

# Agenda – Culture, Welsh Language and Communications Committee

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Meeting Venue:

Committee Room 2 – Senedd

Meeting date: Thursday, 16 March  
2017

Meeting time: 09.15

For further information contact:

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## Informal Pre-Meeting

(09.00–09.15)

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

### 2 Funding for and access to music education – Evidence Session 9

(09.15–10.00)

(Pages 1 – 12)

David Barnard, Education Official, Musicians' Union

## Break

(10.00–10.05)

### 3 Funding for and access to music education – Evidence Session 10

(10.05–10.50)

(Pages 13 – 15)

Tim Rhys-Evans MBE, Founder & Artistic Director, The Aloud Charity

## Break

(10.50–11.00)



Cynulliad  
Cenedlaethol  
Cymru

National  
Assembly for  
Wales

**4 S4C Review – Evidence Session 4**

(11.00–12.00)

(Pages 16 – 30)

Iestyn Garlick, Chair of TAC

Gareth Williams, Council Member for TAC

**5 Paper(s) to note**

**Reply from the Auditor General of Wales to the letter from the Chair: Arts Council of Wales – Procurement of Services**

(Pages 31 – 32)

**6 Motion under Standing Order 17.42 to resolve to exclude the public from the meeting for item 7**

**7 Private de-brief**

(12.00–12.15)

# Agenda Item 2

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Cynulliad Cenedlaethol Cymru / National Assembly for Wales  
Pwyllgor Diwylliant, y Gymraeg a Chyfathrebu / The Culture, Welsh Language  
and Communications Committee  
Ariannu addysg gerddoriaeth a mynediad ati / Funding for and access to  
music education  
CWLC(5) FAME07  
Ymateb gan Undeb y Cerddorion (MU) / Evidence from The Musicians' Union  
(MU)

The Musicians' Union (MU) has around 20,000 members who teach music, and is therefore well placed to offer insight into music education across Wales, including how the current situation and any possible changes compare to the rest of the UK. This submission sets out a few crucial aspects of music education that must be considered by the Committee as part of their inquiry.

Firstly, the ultimate goal of music education in Wales should be that all children have access to affordable, high-quality musical tuition and opportunities, across all genres of music and all areas of the country. However, this is not the current situation, as there are differences in provision across the country, while music services and teachers face significant pressures. Music education must be based on equal support for all genres of music as well as children's needs, with a focus on diversity and inclusion, so that young people with special educational needs and in deprived areas have the same opportunities as those in wealthier areas. The Committee should consider the extent to which provision varies across Wales and how to ensure that the situation improves.

Secondly, funding and business models are fundamental issues for the successful delivery of music education, as they affect every other part of the system. Music education in Wales is still largely delivered by local authority music services, but this model is under pressure due to lack of funding as well as additional challenges, such as the rural and deprived nature of much of Wales. There are alternative business models for music education, as highlighted by the MU's series of Hub Reports – examples include the Denbighshire Music Co-operative and, in England, the Cornwall Music Service Trust. However, the lack of ring-fenced, long-term funding for music education in Wales is a major issue, and greater resources are needed to deliver the vision set out above. The Committee should consider how to ensure the right resources and structures are in place for the successful delivery of music education.

Finally, it is crucial that the Committee considers the current state of the workforce, and how to provide better support for music teachers, without whom no music education would take place. The MU's members who teach tell us that they get an immense amount of satisfaction from what they do to inspire the next generation of musicians. However, good pay and conditions, as well as professional recognition, is just as important for music teachers as for other workers, and over time there has been a gradual erosion of rates of pay and conditions, as well as a move towards self-employment. Music education is only possible with a committed, skilled, and creative workforce, and unless teachers are supported and appreciated then unfortunately it is the quality, affordability, and accessibility of children's music education that will suffer. The Committee should consider how best to support music teachers in delivering high-quality, affordable, and accessible tuition across Wales.

Wales is rightly proud of its musical heritage, and there is still a variety of quality music-making taking place. However, this is not consistently affordable and accessible for children across the country, which will only be possible with the right strategy, along with appropriate funding and well-supported teachers. Issues of accessibility, funding, and the workforce must be considered in the Committee's inquiry to ensure the viability and success of music education in the future.

Cynulliad Cenedlaethol Cymru / National Assembly for Wales  
Pwyllgor Diwylliant, y Gymraeg a Chyfathrebu / The Culture, Welsh Language  
and Communications Committee  
Ariannu addysg gerddoriaeth a mynediad ati / Funding for and access to  
music education  
CWLC(5) FAME12  
Ymateb gan Elusen Aloud / Evidence from The Aloud Charity

## Agenda Item 3

I'm writing to register my interest and those of my organisation, The Aloud Charity which administrates the choirs Only Boys Aloud, the Only Boys Aloud Academi and Only Kids Aloud in the Welsh Government Inquiry into Music Provision.

Having received so much of my own musical training through the Mid Glamorgan Youth Choir, Mid Glamorgan Youth Brass Band and latterly the National Youth Choir of Wales, I know only too well what a difference this activity makes to the creation of engaged, young musicians and perhaps more importantly, well-rounded individuals.

It is highly unlikely that I would have become a professional musician had I not had the benefit of the early musical development 'The Glam' afforded. I have spent my life involved with choral music and partaking in youth music activities as a young man enabled me to overcome bullying in school, find like-minded friends and gave me the confidence and the requisite skills to me study music at university and to eventually carving out a career in the subject I am so passionate about.

Seeing the gradual decline in the county music system in Wales has saddened me greatly. From the age of 11 until I was 14 I got on a free bus every Saturday morning to attend rehearsals for the county brass band. When I was 15, I first sang Messiah and at 16 the Verdi Requiem... all thanks to a thriving organisation that was provided free of charge to me (because of receiving free school meals) and at very little expense to my fellow choristers. What comparable musical activity is provided by government to young musicians in 21st Century Wales?

In 2010, I founded Only Boys Aloud which was then administered by Only Men Aloud. It immediately became apparent that there was an appetite amongst young people for choral music and to this end we established the Aloud charity in 2012 to formalise our provision of choral music for 13-19 year old boys across Wales.

Because of my own experience and development through those opportunities that were provided to me free of charge, it was very important to me that those who need Only Boys Aloud the most (i.e. those without the means for private tuition) are able to access it. For the past seven years, we have provided OBA free of charge to all our members and during this time hundreds of boys have gone through the scheme, many of them never having experienced music-making before and a number of them pursuing a career in music as a result of the scheme. We have numerous testimonials from boys saying how the scheme has impacted positively in their lives and the lives of their families and I am very happy to share all of these with you should the opportunity arise.

As well as a policy of not charging our members, equally important to us is a policy of not auditioning. Many of our members have acute levels of additional learning needs who all feel welcome, valued and that they have something to contribute. We emphasise good discipline at all times and believe that providing a strong framework for our sessions enables our members to grow, not only as musicians but as valuable members of the community. So valued is our work in the area of developing responsible young citizens that we have for the past two years received grants from the 'North Wales Police: Your Community, Your Choice' fund which recognises the impact we've made on the lives of our young choristers in North Wales.

We provide free access to 14 choirs on a weekly basis for our members, all run in community venues (rugby clubs, football clubs etc) in some of the most deprived communities across Wales from Holyhead to Cwmbran. In addition to this we provide a higher level of musical training to 32 of our boys with the ambition and ability to work at an advanced level via our annual Academi. Following success at audition, each member of our Academi receives advanced training in general musicianship, sight-singing and aural training, group choral singing, individual singing lessons, acting, movement and drama. The nine-day residential course immerses the boys in a world of serious-minded music making, helping them achieve their potential and playing a part in the development of the Welsh professional musicians of the future.

We have a small dedicated and hard working team running the Aloud charity and with the support of a tireless, supportive board of trustees, now have a robust business model.

However, we have never received any core funding from public subsidy though we have received a small number projects amounting to around £100,000 over seven years. Our annual fundraising target is £500,000 so as you will see, the vast majority of our funding comes from a wide portfolio of sources including business sponsorship, grants from trusts and foundations, individual donors and any income we can generate from performances. But alongside all of the other income streams we work so hard to secure we strongly feel that public subsidy should be an important part of this mix.

With over 650 boys going through OBA, the total amount of public subsidy for each boy over 7 years is less than £150.

We have also run Only Kids Aloud in partnership with Wales Millennium Centre since 2012 in the form of the WMC/OKA National Children's Chorus of Wales and via the Land of Song project which engaged with over 4,000 key stage 2 children in live performances. WMC have recently withdrawn from this partnership and we are therefore currently investigating ways in which we can continue this provision.

I wish to close my saying that we are "Gwlad Beirdd a Chantorion" but if we are not going to ensure that our youngest and most vulnerable citizens have direct access to music, for how much longer can we hold true to this?

I am delighted that Welsh Government is commissioning this inquiry and am happy to lend any support I can to improve music provision for ALL our young people.



# Agenda Item 4

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## Introduction

1. Teledwyr Annibynnol Cymru represents independent TV production companies in Wales. There are around 60 companies ranging from small firms to some of the leading players in the UK. They predominantly produce television programmes and digital content for the UK PSB networks – BBC, Channel 4, ITV, Channel 5 – as well as for cable and satellite channels, and are also involved in international co-productions. They also produce almost all of the original programmes on S4C and a variety of productions for BBC Radio Wales and BBC Radio Cymru.
2. TAC greatly welcomes the decision by the CWLC Committee to hold an inquiry on S4C. This is a hugely important year as we prepare for the independent S4C Review, and the Committee's work will provide an important contribution to that process.

What sufficient funding for the channel looks like For example, who should provide it, and how should it be calculated – should it be linked to a formula? How should this be supplemented with revenue raised by S4C?

3. Establishing a long-term stable structure for sustainable funding is the most significant issue to be addressed for S4C. As the Committee is aware, S4C's funding formula has been subject to frequent changes in recent years, particularly as a result of the 2010 UK Government Spending Review, and as a consequence S4C's budget has been severely reduced.
4. The decision in the 2010 CSR to reduce S4C's funding was in clear contradiction with the findings Ofcom's second PSB Review which, in January 2009, stated that:

‘Existing government funding should continue for other public service broadcasters (S4C and BBC Alba) in the devolved nations, to ensure they can continue to fulfil their public roles.’<sup>1</sup>

‘Direct government funding offers potentially high and secure funding and reduces issues with collection and incentives of recipients.’<sup>2</sup>

5. The Government’s letter to Lord Hall in 2015, concerning the transition of paying for free over-75s TV Licences to the TV Licence Fee, states that ‘The BBC’s grant to S4C may be reduced by an equivalent percentage reduction in funding to the percentage reduction made to BBC funding over the period 2018/19 – 2020/21. It will be up to the Government to decide how to make up the shortfall’.<sup>3</sup>
6. The above points are important to consider as we look forward. The acknowledgement that there is a shortfall, and that the Government is obliged to do address it, makes it particularly disappointing that the Government subsequently decided to further cut S4C’s DCMS funding, cuts which were only frozen after TAC and others called for a reversal of that policy.
7. The effects of the cuts in 2010 were to some extent mitigated by two factors: firstly the S4C management reduced administration costs and used the partnership with the BBC to save on things such as transmission costs. Secondly, the independent production sector also worked hard to reduce costs. But as Ofcom stated in its last UK PSB review: ‘demand for production staff and studio costs is now increasing, and savings – in terms of producing the same programmes with smaller crews and fewer filming days – have largely been realised’<sup>4</sup>.

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<sup>1</sup> Second Public Service Broadcasting Review: Putting Viewers First. Ofcom, January 2009, p11, para 1.87

<sup>2</sup> Second Public Service Broadcasting Review: Putting Viewers First. Ofcom, January 2009, p51, para 5.47

<sup>3</sup> Letter on arrangements for over-75s TV licence concession from 2017/18. HM Treasury & DCMS to Lord Hall, 3 July 2015

<sup>4</sup> Public Service Broadcasting in the Internet Age: 3rd Review of Public Service Broadcasting. Ofcom, July 2015, p9 para 3.15

8. Even if the current level of S4C budget was linked to inflation, it would not be sufficient to counter the ongoing effects on audiences of so many repeats. There is also the need for S4C to follow other broadcasters and invest in being available on as many platforms as possible. S4C's online viewing, particularly via the iPlayer, has increased substantially, up from 5.7m in 2014-15 to 8.4m in 2015-16<sup>5</sup>, showing that viewers throughout the UK enjoy watching S4C.
9. The non-Licence Fee direct public funding received by S4C is important, as stated by Lord Puttnam's recent PSB review: 'the government's commitment to language programming has to be backed up with secure, long-term funding. Given the particular purposes they serve in relation to national heritage, cultural diversity and education, we feel that they should be at least partially funded by ring-fenced money – either from central government or another source – and not left to survive on whatever the BBC can find from its (declining) budgets.'<sup>6</sup>
10. Extra public investment should not be seen as a cost to the taxpayer. As research has demonstrated S4C more than doubles the value of its money by investing in the local creative economy<sup>7</sup>. Clearly, additional investment will deliver further economic benefits.
11. The committee asks whether a formula is needed. A long-term stable structure for sustainable funding is certainly needed, enabling S4C to invest in high quality television programmes and digital content which is relevant and engaging to its audience and contribute significantly towards the Welsh Government's objective of achieving a million Welsh speakers by 2050. This funding formula should incorporate a commitment from both of S4C's current primary funders – the TV Licence Fee and the DCMS contribution – with an irrevocable commitment for such funding to run concurrently with the review of the TV Licence Fee structure, in addition to continuing to allow S4C to generate commercial income in its current form.

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<sup>5</sup> Annual Report 2015-16. S4C, 2016, p4

<sup>6</sup> A Future for Public Service Television. Goldsmiths College/University of London, June 2016, p126

<sup>7</sup> Annual Report 2015-16. S4C, 2016, p4

12. The level of S4C's funding has fallen to a point at which TAC considers it is below what should be statutorily provided as 'sufficient funding'. There should be an immediate boost for S4C's public funding of 10% (i.e. 10% of the combined total from both the DCMS and TV Licence Fee, which would amount to around £8.3m), plus being linked to inflation so it keeps pace.
13. Maintaining a combination of funding sources will further emphasise S4C's independence and help prevent S4C from being unduly influenced by a single funding source. Moving most of S4C's funding to the TV Licence Fee amounted to an approximate 96% public spending reduction, a saving greatly in excess of most public spending cuts under the Government's austerity programme. Raising the DCMS grant to £15m would therefore still constitute a major reduction in DCMS spending on S4C from pre-2010 levels of above £100m.
14. Furthermore, we would argue that it is no longer logical for the BBC to control and determine the production of the statutory 10 hours non-news and news related programmes broadcast on S4C's services. TAC understands that the 10 hours currently cost about £20m per annum to produce, of which news amounts to approximately £6m. TAC would like the balance of £14m transferred to S4C's, so that it has sole control over both the editorial content and who should produce it.
15. On another note, some of the government's highly beneficial tax breaks for the creative industries have not been as useful to S4C as to other UK PSBs. Due to S4C's lower budgets for drama, its production do not qualify for the high-end TV tax credit, and TAC would like to see a lower threshold for UK minority indigenous language productions.

What S4C's statutory remit should be. Is its current remit fit for a contemporary broadcaster, and if not, how should it change? How should it reflect the digital role of a modern broadcaster?

16. S4C's remit requires 'the provision of a broad range of high quality and diverse programming', most of which must be in Welsh<sup>8</sup>. A wide-ranging remit increases S4C's scope to raise additional revenues, as at least some of

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<sup>8</sup> Communications Act 2003. HM Government, 2003, section 204 (2)

the genres, for example high-quality drama such as 'Y Gwyll', will be of commercial benefit.

17. S4C's stated role should also be to portray Wales and its culture and people to the rest of the UK and beyond. New platforms make this much more viable, as demonstrated by the success of S4C on the BBC iPlayer, as well as You Tube, Facebook and Twitter. S4C's role to be present on these platforms should be clearly recognised in its remit.
18. S4C's report 'The Future of Welsh Language Television' stated that one of S4C's key objectives from 2017 should be to; 'have an impact on the creative industries, and local economies and communities across Wales and support growth in the Welsh language'<sup>9</sup>. In accordance with this, S4C's remit should have a greater overt emphasis on working with a wide range of production companies. S4C's role in providing first commissions and an ongoing supply of work provides greater financial stability for the creative TV sector. Producers can use their track record with S4C to gain commissions from UK-wide broadcasters. It allows TAC members to further develop training and skills, and make capital investments in plant and equipment, as well as reaching out to new markets and attracting inward investment.

**What governance and accountability structures S4C should have in place. For example, should responsibility for S4C be devolved to Wales?**

19. TAC supports the continuation of the S4C Authority provided it can be demonstrated it is not too heavily involved in day-to-day affairs and is concentrating on core oversight to the service. The S4C Authority can regulate S4C in a co-regulatory model with Ofcom overseeing it, making sure that the TVLF is well spent by S4C, without any involvement from the BBC. The Authority should perhaps therefore be the 'S4C Regulator'.
20. There should be the opportunity within the governance structure for official representatives of the independent sector to comment on changes to commissioning strategy before they are finalised, to avoid any policies which might inadvertently damage the ecology of the sector.

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<sup>9</sup> The Future of Welsh Language Television. S4C, 2014, p34-35

21. We understand that the DCMS, BBC and S4C are discussing a ‘post – BBC Trust’ arrangement, described thus by S4C Chief Executive Ian Jones to the CWLC Committee last year: “The relationship will become more of a contractual one ... the implication is that S4C will account to the BBC for the fact that the money has been used for the purpose intended.”<sup>10</sup>
22. This should be viewed with concern, as whilst the BBC Trust was at least an ‘arms-length’ body, the new ‘contract’ would be between the S4C Authority and the Board of the BBC itself. This situation represents a significant conflict of interest – it cannot be right for the board of one broadcaster to have any say over the affairs of another.
23. To safeguard S4C’s independence, the portion of the TV Licence Fee that goes to S4C should be wholly separated, and not require any oversight of any sort from the BBC. TAC would like to see the relevant TVLF funds go directly to the S4C Authority (or ‘Regulator’), which is after all entrusted by Government to ensure that S4C is spending the funds correctly. Furthermore S4C’s TV Licence Fee income should also be ring-fenced and protected from any further reductions as a result of extra obligations placed on the BBC, such as happened recently in terms of the BBC having to adopt funding of TV Licence Fees for the over-75s.
24. TAC would urge caution in terms of devolving S4C to Wales. As a valued cultural asset, the Welsh language should rightly be supported by UK Government. Working with all of the UK PSBs, TAC members witness the importance of S4C being part of the wider UK PSB ecology.
25. It would be unfortunate to potentially marginalise S4C and make it a niche service considered only to be of importance to Wales, when in fact its programmes have a much wider impact, as does the creative TV sector with which it works. S4C’s funding should not become a matter for the Welsh Assembly Government to have to consider next to priority spending on the economy, health, education, environmental matters and other devolved matters.

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<sup>10</sup> The Big Picture: The Committee’s Initial Views on Broadcasting in Wales. National Assembly for Wales – Culture, Welsh Language and Communications Committee, February 2017, p23 (63)

### What S4C's relationship with the BBC should look like

26. There are undoubtedly benefits from the partnership between S4C and the BBC, such as sharing transmission services. Co-commissioning or cost sharing of certain high value programmes such as drama, cultural and sports events and rights, bring benefits both to broadcasters and commissioned producers. TAC's ensures that the Terms of Trade, as stipulated by the Communications Act, are adhered to by S4C when dealing with the independent sector on such commissions.
27. In the light of changes in the BBC Charter making more of BBC TV programmes open to competition, working with an increased number of the Welsh independent sector can help improve diversity of voice on the BBC, as well as fulfilling the BBC Charter requirement for the BBC to work with the creative economy<sup>11</sup>.
28. Nevertheless, as stated above the BBC-S4C relationship should not involve the portion of the TV Licence Fee that goes to S4C is allocated towards part funding the S4C service.

### The visibility of S4C: covering issues such as S4C's prominence on the electronic programme guide and smart TVs.

29. The prominence of all free-to-air public service broadcasters on the EPG and smart TVs remains crucial. In some way or other all PSBs benefit from public support in terms of spectrum and in some cases public funding. Therefore the public should find them readily available. Research has shown the EPG position has a direct relation to the viewing habits of the channels concerned and as S4C clearly does not have the marketing budgets of some other broadcasters it is crucial it can be prominent in other ways.
30. We agree with the Committee's recommendation that 'UK Government and Ofcom consider amending Ofcom's Code of Practice for EPG providers to

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<sup>11</sup> The description of the BBC's fourth public purpose in its new Charter includes the statement that: 'In commissioning and delivering output the BBC should invest in the creative economies of each of the nations and contribute to their development'. Ref: BBC Royal Charter. HM Government, December 2016, p5



ensure that S4C receives greater prominence in Wales on Electronic Programme Guides and smart TV applications'.<sup>12</sup>

31. Of specific concern is Virgin Media's service provision in Wales. BBC1 Wales appears on channel 101, BBC2 Wales appears on channel 102, ITV Wales appears on channel 103 however channel 104 is occupied by Channel 4. S4C finds itself completely isolated on channel 166 – thus invisible to viewers channel hopping PSB's service. Given Virgin Media's significant growth and aggressive marketing practices in its cabled households TAC calls on the Committee to urge Ofcom to address this matter.
32. Although online viewing figures are growing, there is still a need for S4C to retain its presence as a free-to-air terrestrial network. As Ian Jones told the Welsh Affairs Committee: "at the moment if S4C was completely online, we would lose 60% to 65% of our audience straight away."<sup>13</sup> Linear TV viewing is still strong, with 91% of the UK population watching live TV each week.<sup>14</sup> With the demographic of Welsh speakers includes a fair amount of older people who are not naturally given to view TV online. This contrasts with a Channel like BBC3 which, with its younger demographic, was arguably a more logical service to make online-only.

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<sup>12</sup> The Big Picture: The Committee's Initial Views on Broadcasting in Wales. National Assembly for Wales – Culture, Welsh Language and Communications Committee, February 2017, p25

<sup>13</sup> Oral evidence: Broadcasting in Wales follow-up: S4C funding – 30 Jan 2017. Welsh Affairs Committee, HC 981, published Feb 2017, p8, Q19

<sup>14</sup> Communications Market Report 2016. Ofcom, August 2016, p16

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Date: 8 March 2017  
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*Anwyl Bethan*

#### **ARTS COUNCIL OF WALES – PROCUREMENT OF SERVICES**

Thank you for your letter dated 16 February 2017 seeking clarification regarding the cessation of funding to Arts & Business Cymru ('A&BC') by the Arts Council of Wales (the 'Council') and the Council's use of public procurement to obtain future provision of services. I understand the position to be as follows:

- The Welsh Government ring-fenced £140,000 within the Council's Grant in Aid remit for 2014-15 and 2015-16 as a two year funding commitment to A&BC. It was made clear at the time that post 2015-16 funding would cease. This was clarified in a letter to A&BC Chair from Mr S Tomos (Director of Enterprise and Regeneration) dated 17 December 2015.
- The Council provided further financial assistance from its Lottery Distribution Activities in 2016 to A&BC of £30,000 for transition funding and £25,000 for the appointment of consultants to assist A&BC with planning for a sustainable future.
- The Council, as part of its 'Resilience' transformation programme for the arts organisations it core funds, continues to invite bids as part of a public procurement process at which A&BC can, and has submitted bids. Whether A&BC is successful depends on, as for any other organisation, whether it provides the best quality and value for money for the Council's service requirement.
- As explained by Mr N Capaldi in his letter to you dated 13 February 2017, the Arts Council is required to undertake the activities as directed within the Council's remit letter, whilst complying with public procurement regulations in Wales as issued by the Welsh Government, namely Managing Welsh Public Money and the Wales Procurement Policy Statement.


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- It is not my role nor that of my staff to design or impose any rules for public bodies' procurement of services, but in the course of our audit work we will frequently review a sample of expenditure items and any associated public procurement exercises including the extent to which they conform to regulations issued by the Welsh Government.

I hope this answers your questions. If you would like to discuss further then please do not hesitate to contact me.

*1/2 gyw*  


**HUW VAUGHAN THOMAS**  
**AUDITOR GENERAL FOR WALES**