) – <https://ethicalbizex.org>

European Association of Chamber Music Teachers (ECMTA) – www.ecmta.eu

European Choral Association - Europa Cantat – www.EuropeanChoralAssociation.org

European Early Music Network (REMA) – <https://www.rema-eemn.net/>

European Folk Network (EFN) – www.europeanfolknetwork.com

European Music Council (EMC) – <https://www.emc-imc.org>

European network for live music associations (Live DMA) – www.live-dma.eu

European Publishers Council (EPC) – www.epceurope.eu

European Shakespeare Festivals Network (ESFN) – www.esfn.eu

European Writers' Council (EWC) – <https://europeanwriterscouncil.eu/>

Europaia – <https://europaia.org.uk/>

Europinion – www.euopinion.uk

Exiled Writers Ink – www.exiledwriters.co.uk

Face-value European Alliance for Ticketing (FEAT) – www.feat-alliance.org

Fashion-Enter Ltd (FEL) – www.fadhioncapital.co.uk

Federation of European Publishers (FEP) – <https://www.fep-fee.eu/>

Fevered Sleep (FS) – <https://www.feveredsleep.co.uk/>

feyen.music – www.feyen.music

Ffotogallery Wales LTD – www.ffotogallery.org

Film Leicester CIC – www.filmleicester.com

fix+foxy – www.fixfoxy.com

Fondazione Nuovo Teatro Verdi (FNTV) – www.nuovoteatroverdi.com

For/With/By European Youth Theatre Consortium (F/W/B)

Forma Arts & Media – www.forma.org.uk

Frozen Light – www.frozenlighttheatre.com

Fuel Productions Ltd – www.fueltheatre.com

g39 – www.g39.org

Giulia Mio Millinery – <https://giuliamiomillinery.com/>

Global Somali Diaspora (GSD) – www.global-somalidiaspora.com

GroundWork Gallery – <https://www.groundworkgallery.com>

High Oak Youth and Community Centre – <https://www.higoak-youth.com>

HQ CAN Community Interest Company – www.hqcan.org

HQ Recording LTD – www.hqrecording.co.uk

IndieSuisse – indiesuisse.ch

International Artist Organisation (IAO) – www.iaomusic.org

International Federation for Choral Music (IFCM) – ifcm.net

Irregular Arts Ltd – <https://irregular.org.uk/arts>

IZOLYATSIA. Platform for cultural initiatives – <https://izolyatsia.org>

Jack Drum Arts CIC – <https://www.jackdrum.co.uk>

Kaimera – <https://www.kaimeraproductions.com/>

Keychange ASBL – www.keychange.eu

Kunsten '92 – www.kunsten92.nl

La Mecànica Prod SLU – www.lamecanica.org

Lavanderia a vapore (Lav) – www.lavanderiaavapore.eu

LDH Dance House Lefkosia – www.dancehouselefkosia.com

LegalAliens Theatre – legalalienstheatre.com

Leicester Creative Business (LCB), part of Leicester City Council – www.lcbdepot.co.uk

Leicester Music Board (LMB) – leicestermusicboard.co.uk

Lieux Publics – www.lieuxpublics.com

Linden Editions Ltd – www.lindeneditions.com

Literati Arts CIC – www.literatiarts.com

Literature Across Frontiers (LAF) – <https://lit-across-frontiers.org>

Liv.in.g. srl impresa sociale – www.livingnet.eu

Live music Industry Venues and Entertainment (LIVE) – www.livemusic.biz

Malý Berlín – <https://www.malyberlin.sk>

Marlborough Theatre Productions Ltd – www.marlboroughproductions.org.uk

Migrants in Theatre (MIT) – <https://migrantsintheatre.co.uk>

Mimbre Ltd – www.mimbre.co.uk

Mime Action Group T/A Total Theatre Network – <https://www.totaltheatrenetwork.org>

MobiCulture – <https://mobiculture.fr/en>

Music Venue Trust (MVT) – www.musicvenuetrust.com

National Technical University of Athens (NTUA) – <https://ntua.gr/en/>

New Leaf Sustainability Ltd – <https://www.herefordshirenewleaf.org.uk>

New Media Art Club CIC (NMAC) – <https://www.newmediaart.club>

One Latin Culture Ltd trading as Luma Creations – lumacreations.org

One World Orchestra CIC (OWO) – <https://oneworldorchestra.uk>

Open Eye Gallery – <https://openeye.org.uk>

Opera Circus – <https://operacircusuk.com>

Pedestrian Limited – www.pedestrian.info

Peepul Centre – www.peepulcentre.org.uk

PERFAS - Performing Artists Association South Tyrol – <https://www.perfas.org/>

Performing Right Society Foundation (PRS Foundation) – <https://prsfoundation.com>

Peshkar Productions Limited – www.peshkar.co.uk

Phizzical Productions – www.phizzical.com

Prodigal Theatre & The Urban Playground Team – www.prodigalupg.com

PROJEKT EUROPA – <https://europia.org.uk>

Quarantine – www.qtine.com

RBX GmbH – www.rbx.music

Revel Pucks LTD (Revel Puck Circus) – www.revelpuckcircus.com

Rhiannon Faith Company – www.rhiannonfaith.com

Robinson Howell Partnership Ltd (Culturapedia) – www.culturapedia.co

Scottish Sculpture Workshop (SSW) – <https://www.ssw.org.uk>

Selladoor Worldwide Limited – <https://www.selladoor.com>

SO Festival (SOF) – sofestival.org

Society of Spanish Researchers in the United Kingdom (SRUK/CERU) – <https://sruk.org.uk/>

Soft Touch Arts Ltd – <https://www.soft-touch.org.uk/>

Space-time Works AB (STW) – www.stw.nu

Splash of gold (Gould) – splashofgold.com

Spymonkey Ltd – www.spymonkey.co.uk

Stan's Cafe Theatre – stans.cafe

Stopgap Dance Company – www.stopgapdance.com

Tanzbüro München - Simone Schulte-Aladag & Tina Meß GbR – www.tanzbueromuenchen.de

TGR The Green Room (TGR) – <https://www.thegreenroomforartists.de>

The Association of Independent Music Limited (AIM) – <https://aim.org.uk>

The Bridge Theatre – <https://thebridge.brussels>

The Caravan Gallery (TCG) – www.thecaravangallery.co.uk

The Creation Works CIO – www.thecreationworks.com

The Culture Network LCR CIC – culturenetwork.co.uk

The European Union of Music Competitions for Youth (EMCY) – www.emcy.org

The Lot Productions – www.thelotproductions.com

The Paper Birds Theatre Company – thepaperbirds.com

The Professors – <https://profsperformingart.wixsite.com/theprofessors>

The Summer School Foundation (MSSF) – www.mssf.org.uk

The Tute – www.thetute.uk

The Work Room (Dance) – www.theworkroom.org.uk

theater arbeit duisburg (TAD) – www.theater-arbeit-duisburg.de

Theatre de Complicité Education Ltd – complicite.org

Theatre Workout Ltd – www.theatreworkout.com

TheatreTransformations – www.theatretransformations.com

ThickSkin Theatre – www.thickskintheatre.co.uk

Trans Europe Halles (TEH) – www.teh.net

UK New Artists (UKNA) – www.uknewartists.co.uk

United Cowboys – www.unitedcowboys.net

Upswing Aerial limited – www.upswing.org.uk

Village Underground (VU) – earthackney.co.uk

Wales Arts International / Arts Council of Wales (WAI/ACW) – www.wai.org.uk

Wales Literature Exchange (WLE) – <https://waleslitexchange.org/>

We Live Here (WLH) – www.welivehere.org.uk

Yellow Everything (YE) – www.yelloweverything.com

York International Shakespeare Festival (YISF) – www.yorkshakes.co.uk

Youth for Inclusive Europe (Y4IE) – www.inclusiveeurope.page

Zbigniew Raszewski Theatre institute (ZRTI) – www.institut-teatralny.pl

Zone Franche, le réseau des Musiques du Monde – <https://www.zonefranche.com>

Zoo Co Creative Ltd – <https://www.wearezooco.co.uk/>

Annex: Sources

Evidence on the challenges faced by CCS in the EU and the UK can be found namely in:

- Culture, Media and Sport Committee (2025). British film and high-end television. House of Commons.
<https://committees.parliament.uk/publications/47474/documents/246529/default/>
- Ellingsworth, J., Floch, Y. and Köver, V. (2023). Cultural Mobility Flows Between the United Kingdom and the European Union – Report and Policy Recommendations. On the Move.
https://on-the-move.org/sites/default/files/library/2023-09/OTM_cultural-mobility-flows-UK-EU.pdf
- Faucher, Charlotte (2020). The Arts after Brexit: The impact of the UK’s departure from the European Union on its cultural relations with European Union Member States. University of Manchester.
https://pure.manchester.ac.uk/ws/portalfiles/portal/184649986/Report_by_Charlotte_Faucher_The_Arts_after_Brexit_final_.pdf
- Haddoud, M. Y., Fillis, I., Murphy, T. (2023). Post-Brexit migration and accessing foreign talent in the Creative Industries. Creatine Industries Policy & Evidence Centre/NESTA.
<https://pec.ac.uk/wp-content/uploads/2023/12/PEC-Post-Brexit-migration-and-accessing-for-ign-talent-in-the-Creative-Industries.pdf>
- Jozepa, I. (2023). Touring artists and the UK-EU economic partnership. House of Commons Library.
<https://researchbriefings.files.parliament.uk/documents/CBP-9658/CBP-9658.pdf>
- Scottish Government (2025). Creative Europe reassociation: position paper.
<https://www.gov.scot/publications/creative-europe-reassociation-position-paper>
- Warner, K. and Kassim, H. (2025). How UK creative industries are navigating Brexit alone. UK in a Changing Europe.
<https://ukandeu.ac.uk/how-uk-creative-industries-are-navigating-brexit-alone/>
- Welsh Parliament (2024). Culture and the new relationship with the European Union.
<https://senedd.wales/media/mymnfoxa/cr-ld16778-seasneg.pdf>
- Welsh Parliament (2025). UK-EU implementation review of the Trade and Cooperation Agreement.
<https://business.senedd.wales/documents/s164786/Committee%20Report%20UK-EU%20im-plementation%20review%20of%20the%20Trade%20and%20Cooperation%20Agreement%20-%2010%20September%20.pdf>

Evidence on the financial and other benefits of UK participation in the Creative Europe programme can be found in:

- Creative Europe Desk UK (2021). Creative Europe in the UK 2014-2020. Support for the UK's cultural, creative and audiovisual sectors.
<https://www.bfi.org.uk/get-funding-support/funding-support-international-activity/creative-europe-desk-uk>

Recommendations to strengthen EU-UK relations made by other organisations can be found namely in:

- British Council, Bozar, European Cultural Foundation (2018). *Moving Beyond Brexit: Uniting the Cultural and Creative Sectors*. Recommendations made by more than 60 leading experts from the cultural and creative sectors from Europe, including the UK, called on Brexit negotiators in 2018 to address their urgent concerns related to mobility, funding and partnerships, as well as legal questions surrounding the future relationship between the UK and the EU.
https://www.britishcouncil.be/sites/default/files/moving_beyond_brexit_recommendations_.pdf
- IMPALA (2023). *A New European Vision for Touring*. The paper outlines key priorities for making cross-border touring in Europe more sustainable and accessible for artists and crews, touching on mobility, environmental, and administrative aspects.
<https://www.impalamusic.org/wp-content/uploads/2023/07/A-New-European-Vision-For-Touring-July-2023.pdf>



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Professor Mererid Hopwood
Aberystwyth University

14 November 2025

Dear Professor Hopwood,

UNESCO City of Literature

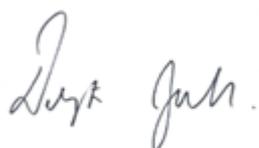
It is with delight that I write as chair of our Senedd's Culture and International Relations Committee to extend my warmest congratulations to you and everyone involved in Aberystwyth's successful bid to become the first UNESCO City of Literature.

This remarkable achievement is more than a cultural accolade: it is a powerful statement about Wales's place in the world. Your vision and leadership have guided this bid with passion and purpose, and the result is a testament to the creativity, dedication, and collaborative spirit of all those who contributed.

During our recent inquiry into the Welsh Government's International Strategy, stakeholders consistently emphasised the importance of strengthening Wales' international cultural and economic links. Your success exemplifies these priorities, reinforcing Wales's identity as a nation of language, literature, and global engagement.

We are all absolutely delighted for you. Llongyfarchiadau, Aberystwyth!

Yn ddiffuant,



Committee Chair

Croesewir gohebiaeth yn Gymraeg neu Saesneg.

We welcome correspondence in Welsh or English.



Rt Hon Elin Jones MS
Llywydd
Senedd Cymru

14 November 2025

Dear Llywydd,

Business Committee Review of the Public Bill and Member Bill Process; Publication of Pre-introduction Bills

Thank you for your letter dated 10 October 2025.

Our Committee has direct experience of the Welsh Government's recent practice of publishing pre-introduction versions of Bills, specifically the Prohibition of Greyhound Racing (Wales) Bill.

The Bill was formally introduced on 29 September 2025. Ahead of formal introduction, the Welsh Government published a pre-introduction, draft version of the Bill on 28 August 2025.

Please find below our responses to your questions:

Whether the publication of the Bill prior to its formal introduction was useful.

The publication of the Bill prior to its formal introduction was useful, to an extent. The Committee's experience of scrutinising this Bill, however, demonstrates that such early publication is not an adequate substitute for either a shortened scrutiny timetable or a robust policy development process ahead of introduction.

Whether it enabled you to take any decisions or carry out any activities that you would otherwise have been unable to.

The early publication of a draft of the Bill enabled the Committee to share information with key stakeholders ahead of formal introduction. Advanced sight of the text and scope of the Bill allowed stakeholders to begin the preparation of their evidence in anticipation of the shortened timetable for Stage 1 scrutiny of eight weeks.

Whilst this early access was beneficial in facilitating some preparatory work, both for stakeholders and officials, this did not fully compensate for the impact of the shortened timetable (which undoubtedly had a negative effect). Several stakeholders were not able to engage with the scrutiny process as fully as they would have wished. Some respondents told us they had not had sufficient time to form a considered position on the Bill, and others were unable to attend evidence sessions or submit written evidence within the time available.

Whether there were any associated disadvantages, limitations, or risks.

A clear risk and limitation of this approach is that work on a draft Bill may still be ongoing at the time of early publication, meaning the text might be subject to change before formal introduction. This could lead to confusion or misinterpretation among stakeholders who engage with a version of a bill that is not final.

Any changes to the draft might also result in wasted time and effort for those preparing to scrutinise a Bill that is significantly altered. Preparations can only be made so far in advance, and uncertainty around the final content limits the effectiveness of early engagement.

What is more, early exposure of the draft Bill in this case (that is, the bill we have been scrutinising) attracted complaints from stakeholders about the scrutiny process before it had formally begun and could be robustly defended. This created challenges in managing expectations and maintaining confidence in the integrity of the process.

Whether future Welsh Governments should be encouraged to continue the practice of publishing Bills prior to formal introduction.

As a general principle, our Members expressed a preference for having as much information as possible, as early as possible, particularly for larger Bills that require a longer lead-in time, and more time for stakeholders to engage with the process. That is, we believe that the early publication of draft Bills would be most useful when dealing with large and complicated pieces of legislation, where early engagement can support more effective scrutiny and preparation. For smaller or less complex Bills, though, we think the benefits are more limited.

In our view, the effectiveness of legislation depends on the quality of the underlying policy work. Early publication of draft Bills cannot compensate for inadequate policy foundations. Robust and well-considered policy work remains the cornerstone of good legislation.

In summary, we believe that it is useful to see as much information as possible as early as possible. The pre-introduction process does therefore have some merit, most especially with large, complicated Bills. However, its use should not be used as a justification either for inadequate policy development or for shortened Senedd scrutiny.

I trust that the Committee's views will be useful to your consideration.

Yours sincerely,



Delyth Jewell

Delyth Jewell MS
Committee Chair

Croesewir gohebiaeth yn Gymraeg neu Saesneg.

We welcome correspondence in Welsh or English.

Agenda Item 6

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

Document is Restricted



Delyth Jewell MS
Committee Chair
Culture, Communications, Welsh Language,
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31 October 2025

Dear Delyth

Thank you for your letter dated 21 August 2025 regarding the Senedd Committees' scrutiny of the Welsh Government's Draft Budget 2026-27. I appreciate the opportunity to contribute to the Committee's important work, and I am pleased to provide responses to the requests for information in your letter. These are attached at Annex A.

I note the Committee's intention to follow the Finance Committee's principles of financial scrutiny, affordability, prioritisation, value for money, and budget processes, and welcome the opportunity to provide evidence that aligns with these principles.

I also acknowledge the Committee's plans to seek evidence from the Minister for Culture, Skills and Social Partnership and the Cabinet Secretary for Finance and Welsh Language and will coordinate with them as necessary.

Following the oral evidence sessions, I will ensure that any additional requests for information or clarification are addressed promptly.

Thank you for your correspondence. I look forward to working with the Committee to support its scrutiny of the Draft Budget 2026-27.

Eluned Morgan

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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.

Annex A

International Relations Budget Expenditure Line (BEL)

Q1. Allocations and commentary in respect of:

- (i) Final out-turns for 2024-25.
- (ii) Forecast out-turns for 2025-26.

Spending for the current financial year remains focussed on delivery of the International Strategy and International Delivery Plan. Through impactful activities including our Wales and Japan Year, we are forecasting a full spend reflecting an increasing trend of fiscal stability and planning.

The outturns and forecast are as follows:

| International Relations BEL | 2024-25 | 2025-26 |
|---|----------------|----------------|
| Budget | £8,093,000 | £8,193,000 |
| Budget after 1 st supp transfer* | n/a | £8,168,000 |
| Outturn / forecast | £7,903,106 | £8,168,000 |

- The 1st Supplementary budget for this current financial year 2025-26 reflected a £75,000 increase on the previous financial year (2024-25).
- At Final budget stage the increase compared to 20225 was £100k, however, this included £50,000 of additional funding for the Wales and Africa Programme following budget negotiations which was initially included against the International Relations BEL 3720 at Final Budget stage, instead of the International Development BEL 7074. This has subsequently been transferred as part of the 1st Supplementary budget.
- Therefore, the increase to the budget for this year is £75,000. This comprises £50,000 to accommodate staff salary rises and an additional £25,000 uplift was provided for National Insurance contributions.
- Following the repurposing of the allocated funds for the Wales and Africa Programme and the additional funding, the final amended budget is now **£8,168,000** (as reflected in the table above). We are forecasting a full spend by the end of the financial year.
- The International Relations BEL budget has not yet been approved but the **indicative** budget for 2026-27 (using the 2026-27 Draft Budget calculations) is £8,179,000. This represents an increase of £11,000 and will be further broken down as follows (this is subject to change):

| International Relations Budget Line | Indicative Amount (2026-27) |
|--|------------------------------------|
| International Engagement | £2,708,600 |
| Overseas Operations | £4,720,400 |
| Overseas Offices Activity | £750,000 |
| TOTAL | £8,179,000 |

- The next financial year reflects a transitional period as the International Strategy and International Delivery Plan will come to an end in March 2026 and a new government term will commence in May 2026.
- There will be financial stability through this transitional period. At the strategic level, the three aims of the International Strategy to raise the profile of Wales; to grow the economy; and to establish Wales as a globally responsible nation form the basis of our future planning and spending ahead of decisions about a future approach. These aims are consistent with other international strategies across the world which are to prioritise profile, growth and global responsibility.
- To ensure consistency and certainty a number of actions are already underway. The strategic partners have already been invited to bid for funding for the next financial year, and planning is underway for a Wales and Year which focusses on international engagement and activity in Wales. The International Relations BEL will continue to be used to deliver our international priorities, meaning that more than half is already profiled.
- Work is continuing to review delivery of the actions in the International Strategy and associated Action Plans, and this will continue to inform a future position. The Committee's Inquiry will also support this work.
- There are currently nine bilateral agreements in place with partner countries and regions, and the work to take forward these agreements will continue to be delivered into 2026-27 through the International Relations BEL. We expect to sign additional bilateral agreements in early 2026-27. The 2026-27 draft budget will also fund the activities and support for our overseas offices, including the running costs.

Q2. Comprehensive breakdowns of planned spending within the BEL for:

(i) International Engagement, including the Priority Regional Relationships and Networks Action Plan, Public Diplomacy and Soft Power Action Plan, Diaspora Engagement Plan and Cross Cutting Activity.

- Whilst the Action Plans will no longer be extant, funding is not being allocated against each Plan. However, as set out above, actions are already underway to support our international activity in 2026-27 such as funding for our strategic partners.
- Once new international priorities have been agreed as part of the next government term, a full breakdown of planned spending can be provided.

(ii) Overseas Operations costs by country, including details of what outcomes will be delivered and how delivery of these outcomes will be measured.

- The Welsh Government's overseas offices play a crucial role in promoting Welsh interests abroad. Their work includes fostering trade relationships, attracting investment, and enhancing cultural ties. Each office is currently tasked with setting specific, measurable objectives aligned with the overarching goals of the Welsh Government's International Strategy, through an annual country plan.
- Each country plan is based on a nuanced approach to reflect the market and resourcing available to them and is subject to continuous review to ensure the plans remain aligned to strategic priorities. The plans will contain qualitative and quantitative objectives, including activity targets, with progress measured through a formal monthly reporting process for ~~senior officials~~ and Ministers. Scrutiny around

the Overseas Network's Trade and Investment activity is also undertaken by the Economy, Trade & Rural Affairs (ETRA) committee as part of its regular 'general scrutiny of the economy portfolio. New country plans, based on the international priorities set out in the next Senedd term, will set out the outcomes to be delivered by each market, but a common remit is expected to remain, to raise the profile of Wales; to grow the economy; and to establish Wales as a globally responsible nation

- The current Overseas Network structure will be reviewed prior to the new Senedd term, to assess the office locations, and resource allocations. To ensure the network remains strategically aligned with our international ambitions.

(iii) Overseas Network costs by region.

- The proposed budget allocation for the overseas operations work to support delivery of all operational and logistical elements of the overseas offices including staffing costs is £4,720,400. Historically, we have been unable to break the costs down accurately at a specific office level, with the ONE HMG Platform cost not provided at an office level. However, Welsh Government, along with other Government partners, has been advocating for the FCDO to improve financial information for a long period, and this is now likely to be in place for the end of this financial year. This information will inform the Overseas Network Review.
- A further £750,000 is allocated to the overseas networks split equally between the North America (£250,000), Europe (£250,000) and MENA (£250,000) (Middle East/North Africa) networks, and broken down further amongst the 20 international offices, as required. Budgets are not further allocated to individual offices at the start of the financial year, rather they are allocated on a needs basis once activity has been identified to ensure regions are able to respond in an agile manner to activity as it develops.
- Allocations for individual overseas offices will be determined based on their strategic importance, historical performance, and alignment with the Welsh Government's international priorities. Each office's allocation reflects its potential to contribute to economic growth, cultural diplomacy, and the promotion of Welsh interests on the global stage.

(iv) Information on allocations relating to the International Delivery Plan's 15 key aims.

- The International Delivery Plan (IDP) was developed as a strategy to identify our priority international activity for 2025-26 and was funded through the existing budget allocations. It is not expected that this Plan will continue into financial year 2026-27.

(v) Confirmation of the Welsh Government's delivery partners for 2026-27, with corresponding allocations.

- Our Team Cymru approach to diplomacy reflects that we work together to maximise our impact overseas. This involves work with a wide range of partners. We provide direct funding to four delivery partners. All of these have been invited to submit bids for the next financial year. These have not been confirmed at this point.

Q3. Information relating to outputs, outcomes, impacts and value for money for each area of expenditure.

- Our international priorities are outlined in the International Delivery Plan which will come to an end at the end of this Government term. Our 2026-27 priorities will be agreed in the next

Government term.

- Measuring attendance, reach and engagement at our overseas events is done by, for example, the number of companies attending a trade mission or trade show, the number of investment leads sourced or the value of export deals signed at these events - all provide very tangible outcomes - as do the number of attendees at a diaspora reception or networking event.
- Where it is difficult to measure the outcomes due to the nature of the work, we can use metrics - such as comms - to understand the reach of our activity. Of course, not all our activity can be measured in this way but each of our overseas teams uses social media to promote Wales in line with the ambitions of the International Strategy.
- Work is underway to further enhance our reporting on the impact and benefits of our international relations work, based on the Committee's feedback over the last Senedd term, and lessons learned from delivering the Welsh Government's first-ever International Strategy.
- Soft power, by the very nature of its activity, is difficult to measure, but is a valuable tool in our international engagement. The Committee is aware of the ongoing difficulties in setting quantitative targets for our soft power activity but should be assured that we are working with many other countries to understand their approaches and have identified that measuring international relations or soft power activity is a shared challenge. I am aware that the Committee has been looking to Scotland in terms of its approach, so, Members will be aware of the academics and officials who spoke at length as part of an inquiry in 2023-24 about the challenges of monitoring international relations work.
- The annual overseas network report is just one of the methods that we have used to report on our outcomes; however, I am mindful that these do not always highlight the identifiable benefits that the Committee would have liked to see, so work is underway to examine how we will report on this in the future. In the longer term, officials will consider how detailing plans, and more regular monitoring, can form part of a wider measurement framework. However, I would always urge the ability to retain flexibility to respond and exploit opportunities as they arise.

Q4. Allocations for the Wales and Japan and 2026 promotional years with commentary on how the Welsh Government's evaluations of previous years have informed draft budget 2026-27 allocations. The information should confirm the location of its 2026 promotional year.

- The total budget allocation for Wales and Japan 2025 is £386,470. Due to the way in which activity for Wales and Japan was developed, spend has taken place over the course of two financial years. In 2024-25, £111,470 was spent on Wales and Japan and we are forecasting to spend £275,000 in financial year 2025-26.
- We are developing plans to see 2026 celebrate how our international work has directly benefited Wales with activity taking place here in Wales. This will offer an important focus on legacy following Wales and Years in Germany, Canada, France, India and Japan. This programme is being informed by a piece of ongoing work to look at international events in Wales in 2026 as well as identifying outcomes for Wales of the work of International Relations and the overseas offices over the life of the International Strategy. This will include outcomes of previous Wales year evaluations and engagement with Team Cymru partners which has recommended that some time is given to focussing on legacy. Until this work has concluded and a programme developed, we have not allocated a figure for the 2026 year.

International Sustainable Development

Q5. Allocations and commentary in respect of:

- i) Resource provided to the projects and organisations supported by the Wales and Africa Action Plan.
- ii) Relevant allocations
- iii) relevant allocations associated with establishing Wales as a globally responsible nation.

Budget allocations (including the partner delivery organisations) for the International Sustainable Development BEL in 2026-27 are as follows:

| Project | Budget Allocated | Duration of Funding | Reason for Spend |
|--|-------------------|--|---|
| Size of Wales (SoW) / Mbale Tree Planting | £350,000 | Grant ends on 31 March 2027 | To enable SoW and its local partner the Mount Elgon Tree Growing Enterprise to grow over 29 million trees by 2027 in partnership with the Welsh Government and other funders. |
| Hub Cymru Africa (HCA) | £349,000 | Grant ends on 31 March 2027 | To support the development of effective links between Wales and Sub-Saharan Africa. |
| Small Grants Scheme (Wales Council for Voluntary Action) | £ 309,913.60 | Contract and Grant ends on 31 March 2028 | To administer the Wales and Africa (WaA) small grants scheme on behalf of the Welsh Government. |
| Disasters Emergency Committee | £22,000 | Grant ends on 31 March 2027 | To fund a Wales-based External Relations Manager. |
| Safeguarding | £6,000 | Contract ends on 31 March 2026 | To provide expert safeguarding advice to WaA as well as wider International Relations. |
| Communication, Monitoring, Evaluation and Policy Development | £13,086.40 | | To be used for Communication, Monitoring, Evaluation and Policy Development. |
| TOTAL | £1,050,000 | | |

iv) funding to support Wales as a Fair-Trade Nation, and details of what outcomes will be delivered and how delivery of these outcomes will be measured.

- Hub Cymru Africa (HCA) is grant funded by the Welsh Government and allocates funds for Fair Trade Wales and the Fair-Trade Nation campaign from within that grant. Details of how the outcomes will be delivered and measured can be found in the Fair Trade Nation Criteria [Report 2024](#), which is published by Fair Trade Wales. Hub Cymru Africa also provides a monthly report, and officials hold quarterly meetings to discuss progress towards HCA's objectives.

Other

Q6. Allocations and commentary in relation to:

- i) International relations commitments in the Welsh Government's Programme for Government, including draft budget allocations.
- There are two Programme for Government commitments for International Relations.
 - The commitment to retain an Office in Brussels was delivered in April 2023 when a new lease was signed. Ongoing costs for the office are met by the wider Welsh Government Estates budget and, as set out above, the ongoing £750,000 activity budget for our overseas network is allocated on a needs basis rather than by individual offices.
 - The second commitment to Establish a Peace Academy/Academi Heddwch in Wales has also been delivered. Academi Heddwch was established in 2020, and Welsh Government funding has supported the delivery of the following:
 - o The Women's Peace Petition Project to conserve, digitise and catalogue the Petition and enables people to actively participate in transcription efforts to create a searchable database of all 390,296 signatories of the Petition.
 - o Recruitment of an Academic Research Lead and Project Development Officer
 - o Events such as the annual Peace Lecture and Peacemakers Awards.
 - o Baseline research pieces - "Wales as a Nation of Peace" and "The Peace Education Review".
 - o Establishment of a Wales Peace Research Network.
 - Academi Heddwch has been a Strategic Partner throughout the delivery of our International Relations activity. As mentioned above, our strategic partners have already been invited to bid for funding for the next financial year.
- ii) The International Learning Exchange BEL as it relates to the Taith programme
- The International Learning Exchange (ILE) Programme budget for 2026-27 is being maintained at the same level as 2025-26. The increase in the ILE Programmes BEL is wholly due to a transfer of £0.160m funding from the Teacher Development and Support BEL (within the Education MEG) for the Lessons from Auschwitz project increasing the total budget for financial year 2026-27 to £6.662m.
 - A one-year extension to Taith was announced in June 2025. This extends the financial commitment to deliver the Taith programme to 2027-28. The programme is regularly assessed in terms of value for money, deliverability and affordability.

iii) The First Minister's responsibilities for 'Wales and Europe', the financial implications of EU exit on Wales, how EU exit has shaped the Welsh Government's Draft Budget in respect of International Relations.

- Wales' relationship with the EU remains hugely important post-EU exit. Retaining the Brussels office is a Programme for Government priority, supported by the appointment of Derek Vaughan as Welsh Government European Representative to rebuild and strengthen institutional ties.
- Engagement with the EU has included meetings with European Commissioners and Welsh Ministers speaking at European Parliament Committees. This engagement has enhanced Wales' profile and credibility in Europe and influenced EU policy-making. For example, Taith has been referenced by EU Parliament and Commission as a positive case study on attracting harder to reach individuals into international mobility. Wales' Wellbeing of Future Generations Act is also noted as an influence behind the decision to appoint the first European Intergenerational Fairness Commissioner.
- The Welsh Government has assumed leadership roles in European networks, including the Conference of Peripheral Maritime Regions (CPMR) and the Vanguard Initiative, driving collaboration with EU regions – further strengthening relationships with our priority European regions and widening our networks in Europe. Adopting these leadership roles has allowed us to contribute to the strategic agenda of these networks and demonstrate Wales' commitment to international action to advance shared policy interests. Our proactive engagement has delivered tangible outcomes, such as Wales' inclusion in a European Parliament-funded project on interregional cooperation, with regional partners from Spain, France, Portugal and Québec. The Vanguard Initiative VINNOVATE fund, launched under our leadership of the network, has created new opportunities for collaborative innovative projects with Welsh and European academic and industrial partners.
- The UK's exit from the EU is expected to reduce trade and productivity, having a negative effect on the economy. According to the Office for Budget Responsibility's latest Economic and Fiscal Outlook, the UK's long-run productivity is expected to be 4 per cent lower, relative to remaining in the EU, with the volume of exports and imports projected to be around 15 per cent lower in the long term.
- The Centre for European Reform found that at the end of 2024, UK trade intensity remained 3.5% lower than pre-pandemic levels. In addition, UK trade volumes have grown just 1% on 2019 levels in real terms, compared with 8% growth in both the G7 and the EU. This highlights the relatively poor trade performance of the UK and Wales since our exit from the EU.
- Latest data for the year ending June 2025 show the value of Wales' goods exports to the EU to be around 10% (£1.1bn) lower than in the year ending June 2019. Over this same period, the volume of goods exports to the EU fell by closer to 39%, suggesting that the reporting of export value in current prices could be masking the true decrease in the volume of exports to the EU.

- Despite exiting the EU, the EU continues to be Wales's biggest trading partner and the largest source of inward investment. Latest data from the rolling 12-month period year to June 2025 shows a significant portion of Welsh goods exports, 56.8%, are destined for EU countries, compared to 48.4% for the UK overall, highlighting that Wales is more reliant on trade with the EU than the UK as a whole, and is likely to be disproportionately impacted by Brexit.
 - Accurately identifying and analysing the exact impact of the UK's exit from the European Union is challenging due to the timing of other global events and changes in UK data collection, making it difficult to isolate the effects of the EU exit alone. However, my officials continue to monitor the available data to understand changes to the Welsh economy.
- iv) Responding to global conflict and international emergency appeals.
- Budget is not set aside to respond to emergency appeals. Donations to emergency humanitarian appeals are made on an ad hoc basis.