Agenda – Culture, Welsh Language and Communications Committee

Meeting Venue:	For further information contact:
Committee Room 2 – The Senedd	**Steve George**
Meeting date: 18 April 2018	Committee Clerk
Meeting time: 09.00	0300 200 6565
	SeneddCWLC@assembly.wales

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

2 **Office of National Statistics: Census 2021**

(09:00 – 10:00) (Pages 1 – 16)

Iain Bell, Deputy National Statistician and Director General for Population and Public Policy

Garnett Compton from the Office of National Statistics Census Programme

3 **Film and major television production in Wales: Evidence Session 1**

(10:00 – 11:00) (Pages 17 – 59)

Pauline Burt, Chief Executive, Ffilm Cymru Wales

Michael Gubbins, Chair, Ffilm Cymru Wales

Phil George, Chair, Arts Council of Wales

4 **Paper(s) to note**

4.1 **Film and major television production in Wales: Notes from stakeholders workshop**

(Pages 60 – 64)

4.2 **Radio in Wales: Additional Evidence from BBC**

(Pages 65 – 67)

Cynulliad Cenedlaethol Cymru
National Assembly for Wales

5   Motion under Standing Order 17.42 to resolve to exclude the public from the meeting for the following business:

6   Funding for and access to music education: Consideration of Draft Report

7   Consideration of Evidence

(11:30 – 12:00)

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Iain Bell | Deputy National Statistician and Director
General for Population & Public Policy

Bethan Sayed AM,
Committee Chair,
Culture, Welsh Language and Communications Committee
National Assembly for Wales
Cardiff Bay
Cardiff
CF99 1NA

26 March 2018

Dear Ms Sayed,

I write in response to the Culture, Welsh Language and Communications Committee's call for evidence on the 2021 Census.

As the Committee are aware, the Office for National Statistics (ONS) is the UK's National Statistical Institute, and largest producer of official statistics. We aim to provide a firm evidence base for sound decisions, and develop the role of official statistics in democratic debate.

We are also responsible for the Census in England and Wales, with the next census to be carried out in 2021. In advance of appearing before the Committee in April to answer your questions, the below provides some initial information for consideration.

Census consultation to date

Question development for the 2021 Census started in June 2015 with the 2021 Census topic consultation[1], asking stakeholders for views on our initial thoughts on which topics we should ask questions on in the 2021 Census. 1095 stakeholders responded to the consultation indicating their need for data on different topics, expressing needs for information on new topics such as the Armed Forces community, sexual orientation and gender identity, and outlining areas where changes made could help better meet user needs. Following the topic consultation, we published topic-specific reports outlining our next steps, and developed testing plans to research the needs identified.

Further consultation has been held around topics where greater needs for change or development were identified. We have also held public events such as a series of roadshows (July 2016) and ad-hoc meetings with interested parties including All Party Parliamentary Groups, community groups and charities. Most recently, ONS held a stakeholder forum in London on 13 December 2017. At the forum, we discussed needs and research on the topics of gender identity, sexual orientation and ethnicity. We will be hosting another forum on 23 April in Cardiff to discuss the topic of ageing.

On 28 February, we launched a public consultation on 2021 Census Output content[2] to help us understand what statistical products our users need from the 2021 Census outputs, and to help prioritise our future research. This is open for views until 23 May.

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[1] 2021 Census topic consultation
[2] Outputs consultation

Achieving a successful census in Wales

ONS engages with Welsh users and stakeholders through a number of different channels to ensure that the needs of Welsh communities and users of statistics are fully represented and taken into account.

There are three main areas we have engaged on:

1) Ensuring the questions cover the needs of Welsh users;
2) Successful operational delivery within Wales; and
3) Ensuring the outputs meet the needs of Welsh users.

All three of these activities are covered by the Welsh Census Advisory Group (CAG). This is chaired by Glyn Jones, Chief Statistician for Wales, and includes stakeholders from other government departments, universities and non-profit data users. The group's remit covers design and delivery issues as they relate to data production and data use. The CAG formally meets twice a year but members are regularly consulted and updated throughout the year between meetings.

At the last meeting of the CAG in January 2018, ONS updated the group on progress to date, and sought input from group members on topics, developments in geography and results of the 2017 Census test[3]. Most recently, group members have been invited to respond to the outputs consultation that we launched in February.

Question design

As well as engaging stakeholders through the CAG, in November 2017, ONS and the Welsh Government jointly hosted a 'Welsh Language in the 2021 Census' stakeholder event. Attendees included representatives from Welsh Councils, the Welsh Language Commissioner and Welsh Language interest groups. Presentations from ONS and the Welsh Government were followed by a Roundtable discussion on the Welsh language, which considered the format and routing of the questions, and allowed the group to consider how the data may be used, and potential limitations. Their views and feedback are being considered, alongside testing and evaluation results, to propose the recommendations for the 2021 Census. The group may be contacted again in the future for matters relating to Welsh language in the Census.

Operational delivery

The CAG is also utilised to support strategic and operational development of the 2021 Census. A key example of this was the provision of information relating to religious communal establishments in Wales. This information has been used to inform the strategic and operational approach to communal establishments more broadly.

In addition to the CAG, we use the Census Liaison Operational Management Group (OMG) to address operational issues with ONS and its members which include Ceredigion and Cardiff County Councils.

Meeting user needs

Users from the Welsh Government recently expressed interest in the 2017 test results. The Welsh Statistical Liaison Committee and the Third Sector User Panel at Welsh Government were presented with this information last year. Work with the CAG has enabled us to build relationships with these groups, and has helped us understand the specific needs of the users that these groups represent.

More widely, as in 2011, we are currently undertaking programmes of work to engage at local authority level, and a census community engagement programme. To ensure we are able to engage

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[3] 2017 Census Test Report

with users effectively, we provide information and promotional materials in Welsh and are also developing a bilingual census logo.

Welsh Language Questions

In 2011, language data was collected through questions on Welsh skills, Main language and English language proficiency (examples at Annex A). Main language and English proficiency were new questions in 2011. The aim of the language questions is to identify the size of the population for whom English is not their main language, and their level of proficiency in English. This data is used to inform policy development, local planning and service provision such as education, health and local services.

The structure of the language questions was as follows:

- **Welsh skills** was collected only in Wales and the question space was left blank in England.

- **Main language** response options were slightly different in England and Wales, with the 'English' tick box in England replaced by 'English or Welsh' in Wales to capture both national languages in Wales. The Welsh language version reads 'Cymraeg neu Saesneg' ('Welsh or English') to reflect the version of the form chosen.

- The **English proficiency** question was identical in England and Wales.

During question testing, an option was tested where the main language response options 'English or Welsh' / 'Cymraeg neu Saesneg' was split into two separate tick boxes. Results of the testing showed that respondents struggled to answer, particularly amongst the Welsh speaking community. Results of the research were shared with Welsh language stakeholders at the event held in November 2017. The Welsh language stakeholders discussed the results and agreed as a group that the response option should not be split. They agreed that Welsh skills data would be best placed for monitoring the Welsh language*.*

The need for language sub-topics was identified in the 2021 Census topic consultation held in 2015. Some stakeholders did express an interest in first/second, 'native' or additional languages but the requests did not evidence a strong enough user need to pursue a change. Data quality was not raised as an issue following on from the 2011 Census. All work so far has largely focused on user need but further testing and user research is planned to finalise all of the question wording, particularly focused on the online census questionnaire.

As a result of testing and feedback, we are proposing to use the same language questions from the 2011 Census in the 2021 Census.

Legislation

The Office for National Statistics (ONS) is only responsible for the Census in England and Wales; the censuses in Scotland and Northern Ireland are devolved responsibilities and are carried out by National Records of Scotland and the Northern Ireland Statistics and Research Agency. We work closely with the Devolved Administrations to ensure that results from each of the censuses are as comparable as possible. Although detailed arrangements may vary, each country will follow the same basic procedures with the publication of initial proposals being followed by the required secondary legislation.

For England and Wales, the Census Act 1920 provides for a census to be taken, however each census can only be carried out following approval of secondary legislation - the Census Order (affirmative procedure) and Census Regulations (negative procedure), which set out the questions to be asked and the procedures for collecting the information. Welsh Ministers must be involved in respect of explicit consent to the order and laying of separate regulations in the Welsh Assembly.

Secondary legislation is preceded by a White Paper which traditionally sets out the proposed topics for inclusion in the census questionnaire and proposals for how the census will be conducted. The most significant changes this time being that the census will be predominantly online and the greater use of administrative data to pave a way to meet the Government's ambition that censuses after 2021 are conducted more frequently, using existing data.

Updates on other topics

Many of the core issues about what to ask in the 2021 Census have already been determined through the topic consultation in 2015 and subsequent research since 2016. Testing has taken place in England and Wales, in both the English and Welsh language.

The latest update, where a final proposition was reached, was our announcement that we will be proposing a question on Armed Forces veterans to provide information to help public authorities meet their obligations under the Armed Forces Covenant. This was followed by the 2021 Census topic research report in December 2017[4].

We have identified a clear need for improved information on sexual orientation and gender identity. This is especially in relation to policy development, service provision and fulfilling duties under the Equality Act 2010. Data on the Lesbian, Gay, Bisexual and Transgender (LGBT) population would provide evidence on the extent of inequalities, discrimination and disadvantage, which in turn would help to target and improve policy making, particularly in health services, education, employment, housing, social services and homophobic crime reduction services for LGBT groups.

We are still considering whether and how to collect information on gender identity, alongside continuing to collect information on male or female. This is particularly complex in meeting a respondent need for gender identity, a user need to measure the size of the trans population while ensuring an accurate estimate of the male and female population. Our research so far gives us confidence that collecting gender doesn't have a negative impact on collecting information on male and female. We also know that there is a strong information need for separate information on the trans population.

Further testing is planned to refine the question design and inform our recommendation about the inclusion of such a question or questions in the 2021 Census. To be clear, we have never suggested that people would not be able to report themselves as male or female. We have and will continue to collect this vital information.

Users expressed a wide range of demands for data on ethnicity and religion. Based on user need, we have narrowed this down to four potential additional tick boxes to the question asked in 2011 – Jewish, Roma, Sikh and Somali. We continue to engage with the relevant communities on the acceptability or otherwise of including such additional tick boxes. We are also undertaking further research to assess whether the inclusion of new categories will collect sufficient quality information to meet the user need and that our conclusions are compliant with our legal obligations.

A successful census test was carried out in 2017 including areas within Powys, to test the impact on response of including a sexual orientation question and to assess the new technologies and processes required to run a predominantly online census. We are planning for a rehearsal of around 100,000 households in 2019 before scaling up to 26 million households in 2021. The rehearsal will be run in both England and Wales.

ONS will make its recommendations to government on 2021 Census content later this year. Our recommendations will be based on our considerations around the evidence of user need, public acceptability of proposed questions, and our ability to devise questions that collect good quality information to meet the user need and our legal obligations.

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[4] 2021 Census topic research: December 2017

I look forward to answering your questions and elaborating on the above in April.

Yours sincerely,

Iain Bell
Deputy National Statistician and Director General, Population and Public Policy
Office for National Statistics

Annex A   Examples of the 2011 Census form

The main language question is used to route respondents with the national language as their main language past the 'English proficiency' question.

Questionnaire in England

17 This question is intentionally left blank ➡ Go to **18**

18 What is your main language?
- ☐ English ➡ Go to **20**
- ☐ Other, write in (including British Sign Language)

☐☐☐☐☐☐☐☐☐☐☐☐☐

19 How well can you speak English?

Very well	Well	Not well	Not at all
☐	☐	☐	☐

Questionnaires in Wales

17 Can you understand, speak, read or write Welsh?
↻ Tick all that apply.
- ☐ Understand spoken Welsh
- ☐ Speak Welsh
- ☐ Read Welsh
- ☐ Write Welsh
- ☐ None of the above

18 What is your main language?
- ☐ English or Welsh ➡ Go to **20**
- ☐ Other, write in (including British Sign Language)

☐☐☐☐☐☐☐☐☐☐☐☐☐

19 How well can you speak English?

Very well	Well	Not well	Not at all
☐	☐	☐	☐

17 A allwch ddeall, siarad, darllen neu ysgrifennu Cymraeg?
↻ Ticiwch bob blwch sy'n berthnasol
- ☐ Deall Cymraeg llafar
- ☐ Siarad Cymraeg
- ☐ Darllen Cymraeg
- ☐ Ysgrifennu Cymraeg
- ☐ Dim un o'r uchod

18 Beth yw eich prif iaith?
- ☐ Cymraeg neu Saesneg ➡ Ewch i **20**
- ☐ Arall, nodwch (gan gynnwys Iaith Arwyddion Prydain)

☐☐☐☐☐☐☐☐☐☐☐☐☐

19 Pa mor dda allwch chi siarad Saesneg?

Da iawn	Da	Ddim yn dda	Dim o gwbl
☐	☐	☐	☐

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Cynulliad Cenedlaethol Cymru / National Assembly for Wales
Pwyllgor Diwylliant, y Gymraeg a Chyfathrebu / The Culture, Welsh Language and Communications Committee
Cynyrchiadau Ffilm a Theledu Mawr yng Nghymru / Film and Major TV Production in Wales
CWLC(5) FILMTV14
Ymateb gan Ffilm Cymru Wales / Evidence from Ffilm Cymru Wales

C O M M I T T E E ' S T E R M S O F R E F E R E N C E :

1. To achieve clarity on the Welsh Government's policy aims for funding film and major television production in Wales, and transparency as to why and how decisions are made in this area;

2. The support given by the Welsh Government to develop the film and television industries in Wales including:

   - Economic impact, and how this is spread across Wales;

   - Cultural impact, including the Welsh language;

   - Value for money.

3. How support for the sector may be affected by the Welsh Government's new Economic Action Plan;

4. To investigate how Ffilm Cymru Wales, the BFI and others support the sector, and how this work complements the work of the Welsh Government in this area;

5. The support given to develop skills and address skills shortages in the industry, whether there is sufficient data to map existing skills.

1.0   Introduction:

1.1   Ffilm Cymru Wales' welcomes the opportunity to feed into the Culture, Welsh Language and Communications' committee's consultation into the support for film and television production in Wales. Our response focuses on the Committee's terms of reference 4 and 5, which most closely relate to our organisation.

2.0   Operational context for Ffilm Cymru Wales:

2.1   Ffilm Cymru Wales (formerly the Film Agency for Wales) was established in 2006 as the external delegate of the Arts Council of Wales (ACW) and the UK Film Council (whose functions are now taken up by BFI) to develop and manage strategic film support on their behalf in Wales – spanning both a sectoral development role and a cultural remit. Our corporate mission is to *advance a sustainable film sector and film culture that works for everyone across Wales.*

2.2   Set up as an independent social enterprise – a Community Interest Company limited by Guarantee – Ffilm Cymru offers the necessary arms-length positioning required for lottery delegation.   In addition to reporting to ACW and the BFI, Ffilm Cymru is audited annually and subject to the CIC regulator in respect of its Public Good objectives, where any surplus is reinvested into these objectives.

2.3   Comprised of an industry savvy Board and Executive whose experience spans commercial film finance (risk managing upwards of £250m of investment for banks, insurance entities and private funds), international sales, production (with an Oscar nominee on staff), entertainment law, broadcasting and international policy.   The Board take their governance role seriously and ensure consistency and transparency of decision-making with the company's Strategic Plan, Guidelines and funding decisions published on-line.

2.4   Ffilm Cyrmu's annual turnover is c.£2m, £1.6m of which is delegated lottery funds from the Arts Council of Wales (£1.4m) and BFI (£200k). Allowing for reinvestment of recycled and recouped funds, this provides

up to £1.3m of available lottery finance to invest across production and development per annum, with funds additionally directed towards supporting film exhibition (e.g. cinemas, film festivals, pop-up community providers) and film education. Third-party finance is also raised to address gaps in provision, such as the successful BIG Lottery bid to provide mobile community cinema in the Afan valley and the new entrant training programme, Foot in the Door, delivered in partnership with Housing Associations for those living in economically deprived areas.

3.0   **How Ffilm Cymru Wales' support complements Welsh Government's offer:**

3.1   The creative industries and film in particular benefits from a mixed economy that can attract inward investment and large-scale productions that generate jobs and sustain infrastructure (facilities and service companies), whilst advancing home-grown talent and companies that generate and exploit IP.

3.2   Arguably, Welsh Government's commercially geared Media Investment Budget – which provides funding for television and films that evidence market appeal and significant spend in Wales – is more naturally geared at large-scale and long-running productions and inward investments, whilst Ffilm Cymru Wales' lottery-based sector offer is geared at building Wales' film sector from its talent and local company foundations up.

3.3   The two approaches are both necessary and complement each other. For example, the presence of sustained large-scale production provides a basis for cast and crew to remain local, which stabilises costs provided there is sufficient capacity to service demand. Whilst an indigenous talent base provides stability including when external factors negatively impact on inward investment – such as an unfavourable currency exchange rates, perceived challenges to filming in the UK (potentially post-Brexit, depending on freedom of movement/visa provisions), or competing international offers (e.g. the 40% Australian tax rebate, or Northern Ireland's Titanic Studios, significant fiscal incentives and market awareness post-Game of Thrones).

3.4   Most importantly, support for home-grown talent and companies who are generating IP, means that wherever they shoot the various forms of value

they generate benefit Wales – whether that's revenue flowing back to local professionals and companies, or increased market presence.   In our experience, there is also a loyalty amongst indigenous companies whereby they want to 'give back' – by providing training opportunities for new entrants, for example, employing local crew and services, and thinking longer-term.

INWARD INVESTMENT

ATTRACTING BRANDS

JOB CREATION

WELSH LANGUAGE CONTENT

INTERNATIONAL COLLABORATION

INDIGENOUS COMPANIES

Llywodraeth Cymru
Welsh Government

MARKETING WALES
LOCATIONS
CREW
FACILITIES
FISCAL INCENTIVES

DRIVING DEMAND

EDUCATION

DISTRIBUTION

AUDIENCES

TRAINING

64 FEATURE FILMS
23 WITH WIDER IP EXPLOITATION

TALENT

ffilm CYMRU WALES

3.6 The diagram illustrates tendencies and relative emphasis between funds and shows how our work meets in the middle where there are investment propositions that are attractive both in terms of Welsh spend and commercial appeal (to meet Welsh Government's Media Investment Budget needs) and generated by Welsh talent, offering strategic benefits, to align with Ffilm Cymru's priorities. We have recently closed our second-feature co-financed with Welsh Government's Media Investment Budget – Craig Robert's *Eternal Beauty* – following on from Red and Black's *Don't Knock Twice* and we expect to proceed to a third feature in the first quarter of 2018-19.

3.5 It has taken time for the sector to mature to the point that there are several Welsh companies with commercially compelling slates. Ffilm Cymru has worked with 9 of these companies with multiple points of investment and sector development (such as providing training, advice or introductions) over the last 11 years. In addition, we have invested in a pipeline of 50+ projects in development and are tracking some £30m of production for 20118-19, 19/20.

3.6 It is worth noting that from time-to-time Welsh Government's nonrepayable finance has been accessed to support film productions on the basis of there being significant Welsh spend. This is more flexible funding than the commercially geared Media Investment Budget and has been used to cofinance films with Ffilm Cymru Wales, such as Marc Evans' musical, *Hunky Dory*; Mad as Birds debut feature, *Set Fire to the Stars* and Severn Screen's *Denmark*. However, it is not a sector specific offer, which has meant that availability and application has been somewhat ad hoc, and marketing materials are understandably not geared to the sector. This less onerous financial capacity is invaluable, particularly as demand grows, but would benefit from tailoring, which would need to align with European legislation (e.g. the Cinema Communication).

4.0   Value generated:

4.1   Ffilm Cymru Wales generates significant economic, cultural and educational value for its relatively small annual turnover of c.£2m and works in partnership in all areas. Results include:

- **64 feature films** progressed to production from a production investment of £7.38m. 62 of these features have had Welsh writers, directors and/or producers at the helm. The two exceptions are *Submarine*, originating from a Welsh book and both fully set and shot in Wales – which launched the film career of Craig Roberts (now also a writer-director whose first two features we have funded), and the Sundance awardwinning documentary, *Dark Horse*, which focused on Blackwood's community and has since been developed into a fiction film with a Welsh director at its helm, whose debut feature we funded.

- **£56.2m in partnership finance**, including over £12m in pre-sales to all-rights and broadcast distributors and over £20m in additional equity including £12m in commercial finance such as Welsh Government's Market Economic s Investor funds (via Pinewood or the previous IP Fund) and tax incentivized private investment (mainly via EIS).

- **13 international co-productions**, leveraging £4.9m in co-finance. Co-producing territories include France, Switzerland, Sweden, Luxembourg, Argentina and Ireland – our most frequent partner (6 films).

- **Significant international presence**, with films from Welsh talent selling to upwards of 30 territories (where territories frequently aggregate countries – e.g. North America, Middle East, French-speaking rights) – with *The Machine, Ethel & Ernest, Submarine, I Am Not A Witch, Just Jim, Dark Horse, Mugabe and the White African, The Canal* and *Don't Knock Twice* all exceeding 10 territories each.

- **Significant festival and award recognition** including Cannes, London, IDFA, Sheffield Docs, Edinburgh, Tribeca, Telluride, Toronto and Sundance, BAFTA, BAFTA Cymru, Grierson and the European Film Awards.

- **£21.5m direct Welsh spend** generated from our £7.38m investment, returning close to £3 for every pound spent, whilst continuing to offer flexibility in where productions are shot and co-financed.

- **c.200 paid trainee placements** on funded productions.

- **9 films (14% of films) shot in Welsh or bilingual** and co-financed or acquired by S4C, with a further ambitious opera-based film co-financed that did not come through to fruition.

- **A pipeline of 50+ features developed by Welsh talent**, in addition to providing a ladder of progression for emerging talent via delegated BFI Network funding, which provides seed project and career progression support, networking events and targeted support to redress under-representation as with our funding for the New Black Filmmakers Collective, mentored Female Filmmakers Lab and year-long training lab, Y Labordy, for directors working in the Welsh language.

- **Company growth finance totalling £460,000 offered to 9 Welsh companies** where film is a component of their overall offer and they are positioned to expand their productivity and market. This finance specifically supports objectives beyond individual projects, such as opening a North Wales office; taking on staff that expands in-house skills and capacity; researching new markets. These companies are also able to participate in a tailored programme to refine their value proposition and prepare for private investment, where applicable.

- **An approach that advances the broader realisation of IP and market-reach.** We call this approach 'Magnifier – making the most of good ideas', and we have seen 16 projects realise their wider IP as a result, including the development of VR Games, apps, education assets, soundtracks, book publications and television/theatre spinoffs. For example, Red and Black's VR game accompanying the feature *Don't Knock Twice* is returning an profit and influencing the company's business model, whilst education assets (developed alongside *The Machine & Ethel & Ernest*) showcase aspirational role models to the next generation of filmmakers.

- **A broad range of content** for audiences including animation, documentary and fiction films across a variety of genre. Ffilm Cymru's slate includes Wales on screen with *Dark Horse*

(Blackwood), *Gospel of Us* (Port Talbot), *Sleep Furiously* (Trefeurig), *Patagonia* (Cardiff/and Patagonia), *Yr Ymadawiad* (Tryweyn), but equally films from Welsh talent that are not culturally identifiable as Welsh (such as the sci-fi, *The Machine* and Raymond Brigg's animated feature, *Ethel & Ernest*, co-produced by Cardiff-base Cloth Cat, which was a finalist in the European Film Awards for Best Animated Feature), and films from Welsh talent that took them elsewhere around the world, such as Rungano Nynoni's BAFTA winning *I Am Not A Witch*, which was selected for Cannes, London, Toronto and Sundance or Kieran Evans' BAFTA winning debut, *Kelly + Victor*, an adaptation of Niall Griffiths' Liverpool-set book.

- The above largely focuses on Ffilm Cymru's sector development work in the context of the inquiry, but we also offer a combination of delegated BFI grant-in-aid and ACW lottery funding to **improve cultural access and opportunity across Wales.** This includes funding for cinemas, festivals, mixed-arts venues, community pop-up providers and others offering film in a social setting, which encourages innovation and inclusivity. On average we co-fund around 25 exhibitors across Wales each year including for example Galerie Caernarfon, Chapter Arts Centre, Iris LGBT festival and PICS young people's film festival. Collectively these awardees provide around 5700 film screenings with over 200,000 admissions per annum.

- Our support for **film education projects** across Wales, prioritises areas and communities that are under-served and is delivered via more than 30 film education practitioners that work in parallel to, though often in collaboration with, the formal education sector.

4.2 It's worth noting that when we started in 2006 there were

- No Welsh companies consistently making Welsh films
- Only the occasional, if notable, example of Welsh talent on the international stage,
- Only one small company supported to provide education

- A lack of strategic skills development
- Limited audience focus, with only one exhibitor funded
- Disconnected demand and supply chain
- Little consideration of wider exploitation of intellectual property.

The sector has come a long way.

5.0 Training

5.1 In order to support growth, there is of course a need to continue to develop new entrants across all roles in order to ensure there is sufficient capacity to meet demand and ensure that prices do not become unsustainably inflated. Additionally, there is a need to offer Continued Professional Development training to ensure that the sector continues to adapt to the market, new technology and evolving business practice. That training needs to meet the needs of both the largely freelance sector base and companies.

5.2 Creative Skillset is the UK sector skills council for the creative industries, which previously had Advisory Panels in each of the devolved nations, until they were mothballed following cuts to funding. Those panels provided a helicopter view of the creative industries – including representatives across FE, HE, the unions, indie reps and sub-sector specific representatives including broadcasters and Ffilm Cymru Wales. Whilst these panels were likely too broad – aligning with the then 13 sub-sectors, including fashion/textiles, advertising and publishing – Creative Skillset has since refined its focus to the screen industries – including film, television, games and animation.

5.3 There is a strong argument for reinstating a more focused screen sector training panel that can offer insights into workforce training needs and opportunities and to guide future policy and financial decisions relating to training in the future. We would recommend that that panel is independent of Welsh Government's Media Investment or Creative Industries panel – providing representatives with specific prior experience in addressing training needs across animation, games, film and television across Wales and at various points from entry level and freelance

provision to established companies. It would be desirable to facilitate a range of training providers in developing a broader market offer, including specialists that can work alongside large-scale government framework affiliated companies.

5.4 Ffilm Cymru Wales has always offered trainee placements on its funded productions (c. 200 paid placements to-date), in addition to designing and delivering bespoke programmes where there has been a gap in available training provision. In particular, we designed:

- Magnifier to address the relatively siloed approach to exploitation of IP, encouraging the broader exploitation of IP across formats and platforms through the provision of training, integrating networks and flexible finance.
- Film Junction and Cinematic, which offered market and distribution-based training to 50 professionals, and
- The new entrant training programme, *Foot in the Door*, which has trained 30 individuals from deprived areas during its pilot phase, with a focus on transferable skills (e.g. carpentry, electrics, hair/make-up, costume, administration, design, accounts) where we work in partnership with Housing Associations to support people to move between opportunities in their local area.

5.5 In each of these cases we have worked closely with Creative Skillset. They have co-financed bespoke programmes that we've designed and managed; whilst films we finance routinely contribute to the Skills Investment Fund, offer placements and we influence policy through regular exchange including joined up to Creative Skillset's recent successful bid to oversee the BFI's £19.5m skills fund, in partnership with our counterparts in Creative Scotland and Northern Ireland Screen Commission. These discussions are active and on-going as Creative Skillset move into implementation mode.

5.6 Areas of current priority for the skills agenda include:

- improved workforce data collection, which Creative Skillset is tasked with attaining and is conscious of the need to update and refine to show nation and region level stats;

- more inclusive recruitment and retention practices. Ffilm Cymru's Foot in the Door programme is noted as unique in the UK in its scaleable partnership model for addressing;

- a focus on fusion skills and agile learning – relevant across sub-sectors. In this, as part of ACW's national arts company portfolio – along with Wales Millennium Centre, National Theatre Wales, BBC National Orchestra, Welsh National Opera, etc., Ffilm Cymru Wales is participating in a mapping exercise to chart opportunities for trainees to move across companies working in different art-forms, as well as between film, tv, games and animation companies;

- the development of apprenticeship opportunities for the creative industries. This is a particularly challenging area given the short-term and freelance nature of the majority of work opportunities in this sector – hence that national arts company mapping exercise, and broader consideration of shared apprenticeships. As education and skills are devolved areas – this is naturally an area where Creative Skillset is seeking routes to advance these discussions at nation level for film, tv, games and animation, and it is an impediment not to have the Advisory panel mechanism;

- adapting with increasing convergence. This sees film financing skills as highly relevant and transferable to high-end television. There are opportunities for greater movement of skills and personnel between sub-sectors.

- developing improved careers advice – including improved information for job centres and schools on opportunities and career pathways within the sector.

6.0   Collaboration

As should be apparent, a joined-up approach and collaboration is essential to maximise the opportunities and value that can be derived from the creative sector. Projects are devised, delivered and co-financed by a variety of partners and industry practitioners benefit from actively participating in a multi-disciplinary network of professionals.

Ffilm Cymru's collaborators are too numerous to name in full, but include: the network of 45 European film funds, Cineregio – where we are represented at Board level; UK film education charity, Into Film; Creative Skillset; the BFI's Film Audience Network, of which Chapter is Wales' lead organisation; our colleagues at Creative Scotland, Northern Ireland Screen, Creative England, Film London; BAFTA Cymru, Cult Cymru, S4C, BBC Wales, BBC Films, Film 4/Channel 4, colleagues across the Creative Industries Council and Creative Industries Federation, the national arts companies of Wales, WJEC, Film Education Network members, British Council and numerous individual sales, distribution and financing companies – public and private.

7.0   Final thoughts – opportunities to improve

7.1   In terms of presenting Wales to the World – we might want to consider whether a 'Creative Wales' proposition needs to be a structural new entity, or whether instead it might be a virtual 'brand wrapper' that markets the whole of what Wales has to offer. For example, when attending international markets in Cannes, Berlin, Toronto, the US or elsewhere – potential international collaborators are simply interested in what Wales has to offer, without any confusion around various entry points/providers. There is a compelling story to tell in the round of Wales as a creative bilingual nation, rich in culture and talent, infrastructure and World-class facilities, crew and services. There's flexible finance and support for each of those areas. But this holistic offer could be more effectively and consistently communicated.

7.4 As indigenous companies mature there is a bottle-neck in demand with limited lottery funds (c.£1.3m per annum) being insufficient to address need, whilst projects are likely to need more flexible terms than the commercial Media Investment Budget offering (£30m). Consideration might usefully be given as to the stranding and repurposing of a portion of the MIB to address this.

7.2 How might we best address the challenges of a growing sector including a pressing need for increased crew capacity across the piece, improving sector diversity in the process? We'd advocate for an independent, experienced and screen targeted training advisory group to inform policy and future (financial) interventions in this area.

7.3 As the sector matures demand is growing for improved business support and high-level company training. More investment in this area is advisable, with consideration given to sector-specific tailoring.

Cynulliad Cenedlaethol Cymru / National Assembly for Wales
Pwyllgor Diwylliant, y Gymraeg a Chyfathrebu / The Culture, Welsh Language and
Communications Committee
Cynyrchiadau Ffilm a Theledu Mawr yng Nghymru / Film and Major TV Production
in Wales
CWLC(5) FILMTV24
Ymateb gan Cyngor Celfyddydau Cymru / Evidence from Arts Council of Wales

1. Introduction

The Arts Council of Wales is one of the main investors in creativity in Wales. We provide significant investment to film-related activity and believe strongly that film plays a vital role in fullfilling our vision: " a creative Wales where arts are central to the life and well-being of the nation".

In our submission we outline where all interested parties in Wales can do better to take full advantage of the cultural, social and economic value film offers. It is an opportunity to build on the good work done to date. Since the turn of the millennium there has been substantial growth in the film and TV production sector in Wales and UK as a whole. Whilst this growth has been fast, the benefits to Wales are considerably less than what might be expected from a population-based share of UK sector activity.

We're fully committed to the goals enshrined in Future Generations legislation. As such, we'd want to see sector growth as **inclusive** and **sustainable** in the longer term. We'd also like the sector rich in creativity as well as wealth – to be conceiving and developing the stories themselves and not just realising the works of others' imaginations.

This belief in capitalising on the longer term value of cultural investment is reflected in our own statement of strategy – **Make: Reach: Sustain. Make** is a commitment to excellence and the best creative work in an environment that nurtures peoples' talent and capabilities, **Reach** connects with the widest possible range of people in Wales in ways that are fair and equitable. **Sustain** protects the value of creative and financial investment for the benefit of future generations, maximising the return on that investment.

2. Scope of our response

As an Arts Council, our support of film – and as a consequence our submission to this Inquiry – is rooted primarily in a cultural perspective. However, it's not possible (or desirable) to isolate cultural benefits and levers for change from the social and economic value of the sector. One cannot invest in one element without consideration of the wider film and screen sector and ecology in Wales and its overall impact.

Our submission focuses on our own areas of intervention and interest, and in particular that of a distributor of Lottery funds (a responsibility that we currently delegate to Ffilm Cymru Wales).

Under Lottery arrangements, the Arts Council retains overall responsibility for all Lottery distribution. However, using provisions set out in Lottery legislation, we delegate day–to–day funding decisions to Ffilm Cymru Wales. Delegation is based on our belief that this arrangement makes best use of the specific expertise and entrepreneurial fund–raising freedom of Ffilm Cymru Wales as an independent organisation. We believe that this offers the best prospect of a high quality, value for money service.
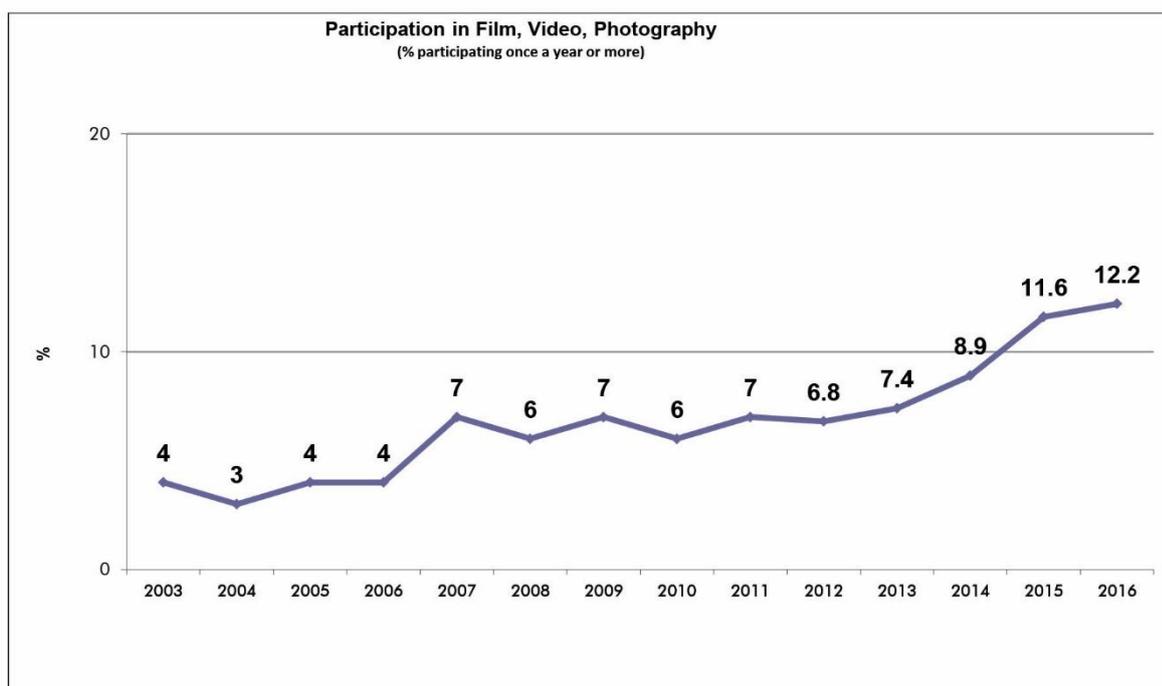
3. Why Film?

Film is an accessible artform. From our earliest age we're increasingly growing up in a screen mediated culture with moving images (across a range of platforms) amongst the first we come into contact with. There are low barriers to seeing film and increasingly low barriers to those wanting to begin to create through film or digital media. With the invention and now affordability of smartphones, mini cams, software and more, the ways into artistic production and distribution have been democratised. In the 1930s if you wanted to make a movie, you had to work for Warner Brothers or the Ealing Studios. Now it's possible capture on your mobile and upload to YouTube with millions of others.

In today's digital world, anyone can be a potential author, creator or producer. So the challenge for us all is to recognise and enable the opportunity to enter a new marketplace defined by participation not just production. Film might often be at the gateway of innovation in medium, but at its core is storytelling and there is a story for everyone.

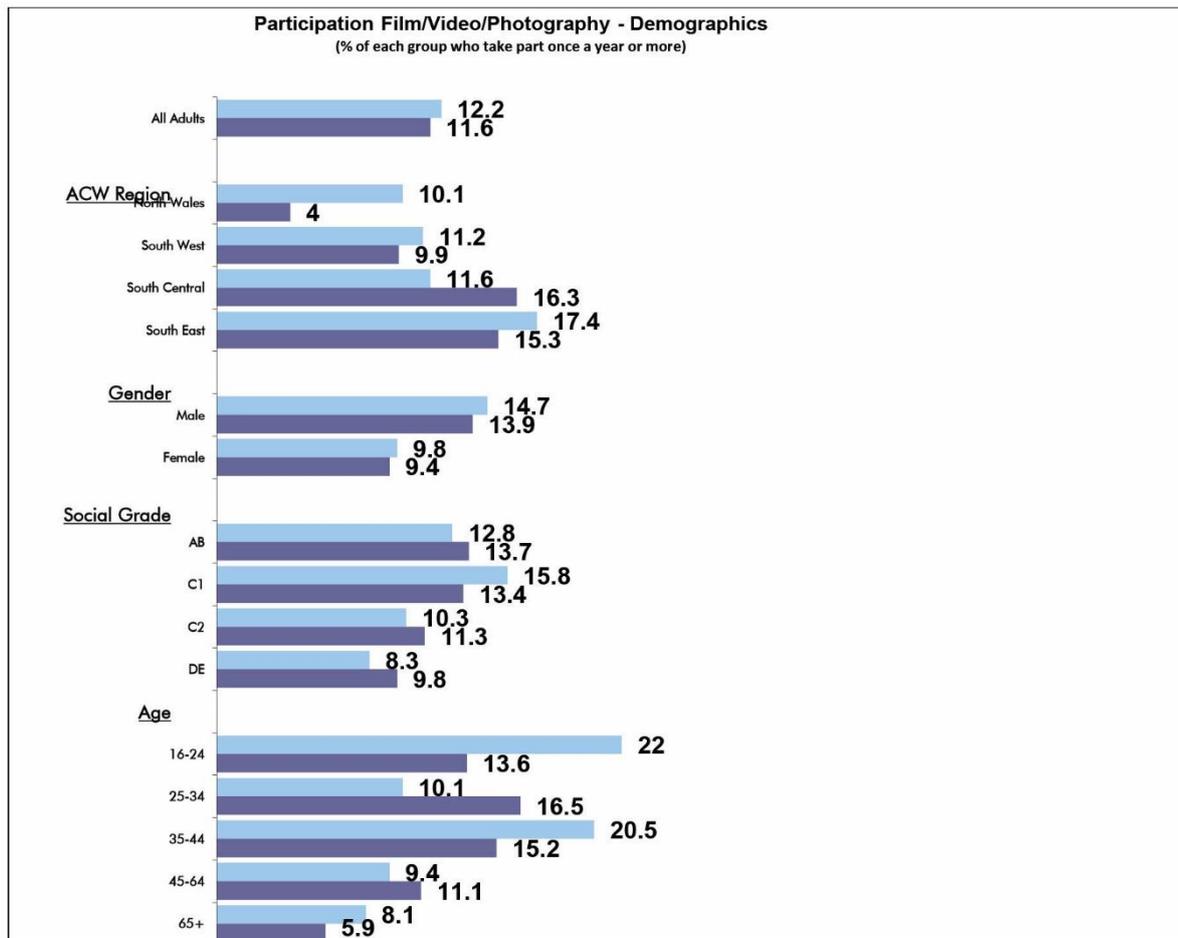Cinema remains the most popular art form to attend.

In our 2016 national Omnibus Surveys of Attendance and Participation, half of adults (51.0%) went to see a film at least once a year. This is an increase of 1.4 percentage points from 2015 (49.6%)[1]. In terms of adult participation, Film, Video & Photography experienced the second highest increases from 2015, up by 0.5 percentage points.

Participation in Film, Video, Photography
(% participating once a year or more)

Year	%
2003	4
2004	3
2005	4
2006	4
2007	7
2008	6
2009	7
2010	6
2011	7
2012	6.8
2013	7.4
2014	8.9
2015	11.6
2016	12.2

Base: All Adults (at least 1,000 per wave)   Source: Wales Omnibus survey 2003-2016

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[1] Arts Council of Wales Adult's Omnibus Survey 2016

Participation Film/Video/Photography - Demographics
(% of each group who take part once a year or more)

Group		
All Adults	12.2	11.6
ACW Region		
North Wales	10.1	4
South West	11.2	9.9
South Central	11.6	16.3
South East	17.4	15.3
Gender		
Male	14.7	13.9
Female	9.8	9.4
Social Grade		
AB	12.8	13.7
C1	15.8	13.4
C2	10.3	11.3
DE	8.3	9.8
Age		
16-24	22	13.6
25-34	10.1	16.5
35-44	20.5	15.2
45-64	9.4	11.1
65+	8.1	5.9

Base: All Adults (2015:1,000 / 2016: 1,004)   Source: Wales Omnibus survey 2015-2016

In the same year 38.1% of children in Wales participated in film, video and photography activities with a high proportion choosing to do so outside of formal school settings[2]. Of note too is the fact that 45.2% took part in the closely related field of digital arts.

Overall we've seen an upward trend children's participation since 2010

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[2] Arts Council of Wales Children's Omnibus data 2016

Film and Video Making Participation
(% taking part once a year or more often)
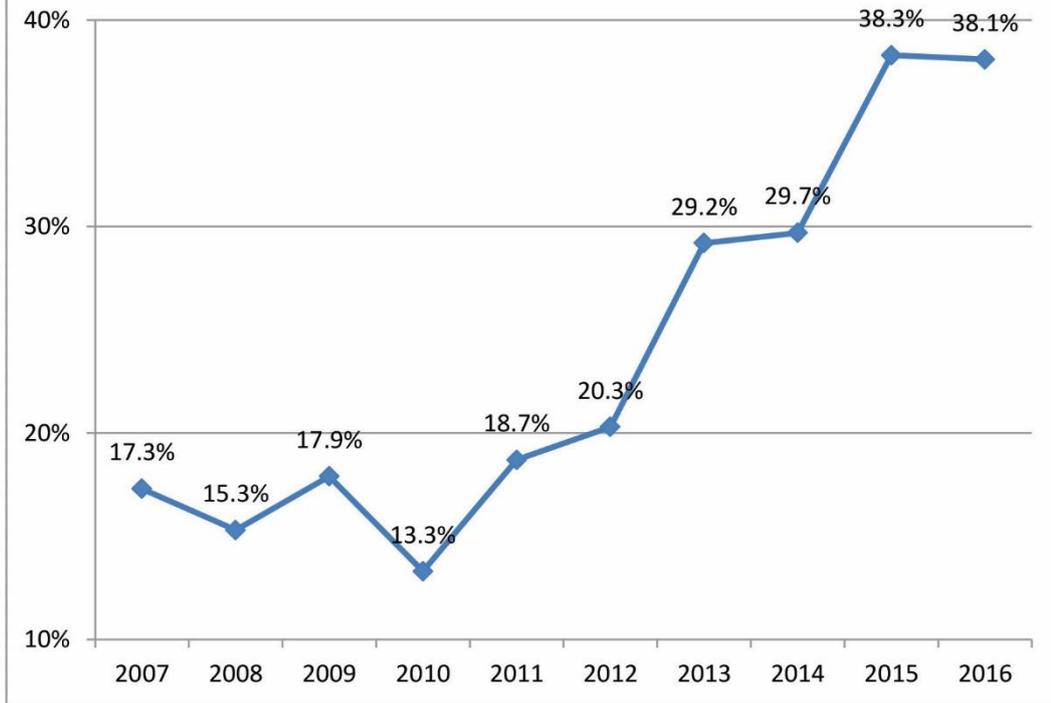
Year	Value
2007	17.3%
2008	15.3%
2009	17.9%
2010	13.3%
2011	18.7%
2012	20.3%
2013	29.2%
2014	29.7%
2015	38.3%
2016	38.1%

Base: All 7-18 year olds (at least 1,000 per year)   Source: Children's Omnibus Survey 2007-2016

Film and Video making participation by demographics
(% taking part once a year or more often)

Category	2016	2015
Total	38.1%	38.3%
Age		
7-10	44.9%	45.6%
11-15	38.7%	37.3%
16-18	28.6%	30.1%
Gender		
Male	37.6%	37.3%
Female	38.5%	39.4%
ACW Region		
North	32.0%	41.4%
South West	41.3%	31.2%
South Central	39.9%	40.3%
South East	37.1%	41.8%
Social Grade		
ABC1	41.4%	42.4%
C2DE	34.8%	34.4%
Welsh Language		
Speak any Welsh	39.4%	41.2%
Non Welsh speaker	37.0%	36.5%
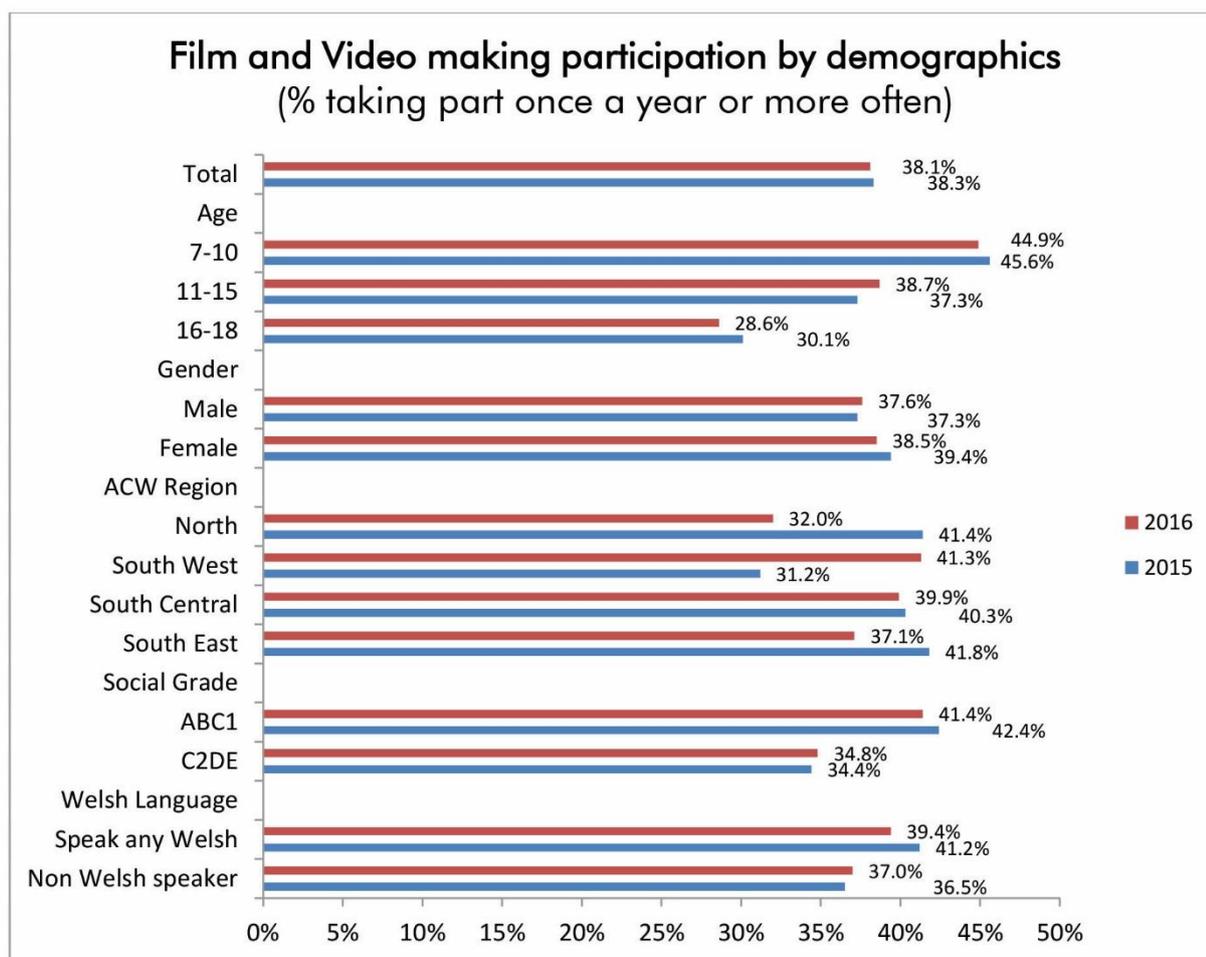
Base: All 7-18 year olds (at least 1,000 per year)   Source: Children's Omnibus Survey 2015-2016

In addition to the Omnibus Surveys we also collect film screening audience data from venues in our portfolio of revenue-funded organisations that have screening facilities. In 2016/17 there was a significant increase in Welsh language screening and attendances – from 38 in the previous year to 231. This is in part due to Ffilm Cymru Wales' investing in Welsh language product and Theatr Genedlaethol Cymru screening their production of Shakespeare's "Macbeth".

Beyond promoting a widespread engagement with film, Arts Council of Wales seeks to develop a diverse range of strong, distinctive creative talents and sustainable companies through its funding of Film. We don't just want the people of Wales to experience the fruits of other people's creativity. We want to inspire people across Wales to feel that they too can realise their own imagination on screen and give them the support to fulfil their potential. We want the best Welsh creative talent (from all backgrounds) to be able to progress to make creative world-class work from, and often of, Wales.

If the sector is to grow in Wales and to produce work of the highest quality in a way that reflects our culture and society, the intervention and contribution of Ffilm Cymru Wales have been and will continue to be crucial to progress.

4. Ffilm Cymru Wales – our Film Delegate

Ffilm Cymru Wales has been our Lottery delegate for film production, education and exhibition support since 2006 (Prior to 2014 the organisation was called the Film Agency for Wales, but was essentially the same entity).

For clarity it's important to note that some visual artists also chose to work in the medium of moving image although they're not producing what might usually be recognised as a 'film'. In these cases we regard this activity as coming from the base of visual arts practice and this would be funded by the Arts Council in the same ways as other artists' work. It is the feature, documentary and narrative short film productions which are delegated.

Other aspects of the Arts Council's work include support for work through the medium of Film. Examples would include our Creative Learning through the Arts programme and some of the Festivals we support that may include film. But where Film is the primary focus or output, this activity would be directed to Ffilm Cymru Wales under the delegated arrangements.

i.   Background

In order to understand current arrangements and relationships it's useful to look briefly at the evolution of funding and development structures over the past couple of decades.

Prior to 2006, awards for film activity and production were managed in house by the Arts Council of Wales. We commissioned specialist consultants [3] to carry out a study into the viability of Sgrin (the then screen agency in Wales). The purpose of this review was to test whether Sgrin was the appropriate body to be the Arts Council's Film delegate. The report concluded that Sgrin was not fit for that purpose.

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[3] Burns Owen Partnership

At the same time, the then Welsh Assembly Government (WAG) carried out its first review into the Creative Industries in 2004. One of the review's key recommendations was that a consolidated film agency should be set up for Wales. It was this series of events that led to the establishment of Film Agency for Wales (FAW), with Pauline Burt as its founding Chief Executive Officer. The new Agency was established with core funding from the economic development department of WAG to be followed by the delegation arrangement with Arts Council of Wales.

A single body staffed by expert and well connected film specialists meant that a longer-term strategic view could be achieved. The new agency didn't only look at the merits of individual projects, but the contribution they would make to developing the film sector in Wales.

This also meant that FAW was well-placed to advise and support productions on the leveraging of co-investment from a variety of sources including public, private and international co-productions.

In the intervening time, WAG set up its own separate Creative IP fund. This made a number of film investments and managed the Wales Screen Commission, a service that attracted and facilitated location filming to Wales (as a service of the Welsh Government, we do not include any commentary on this in our submission).

A further review of the creative industries was commissioned by the Welsh Government from Professor Ian Hargreaves whose report was published in in 2010 [4]. On Film, it recommended a joined up approach based on a central 'hub' and a series of sector 'spokes' (of which Film would be one). The consolidation of all activity would, Hargreaves argued, be more effective and efficient.

The report also recommended that a Creative Industries Panel should be established, with one of its members being the Chief Executive of the Arts Council. The basis for such an arrangement was Hargreaves' conviction that there was a close and complementary alignment between the cultural objectives of the arts and the economic drivers of the creative industries. The creative industries have their origin in individual creativity, skill and talent that has the potential for wealth and job creation through the generation and exploitation of intellectual property. It is creative roles that are high value and cannot be automated. The arts nurture the

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[4] Heart of Digital Wales, Prof Ian Hargreaves for Welsh Assembly Government:
https://www.cardiff.ac.uk/__data/assets/pdf_file/0006/113586/HeartofDigitalWales.pdf

imagination and vision that provide the steady flow of new ideas and products that enable economic exploitation through the creative industries. In the event, the Arts Council was removed from the Panel after a few meetings.

Another of Hargreaves' recommendations was that a new concordat should be put in place between the Creative Industries team (within the Economy department) in the Welsh Government (the 'hub') and the Arts Council of Wales to work more closely together. This recommendation was not realised.

The Welsh Government's Economy department withdrew funding from the Film Agency Wales in 2011/12. Our understanding was that this decision was made on the basis that the Agency was not sufficiently focused on immediate economic return and that its blended approach to cultural, economic and social return on investment was not in line with Government policy.

From the Arts Council's perspective we have always welcomed the holistic and long term approach to sector development. We entirely believe in the importance of economic return but we also believe that this is entirely compatible with our core mission of developing and bringing to market Welsh creative talents who will grow quality projects and jobs. After ten years we're starting to see the creative talent that has come through the outreach and education work of Ffilm Cymru Wales. And this talent is itself now making films and pitching for investment. Changing a culture takes time.

Arts Council continued to support FAW through a period of transition which saw the organisation repurpose their role and their position in the film sector in Wales. Credit should be given to staff and board, in particular their incoming Chair at the time, Michael Gubbins, for steering the organisation through a critical period of change. They have emerged rejuvenated and re-branded as Ffilm Cymru Wales (FfCW).

ii. Delegation and monitoring

As our Lottery delegate, we have thorough legal processes that underpin our relationship. These arrangements are approved by the Department for Digital, Culture, Media and Sport (DCMS) and subject to annual audit by the National Audit Office/Wales Audit Office.

The delegated Lottery funding to FfCW is split across production investment, education and exhibition activities and organisation running costs. These are set out in an annual legal delegation agreement. As a National Company, we also expect FfCW to be a sector leader.

As part of our monitoring and delegation agreement with FfCW we test the quality of the organisation's governance. The organisation has always maintained excellent governance, with a strong, diverse, expert board in place. The chief executive has unparalleled experience in Wales of managing a complex slate of film investments.

iii. Funding

Below is a summary of the funds received by FfCW from Welsh Government and Arts Council of Wales.

When Welsh Government withdrew core funding in 2011/12 the organisation went through a through strategic business review (and Arts Council of Wales commissioned its own review into future options for the organisation). This led to a number of new social and educational initiatives. Given the extent to which these aligned with our own aims, we increased levels of funding.

	Welsh Government Funding	Arts Council other grant-in-aid	Lottery funding from Arts Council	
	Annual Revenue		Lottery Delegation	Lottery Grants
2006/07	£164,604			
2007/08	£168,719		£787,000	
2008/09	£168,719	£98,760 (Reach the Heights: **EU funding** with additional GiA)	£750,000	
2009/10	£168,719	.	£785,000	£5,000 Staff Training
2010/11	£168,719		£785,000	£4,502 Staff training
2011/12			£1,200,000	
2012/13			£1,200,000	£25,195 Audience Connect training
2013/14			£1,400,000	
2014/15			£1,400,000	
2015/16			£1,400,000	£3,881 Film in Afan transition funding
2016/17		£20,000 Labordy II: Tailored training initiative for Welsh Language directors	£1,351,000 *	
2017/18			£1,400,000	£30,000 Foot in the Door business model development

*3.5% cut to all revenue funded organisations in this year reflecting overall funding reductions.

iv. Wider UK context and connections

<u>British Film Institute (BFI)</u>

What is not included in these figures is the delegated and project funding FfCW receives from the British Film Institute (BFI). The BFI is the UK body responsible for film development across the UK. They delegate areas of delivery of this strategy to FfCW as well as other Wales-based organisations, such as Chapter. Chapter works across Wales running the successful Film Hub Wales activity that contributes to the BFI's investment in its UK-wide exhibition strategy. This in general is a complementary arrangement. Alongside BFI's broader aims for film as a medium, FfCW's strategy is Wales-focused. FfCW's work is nuanced with an understanding of the landscape and particularities of Wales, its cultural and economic strengths and challenges and, of course, Welsh language.

<u>Welsh Government</u>

Arts Council of Wales has had no involvement in Welsh Government policy or implementation of that policy for Film. We await further information on the proposed initiation of Creative Wales and are keen to explore how we might ensure an open and collaborative relationship with the new entity.

We work with Welsh Government officials wherever possible but through force of circumstance this tends to be on a case by case or *ad hoc* basis. An example would be the way that we've jointly co-invested (until 2018) in a Welsh presence at the international South By South West (SXSW) music, film and interactive conference and festival. This would undoubtedly have delivered greater value if we'd both been able to take a longer term, strategic view on how our work and remits might be mutually supportive. Our understanding from FfCW is that their relationship has a similar pragmatic but not strategic approach.

<u>The Other UK Nations</u>

Devolution isn't symmetrical and it's no surprise that there are different models for film funding and support in England, Northern Ireland and Scotland.

<u>England:</u>

As well as the UK-wide BFI initiatives, film support in the main is the responsibility of Creative England who focus on inclusive growth of the creative industries. A not-for-profit organisation with a trading arm, it is funded by a mix of private investment, earned income, Regional Growth Funds, EU funds and BFI funding. Additionally there are regional film units – Northern Film & Media, South Film and Screen Yorkshire.

<u>Scotland:</u>

Both arts and creative industries come under the responsibility of Creative Scotland, the "arts council" for Scotland. It is currently in the process of establishing a new dedicated Screen Unit, a partnership between Creative Scotland, Highlands and Islands Enterprise, Skills Development Scotland, Scottish Enterprise and the Scottish Funding Council. The Scottish Government is providing an additional £10m to support Scotland's Screen sector, bringing the total funding for screen to £20m in 2018/19. It is striving for an inter-agency approach and although growth is its central aim it will drive "cultural, social and economic development".

<u>Northern Ireland:</u>

Northern Ireland screen work across an economic, cultural and educational remit. They are funded by Invest Northern Ireland (£9,127,989 in 2016/17), Department for the Economy (£351,726) and the Department for Communities (£1,765,647) and is delegated by the Arts Council of Northern Ireland to administer Lottery funding for film in Northern Ireland (ACNI £690,830) plus BFI and DCMS funding (£4,207,985). Figures taken from their annual accounts.

International matters and Brexit

There is huge uncertainty about international co-productions post-Brexit, especially for the financing of low and mid-budget independent films.

FfCW has an impressive record of productions that have leveraged funds though European cooperation (via schemes such as Creative Europe and direct partnerships). Their membership of a number of European networks, Cineregio, also delivers benefit through the sharing of contacts, best practice and joint approaches.

Whatever Brexit brings, there are a number of issues that are specific to film and creative industries. Many will be shared across the cultural, educational and heritage sectors. Although not strictly within the remit of the Committee's current Inquiry, these issues do nevertheless need to be addressed clearly and systematically if Wales is to continue to benefit economically, culturally and socially from its international relationships.

Every sector has its Brexit issues and the creative industries and the arts are no different. We'd identify four key areas of risk. They are:

- **Talent and skills** – including freedom of movement for specialist workers, skills shortages, visas and touring

- **EU funding** – including access to Horizon 2020, Interreg, Erasmus+, Creative Europe, cultural exchange, export opportunities, eligibility in the run-up to Brexit

- **Trade and investment** – including the EU as a principal market, new markets, regulated services, tax credits, World Trade Organisation terms

- **Regulatory frameworks** – including Digital Single Market, intellectual Property rights, copyright protection, influence over new regulations

5. Ffilm Cymru Wales – a snapshot of activity and impact

The analysis that follows maps activity across our three priorities of Make, Reach and Sustain and is illustrative rather than comprehensive. However, we reiterate that the key success factor for FfCW is the ability to integrate key themes across its work. For example, their *Hatch* project identified a gap in the market for action films for a key demographic – young people. They are working in partnership with publishers to develop book options that might lead to Welsh film productions and using their exhibition network and *Magnifier* approach to work with focus groups of young people and explore all IP possibilities (e.g. games, merchandise, school resources). It is this 'whole view' approach that FfCW are uniquely placed to deliver in Wales.

MAKE

i.   Production

It's important to note that market incentive rather than market failure is core to FfCW's interventions. FfCW is often the first to back, to take a risk and this leads to leveraging of investment from other sources. All productions must feature Welsh creative talent.

All investment decisions are made by an expert and informed board with full consideration to cross cutting themes (inclusion and diversity), the quality of the creative proposal and team and its value proposition (Who is the audience? What is the finance plan? Is the budget realistic?).

FfCW make 3–6 production or completion awards a year, at least one of which in the Welsh Language

I Am Not A Witch (2017) was the first feature from Welsh writer/director Rungano Nyoni. It was selected for Sundance, Cannes, London and Toronto film festivals and has won a BAFTA. Rungano was this month named as one of Screen's Stars of Tomorrow and was nominated for the IWC Filmmaker Bursary. After 5 weeks at the UK box office, the film reached a cumulative gross total of £56,739.

Dark Horse (2015) is a documentary on the Cefn Forest community in the south Wales valleys that purchased and trained a racehorse. Critically acclaimed, the film is made by a Welsh producer. It won the Audience Award at Sundance.

Filmed back to back in English and Welsh in partnership with S4C and BBC Films, *The Library Suicides / Y Llyfrgell* (2016) is a horror feature directed by award winning director Euros Lyn, and based on Fflur Dafydd's bestselling novel. The film was developed through FfCW's Cinematic initiative to support emerging film makers (with BFI funds). It was screened at Edinburgh Film Festival.

American Interior (2014), was a feature written by musician Gruff Rhys and produced by Welsh company Ie Ie Ie spanning a feature film, music album, smartphone app, and book in partnership with Turnstile Records and Penguin Publishing. It is an early example of FfCW's 'Magnifier' approach

ii. Welsh Language

FfCW has targets for Welsh language film production and their partnership with S4C is key to realising this (alongside their support for production companies). As well as an emerging slate of films, WJEC resources are enabling Welsh film to be studied at GCSE and A Level.

FfCW makes efforts to work across Wales in both languages. They have changed their talent development structure to have a Welsh speaking development executive based in north Wales. This has made a real difference in enabling projects such as "Foot In the Door" partnering with *Craith*.

The work of Film Hub Wales has made it easier for exhibitors to find Welsh language product and understand how to best promote it to Welsh speaking audiences and learners.

iii. Professional development and Training

FfCW is home to BFI.Network, the UK-wide talent development programme for emerging film writers, directors and producers, in Wales. They have a dedicated officer who leads on this work. It includes creating and supporting peer group support (Connector) as wells as seed funding for short film (Cinematic).

"Foot in the Door" is FfCW's new training imitative working with Housing Associations to identify tenants that have transferable skills that could be utilised on film sets. Starting with an exhibition partnership, taking film to estates, the programme has at its core a strong relationship with housing officers who know the tenants well, their abilities and needs and can work to remove barriers such as transport. There is no upper age limit.

The pilot saw 20 placements on Michael Sheen's Film *The Apostle.* Two have since gone on to paid work on the set of *Denmark*, starring Rafe Spall. There is strong evidence of demand with 58 applicants from across north Wales for the first offer of 10 places of this programme in the area – all of whom would be considered NEET.

This is an innovative and targeted programme. Following funding from Welsh Broadcasting trust and Skillset, and further interest from BBC Studios and S4C, FfCW are now looking at business modelling as a 'paid for' service as well as BIG Lottery.

http://www.ffilmcymruwales.com/index.php/en/film-educators/foot-in-the-door

iv.   Company development

Taking a longer term view on sector development, FfCW invest in sustaining and growing companies through Company Support awards to production and education related companies. In the creative sector, it is easy for the focus to be on producing the work and not on the sustainability of companies who can be around long enough to make more work and grow. This scheme seeks to address that. Nine have benefited from this so far including Severn Screen, a company on the cusp of scaling and already demonstrating its benefit back to the sector (whilst still needing support in these final stages of consolidation). It is important that we build a bridge and not a pier.

REACH

v.   Exhibition

FfCW Audience access strategy follows the principles of inclusion, innovation and value for money. It supports a portfolio of cinemas as well as being open to applications from venues and festivals across Wales (such as Theatr Gwaun in Fishgard, Afan Community Cinemas and Pontardawe). The fund is flexible to the varying needs of each applicant. A larger venue, such as Chapter, will have its own audience development strategy but may want to innovate its delivery. A community resource, such as the housing association project Flix Community Cinema, may have more immediate requirements for frontline delivery.

FfCW meets regularly with Film Hub Wales who deliver BFI's exhibition strategy in wales (and beyond) to ensure that that duplication is avoided and areas of collaboration are identified.

vi.   Education and young people

FfCW Create new, ambitious education resources for educators and learners are based on Welsh films such as sci-fi feature, The Machine. These are produced with the WJEC and distributed to 200 teaching centres across the UK. Additionally they have compiled a database of education resources for teachers and film educators, promoted on Welsh Government's digital learning platform Hwb. Alongside this they have an open application fund for education projects the design of which followed a comprehensive review of film education on 2016. They are founder members of the Film Education Network (FEN).

vii.   Equalities and diversity

Equalities cuts across all FfCW work. They have a detailed Equality, Diversity and Inclusion (EDI) Action plan with clear targets. All decision makers benefit from diversity and unconscious bias training and EDI data is collected. All of the production applications are assessed on how representative they are on screen and off. Through their education work they have supported partnerships with Hijinx and BAWSO (the latter targeting survivors of FGM) and their "Foot In the Door"

partnerships works directly with Housing Associations to cross social-economic barriers to film.

Their Audience Access support has resulted in the development of Iris Prize, Wicked Wales Young Persons Film Festival in Rhyl and PICS – the only Welsh/no language film festival in the world and also based in North Wales.

They have also established targeted peer networks to address under-representation, such as SHIFFT female filmmakers group.

We commend FfCW for their approach and action in this area.

SUSTAIN

viii.   Operational arrangements

As detailed previously, Arts Council of Wales has no concerns regarding FfCW's governance arrangements and commend its strong and committed board.

ix.   Partnerships

Collaboration is at the heart FfCW's approach in all its strands of work – from education partnerships to co-productions – as outlined here. Additionally FfCW has been generous with its sharing and is a key member of our portfolio of national companies. It has supported a filmmaker in residence at Welsh National Opera and worked with National Theatre Wales to capture the process of working with the steel-making community of Port Talbot to produce "We're Still Here".

x.   Income generation

Since their inception FfCW has leveraged approximately £56m of funding in presales private investment and investment funds. With Arts Council support, FfCW is currently working with consultants to see how they can devise a business model round their "Foot in the Door" programme.

6. Our other support of film

Although the work of FfCW is the main instrument for our investment in Film, there are other initiatives that Arts Council has supported through Lottery, grant in aid and in kind. Relevant examples include:

- The Creative Cardiff led bid to Arts & Humanities Research Council for a creative cluster focusing on screen-based R&D to be based in the City Region with Cardiff University, University of South Wales and Cardiff Met. We have committed staff time to the management should the application be successful. FfCW is also active in their support of this application.

- The work of "It's My Shout" using film to offer skill development opportunities to young people. BBC and S4C are broadcast partners.

- Labordy. A training initiative that has run two advanced development programmes for writers and directors. These are roles relevant across the arts, film and TV sector (and so developed in partnership with FfCW, S4C and Skillset).

- Providing funding to support the upgrade or installation of a network of digital screens to venues across Wales through our Capital funds.

- Support for artist film. A number of high profile and emerging artists, such as Bedwyr Williams, Sean Vickery and Eisteddfod Gold Medal winners Sean Edwards and Josephine Snowden, work in moving image.

- Culture UK is a BBC partnership that aims to work with the arts councils in the nations to realise opportunities for arts broadcast. Alongside their other arts digital initiative, The Space, the focus is mainly on capture or reinterpretation of 'live' events rather than film or drama so we have not gone into detail in this submission. But to additionally note that Theatr Clwyd, revenue funded by the Arts Council, has recently announced a partnership with Streamer to pilot streaming of their productions.

- Many of the venues included in our portfolio of revenue funded organisations have a film offer. Of particular note is excellent development work that Chapter, one of our funded organisations, do through Film Hub Wales. Funded directly by BFI to work across Wales and the UK to support exhibition and access to film, they offer many

opportunities for training and development to exhibitors. They also support and promote access to Welsh film through their "Made In Wales" initiative. See http://filmhubwales.org/films

7. Looking to the future

Arts Council of Wales has no plans to change the delegation arrangement with FfCW. We see the value in having a strategic body for the development of film that can take a view across the ecology, from early access to education, to production and skills development and production investment. But there are ways that we can work even more coherently across film.

Since the closure of Skillset Cymru there is no single forum for stakeholders involved in skills development for the creative sector to come together to strategise and coordinate delivery. We feel that establishing such a forum would make a real difference to ensuring the future needs of the sector will be met. That the pipelines for talent development are clear, wide reaching and that equality will be at their core. We would expect that members would include (not exclusively) BBC Cymru, S4C, representation for the indie sector, higher and further education, FfCW, Welsh Government and Arts Council of Wales.

8. Concluding observations

1. Arts Council of Wales places great value on the power of film as an accessible artform and a gateway to other forms of creative participation and arts. As with all arts, it is important that it reflects the society we live in. For those working in the sector there is a responsibility to be representative of our population, through the stories that are told and the languages that they're told in.

2. Our primary remit is culture. Nevertheless, we do not seek to separate cultural benefits from the wider film ecosystem (which includes commercial considerations). We want a sustainable and diverse film sector in Wales. We want film to be accessed by the many, where ambition is nurtured and met by routes into the sector and where talent is supported through education,

ongoing skills development and investment in productions and the companies themselves.

3. We believe that our Lottery delegatee, Ffilm Cymru Wales, is well placed to deliver our aims as set out above. As a strategic body for the development of a film sector in Wales, Ffilm Cymru Wales consistently takes the long term view on development. We wholeheartedly support their holistic approach to developing a sustainable film sector in Wales across exhibition, formal education materials, specialised training, production investment and company support.

4. We particularly commend FfCW for its equality and diversity work.

5. We recognise the role that the BFI plays in the UK as the body responsible to UK wide strategy for the film medium. However, it's crucial that a Wales-focused approach is maintained through the strategic work of FfCW and the quality delivery of Film Hub Wales.

6. We share the concerns of the sector in how we continue to maintain international co-productions and shared learning and development opportunities post Brexit.

7. Skills development is one area where there could be better cooperation across the sector and with Welsh Government. We'd welcome the establishment of a forum to lead on this bringing together relevant stakeholders. We'd particularly like to see creative talent development as well as the development of technical skills.

8. Starting with skills, it is our ambition for there to be a more coordinated, holistic and complementary approach to film. Success will depend on all relevant agencies and stakeholders being able to take a longer term view of the film sector and culture we want to create in Wales.

Agenda Item 4.1

Culture, Welsh Language and Communications Committee

<u>Film and Major Television Production in Wales: Summary of Stakeholder Workshop Group Discussions</u>

<u>Transparency and information</u>

- There is an absence of a detailed assessment of the sector and a general lack of information. This was a recurring theme throughout the discussions. It was suggested that it would be useful for someone to map which organisations do what in the sector in Wales.

- Transparency is needed as to how the Welsh Government spends its money – and how effective this spending is.

- The Welsh Government's vision needs to be clarified and effectively communicated to the sector.

- Generally Welsh Government policies affecting the sector need to be far more transparent.

- The University of South Wales has made a bid for a screen industry cluster in Cardiff – under the UK Government's Business Strategy Fund. 'Screen Lab' will play a research and development role and will aim to provide meaningful data on what works in Wales.

- The workforce needs to be mapped.

- The withdrawal of Creative Skillset in Wales was a huge blow – it has not been replaced. It remains present in the English regions. In its absence it is not clear who is mapping the skills in the Welsh film workforce.

<u>Education/skills development</u>

- Content of media courses may be out of date. Courses should also cover the business skills needed to prosper within the sector. This needs to happen from secondary school education through to masters provision. Generally, there needs to be more integration.

- There is currently no specialised film school in Wales. USW (formerly at the Newport Film School) is the closest thing we have to a specialised film school in Wales. Scotland has recently opened a National Film and TV school hub which is based in their BBC Scotland's studios. More info on the links below:

  - https://nfts.co.uk/school/nfts-scotland

- http://www.bbc.co.uk/mediacentre/latestnews/2017/scotland-film-tv-school
- New scheme to 'turbo-charge' BBC Wales's commitment to recruiting talent from under-represented communities.

- Internships need to be integrated into the film education system – paid internships; these are essential to diversity within the sector.

- Shadowing and mentoring within the sector needs to be progressed.

- There should be incentives in place to encourage more film based career paths.

- In light of Brexit, skills need to be developed domestically.

- The independent producer base needs to be developed. There is a clear need for a strategy here.

- Skills: there are about 20 different areas that require an upskilling in Wales. Transferrable skills should also be looked into – electricians are needed on film sets but they are not dependent on the sector. Perhaps there is something to learn from this.

Investment

- Investing in British independent films is very risky – generally these films do not make money.

- Investment depends on a company's KPIs

- Demand for new content is huge.

- Welsh Government funding within the sector – more stipulations are needed to build a healthy ecology – it should not be based solely on financial return. The large scale of projects invested in from the Welsh Government's Media Investment Budget precludes Welsh companies' involvement. Productions attracted to Wales by the MIB spend money here and then leave, providing little legacy.

- 2017 saw the largest inward investment in the sector - £1.9b across the UK. The Committee may want to investigate how Wales can get a bigger portion of this money.

- Branding is very important within the sector – it guarantees a certain amount of distribution which is essential when attracting investment.

<u>Welsh Government investment</u>

- The Welsh Government is struggling to spend its Media Investment Budget (MIB).

- The MIB is very opaque. As it is focused on financial return it tends not to fund independent producers as they are deemed too risky.

- The target ratio for financial return for the MIB is 10:1.

- It was suggested that there should be two strands of the MIB – one focused on financial return, the other on supporting indigenous Welsh produce.

- Decisions need to be taken – the Welsh Government's aims are not clear.

<u>Diversity</u>

- Iris Festival (in Wales) has the biggest fund for LGBTQ support in the world.

- The BFI Diversity Standards are set to be published in April of this year.

- Putting diversity on the agenda of studios is very difficult – though it needs to happen.

- There is one female director active in Wales (Rungano Nyoni, who won a BAFTA this year for Outstanding Debut by a British Writer, Director or Producer.

<u>Current climate</u>

- There is a lack of labour force – this leads to wage inflation and makes the UK less attractive to film makers.

- Film makers in Wales often take their business to England as they do not have the right contacts in Wales – even though they want to work with Wales based professionals.

- The time is right to make positive changes in the sector – Ofcom are introducing portrayal requirements for the BBC, S4C and BBC are investing etc.

- More needs to be done within Wales to support Welsh film produce – Welsh films are not being shown enough in Welsh cinemas.

- Film makers have no control over content made for the BBC – who can exploit it internationally etc.

- In TV there is a terms of trade framework – there is not one for film.

- The terms of trade framework is very important in relation to making a profit from digital content.

- Though the BFI is vocal in relation to its support of the nations and regions they have no permanent presence in Wales – they do not practice what they preach.

- Ffilm Cymru does very good work with the little money it has – an example was given of them issuing lots of small repayable loans.

- Ffilm Cymru's 'Foot in the door' scheme has been very effective at facilitating entry into the industry.

- Co-production is becoming increasingly necessary.

- There is a very limited budget for marketing films in Wales. Festivals are "hugely important".

- Between 2007-2017 there has been significant nominal growth in the industry in Wales.

- There is not an obvious centre of the Welsh film industry.

- There is very little support for Welsh language film-making.

- Generally, the money that trickles back to film producers is miniscule - producers need support between productions.

Points to note
- Film tax credits, infrastructure and a sufficient skills base are the three ingredients for a healthy production ecology.

- Animation and games should be included in the inquiry.

- Witnesses talked about "Screen Alliance Wales": an arrangement between the Welsh Government and Bad Wolf Productions. There was little clarity as to what this entity did, or plans to do.

- To what extent is Intellectual Property developed in Wales, and does it stay in Wales?

Possible case studies

- South Korea has a thriving indigenous film industry the Committee may wish to look at.

- The peach symbol used in Georgia (USA), if shown on screen, qualifies the film makers for extra tax credit.

- Northern Ireland Screen is a good example of how to attract inward and domestic investment.

- A recent publication (Go West) provides an overview of the history, evolution and current configuration of the film and television industries in the Bristol region.

BBC Cymru Wales
Cardiff Caerdydd CF5 2YQ
bbc.co.uk/wales bbc.co.uk/cymru

Radio News in Wales – BBC Briefing Note to the National Assembly for Wales' Culture, Welsh Language and Communications Committee

1. Purpose

BBC Wales provided evidence to the National Assembly for Wales' Culture, Welsh Language and Communications Committee as part of its inquiry into Radio in Wales. The Committee raised the question of the BBC's ability to opt out of its Network FM radio services, primarily Radio 1 and 2 in Wales.

This note provides additional information for the Committee by the BBC in response to that question.

2. Distribution

The primary challenges the BBC faces in implementing an opted news bulletin are technical distribution issues.

The Wenvoe transmitter provides FM coverage for an estimated 1.5m listeners (0.63m households) in the South West of England, and 1.3m listeners (0.54m households) in Wales.

Any editorial change to the network output from that transmitter would have to take the coverage footprint into consideration. The BBC could mitigate the impact on around 0.2m listeners in England by changing the source feed for a number of FM relay transmitters (at significant expense) but beyond that we would require additional frequencies that are simply not available.

The BBC has, on limited occasions in the past, opted on UK-wide FM. However, these programmes when transmitted from Wenvoe have only been available to listeners in <u>both</u> Wales and the West of England since it is impossible to isolate the signal to Wales only.

For these reasons, the two hour-long weekly *BBC Radio One Introducing in Wales* programme which came to an end in 2011, was available in both Wales <u>and</u> the South West of England.

3. Summary

The BBC is always looking for ways to serve our audiences better, and the provisioning of our Radio Services is a central part of this. The internet enables the BBC to offer a more

personalised audience service and with a suitable distribution network across fixed and 5G mobile networks in place, this may provide a better solution in the long term to the problem of bringing opted content to BBC Network audiences.

In the meantime, and in the context of the expected DCMS review into digital listening, we continue to monitor the best way to deliver our services and to seek improvements where possible.

This note does not consider whether implementing such a change might be considered a material change to these services requiring approval by Ofcom.

Rhys Evans, Head of Strategy, BBC Wales

Robin Holmes, Head of Distribution Platforms, BBC Distribution

Yr Arglwydd Elis-Thomas AC/AM
Y Gweinidog Diwylliant, Twristiaeth a Chwaraeon
Minister for Culture, Tourism and Sport

Julie James AC/AM
Arweinydd y Tŷ a'r Prif Chwip
Leader of the House and Chief Whip

Ein cyf/Our ref DET/00124/18

Nick Ramsay AM, Russell George AM, Bethan Sayed AM
Committee Chairs
National Assembly for Wales
Cardiff Bay
Cardiff
CF99 1NA

23 March 2018

Dear Nick, Russell & Bethan

Thank you for your letter of 19 February in relation to the draft Memorandum of Understanding (MoU) concerning the relationship between UK Government, the Welsh Government, the National Assembly for Wales and the Office of Communications (Ofcom), arising as a result of the St David's Day announcement and the subsequent Wales Act 2017.

I am grateful that your respective Committees have considered the MoU and for the comments provided in your letter.

As you will be aware, the Welsh Government wants to improve the accountability of broadcasting institutions to the National Assembly and to viewers and listeners in Wales. Following the BBC Charter Review, the BBC now has appropriate accountability to the National Assembly for Wales. As we prepare to appoint the member for Wales to the Ofcom Board for the first time, we are conscious of the need to ensure similar arrangements for Ofcom itself. This will be achieved as a result of this MoU.

We note your request for a pre-appointment hearing to be held with the preferred candidate for the Ofcom Board Member for Wales. However, we are not in a position to agree with this. Ofcom is a UK body and the agreement to appoint a representative for Wales must remain the prerogative of Welsh Ministers, consistent with the approach taken during the recent process for the appointment of an Ofcom Board Member for Scotland. However, once appointed, we would expect the new Ofcom Board Member for Wales to be fully aware of their role in ensuring that Ofcom is properly accountable to all relevant Assembly Committees.

I am sending a copy of this letter to the Presiding Officer, Elin Jones AM. We will now seek for the MoU to be signed by the relevant parties as soon as possible.

Yours sincerely

Yr Arglwydd Elis-Thomas AC/AM
Y Gweinidog Diwylliant, Twristiaeth a Chwaraeon
Minister for Culture, Tourism and Sport

Julie James AC/AM
Arweinydd y Tŷ a'r Prif Chwip
Leader of the House and Chief Whip

Eluned Morgan AC/AM
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Minister for Welsh Language and Lifelong Learning

Llywodraeth Cymru
Welsh Government

Ein cyf/Our ref MA/P/EM/0721/18

Bethan Jenkins AM
Chair
Culture, Welsh Language and Communications Committee
National Assembly for Wales
Cardiff Bay
CF99 1NA

6 March 2018

Dear Bethan,

Further to my appearance before the Committee on 18 January for scrutiny on the Welsh language, this letter provides information in response to the action points recorded by the Clerk during the session.

1. **Latest evaluation of the outcomes of the Welsh Language Sabbatical Course / How many practitioners return to schools following the course to teach through the medium of Welsh**

The most recent evaluation of the Sabbatical Course, under the title *Review of the Welsh-language Sabbatical Scheme for education practitioners*, was published in 2014. This study was based on the views of participants who attended courses during the period January 2011 – December 2012. A total of 324 practitioners completed courses during this period (Higher Level: 115; Foundation Level: 113; Entry Level: 96).

It is important to note that the Higher Level course is the only course designed to enable participants to return to school to increase how much they teach through the medium of Welsh. The Foundation and Entry Level courses are designed for practitioners in English-medium primary schools, with a view of developing their Welsh language skills to enable them to improve their teaching of Welsh as a subject and the use of Welsh across the curriculum.

The following provides an outline of findings in relation to the **higher level** course:

68 Higher Level participants responded to the online survey (out of a total of 115 who had completed the course).

Participants were asked to note the number of hours of Welsh-medium/bilingual teaching they provided before and after attending the higher level course, with the review providing an outline of the data by sector and by medium, with the following caveat:

…it is important to note that the medium and context of each institution determine to a considerable extent whether there are any opportunities to increase the number of hours of Welsh language provision. The very idea of 'hours' of provision differs between secondary schools compared with primary schools, where often there are no specific blocks of provision. Therefore, quantifying the exact number of hours in the primary sector can be more challenging.

- For teachers in Welsh-medium schools (primary or secondary*)* there was no expectation that the Sabbatical Scheme should lead to an increase in the number of hours of provision: these teachers already deliver through the medium of Welsh. However, responses to the questionnaire confirmed that the scheme had, in the opinion of the respondents, improved language skills and strengthened teaching methods.

- 18 out of 30 teachers who attended the higher level course and taught in English-medium secondary schools reported that there had been an increase in the number of hours of Welsh provision in their schools since they completed the course. Evidence also suggested that attending the course led to a wider use of Welsh across a range of subjects in a number of schools.
- All four of the teachers teaching in bilingual schools reported an increase in the number of hours of Welsh language provision.

- Responses to the questionnaire were received from 22 participants from the further education sector who had attended the higher level course. Of these, six reported no increase in the number of hours of Welsh-medium or bilingual teaching. Fourteen of the participants reported that the number of hours of Welsh language or bilingual teaching they provided had increased, significantly so in some cases.

A copy of the report is attached to this letter.

As I mentioned during the Committee meeting in January, I have spoken to people who have attended the programme, who say that after-care is crucial. That is also reflected in the evaluation. We are working with the regional consortia to ensure that after-care is provided and that the practitioners continue to make progress when they return to school.

We continually evaluate the programme to make improvements, and the need to increase the number of the teaching workforce able to teach through the medium of Welsh is of strategic importance under the *Cymraeg 2050* Welsh language strategy. With this in mind, the work of commissioning a further evaluation of the Scheme is underway, with the intention of beginning the evaluation in the summer for a period of three years.

2. **The total number of Welsh Government employees working to prepare the Welsh Language Standards**

Capacity within departments of the Welsh Government Civil Service is a matter for the Permanent Secretary.

3. **Coleg Cymraeg Cenedlaethol funding for 2017/2018**

Since its establishment in 2011 the Welsh Government has provided funding for the Coleg Cymraeg Cenedlaethol (the Coleg) to maintain its activities; providing independent

oversight, strategic planning, management and support to the development of Welsh-medium higher education (HE) across Wales. The funding which was provided via HEFCW included the provision of Welsh-medium scholarships to incentivise higher education study through the medium of Welsh.

From 2017-18 onwards, the Welsh Language Division has had responsibility for funding the Coleg and £5.4m was allocated from the Welsh Language Division's revenue budget for this purpose. (This budget was made available as a result of a transfer of budget from the Higher Education Revenue budget to the Welsh Language Division). For 2017-18, HEFCW allocated an additional £0.330m to support Welsh-medium Scholarships.

The funding provided for 2017-18 was maintained at the level provided by HEFCW during 2016-17. This was in line with the recommendations of the Diamond review which recommended the continuation of funding for the Coleg to promote the provision of Welsh Language in Higher Education. It stated that funding for the Coleg Cymraeg Cenedlaethol and its scholarship programme should be maintained at least at the level for academic year 2016/17.

On 12 December 2017 the Welsh Government response to the final report of the task and finish group which reviewed the future role of the Coleg Cymraeg Cenedlaethol was published. This report concluded that investment will need to be sustained within higher education in order to maintain the growth in provision that we've seen already and that the growth will not be sustainable without continuity in this investment. In considering future funding and the expanded role of the Coleg within the post-16 sector as a result of the review; future funding will be allocated in response to the priorities and recommendations of the review group which were accepted by the Cabinet Secretary for Education.

4. **How the Welsh Government are monitoring and evaluating expenditure on National Centre for Learning Welsh**

The Welsh Government holds regular meetings with the National Centre for Learning Welsh to monitor progress against its work programme. This includes the monitoring of expenditure against its grant allocations.

Funding allocated by the Centre to its network of 11 providers across Wales is calculated using the same hourly rate as other Welsh Government funded Further Education provision to ensure parity with other provision.

The Welsh Government has also established an independent Welsh for Adults Scrutiny Committee. The Committee meets three times a year, and its main purpose is to scrutinise the work of The National Centre for Learning Welsh and advise on matters such as value for money and how the Centre is responding to Welsh Government policies.

Yours sincerely

Eluned Morgan AC/AM
Gweinidog y Gymraeg a Dysgu Gydol Oes
Minister for Welsh Language and Lifelong Learning

Evaluation of the Welsh-medium Education Strategy

Review of the Welsh-language Sabbatical Scheme for educational practitioners: participant experiences 2011-2012

Evaluation of the Welsh-medium Education Strategy

Review of the Welsh-language Sabbatical Scheme for educational practitioners: participant experiences 2011-2012

January 2014

Arad

Brett Duggan, Hefin Thomas and Sioned Lewis

Views expressed in this report are those of the researcher and not necessarily those of the Welsh Government.

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Contents

1 Executive summary

1.1 This report summarises the findings of the review of the Welsh-language Sabbatical Scheme (WLSS) conducted by Arad Research on behalf of the Welsh Government during the first half of 2013. The review focuses on measuring the impact of the Sabbatical Scheme, and is based on the views of participants who attended courses during the period January 2011 – December 2012. Their views were gathered through surveys and interviews. We also contacted a sample of line managers, *athrawon bro* and training providers in order to consider participants' comments in a wider context.

1.2 This review forms part of a wider research programme to evaluate the Welsh-medium Education Strategy (the Strategy) that was published by the Welsh Government in 2010. That evaluation will assess progress against the Strategy's aims and objectives and will aim to understand how effectively the various elements of the Strategy interconnect. We will use the conclusions of this review when considering the contribution of the WLSS to the aims and objectives of the Strategy as a whole.

Findings

1.3 In broad terms, all of those who contributed to the review held very positive views about the quality and nature of the training delivered through the Sabbatical Scheme. The fieldwork suggested that the content of the courses at each level was appropriate.

1.4 A large number of participants reported increased confidence and enthusiasm as a result of the course, and the majority also greatly appreciated the opportunity to develop their language skills.

1.5   The Sabbatical Scheme has helped schools to strengthen their Welsh language ethos and introduce more incidental use of Welsh. Evidence of the impact on learners' skills levels is less apparent (and beyond the remit of this review). Interviews with local authority officers suggested that it may not be realistic for the Sabbatical Scheme alone to lead to measurable benefits in terms of the educational attainment of pupils taught by course participants.

1.6   The review highlighted that the journey from the initial recruitment to post-course support varies for participants, depending on how they came into contact with the WLSS, as well as on personal motivation and the school's motivation for participation.

1.7   The Sabbatical Scheme has been adapted and refined several times over the years, but one important element when seeking to build further on the success of the WLSS is the need to strengthen the post-course support offered to participants upon completion of the course.

1.8   This review outlines recommendations to help the Sabbatical Scheme respond to these challenges during the next phase of its development. The recommendations refer to the need to ensure effective joint-planning at national and local levels and in schools and colleges, in order that participants are recruited in a strategic and purposeful way.

1.9   One of the main challenges for the future is to ensure that the WLSS as a whole (including recruitment methods, the targeting of individual practitioners and schools) is implemented in a more strategic and targeted manner. A clear link between the WLSS and the priorities of the Welsh in Education Strategic Plans must be established across local authorities and consortia.

1.10   There are also recommendations that refer to the need to improve post-course support for participants. Local authorities should ensure that priority is given to providing suitable and effective support for participants.

Acknowledgements

1.11 We would like to thank all those who contributed to this review of the Welsh-language Sabbatical Scheme. Special thanks go to course participants and to other school, college and local authority representatives for the valuable information presented, which has provided the basis for this report and its findings.

2 Introduction to the review

2.1 Arad was commissioned to conduct a review of the Welsh Language Sabbatical Scheme (the WLSS), a programme which offers Welsh language and methodology training to practitioners in order to enable them to teach, lecture or train bilingually or through the medium of Welsh. This report outlines the evidence collated and the conclusions of the research process. It is intended for the review to lead to recommendations for implementing the WLSS in the future.

Review of Sabbatical Scheme – Context

2.2 This review of the Sabbatical Scheme forms part of a wider programme of research to evaluate the Welsh-medium Education Strategy (the Strategy), published by the Welsh Government in April 2010.[1] Arad was commissioned to conduct a programme of research to consider the impacts of the Strategy as a whole, basing the work programme on the *Proposed Evaluation Framework for the Welsh-Medium Education Strategy.*[2] The Evaluation Framework provides a useful basis for addressing the objectives and the research questions noted in the research programme's specification.[3] These objectives include considering the progress made against the Strategy's aims and targets, in addition to considering whether the targets are still appropriate. It is also intended for the evaluation to consider the factors that are either obstructing or facilitating the realisation of the Strategy's vision, by researching the effectiveness of different activities in different areas and contexts. The outputs of the evaluation will

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[1] Welsh Government (2010). *Welsh-medium Education Strategy*
http://wales.gov.uk/topics/educationandskills/publications/guidance/welshmededstrat/?skip=1&lang=en
[2] Welsh Government (2011). *Evaluation Framework for the Welsh-medium Education Strategy*
http://wales.gov.uk/docs/caecd/research/120330welsheducationen.pdf
[3] Specification for an independent research programme to evaluate the Welsh-medium Education Strategy. Advertised by Welsh Government on the sell2wales website in July 2012.

include recommendations to the Welsh Government and other strategic partners, suggesting ways of adapting or improving plans to support the development of Welsh-medium education.

2.3   The Evaluation Framework was revised in early 2013 as part of the current research programme, building on the theory of change in that document, and a logic model was developed for the research programme. The questions identified as part of that process allow us to consider the significance of the Sabbatical Scheme in the context of the full evaluation of the Strategy. The questions below interpret the questions in the Evaluation Framework and link them specifically to the Sabbatical Scheme. Conclusions in relation to the questions below are outlined in sections 6.17-6.26.

i.   To what extent does the Sabbatical Scheme support the Strategy's aims, outcomes and objectives? Specifically:

o   In what way has the WLSS improved/supported the process of planning provision?

o   Has the project contributed to the aim of developing Welsh language skills amongst participants?

ii.   Does the WLSS link with/complement other programmes that are associated with the Strategy?

iii.   Would the developments seen in schools and colleges as a result of the Sabbatical Scheme have happened in the absence of the WLSS?

2.4   With this in mind, the research team will consider the evidence submitted and the analysis of the data through two lenses: firstly, there will be a focus on any 'lessons' for the future implementation of the WLSS; and, secondly, we will consider the Sabbatical Scheme's contribution to the Strategy's aims and objectives more widely.

The Sabbatical Scheme and the Welsh-medium Education Strategy

2.5   Strategic objective SO4.3 of the Strategy refers to developing *'a national infrastructure for regional delivery of in-service Continuing Professional Development (CPD) training for Welsh-medium/bilingual and Welsh-language skills for all sectors'*. The objective outlined in the strategy is to '*Improve the linguistic skills of practitioners in all sectors by providing opportunities for training through different models of the Sabbatical Scheme in a national framework'*. The challenge for local authorities therefore is to *'improve the linguistic skills of practitioners by identifying priorities for training, correlating with planning processes at local and regional level'*.

The context of planning Welsh-medium education and supporting schools

2.6   There have been recent changes to the context and structure of school improvement services that are relevant to this review. The four regional consortia are now responsible for school improvement services.[4] The consortia are also responsible for submitting applications for the Welsh in Education Grant in order to support activities *'aimed at achieving the outcomes of the Welsh-medium Education Strategy'.*[5]

2.7   Local authorities have a statutory responsibility for developing, introducing, revising and implementing Welsh in Education Strategic Plans.[6] However, the regional consortia have a role in assisting with implementing aspects of the Strategic Plans,

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[4] There are four regional consortia across Wales that form a basis for cooperation across those authorities that are responsible for ensuring effectiveness and raising standards in their authorities. When references are made to consortia or regional consortia in this report, this includes both the regional consortia and the local authorities that are part of them.

[5] Welsh Government Written Statement - Welsh in Education Grant 2013-14 (19 September 2012). http://wales.gov.uk/about/cabinet/cabinetstatements/2012/welshineducationgrant/?skip=1&lang=en

[6] These are plans that outline how local authorities will achieve the aims and targets outlined by the Welsh Government in the Welsh-medium Education Strategy. Local authorities introduced their first Welsh in Education Strategic Plans in December 2011 on a non-statutory basis. Following the passing of The School Standards and Organisation Act in January 2013, these Strategic Plans will become statutory.

including those aspects that are linked to Outcome 5 of the National Strategy.

2.8 The consortia will also be working with course providers in future to identify participants and to provide post-course support (see section 5.22 onwards).

Overview of the Scheme

2.9 The WLSS is a training programme for practitioners developed as a pilot in 2005 in order to achieve the objective set out in '*Iaith Pawb*'[7] of increasing the supply of practitioners that are able to teach and train through the medium of Welsh in a range of subjects pre- and post-16. Following an initial evaluation of the WLSS in 2006-07,[8] the pilot was extended for a further two years in order to allow sufficient time for its long term impacts to become clearer. The WLSS was subsequently extended until August 2010 in order to reflect the priorities of the Welsh-medium Education Strategy. Following an evaluation of the impact and effectiveness of the WLSS in the summer of 2010,[9] new contracts were established for the provision of courses during the period 2011-2014 in late 2010.

2.10 The WLSS offers periods of intensive study, away from the classroom, in order to develop Welsh language skills and develop confidence in bilingual and Welsh-medium teaching methodologies. A programme of Welsh language courses at entry, foundation and higher levels are delivered by providers across Wales under a contract with Welsh Government.

2.11 The Sabbatical Scheme covers the costs of supply teachers and participants' travel and subsistence costs to enable schools and colleges to release them to attend the training courses.

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[7] Welsh Government (2003). *Iaith Pawb: A National Action Plan for a Bilingual Wales* http://wales.gov.uk/depc/publications/welshlanguage/iaithpawb/iaithpawbe.pdf?lang=en
[8] Welsh Government (2007). *Evaluation of the National Practitioners' Training Programme and Sabbaticals Scheme*
[9] Welsh Government (2010). *Evaluation of the Extended National Practitioners' Training Programme Pilot* http://wales.gov.uk/docs/dcells/publications/100114nptpreporten.pdf

2.12 Courses are held in locations across Wales. The table below (Table 1) summarises the different courses (by level) provided during the period January 2011-December 2012 along with the number of participants who attended the courses in the different locations.

2.13 The **higher level** course is aimed at those who can speak Welsh fluently, either as first language speakers or learners at a higher level, but lack the confidence or specialist Welsh terminology to use these skills in a professional setting. The courses are an opportunity to develop language skills; receive intensive language training combined with methodological training in teaching through the medium of Welsh; and to gain knowledge of specialist terminology. The higher level course is offered as:

- full-time twelve week block courses;

- twelve week distance learning courses with three obligatory residential periods;

- short courses comprising 12 days of language workshops for further education lecturers and subject teachers in Welsh-medium or bilingual secondary schools.

2.14 The Welsh Government reimburses the cost of 18-60 days of supply cover for these courses, depending on the type of course.

2.15 The **foundation level** course offers Welsh language training to Foundation Phase and Key Stage 2 teachers who work in English-medium or bilingual schools, and who wish to: develop their Welsh language skills to foundation level; take the first steps on a recognised path to learn Welsh with the long term aim of teaching Welsh or teaching through the medium of Welsh; and contribute towards bilingualism in their schools in order to create a Welsh language ethos. The course is aimed at those who have a basic knowledge of Welsh and the motivation to commit to 11 weeks of intensive training. The Welsh Government repays the cost of 55 days of supply cover for this course.

2.16 The **entry level** course is the newest, and has been held in locations across Wales since 2011. This course, which lasts five weeks,[10] is for classroom assistants who work in English-medium or bilingual schools. The aim of the course is to provide classroom assistants with the necessary vocabulary and linguistic skills to support teaching colleagues. The Welsh Government repays the cost of 25 days' supply cover for this course.

Table 1: Number of participants on Sabbatical Scheme, January 2011-December 2012

Higher course*			
	Bangor	Cardiff	Carmarthen
Jan 2011	7 (distance learning)	12 (block)	
April 2011	9 (short courses)	8 (short courses)	12 (block)
Sept 2011	4 (block)	12 (block)	
Jan 2012	9 (distance learning)		
April 2012	6 (short courses)	7 (short courses)	12 (block)
Sept 2012	5 (block)	12 (block)	
Total on the higher level course during this period			**115**

Foundation course							
	Car-marthen	Cardiff	Swan-sea	Gla-morgan	Llysfasi	Gwent	Aber-ystwyth
Jan 2011	11						
April 2011							
Sept 2011	12						
Jan 2012		12	11	12	7		12
April 2012						12	
Sept 2012	12						12
Total on the foundation level course during this period							**113**

Entry course							
	Car-marthen	Cardiff	Swan-sea	Gla-morgan	Llysfasi	Gwent	Aber-ystwyth
Jan 2011							
April 2011							
Sept 2011				10	8		11
Jan 2012	12	13					
April 2012							
Sept 2012			12	12	6	12	
Total on the entry level course during this period							**96**

Source: Welsh Government

* See Table 4 (page 21) for details of participants on the higher course, by sector

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[10] The course was changed from being a four-week course to a five-week course in September 2012 following feedback from participants.

Objective of the evaluation

2.17 The specification for the research programme noted the need for an evaluation *'to consider the impact of the Sabbatical Scheme on practitioners' ability to teach once they have returned to the workplace'*.[11] It was agreed that the work would focus on collecting evidence from participants who attended courses during the period January 2011-December 2012. It was also agreed that the research would consider the experiences of participants in the context of further evidence from the providers of different training courses and education advisers in local authorities. Finally, it was noted that the study should consider *'methods of measuring the impact in the future and the role of local authorities in ensuring that practitioners are supported once they have returned to their workplace'*.[12] These points are discussed in Section 6, *Conclusions and recommendations*.

Overview of the methodology

2.18 This report presents the Welsh Government (the Client) with evidence of the Sabbatical Scheme's impact on the ability of participants to teach through the medium of Welsh or bilingually. Following the guidelines in the original invitation to tender and initial discussions with the Client, the evaluation methodology was based on a combination of desk research and field work that included the following tasks:

Survey of participants

2.19 An e-mail was sent to 268 of the 324 participants who completed courses between January 2011 and December 2012, inviting them to complete an online survey. Current contact details or e-mail addresses were not available for 56 of the participants. 158 responses were received (59% of those who received the

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[11] Specification for an independent piece of research to evaluate the Welsh-medium Education Strategy, June 2012.

[12] As above.

questionnaire); further statistics relating to the questionnaire are found in Annex 1.

Telephone interviews with participants

2.20 Telephone interviews were conducted with 21 participants in order to enquire about their experiences in further detail. Further details are found in Annex 3, which outlines a series of case studies based on these interviews.

Gathering opinions from line managers via e-mail / telephone interviews

2.21 The line managers of the 21 participants interviewed were contacted, and four responses were received providing comments on the impact of the WLSS from the perspective of the school. The views of 12 Bilingual Champions in further education colleges were gathered, to find out about their thoughts on the WLSS and the way it has supported their work in colleges.

Telephone interviews with providers and consortia

2.22 In order to set participants' comments in a wider context, interviews were held with representatives of six training centres, and with four local authority education officers – one from each consortium. They were asked about planning and recruitment, post-course support and for their recommendations for the future of the WLSS.

Desk research

2.23 The field work was supported by desk research which consisted of reviewing a sample of application forms, post-course feedback forms, course moderation reports, Welsh in Education Strategic Plans and previous evaluation reports.

2.24 This review presents a combination of hard and soft outcomes. The report often describes soft outcomes, for example an increase in confidence or self-reported improvements in skills. These are supported by the comments of other individuals, including school head teachers and *athrawon bro* in order to try

and convey a more comprehensive picture of the impacts of the WLSS.

3   Survey results

3.1   This section outlines the results of the survey of participants who took part in the Sabbatical Scheme between January 2011 and December 2012. One hundred and fifty eight full responses were received to the online questionnaire. Of these, 68 had attended the higher course, 64 had attended the foundation course and 26 had attended the entry level course (see Annex 1). Where appropriate, the results have been divided according to the level of the course.

Reason for taking part in the Scheme

3.2   Participants were asked to note what had motivated them to take part in the Sabbatical Scheme. In responding, they were able to tick more than one option (see the wording to this question in Annex 2, question 5).

3.3   Among participants who attended the higher course, 50 of the 67 who answered this question stated that attending the course had been a personal decision. Twenty nine answered by noting that they had received encouragement from their line manager. Only one of the participants who completed the survey had received encouragement from an education adviser or *athro bro*.

Figure 1: Answers of higher course participants to the question 'What prompted you to take part in the Sabbatical Scheme?'
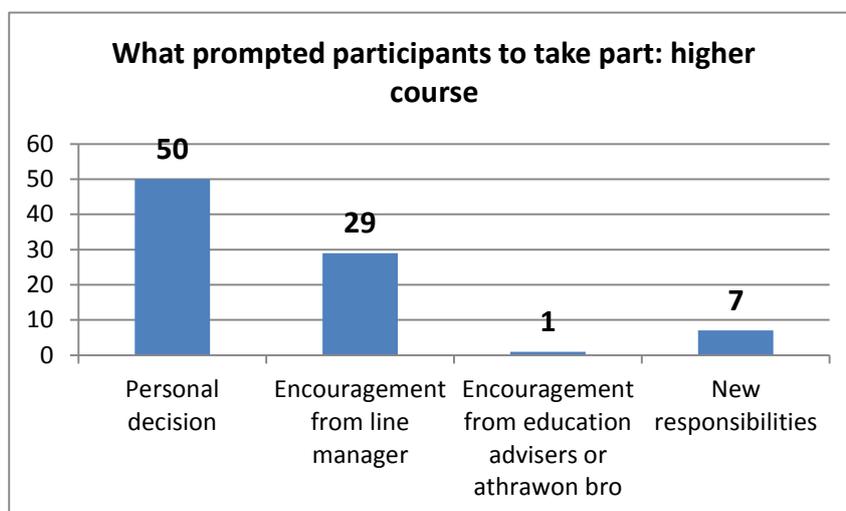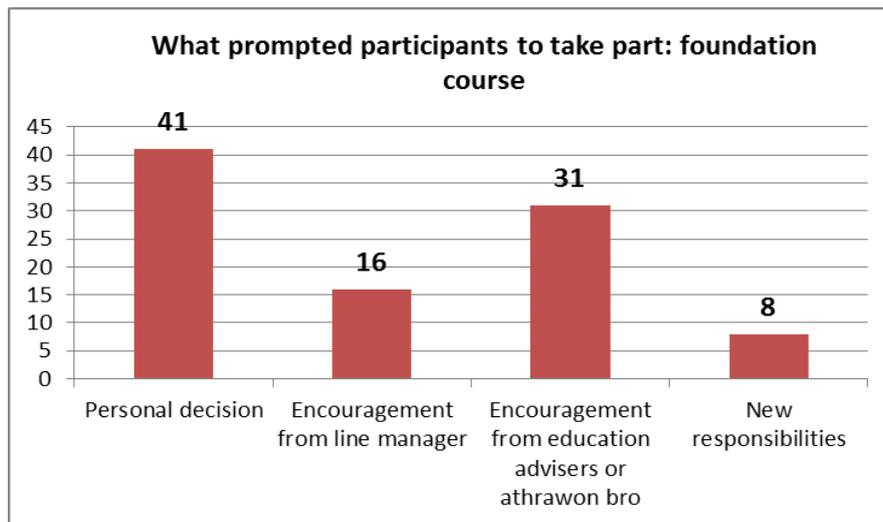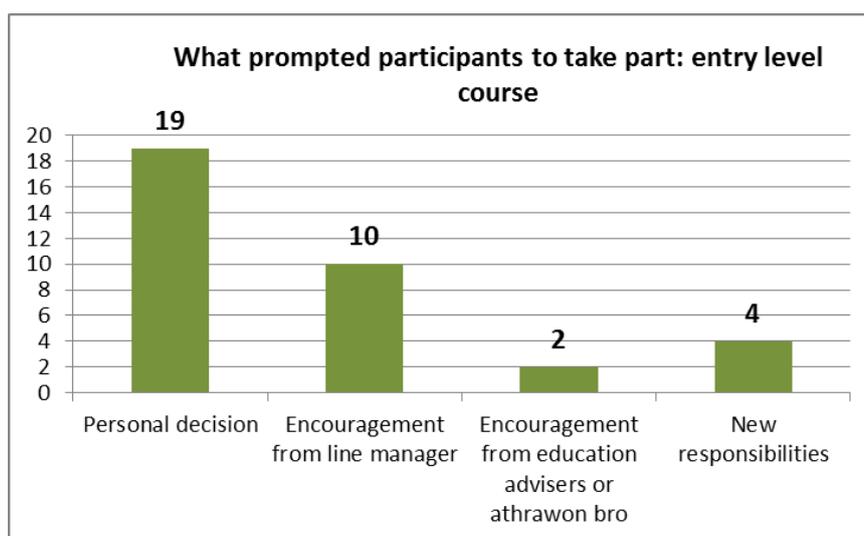

Source: survey of participants

n=67, higher course participants

3.4   Among participants on the foundation course, 41 out of 63 stated that attending the course had been a personal choice. In contrast to feedback from higher course participants, it seems that encouragement from local authority officers or from *athrawon bro* had been an important factor for about half (31 out of 63) of those who replied to the survey, as can be seen in Figure 2.

Figure 2: Answers of foundation course participants to the question ''What prompted you to take part in the Sabbatical Scheme?'

Source: survey of participants

n=63, foundation course participants

3.5   Fewer responses were received from participants who attended the entry level course (25 responses). Again, the majority (19 of the 25) noted that it was a 'personal decision', with 10 participants noting that they had been encouraged by their line manager.

Figure 3: Answers of entry level course participants to the question 'What prompted you to take part in the Sabbatical Scheme?'

What prompted participants to take part: entry level course

n=25, entry level participants

Source: survey of participants

3.6 The data therefore shows that participants made a personal commitment by taking part in the course. Despite this, there are variations (across the different courses) in terms of the influence and encouragement of line managers and *athrawon bro*. It is likely that these variations are linked to the recruitment process for different courses e.g. as *athrawon bro* tend to work more with teachers they would be less familiar with classroom assistants who attend the entry level course and would therefore have less contact with them.

3.7 Encouragement from line managers was more evident on the higher course. It is clear from the written comments that a recommendation from someone who had previously attended the course was also an important factor for this group, whether by speaking with colleagues who had been on the course or by reading an article in a local newspaper about someone who had previously attended one of the Sabbatical courses. This is to be expected as the higher level courses have existed for longer than courses at other levels. As one participant explained:

'Initially I had seen the course advertised in my local paper – a teacher had successfully completed and enjoyed the course. I

was then encouraged by my deputy head and a colleague from a neighbouring school who had both recently attended the course.'

3.8 As expected, a combination of factors were responsible in many cases, with respondents often ticking more than one option:

*'We were told of this by our Welsh advisory teacher. My head teacher encouraged me to apply when he received an email about the course.' (*Primary teacher, foundation level)

'My head teacher mentioned the course and when I looked into it I was excited at the possibilities and the professional development opportunities. I was given support and encouragement from the head and the athrawon bro team.' (Primary teacher, foundation level)

3.9 The aim of improving Welsh language skills was at the heart of personal decisions to take part in the course for a number of participants across the different levels:

'I enjoyed supporting delivery of Welsh in class and wanted to improve my own knowledge of the language so I could be more helpful in this area.' (Classroom assistant, entry level)

3.10 Participants noted (in their responses to the survey and during interviews) a number of other issues that had prompted them to take part in the training scheme. Four participants referred to a link between the Sabbatical Scheme and their school development plans. In some isolated examples, schools seemed to consider the WLSS as a way of addressing strategic priorities (one respondent noted *'we were targeting the development of Welsh across the school as part of our Estyn Action Plan'*).

3.11 Other teachers suggested that a reduction in the level of support from *athrawon bro* in some counties means that teachers and senior managers are more eager to take advantage of any training to improve Welsh language skills.

Views on the different elements of the course

3.12 There was a very positive response to the courses and their content from course participants at each level. The survey data reflects the positive responses seen in the sample of post-course feedback forms reviewed.

3.13 Participants were asked to rate different aspects of the WLSS. As the data below shows, the vast majority of participants who completed the questionnaire felt that the WLSS offers 'excellent' opportunities to develop language skills.

Figure 4: Answers to the question: 'How would you rate the following aspects of the WLSS?'
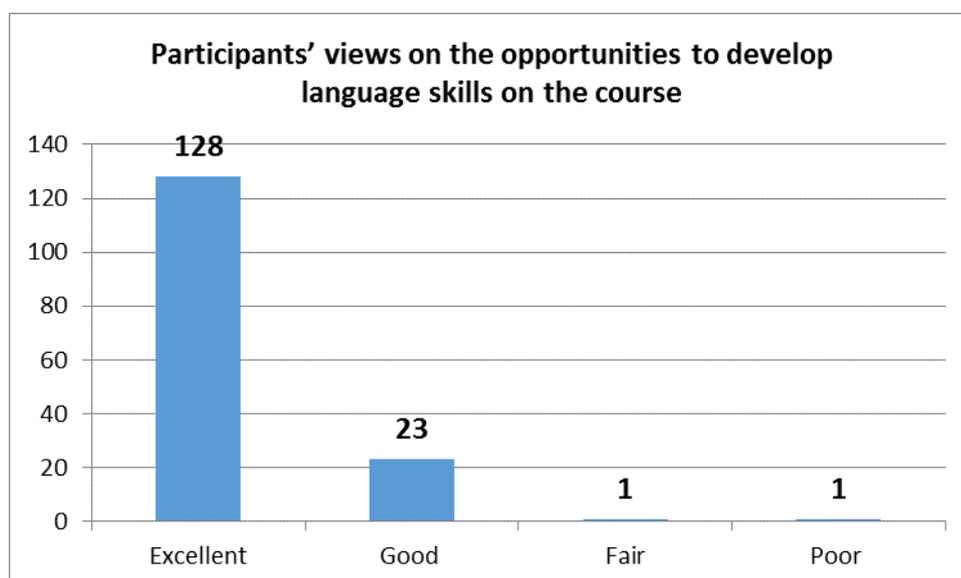
Source: survey of participants

n=153, course participants, all levels

3.14 Similar to the pattern above, the majority of participants (92 out of 152) were also of the opinion that the course had offered an 'excellent' opportunity to learn specialist terminology and to present Welsh sessions in front of a group.

3.15 Opinions on the training on teaching methodologies, although positive, were more mixed. Although half rated it as 'excellent', 24 out of 150 felt that the training was only 'fair', with three participants feeling that this part of the course was 'poor'. There were no significant variations according to course location, but

there was a tendency for higher level respondents to rate this
element more positively than foundation level and entry level
participants.

*Table 2: Participants' opinions on the training on Welsh-medium and bilingual
teaching methodologies, according to course level*

	Higher	Foundation	Entry level	Total
Excellent	44	20	10	74
Good	9	27	13	49
Fair	10	12	2	24
Poor	1	2	0	3
Total	64	61	25	150

Source: survey of participants

n=150, course participants, all levels

3.16 A similar pattern is seen in responses to a question on
opportunities to prepare resources, another central element of the
course at all levels. Respondents who had attended the higher
level course were very satisfied with the opportunities they had to
create resources, with a very high percentage rating this element
of the course as 'excellent' or 'good'. The opinions of foundation
level participants were less positive, in comparison, with a
number of respondents describing the opportunity to develop
resources as 'fair' or 'poor' (although the majority noted that they
had made use of the resources they had produced on the course
– see Section 4.18).

3.17 A complaint expressed by participants was that the resources
were unsuitable for their classes, and likely to be too difficult.

*'Very few resources would be suitable for use in my school
unfortunately; they would be very useful for a Welsh-Medium
primary school though.' (Participant, foundation level)*

*'I do know, though, that they are not appropriate for use in the
classroom. The assessments during the course were not a true
reflection of the needs of a class of 30 mixed-ability children.'
(Participant, foundation level)*

Table 3: Participants' views on the opportunity to develop resources, according to course level

	Higher	**Foundation**	**Entry level**	**Total**
Excellent	44	14	8	66
Good	16	25	9	50
Fair	5	16	4	25
Poor	0	5	5	10
Total	**65**	**60**	**26**	**151**

Source: survey of participants

n=150, course participants, all levels

4 Impact

4.1 The Sabbatical Scheme is described on the Welsh Government's website as a programme which '*offers methodology and Welsh language training to participants who need the confidence and specialist terminology to teach, lecture or train through the medium of Welsh or bilingually, or who teach Welsh as a second language as part of the national curriculum'*. Therefore, it is a scheme with the potential to make a significant contribution to a number of the Welsh-medium Education Strategy's priorities and strategic aims, including:

- To ensure a Welsh-medium education workforce that provides sufficient numbers of practitioners with high-quality Welsh language skills (Strategic Aim 4);

- To improve the way in which provision is planned (Strategic Aims 1 and 2);

- To ensure that all learners develop their Welsh-language skills to their full potential (Strategic Aim 3) (even though this review does not cover this element).

4.2 This section of the report summarises the evidence collected from participants in relation to the outcomes and impacts of the Sabbatical Scheme by level, and focuses on:

- Participants' confidence in using Welsh;

- Additional hours of provision (participants on the higher level course who teach in Welsh-medium or bilingual schools);

- Use of incidental Welsh.

4.3 The analysis below considers the data collected from participants by course. It is based on the data collected through the survey and during interviews with participants and line managers.

Impacts by course level

Higher level courses

Findings

4.4 Responses were received from participants who had attended the higher level course from Welsh-medium secondary schools, bilingual secondary schools, further education colleges and work based learning providers. Table 4 below shows the response rate by sector for higher level course participants. The questionnaire was completed by two-thirds of the participants who had received the questionnaire. The table shows that the number of responses varies greatly with 32 responses from the primary sector compared to three responses from the work-based learning sector.

Table 4: Higher course participants and questionnaire respondents by sector

Sector	Number of higher course participants	% of participants	Number of higher course respondents	Respondents as a % of all higher course participants (by sector)
Primary	51	50%	32	62.7%
Secondary	20	19.6%	11	55%
Further education	25	27.4%	22	78.6%
Higher education	3	2.9%	0	0%
Work based learning	3	2.9%	3	100%
Higher course total	102	100%*	68	66.7%

Source: Survey of participants

n=102, number of higher course participants for whom e-mail contact information was held.

* Percentages don't total 100% due to rounding

4.5 The response to the higher course was very positive, with participants reporting that they had observed progress and changes in several ways since completing the course. Following an analysis of the comments made during the survey, they can be grouped into a number of categories:

- Confidence in using oral Welsh;

- Confidence in teaching in Welsh;

- Strengthening / raising the profile of the Welsh language in school / college;

- Use of incidental Welsh;

- Use of Welsh with colleagues;

- Ability to create Welsh / bilingual materials.

Impact on provision

4.6 Participants were asked to note the number of hours of Welsh-medium/bilingual teaching they provided before and after attending the higher level course. This data offers one way of measuring the impact of the scheme in some contexts. However, it is important to note that the medium and context of each institution determine to a considerable extent whether there are any opportunities to increase the number of hours of Welsh language provision. The very idea of 'hours' of provision differs between secondary schools compared with primary schools, where often there are no specific blocks of provision. Therefore, quantifying the exact number of hours in the primary sector can be more challenging. With that in mind, below is an outline of the data by sector and by medium.

- For those teachers who had attended the higher level course and who teach in **Welsh-medium schools (primary or secondary***)* there is no expectation that the Sabbatical Scheme should lead to an increase in the number of hours of provision: these teachers already deliver through the medium of Welsh. However, responses to the questionnaire confirm that the scheme has improved language skills and strengthened teaching methods.

  'I have the confidence to write reports and prepare presentations without having to ask anyone else to check my work.' (Teacher, secondary school, higher course)

  'Since completing the course, I'm much more confident when writing in Welsh. I now create far more resources to support the

teaching – for me personally and for other people in the department' (Teacher, secondary school, higher course)

- 18 out of 30 teachers who attended the higher level course and teach in **English-medium secondary schools** reported that there has been an increase in the number of hours of Welsh provision in their schools since they completed the course. In addition to increasing the provision of Welsh as a second language, the evidence suggests that attending the course has led to a wider use of Welsh across a range of subjects in a number of schools, varying from science lessons to physical education.

- All four of the teachers teaching in **bilingual schools** who attended the higher level course reported that there has been an increase in the number of hours of Welsh language provision. One teacher noted that his provision in Welsh had increased from two hours every week to four, as he explains:

  'I now teach one afternoon a week in the Welsh stream, leading physical education and information technology lessons through the medium of Welsh.' (Teacher, secondary school, higher course).

- Responses to the questionnaire were received from 22 participants from the further education sector who had attended the higher level course. Of these, six reported no increase in the number of hours of Welsh-medium or bilingual teaching. Fourteen of the participants reported that the number of hours of Welsh language or bilingual teaching they provided had increased, significantly so in some cases. Once again, it should be emphasised that a variety of factors can influence the opportunities available for participants to present modules or new units in Welsh. Despite this, the table below summarising the data presented by further education participants suggests that the Sabbatical Scheme can have a clear influence on the use of Welsh in colleges.

Table 5: Summary of the data from further education survey respondents who indicated an increase in the number of hours of Welsh / bilingual provision

Participant	Number of hours of Welsh / bilingual provision	
	Before attending course	After attending course
1	2	8
2	1	2
3	0	1
4	3	6
5	10	14
6	0	1
7	0	1
8	16	21
9	5	8
10	0	6
11	2	8
12	0	7
13	6	10
14	4	7
Total	**49**	**100**

Source: survey of participants

4.7 Of course, there are specific stories and situations behind all of these figures. The data collected through the survey does not enable us to fully understand the context in each case, even though the case studies in Annex 3 describe the experiences of some participants in the further education sector. Some of the respondents explain:

> *'I have started to teach "Iaith ar Waith" lessons in the college.'* (Participant, further education, higher course)

> *'New units have been introduced. I also try to include some Welsh in each lesson.'* (Participant, further education, higher course)

4.8 One observation to emerge form the analysis is that caution is needed when interpreting data on hours of provision. We cannot be certain how participants have interpreted 'hours of provision'. The data presented by participants, however, is clearly an indication that the Sabbatical Scheme does influence the use of Welsh in different contexts and sectors.

4.9 It is also significant that those participants who noted that they have not seen any increase in the hours of provision have

emphasised a wide range of positive outcomes, as noted in Section 4.5.

Developing resources

4.10 Forty four out of 65 participants from the higher level course reported that they consider the opportunity to develop resources to be an 'excellent' aspect of the WLSS. It was a *'good'* aspect according to 16 participants and 'fair' according to five.

> *'There was plenty of time to develop support resources back in the classroom. I have developed a useful collection of resources following the course.' (Teacher, secondary school, higher course)*

4.11 Participants reported that they had developed a wide variety of resources across a range of subjects and key stages during or after the course.

> *'I was preparing teaching resources regularly when doing the course and the tutor would check the language too. It was also an opportunity for us as teachers to share ideas and resources whilst in the University on the course.' (Teacher, secondary school, higher course)*

> *'I was responsible for piloting an NVQ Welsh second language course and there were no resources previously. During the course I was able to develop a variety of resources e.g. reading exercises, writing frames, vocabulary booklets which helped support me in the delivery of the pilot course.' (Teacher, secondary school, higher course)*

4.12 The comments suggest that participants feel that enough time was allocated to develop resources on the higher course. No evidence was presented by participants (who took part in the block course, the short course or distance learning) to suggest that there had been a shortage of time to develop resources, something that was raised by a minority of the participants who studied the foundation course (see 4.20).

Foundation level courses

Findings

4.13 Responses were received from 64 Foundation Phase and Key Stage 2 practitioners who had attended the foundation level

courses. These participants teach in English-medium schools. In schools where English is the main medium of communication, the Welsh language skills of pupils in the Foundation Phase are developed by implementing the Welsh Language Development Area of Learning.[13] The programme of study for Welsh as a second language in Key Stage 2 is provided in 'Welsh in the National Curriculum for Wales'.[14]

4.14 Similar to a number of the findings in relation to the higher level course, it was noted that the foundation course has succeeded in improving confidence, developing skills and has led to the further use of incidental Welsh and Welsh in informal situations in schools. Participants' comments referred to the following outcomes and progress:

- Greater use of incidental Welsh;

- Improvement in standards and accuracy of language;

- Use of Welsh across the curriculum;

- Increasing emphasis on starting conversations with pupils in Welsh;

- Increasing profile of Welsh / bilingualism in schools;

- The course has motivated others in the school to take part in Welsh language courses.

The comment below by one participant is characteristic of the response from teachers who took part in the foundation course:

'There has been a huge increase in confidence in using spoken Welsh with children. I am also able to support colleagues and lead lessons and assemblies bilingually. Use of incidental Welsh without thinking.' (Teacher, primary school, foundation course)

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[13] http://learning.wales.gov.uk/resources/welshdev/?skip=1&lang=en
[14] http://wales.gov.uk/topics/educationandskills/schoolshome/curriculuminwales/arevisedcurriculumfor wales/nationalcurriculum/welshnc/?skip=1&lang=en

4.15 Some comments suggested that the Sabbatical Scheme has also raised awareness amongst participants of the need to improve the quality of Welsh as a second language.

'I have now been given joint responsibility for Second Language Welsh in school alongside another member of staff who has previously attended the course and we are currently looking into the changes we can make to improve on the levels throughout school.' (Teacher, primary school, foundation course)

Impact on provision

4.16 Data was collected on hours of provision (pre- and post-course) in the same way as described in the previous section in relation to higher course participants. As expected, a more consistent picture emerged from the responses received from teachers who attended the foundation course, as they were all teachers in English-medium primary schools.

4.17 Of the 64 respondents who had attended the foundation course, 58 presented data on the hours of Welsh language provision provided before and after the course. Of these, 42 noted an increase in the number of hours taught through the medium of Welsh. Among the 16 responses that did not report an increase, comments often referred to other developments that had raised the profile or increased use of the language beyond structured Welsh lessons. The figure below demonstrates the increase seen in the schools after participants had completed the course. Based on the data provided by the 58 foundation course participants, this is equivalent to one additional hour each of Welsh provision after the course.

Figure 5: Increase in the number of hours of Welsh lessons among foundation course participants
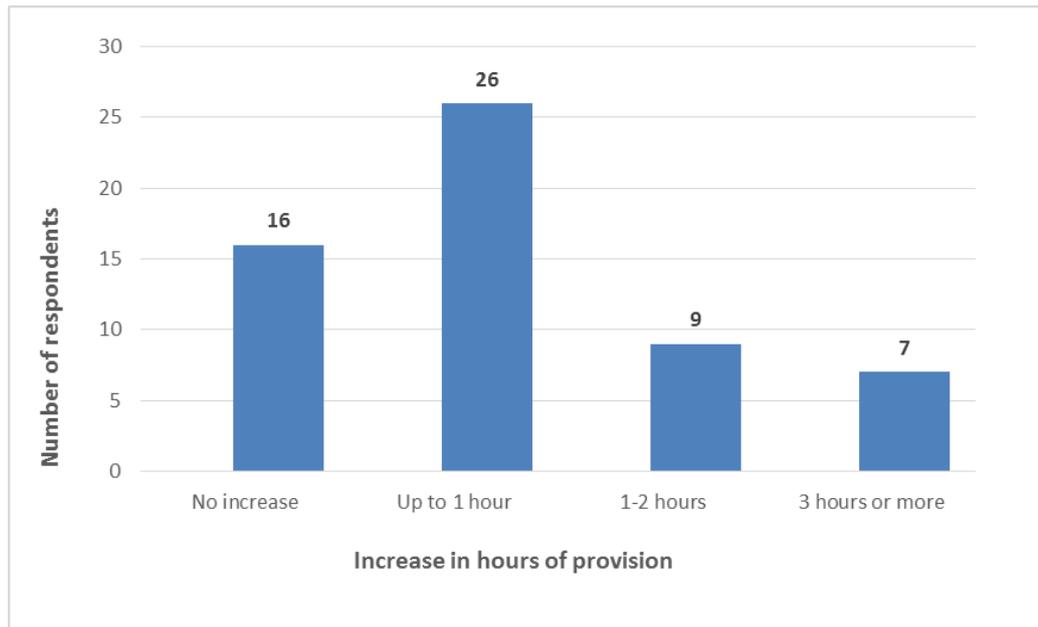
Source: survey of participants
n=58, foundation course participants.

Developing resources

4.18 Those who responded to the questionnaire appreciated the opportunity to develop resources during the course. The majority of respondents who attended the foundation course noted that they had made use of the resources produced. Respondents noted that they had also shared resources with other staff in the school.

'During the course I prepared lessons and supporting resources to teach using a bilingual approach. I have utilised some of the lesson plans and resources with my own class and shared others which would be better suited for use in other year groups.' (*Teacher, primary school, foundation course*)

4.19 In addition to supporting the provision of Welsh as a second language, the course has led to the creation of resources for use across a range of subjects. Some participants also appreciate the fact that they have gained language skills that will enable them to develop additional Welsh and bilingual resources in the future.

'I produced teaching resources for science, maths and Welsh lessons suitable for classes in Key Stage 2. I also have the resources produced by the other members of the group. I have used Powerpoints and activities in my own classes and have

attempted to teach bilingual lessons. The resources however are of secondary importance as the primary aim of the course was to develop and acquire Welsh language skills. I would have been happy to prepare resources in my own time and am now able to prepare resources in Welsh as a result of the skills acquired on the course.' (Teacher, primary school, foundation course)

4.20 A small minority of the respondents (four out of the 54 who provided written comments) expressed negative views in relation to developing resources, including a lack of time during the course to prepare resources.

'Very little time to prepare resources on the course. Very few were relevant to the pupils I teach. The language was also difficult.' (*Teacher, primary school, foundation course*)

Entry level courses

Findings

4.21 Twenty six classroom assistants who had taken part in the entry level course responded to the questionnaire. The evidence suggests that three principal outcomes were seen by participants on these courses. These are consistent to a great extent with the points reported by higher and foundation level participants.

- Greater use of incidental Welsh;

- Confidence when using the language;

- Improvement in language standards and accuracy.

4.22 Classroom assistants noted that their use of day-to-day Welsh had increased significantly. This includes the use of Welsh with pupils and colleagues. It also showed that the course had increased confidence among participants:

'I'm able to use some form of Welsh during every lesson. I have greatly increased confidence and able to deliver Welsh language lessons to the age group I teach and to use a basic level of Welsh with Welsh speakers.'
(Classroom assistant)

Impact on provision

4.23 Following from the above points, entry level participants were asked to note whether there had been an increase in the number of hours of Welsh-medium teaching in their schools since completing the course. This question was optional, but all 26 respondents in this category answered the question.

- Fifteen of the 26 noted that there had been an increase in the number of Welsh-medium teaching in the school;

- Eleven noted that no extra teaching hours were being provided. Of these, eight reported that incidental Welsh had increased.

4.24 Any data of this kind needs to be treated with caution, as it is possible that assistants have interpreted the question in different ways. The role of assistants varies, but tends to encompass a variety of tasks relating to supporting pupils and teachers rather than 'teaching'. However, there is evidence of some increase in provision (based on the qualitative comments) with a number of assistants explaining that they provide short Welsh lessons (e.g. a 10 minute session every day) since attending the course.

4.25 According to participants, the course has improved their language skills and accuracy. A number of respondents reported that their vocabulary had increased and that they had a better understanding of grammar since returning to the school.

'I have gained a lot more knowledge of the Welsh language and use it throughout my working day from greetings, commands and whenever I can incorporate it into our focused activities.'

'[I have a] much improved use and understanding of grammar.'
(Classroom assistants)

It is also recognised that there are benefits to pupils as assistants improve the quality of their Welsh. A number of those on the entry level course noted that pupils benefit by hearing Welsh being used more correctly.

4.26 Evidence also suggests that the Sabbatical Scheme raised the profile and presence of Welsh / bilingualism across schools. One

assistant noted that the course had led to new Welsh events and a partnership with the Urdd.

'I have started a Welsh Club up in the school; I have also built a relationship with Urdd this has meant that all of year 5 are going to go to Llangrannog this year. I am also taking out groups in Key stage 2 and working on their oral skills.' (Classroom assistant)

Developing resources

4.27 Eight of the 26 entry course participants who completed the questionnaire noted that they consider the opportunity to develop resources to be an 'excellent' aspect of the WLSS. It was a 'good' aspect according to nine and 'fair' according to another four. Five respondents reported that the opportunities to develop resources had been 'poor'. There were very few negative comments in relation to this aspect of the course and one participant noted:

'I feel there should have been more direct reference to the curriculum, and direct links to the development of a specific scheme of work.' (Teacher, primary school, entry course)

Views on continuous support: higher, foundation and entry courses

4.28 Participants were asked *'does your institution continue to support your on-going development of Welsh language / bilingual teaching?'* The data in Table 6 (below) reveals some variations in the responses according to the level of the course. Across the WLSS, the majority of participants feel that support is available to some degree from their institutions. Among the participants who attended the higher course, over half (34 of the 65 who answered this question) reported that their institutions continue to offer strong support. Less than half of those who attended the foundation and entry level courses feel that 'strong' continuous support is available to them from their institutions. It is important to consider this data in the context of the discussion on support after attending the course, in Chapter 5 of this report.

Table 6: Overview of responses to the question 'Does your institution continue to support your on-going development of Welsh language / bilingual teaching?'

	Higher	**Foundation**	**Entry**	**Total**
Yes strongly	34	20	10	64
Yes, to an extent	28	36	11	75
No	3	1	4	8
Don't know	0	0	1	1
Total	**65**	**57**	**26**	**148**

Source: survey of participants

n=148, course participants, all levels

General comments on impacts

4.29 The evidence presented by participants suggests that the Sabbatical Scheme makes a difference to the individuals attending the course and makes a positive impression in terms of their desire to use the language. In fact, the clearest messages to emerge from the survey data is that the courses boost confidence and increase the use of the Welsh language.

'A more accurate use of Welsh, hopefully! I have the confidence to write reports and prepare presentations without feeling that someone else needs to check my work.' (Participant, Secondary School, higher course)

'I believe that the scheme is highly beneficial as the teachers who have followed the scheme have benefitted hugely from the experience and their written use of the language in particular has improved. Without a doubt they are much more confident when using the language.' (Secondary school head teacher, participant had attended the higher course)

4.30 In many cases, increased confidence among participants stems from the feeling that they use more correct Welsh, with several noting that they now feel more confident with both written and spoken Welsh, particularly those who attended the higher course. As one explained, *'I tend to use the same amount, but I feel more confident in terms of its accuracy'.*

4.31 Others also noted that taking part in the WLSS had increased their confidence, which had in turn helped to raise the status of

the language generally in the school. Examples were noted where the training had led to persuading others to improve their Welsh language skills; extending the use of the language in internal communication, and leading more Welsh-medium extra-curricular activities:

'I encouraged my NTA [non-teaching assistant] to develop her own skills by attending professional development training with the [.....] Advisory Service and with an evening class. My class recently performed items confidently bilingually to parents during our St David's Day concert and a parent commented that the children's delivery was 'like being in a Welsh school class'. (Primary school teacher, foundation level)

'Welsh has featured heavily in our new school development plan. The profile of Welsh is very strong and visible from the entrance of the school. More staff and children use every day Welsh – the standards have risen.' (Primary school teacher, foundation level)

4.32 Evidence from participants who teach in English-medium primary schools in particular reveals more widespread use of incidental Welsh. This, in turn, makes a difference to the profile of the language, and to an awareness of bilingualism amongst staff and pupils, according to comments made by participants. Comments made by line managers support the positive feedback from participants.

'We endeavour to create a Welsh ethos, however, in order to develop this deeper, we feel that our member of staff has gained enormous confidence in her delivery from the sabbatical and is very excited at the new ideas etc. that she has developed. This enthusiasm is something we can all gain from. We aim to utilise this experience by in house training for support staff after half term and to increase the profile of Welsh across the school in all areas of the curriculum'. (Primary school head teacher, participant had attended foundation course).

4.33 It seems that the Sabbatical Scheme has supported schools in their attempts to promote the use of incidental Welsh by including the language in a range of situations within the school, including in assembly, during registration and in the way staff greet pupils. A large number of participants referred to this increase in incidental use of the language, including those who had not reported an increase in the hours of Welsh taught. The comment

from one teacher who attended the foundation course noting that she was *'making wider use of bilingual guidance and incidental Welsh'* was characteristic of the observations made.

4.34 This evidence suggests that participants consider this as an important outcome of the course, and an increase in the use of incidental Welsh was noted in the qualitative comments of about half of those who responded to the questionnaire.

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Case Study #I (foundation)

'I' teaches in an English-medium primary school where a number of the staff speak Welsh. She shares her time between teaching year 4 and teaching children with special educational needs.

Since the course, she is more confident in using the language in everyday situations and she understands a great deal more. She uses the language in the classroom now, not only in Welsh lessons, but in teaching other subjects through the medium of Welsh. For example, she taught a mathematics lesson on calendars in Welsh, and in Geography lessons, she discusses the names of places and countries in Welsh. There is now more Welsh on the school walls and 'I' has changed from using bilingual commands in the playground to using Welsh only commands. She thinks that her use of Welsh has more than doubled, and says that the 'pupils' attainment level has certainly increased'.

In the past, Welsh has not been seen in a very positive light in the school, so there has been a big step change. These days, Welsh is a lot more fun for the children. The attitude of both children and staff towards the Welsh language has made the learning experience happier and more positive. She has had support from the *athrawes fro* and a course tutor came to the school when she asked for help. The head teacher is very supportive and another teacher is about to start on the course. It was a very positive experience and she would like to attend a further course.

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4.35 Others – a small minority of all respondents – noted that the course had motivated them to attend other Welsh language courses (including Welsh for Adults classes) as they felt that there was still a need to improve their language skills before they can be fully confident when teaching in Welsh.

4.36 Participants' head teachers and line managers noted that they believed that the WLSS had contributed toward raising the standard of Welsh language skills amongst pupils as well as staff. It was reported that a combination of confidence when using the language and a keener awareness of effective Welsh teaching methods has led to an improvement in the quality of the provision

of Welsh second language in particular. As one head teacher noted:

'Releasing staff to attend the sabbatical has had a profound impact on raised standards in W2L [Welsh second language] throughout the school. Teachers have come back from the course enthused and inspired to use as much Welsh as possible within their classrooms and around the school..... I have been able to plan for W2L to be an integral part of each teacher's timetable. A dedicated time each day is given for Welsh development and this again has proved to be successful. Levels of children achieving Level 4+ at the end of KS2 has risen significantly from 23% to 61%. (Primary school head teacher, member of staff had attended the foundation course)

4.37 Although there is isolated evidence that suggests that the WLSS has resulted in higher standards, there isn't a strong basis of information that allows us to understand the impacts or general contribution of the WLSS to pupils' results or progress in Welsh. The evidence we have is 'soft' and often anecdotal. Whilst the evidence is fairly valuable, it suggests that there are gaps in the monitoring arrangements if we are to understand what difference the WLSS makes to the development of Welsh language provision and the Strategy's wider vision. Indeed, there are significant challenges associated with seeking to understand the Sabbatical Scheme's contribution to the National Strategy in the light of the numerous other factors that influence participants' ability to use their Welsh language skills in their schools and colleges.

4.38 Generally, there is a positive but, arguably, an incomplete picture of the Sabbatical Scheme's impact on participants, their use of Welsh and the profile of the language in their schools.

5 Effectiveness of delivery of the WLSS

5.1 As part of this review, the research team wished to understand the level of support for the WLSS from strategic partners, notably local authorities and the regional consortia, and how this links to the role of course providers. This section outlines the findings on the effectiveness of the implementation process, based on the comments of line managers in schools and colleges, course providers in the six training centres and four Welsh-medium education coordinators, one from each consortium.

The strategic planning context: Welsh in Education Strategic Plans and Welsh in Education Grant

5.2 Local authorities are asked to note in their Strategic Plans how they will realise the aims of the (national) Welsh-medium Education Strategy on a local level, whilst the Welsh in Education Grant (WEG) provides financial support for the four consortia in order to conduct activities that contribute to the operation of the Strategic Plans across the region. These activities include the support and training provided by *athrawon bro*. Ensuring a close link between the Strategic Plans and the work financed through the Grant, in addition to effective collaboration between local authorities and the regional consortia, is therefore essential to the Sabbatical Scheme's success.

Level of demand and awareness of the WLSS

5.3 Course providers and consortia officers reported that there was a demand for the courses at all levels, but that it was strongest at foundation and entry levels. In order to maintain interest in the WLSS, a number of the *athrawon bro* and participants felt that further work was needed to persuade head teachers of the benefits and impacts of the course. The *athrawon bro* teams noted that arranging supply teachers is a problem in some schools.

5.4 Participants and staff from the various counties suggested that there was a demand for a short course or workshop for head teachers to raise awareness of the WLSS.

5.5 Some *athrawon bro* believed that the strong demand for places on entry level courses was connected to the fact that it is easier for head teachers to release a teaching assistant compared to a teacher. In the opinion of several *athrawon bro* who were interviewed, the shorter (entry level) course appealed more to a number of head teachers and participants. Despite this, it was noted that engaging with teaching assistants can be quite difficult in some cases as this group has less experience of attending continuous professional development courses and they can appear to lack confidence at times. Course providers and local authority officers reported that awareness of the WLSS is low amongst head teachers and senior managers. A few providers noted that it can be challenging to make contact with head teachers: it was emphasised that various methods should be used when advertising or marketing the Sabbatical Scheme, including publicity at national level and targeting schools at county level, in order to ensure that messages are communicated clearly and to the appropriate individuals.

Administrative processes

5.6 Comments by senior managers and head teachers suggest that they welcome the fact that the WLSS is not too complex or onerous in terms of administrative arrangements. It was noted that the paperwork is relatively simple and repayments for supply staff and other costs are paid promptly.

Recruitment

5.7 In general, the process of recruiting participants to the WLSS has been successful. However, a higher level course due to be held in Bangor was cancelled at the beginning of 2013, and in some areas, recruiting enough participants to attend higher level courses has been challenging. Interest remains very high for the

entry level and foundation courses: one coordinator noted *'we could fill entry and foundation courses easily'*.

5.8 There are three main elements to the recruitment process:

- central information on the Welsh Government's website and newsletters;

- marketing materials published by the providers (websites with case studies and video clips; leaflets); and

- contact between the consortia's Welsh language advisers and the schools.

5.9 It became clear through interviews with participants, providers and consortium officers that the recruitment process, particularly the role of the local authority in supporting recruitment, varies according to area. Although the situation in each individual authority was not examined in detail, interviews with a sample of authorities provide some evidence to suggest that strategic planning on a county level to target schools and participants is limited. This view was supported by providers.

5.10 Each local authority has provided a commitment on paper to support the WLSS and play a part in identifying and monitoring schools and participants in their annual Welsh in Education Strategic Plans. Despite this, the objectives seen in the Strategic Plans are often indefinite, with references to *'continuing to target schools'* or *'continuing to mentor'* without setting any targets for the number of participants or the number of hours of support for the WLSS; as a result there is, in general, a lack of coherence between the Strategic Plans, activities supported through the WEG and local authorities' role in relation to the Sabbatical Scheme.

5.11 It appears that the recruitment process works effectively when relevant local authority officers have strong contacts with, and a good knowledge of their schools' priorities and can, as a result, make detailed plans with an understanding of the schools'

reasons and motivation for sending a participant on the course. However, it was noted that authorities are free to set criteria for recruiting participants onto the courses: this is welcomed, on the whole, but it is felt that further guidance regarding who would benefit most from the course would be useful.

5.12 One of the providers supported this point by explaining that they also ask themselves a key question when dealing with requests:

'Should we prioritise those practitioners from schools where there is a commitment, or prioritise schools where there hasn't been any interest in the scheme so far?' (Sabbatical Scheme Training Centre Representative)

5.13 Some *athrawon bro* noted that that they would appreciate further guidance regarding recruitment methods and opportunities to learn about effective methods from other consortia / local authorities.

5.14 Course providers noted that there were differences between the local authorities they dealt with and that some *athrawon bro* played a prominent role in the recruitment process whilst other local authorities did not put forward any names. It was clear from the interviews that a few authorities operate at arm's length and that their contributions are limited to sending marketing materials to schools. It should be noted that the period under review in this study (January 2011-December 2012) had been a time of significant change in many areas. Moving to work as consortia has added to the workload and responsibilities of a number of officers and this has led to delays when determining functions.

5.15 The task of ensuring that the courses are fully subscribed has meant many hours of administrative work for local authorities and providers, including phoning around schools as and when needed. It was noted that communicating with schools was generally difficult as there was so much competition for their attention and time. Awareness and understanding of the WLSS is low in some schools even though they receive constant

information from many sources, according to local authority officers.

5.16 It was reported that the link between local authorities and providers was inconsistent. Not every local authority has an officer responsible for the WLSS who can contact providers. On the other hand, there are examples where there have been good links between authorities and course providers for some time, and there have been attempts to build on these links. In some areas, *athrawon bro* attend some elements of the course or even form part of the team providing the course. These examples of close collaboration between *athrawon bro* and providers could present ideas that could be built upon in future as a way of developing relationships with participants.

5.17 *Athrawon bro* noted that recruitment had been more inconsistent on the higher level courses, particularly in local authorities in north Wales. Some feel that head teachers are reluctant to release teachers who teach GCSEs and A-Levels and that they are concerned about the effect a period away from the school could have on pupils' attainment and progress.

5.18 There has been an increase in the number of participants from the further education sector who attend courses, mainly due to the introduction of the short courses in April 2011. Some short courses during the evaluation period were filled solely with further education participants. Providers report that there are clear advantages to being able to contact Bilingual Champions in order to identify suitable individuals. It was also noted that some further education institutions had expressed concerns about releasing staff members to attend the course as it can be difficult to find suitable supply staff.

5.19 Several interviewees reported that they would like to see national recruitment and marketing campaigns to raise awareness, to explain the aims and objectives of the Sabbatical Scheme and improve head teachers' perceptions about the courses.

The courses

5.20 The opinion of local authority staff was consistent with the comments of participants and, without exception, they reported that they believe that the courses offer effective and suitable training. It was noted that there had been a few changes in recent years (for example, adding a week to the length of the entry course and offering a short course option on the higher level), that had further strengthened the provision.

5.21 The concerns raised were minor ones, and the only negative feedback that was consistent between the providers and a few of the participants related to the heavy assessment burden. Four teachers who had attended the foundation course noted that they felt there had been too much emphasis on assessment during their time on the course. (This point was not raised by participants who had attended the entry level or higher courses.) According to some, the content of the courses is so heavy that there is not enough time to reinforce and evaluate what was learned.

Post-course support

5.22 Post-course support takes a number of different forms:

a) Post-course support from the local authority / regional consortia;

b) Support from WLSS providers;

c) Support from the school / college.

Further information on the different kinds of post-course support is available below.

Post-course support from the local authority/regional consortia

5.23 Following most courses, the local authority or regional consortium is responsible for offering post-course support (in the case of block higher courses, 3 days of post-course support is delivered by the WLSS providers). They decide on the nature and detail of

the support, which varies from one area to another. The support includes:

- Specific visits from *athrawon bro*, tracking schools and monitoring performance of participants during visits;

- Monitoring during visits and assessments of *athrawon bro* in the schools;

- Additional materials and resources available on the website or *athrawon bro* portal;

- Some local authorities pay for a follow-up one-day course (and supply) from the providers;

- Informal post-course support – facilitating sessions / meetings to bring participants together after the course to chat in Welsh and share experiences.

5.24   The Welsh Government has published a progression pack providing guidelines on the stages of post-course support. Some local authority representatives explained that they did not have the capacity to implement these guidelines. Others referred to the fact that the workload of *athrawon bro* makes it hard to assign time to recruit and provide post-course support.

'We had a post-course pack, and agreed with everything in it, but because of the merger [as a consortium], we haven't had the time to implement it'. (Athrawes fro)

5.25   All of the local authority staff questioned recognised that post-course support was the Sabbatical Scheme's weakest element, and even in those areas where the post-course support was relatively intensive (e.g. regular visits to participants, identifying further courses, tracking results) there remained a feeling that they were not taking full advantage of all the possible post-course support methods that would be suitable. One *athrawes fro*, for example, said she would like to see a sum of money available to trial informal methods of offering post-course support such as social programmes/activities or a system to partner Welsh-

medium schools and non-Welsh-medium schools. It was also recognised that the post-course support offered to participants on the entry level course was limited: the *athrawon bro* do not tend to know or work with them, and it is difficult to track them as assistants move from one class to another.

Support from WLSS providers

5.26 Some providers and local authorities have trialled short progression courses or social evenings for participants. Although participants are initially motivated, there is a tendency for only a small number to take advantage of the offer once teachers re-engage with their responsibilities in school. A number of the interviewees would like to see case studies or scenarios of post-course support methods in other areas so that they can learn from those models.

Support from the school / college

5.27 Participants' opinions were sought on the support they received within their institution (school or college) and from others. The majority responded by stating that they had received support within their institution for their continuous development in relation to Welsh or bilingual teaching (43% strongly and 50% to an extent from among the 154 respondents). A small minority (5% or eight participants) noted that they had not received any support in their institution. One of these was from a further education college and the rest from primary schools, and from across all levels of the course.

5.28 Participants were also asked if they had faced any barriers when using their Welsh language skills after completing the course. Just under a quarter (34 of the 117 that answered) reported that they had. There were no clear patterns in the different sectors, and the foundation level participants were slightly more likely to have faced barriers. A lack of confidence in their skills was the main barrier for half the group (17 out of 34), but a lack of opportunities within their establishments (14 respondents) and a

lack of time to prepare sessions (15 respondents) were also noted as problems. The majority of those who had faced barriers noted that they needed more training (32 out of the 34 who responded).

5.29 The group of higher level course participants who were questioned were keen to continue to develop their language skills. Some suggested holding weekly lessons as a group to *'keep things fresh'*. Another suggestion was to arrange whole-term secondments to Welsh-medium schools (or workplaces) for those participants who were in English-medium schools *'in order to have the necessary 'immersion' experience'*. It was felt that further opportunities needed to be made available for those in non-Welsh-speaking workplaces to practise and use the language.

5.30 A number of participants expressed an interest in additional language training. Some wanted to see further language courses following the Sabbatical course, and referred to the need for a 'continuum' of courses to ensure progress.

5.31 Some providers suggested that a website or digital portal to share good practice, keep in contact or ask questions to other practitioners would be beneficial to some participants. Others questioned how much time the participants have to continue to improve their Welsh language skills once they have returned to school.

5.32 The evidence suggests that further clarity and consistency is needed in terms of post-course support. The process of returning to the school or college is seen as a separate or follow-up element of the WLSS in the eyes of many of the individuals who contributed to this report. Perhaps there is, rather, a need to consider the post-course period as a further element of the same process and that appropriate support for participants should be agreed and planned from the outset.

6 Conclusions and recommendations

6.1 In general, the review has found a positive view of the Sabbatical Scheme among participants and stakeholders: the vast majority of participants speak highly of the courses and report positively on the progress made in relation to their language skills and their use of Welsh after returning to their school or college. Participants attribute the success of the WLSS to the quality, depth and intensity of the courses provided. With regard to the implementation of the WLSS, once again the general opinion was positive, although some suggestions were made about ways in which the courses could be changed or improved.

6.2 The main message from all those who contributed to the review (participants, local authorities and senior managers) was that the WLSS is a valuable scheme and that there is a continuing need for such courses. It appears that this stems from a perception among senior managers, participants and local authority officers that a lack of Welsh language skills continues to be an issue requiring attention if schools and colleges are to be able to increase Welsh-medium and bilingual provision.

6.3 The review has found that participants and line managers have seen direct and indirect outcomes as a result of the WLSS, despite the fact that some only attended the course very recently. The review has also found evidence of changes in practice, such as greater use of incidental Welsh; increased confidence in using written and spoken Welsh; and a more systematic approach to maximising opportunities to use Welsh in school.

6.4 It is important to differentiate between the hard and soft outcomes presented. Those described in this report are often soft, and to some extent, subjective outcomes – for example, increased confidence and self-reported improvements in skills. These observations were supported by comments made by some *athrawon bro*, who noted that they had witnessed improved Welsh language skills during their visits to schools. However, it

should be emphasised that there has been no analysis of pupils'
and schools' results before and after practitioners' participation
on the courses, as there was no intention to compare pre- and
post-course attainment as a measure of the impact of the WLSS.

Success factors and difficulties

6.5   The evidence collected suggests that the WLSS has met the
needs of participants and their schools. The review considers that
the following factors have played a key role in the success and
effectiveness of the WLSS:

- It is based on a clear principle – that intensive training and
  support should be offered to participants to enable them to
  improve their Welsh language skills (in order to teach through
  the medium of Welsh or to teach Welsh as a second language),
  gain confidence in using the language and support teaching
  methodologies. This, in turn, has generated interest among a
  wide range of participants and schools in different parts of
  Wales and in different educational settings.

- All stakeholders, whether participants, line managers or local
  authority staff, considered that the training is of a high standard.

- The WLSS has been designed in a way that makes it as easy as
  possible for organisations to participate, with straightforward
  administrative procedures, and the costs of supply teachers and
  any other associated costs are reimbursed.

- The courses tend to attract participants who are interested in
  improving their Welsh, and from institutions where there is a
  commitment among the senior management team.

6.6   Although all respondents (participants, line managers, local
authorities/consortia) very much welcomed the support, a minority
of stakeholders expressed concerns about some aspects of the
planning process. Some of those concerns are outlined below.

- The experiences of *athrawon bro* and local authority and regional consortia officers reveal that there is still some lack of awareness of the WLSS, partly because there is so much competition for the attention of school head teachers; ensuring that messages get through to them can be difficult.

- There was evidence of a lack of planning at local authority / consortium level in some areas, and some authorities expressed concern that they did not have the capacity to plan recruitment and post-course support sufficiently.

- Stakeholders agreed that the post-course support was the weakest element of the WLSS. Although the recent Welsh Government guidelines were helpful, there remained a lack of clarity about post-course follow-up and monitoring work.

- Participants wish to see more training, and many reported that they would like to attend a further course. In some cases participants had anticipated that the process of learning the language/improving their language skills would be a continuum, beginning with the Sabbatical course and extending to further opportunities after the course: in reality the WLSS does not form part of any such continuous pathway. Perhaps these expectations or aspirations reveal a misunderstanding about the aims of the WLSS among a small minority of participants. The Sabbatical Scheme aims to improve Welsh skills in order to increase and support the quality of Welsh-medium and bilingual provision. Although there is evidence that attending the Sabbatical Course has motivated some practitioners to attend Welsh for Adults classes, the WLSS is not a language course that should be compared with these courses.

Methods of measuring impact

6.7 There is room to improve mechanisms for monitoring and measuring the impact of the WLSS. In past evaluations of the Sabbatical Scheme there has been a tendency to depend heavily

on participants' feedback and reflections on their experiences, their satisfaction levels and their use of the Welsh language after the course. These are the methods adopted in this review also, and they undoubtedly offer valuable evidence on a number of levels. The emphasis on qualitative evidence enables us to identify a number of the successes of the WLSS (from the perspective of individual participants and also their schools or colleges) as well as the obstacles faced. However, a number of important considerations present themselves:

- In which context should the Scheme's impact be measured in the future? Should the impact continue to be considered at the level of individual participants / organisations?

- Should there be a more direct emphasis on the impact of the Sabbatical Scheme in the context of local Welsh in Education Strategic Plans?

- Is there a way of measuring the contribution of the WLSS, within the context of School Improvement Plans, towards raising levels of attainment among learners?

6.8 There are processes in place to measure the outcomes of the WLSS at participant / organisation level. It is possible to refer back to pre-course application forms and reports to understand the changes observed following the course in comparison with the original objectives identified. Nevertheless, this method provides a series of individual examples of the scheme's successes / challenges, rather than a model that allows us to consider and discuss the impacts of the WLSS in a wider strategic context. It is believed that further work is needed in order to fully develop this framework.

6.9 Welsh Government guidelines ask local authorities to provide details about their *'plan to support a strategic and systematic take-up of the Welsh Government's Welsh-language Sabbatical Scheme courses (all levels) by teachers within your local*

authority'. 'Strategic' and 'systematic' are clearly the key words in this regard.

6.10 Local authorities are therefore required to consider how the Sabbatical Scheme supports their strategic priorities for developing Welsh-medium education. Authorities should determine criteria and a rationale for selecting practitioners in specific institutions. It is not clear at present to what extent most authorities target schools or participants in a way that is strategic and consistent with the objectives of their local Welsh in Education Strategic Plans. Authorities should be encouraged to consider (and record) what they would wish the Sabbatical Scheme to achieve (for the individual participant and also for the institution), in order to contribute to the aim of improving standards and increasing the use of the Welsh language. If local authorities – as well as further education colleges and work-based learning providers – are not already considering these questions when working with course providers, they need to do so, and the process of monitoring the Strategic Plans should ensure that this happens, insofar as that is possible.

6.11 Consideration must also be given to whether a more systematic method can be established to determine whether the WLSS has delivered what it was designed to achieve, and identify indicators of success at a local level (e.g. Welsh-medium provision in new subjects / the number of hours of Welsh as a second language / the number of schools that have taken part in the WLSS).

6.12 There is a need to strengthen the Sabbatical Scheme's planning and recruitment processes, and to insist that regional consortia and local authorities clarify how course participants' involvement in the Scheme is expected to contribute towards local strategic priorities.

6.13 ***Purposeful and strategic targeting: the Welsh Government should encourage local authorities to identify performance indicators for the WLSS, which support the priorities of their Welsh in Education Strategic Plans.*** One important aspect that came to light during the review were the varying levels of strategic targeting by local authorities. The Welsh Government should ensure that local authorities use the Sabbatical Scheme 'strategically and systematically' as a means of supporting and realising the priorities included in their Welsh in Education Strategic Plans. This includes establishing a framework to monitor and measure impact, which emphasises the role of the authority in offering strategic leadership in planning and targeting participation as well as the influence of the WLSS on learners' levels of attainment.

6.14 ***There is a need to improve the level of communication between local authorities / regional consortia and with course providers.*** There were examples of good practice in terms of close collaboration across consortia and between local authorities and providers. However, this appeared inconsistent, and some authorities reported that contact with providers was infrequent and that they lacked information about practice in other areas. It was suggested that case studies focusing on recruitment and post-course support should be shared, as well as the contact details of all WLSS stakeholders. The intention of ensuring that regional consortia work with providers in future to identify participants for the Sabbatical Courses and provide post-course support is an important opportunity to strengthen the WLSS.

6.15 ***Further steps should be taken to raise awareness among head teachers of the opportunities and advantages offered by the Sabbatical Scheme.*** Until now, there has been a demand for the courses but it was acknowledged that a number of those who would be eligible are not aware of the WLSS. There were many factors accounting for this, but mainly it was felt that capturing the

attention of head teachers was a significant obstacle. There was a feeling that communication channels should be strengthened through the creation and promotion of marketing materials using a number of different media (e-mail, paper, newsletters etc.). One suggestion was that a short course for head teachers on the subject of bilingualism in schools could be considered. It is possible that such a course could, in due course, generate further demand for places on courses from a wider variety of schools. However, it should also be ensured that any such developments are consistent with attempts to ensure that participants are targeted in a purposeful way which supports local Welsh in Education Strategic Plans.

6.16 ***Strengthening and focussing the post-course support.***
Concern and / or confusion about post-course support was a common theme throughout the field work. It was reported that post-course support was often dependent upon the commitment of individual *athrawon bro* but that a lack of money and capacity in several areas hindered the ability to offer a full post-course support package. Each local authority should therefore ensure that participants receive appropriate and effective support as a priority.

The significance of the conclusions in the context of the evaluation of the Welsh-medium Education Strategy

6.17 The sections below consider the wider significance of the evidence on the impact of the Sabbatical Scheme in the context of the evaluation of the Welsh-medium Education Strategy. It addresses the questions identified in Section 2.3 of this report, which links this review to the Evaluation Framework of the wider research programme.

Has the project contributed to the aim of developing Welsh language skills among participants?

6.18 As noted in Chapter 4 of this report, the Sabbatical Scheme's objectives clearly contribute to the strategic aims of the Welsh-medium Education Strategy. Specifically, there is a direct link between the WLSS and Strategic Aim 4 which notes that ensuring *'a Welsh-medium education workforce that provides sufficient numbers of practitioners for all phases of education and training... is fundamental to the success of this Strategy'*. The aim of the WLSS is to develop Welsh language skills and increase the confidence of participants so that they can teach though the medium of Welsh or bilingually.

6.19 The WLSS has been tailored in order to offer opportunities to participants in every sector. By adapting the WLSS and making it relevant to practitioners from the Foundation Phase to further education, there is a recognition of the need to respond to the requirements of the workforce across the different stages of education and training. Other elements of the evaluation will offer an opportunity to look into any barriers that schools, colleges and local authorities face in recruiting practitioners with the necessary Welsh language skills at different phases of statutory and post-compulsory education.

6.20 As noted in Section 6.6 above, there was a feeling among a number of Sabbatical Scheme participants that they would wish to receive more training or further language courses. There is a need to consider whether there is evidence of a demand for continuous language training among the Welsh-medium education workforce more widely (as well as the extent to which the Sabbatical Scheme can meet any further needs) or whether there are calls for different models of training to support Welsh language skills. These issues will be examined in greater detail within other elements of the research programme.

6.21 The evidence shows that the WLSS has enabled schools and colleges to improve the process of planning Welsh-medium provision, identifying opportunities to introduce new provision or to extend the use of incidental Welsh. However, the review concludes that there is scope to strengthen the link between the Sabbatical Scheme, the Welsh in Education Grant and the Welsh in Education Strategic Plans. Whilst a number of local authorities have measured practitioners' Welsh language skills over the years, each region was asked to conduct a consistent audit of the current workforce's Welsh language skills as part of the Welsh in Education Grant in the summer of 2013.[15] It is expected that this information will be used to identify those practitioners eligible to attend WLSS courses, and to provide a means of designing other training on a local and regional level. Other elements of the research programme will consider how local authorities plan workforce development and continuous professional development activity to support their Strategic Plans.

Does the WLSS link with/complement other programmes that are associated with the Strategy?

6.22 There was evidence of links between the Sabbatical Scheme and the work of Bilingual Champions in the further education sector. Bilingual Champions have encouraged individual tutors to attend the Sabbatical Courses, in some cases reflecting colleges' plans to develop provision in priority subject areas.

6.23 There were also examples of teams of *athrawon bro* collaborating with the Sabbatical Scheme providers in order to support the process of recruiting practitioners to the courses. *Athrawon bro* have also attended some elements of the courses. This

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[15] Welsh Government (2012).Welsh in Education Grant 2013-14 - Guidance
http://wales.gov.uk/docs/dcells/publications/130110welshedgranten.pdf

demonstrates that some local authorities and regional consortia are keen to use the WLSS to complement local Strategic Plans and proposals to raise standards through the Welsh in Education Grant. The research programme to evaluate the Welsh-medium Education Strategy will consider to what extent local authorities and regional consortia identify opportunities to use programmes that are associated with the Strategy to support the priorities noted in their Welsh in Education Strategic Plans and their applications for the Welsh in Education Grant.

Would the developments seen in schools and colleges as a result of the Sabbatical Scheme have happened in the absence of the WLSS?

6.24 The Sabbatical Scheme offers valuable opportunities for participants to develop skills, increase their confidence and receive specialist advice on Welsh-medium and bilingual teaching methodologies. The evidence shows that the WLSS has made a difference to participants in a range of ways, including more extensive use of incidental Welsh and Welsh across the curriculum. It was reported that the profile of the Welsh language had also increased in schools and colleges.

6.25 This raises questions about the difficulties associated with attributing changes or developments entirely to one factor or intervention – in this instance the Sabbatical Scheme. It could be concluded that the WLSS has had a positive effect on Welsh language skills and the use of Welsh. However, it is important to note that a combination of circumstances and factors also influence attitudes towards the Welsh language and institutions' Welsh language ethos. The existence of the national Welsh-medium Education Strategy, local Strategic Plans and curricular developments (e.g. The Foundation Phase, Welsh Baccalaureate) are some examples of factors that can influence Welsh-medium provision, standards and developments relating to the workforce.

6.26 In undertaking the research programme to evaluate the Welsh-medium Education Strategy, the complexity of factors involved and the interrelationship between them need to be recognised (e.g. new frameworks introduced to the curriculum, wider education policy developments, level of demand for Welsh-medium education locally, internal school policies and management, local linguistic context). To what extent do these different factors support or influence each other? Is there evidence that a combination of factors contribute to realising the aims and objectives of the Strategy? How does this vary according to the local context? These questions introduce broader themes to which we shall return as we examine other elements of the research programme.

Annex 1: Statistics relating to the participant survey

Note on the sample

A total of 324 participants attended the WLSS courses on all levels during the period in question (January 2011-December 2012). It was originally intended to invite every participant to complete an online questionnaire. However, there were no current e-mail addresses for 56 of the participants on the list sent by Welsh Government. On the 19th and 20th of February 2013, an e-mail was sent to 268 participants. We were unable to reach 43 of the 268 through their e-mail addresses, so the e-mail was re-sent to the schools' general email addresses or via the schools' website in 41 cases. This means that two participants were therefore lost from the sample.

Up to 266 participants could have received the e-mail, inviting them to take part. By the 4th March, 70 participants had answered, so a reminder was sent to the rest. 162 participants began answering the questionnaire however four of them did not go beyond the first page (background information). 158 answered the entire questionnaire or almost every question. The response rate is therefore 59.4% (or 158/266).

Level of the course

Table 1a: Participants on the Sabbatical courses between January 2011 – December 2012 and respondents to the survey

Level	Number of participants	Percentage of participants	Percentage of respondents	Number
Higher level	115	35.5%	43%	68
Higher level - block course	69	*21.2%*	*28.5%*	*45*
Higher level - distance learning	16	*5.0%*	*3.8%*	*6*
Higher level - short course	30	*9.3%*	*10.8%*	*17*
Foundation level	113	34.9%	40.5%	64
Entry level	96	29.6%	16.5%	26
	n=324			n=158

Sources: Welsh Government data and survey of participants

Comparing this to the numbers that attended courses in the period between January 2011 and December 2012, it's apparent that the entry level participants are under-represented in the answers, although it should be noted that the gaps in contact details were most prevalent amongst this group.

Sector

The majority of the participants who took part in the survey were from the primary sector, as can be seen from the data in the table below. Only participants from the primary sector attended the foundation and entry level courses. A cross-section of participants from different sectors attended the

higher course, and the respondents are noted according to sector in Table 4 of this report.

Table 2a: Number of respondents according to sector (all courses)

In which type of organisation do you work? (Survey respondents)		
Sector	percentage	number
Primary school	77.2%	122
Secondary school	7.6%	12
College	13.3%	21
Work-based learning	1.9%	3
		n=158

Source: survey of participants

Location of the course

Responses were received from respondents from every location, with the distribution of responses broadly corresponding to the numbers that attended courses in those locations.

Table 3a: Number of respondents to the questionnaire according to the location of the course

Location of the course		
Answer options	percentage	number
Bangor	10.1%	16
Cardiff	22.8%	36
Carmarthen	17.7%	28
Coleg Powys	3.2%	5
Aberystwyth	8.9%	14
Coleg Gwent	2.5%	4
Glamorgan	10.1%	16
Llysfasi College	7.6%	12
Swansea	7.6%	12
Deeside College	9.5%	15
		n=158

Source: Welsh Government data and survey of participants

Annex 2: Questionnaire

EICH BARN AR Y CYNLLUN SABOTHOL
Mae gwerthusiad ar y gweill o'r Cynllun Sabothol Iaith Gymraeg - cynllun y buoch chi yn rhan ohono yn ystod y blynyddoedd diwethaf. Fel rhan o'r gwerthusiad rydym yn awyddus i glywed eich barn a byddwn yn ddiolchgar pe allech gwblhau'r holiadur hwn, a ddylai gymryd ryw 5 munud.

Mae'r arolwg yn cael ei gynnal ar ran Llywodraeth Cymru gan gwmni ymchwil Arad. Os hoffech fanylion pellach yna cysylltwch â ███████████ ar ███████ neu ███████████████. A fyddech cystal â dychwelyd eich atebion erbyn dydd Gwener y 15fed o Fawrth? Bydd yr holl ymatebion yn cael eu trin yn gwbl gyfrinachol a ni fyddwn yn eu rhannu gydag unrhyw drydydd parti. Diolch yn fawr iawn.

YOUR VIEWS ON THE SABBATICAL SCHEME
An evaluation is underway of the Welsh-language Sabbatical scheme, a programme you took part in during recent years. As part of this evaluation we are keen to hear your views and would be grateful if you could take the time to complete this questionnaire, which should take no more than 5 minutes.

The review is being carried out on behalf of the Welsh Government by Arad Research. If you require further information please contact ███████████ at Arad on ███████████ ██████████████████████. Please note that the closing date for submission of responses is Friday 15th of March. Your response will be treated in the strictest confidence and no details will be forwarded to third parties. Thank you very much.

1. **Eich enw / Your name**

2. ***Ym mha fath o sefydliad ydych chi'n gweithio? In which type of school or institution do you work?**
   Ysgol gynradd / Primary school
   Ysgol uwchradd / Secondary school
   Coleg / College
   Dysgu seiliedig ar waith / Work based learning
   Arall (nodwch isod) / Other (please specify)

3. **Lleoliad eich cwrs / Location of your course**
   Bangor
   Caerdydd / Cardiff
   Caerfyrddin / Carmarthen
   Coleg Powys / Powys College
   Aberystwyth
   Coleg Gwent / Gwent College
   Morgannwg / Glamorgan
   Coleg Llysfasi / Llysfasi College
   Abertawe / Swansea

Coleg Glannau Dyfrdwy / Deeside College

4. **Beth oedd lefel y cwrs? / At what level was the course?**
   Lefel uwch - cwrs bloc / Higher level - block course
   Lefel uwch - dysgu o bell / Higher level - distance learning
   Lefel uwch - cwrs byr / Higher level - short course
   Lefel sylfaen / Foundation Level
   Lefel mynediad / Entry Level

5. **Beth wnaeth eich cymell i gymryd rhan yn y Cynllun Sabothol? (ticiwch bob un sy'n berthnasol) What prompted you to take part in the Sabbatical Scheme? (tick all that apply)**
   Penderfyniad personol (wedi gweld hysbyseb ayb) / Personal decision (having seen a notice etc)
   Anogaeth gan reolwr llinell / Encouragement from line manager
   Anogaeth gan ymgynghorwyr addysg neu athrawon bro'r sir / Encouragement from county education advisers or athrawon bro
   Cyfrifoldebau newydd / New responsibilities
   Nodwch sylwadau i gefnogi eich ateb / Please provide comments to support your answer

6. **Pa baech wedi cael dewis, pa strwythur cwrs fyddai wedi bod orau gennych? Given the choice, which type of course would you have preferred?**
   Cwrs bloc – drwy'r dydd bob dydd am gyfnod / Block course - daily course over a period of time
   Diwrnod neu ddau yr wythnos dros gyfnod penodol / A day or two a week over a period of time
   Cwrs ar-lein, gyda thiwtor yn ymweld yn achlysurol / On-line course with occasional visits from a tutor
   Cwrs cyfunol, gyda rhai elfennau preswyl a gwaith ar-lein o bell / Combined course with some residential elements alongside on-line learning
   Dosbarth wythnosol wedi ei gynnal yn yr ysgol neu'n lleol e.e. ar ôl oriau ysgol
   Cyfres o weithdai ac aseiniadau ar themâu penodol / A series of workshops and assessments on particular themes

7. **Sawl awr o addysgu cyfrwng Cymraeg/dwyieithog oeddech chi yn eu darparu CYN MYNYCHU'R cwrs Sabothol? How many hours of Welsh/bilingual teaching did you deliver BEFORE ATTENDING the Sabbatical course?**
   Oriau cyfartalog bob wythnos (neu nodwch unrhyw fanylion pellach) / Average hours per week (or note any further details):

8. **Sawl awr o addysgu cyfrwng Cymraeg/dwyieithog ydych chi'n eu darparu, ERS CWBLHAU'R cwrs Sabothol? How many hours of Welsh/bilingual teaching do you deliver now, SINCE COMPLETING the course?**
   Oriau cyfartalog bob wythnos (neu nodwch unrhyw fanylion pellach) / Average hours per week (or note any further details):

9. **Nodwch yn y blwch isod unrhyw gynnydd neu newidiadau eraill ers cwblhau'r cwrs, er enghraifft gwneud mwy o ddefnydd o Gymraeg achlysurol neu ddefnyddio Cymraeg mwy cywir. Please use the box below to record any further progress or changes since completing the course, for example an increased use of occasional Welsh or more correct use of Welsh.**

10. ***Sut byddech yn graddio'r agweddau hyn o'r Cynllun? How would you rate the following aspects of the Welsh-language Sabbatical Scheme?**
Gwych/Excellent   Da/Good   Gweddol/Fair   Gwael/Poor
Amherthnasol/NA

Y cyfle i ddatblygu sgiliau iaith / The opportunity to improve Welsh-language skills
Y cyfle i ddysgu terminoleg arbenigol / The opportunity to acquire specialist terminology
Hyfforddiant ar fethodolegau addysgu cyfrwng Cymraeg a dwyieithog / Training on using Welsh-medium and bilingual teaching methodologies
Cefnogaeth ar ôl y cwrs (e.e mentora, cefnogaeth gan athrawon bro neu gan yr ysgol) / Post-course support (e.g mentoring, support from the school or from athrawon bro)
Y cyfle i gyflwyno sesiynau cyfrwng Cymraeg neu ddwyieithog o flaen y grŵp / The opportunity to deliver Welsh or bilingual sessions in front of a group
Y cyfle i baratoi adnoddau / The opportunity to prepare resources
Nodwch sylwadau i gefnogi eich ateb / Please provide comments to support your answer

11. **Amlinellwch pa adnoddau a gynhyrchwyd gennych ar y cwrs a nodwch sut y mae'r rhain yn cael eu defnyddio (os yn berthnasol). Outline the teaching resources you produced whilst on the course and note how these are utilised or note if not relevant).**

12. **Ydy eich sefydliad yn parhau i gefnogi eich datblygiad parhaus addysgu iaith Gymraeg / dwyieithog? Does your institution continue to support your on-going development of Welsh language / bilingual teaching?**
Ydy yn gryf / Yes, strongly
Ydy i raddau / Yes, to an extent
Nac ydy / No
Ddim yn gwybod / Don't know
Nodwch sylwadau i gefnogi eich ateb / Please provide comments to support your answer

13. **A ydych chi wedi wynebu unrhyw rwystrau wrth ddefnyddio eich sgiliau Cymraeg ers cwblhau'r cwrs? Have you encountered any barriers to utilising your Welsh language skills since completing the course?**
Yes / No

14. **Ydy'r canlynol wedi eich rhwystro chi rhag defnyddio eich sgiliau ers cwblhau'r cwrs? (Ticiwch bob un sy'n briodol) Have any of the following**

been a barrier to utilizing your new skills since completing the course? (Please tick all that apply).

Diffyg hyder yn fy sgiliau Cymraeg / Lack of confidence in my Welsh language skills

Diffyg cyfleoedd o fewn fy sefydliad / Lack of opportunities within my workplace

Diffyg amser i baratoi sesiynau / Lack of time to prepare sessions

Diffyg cefnogaeth / Lack of support

Arall (nodwch fanylion os gwelwch yn dda) / Other (please specify)

15. **Oes angen mwy o hyfforddiant neu gefnogaeth arnoch? Do you need further training or support?**

Oes / Yes

Nac oes / No

Os ateboch 'oes', nodwch pa fath neu lefel / If 'yes' please note what type or level

16. **Diolch i chi am gwblhau'r holiadur hwn. Fel rhan o'r adolygiad efallai byddwn yn cysylltu â chi gydag ychydig yn rhagor o gwestiynau - a ydych yn fodlon i ni gysylltu â chi?**
Thank you for completing this questionnaire. We may wish contact you with a few further questions - would you be willing for us to get in touch?

Ydw / Yes

Nac ydw / No

17. **Os ateboch 'ydw' - sut ddylwn gysylltu â chi? If 'yes', how should we contact you?**

Rhif ffôn neu ebost / Email or 'phone number

Cliciwch 'Anfon' i orffen ac i gyflwyno'ch atebion / Click 'Submit' to finish and submit your responses.

Annex 3: Case studies

The evidence collected during interviews with participants is considered in the body of this report. A short note of the individuals' experiences is presented here.

Participant 'A', Secondary School Teacher, attended the block higher course

> **20 hours** of Welsh/bilingual teaching before the course; **25 hours** after the course.

'A' is a Biology Teacher who now teaches science entirely through the medium of Welsh – from year 7 to A Level. He has been teaching for 20 years. There are around 550 children in the school. The language of the school is English but by now, a third of children in year 7 are in the Welsh stream and are educated through the medium of Welsh. This compares with a quarter of the current pupils in year 11. As regards the staff, up to half of them have at least an understanding of Welsh.

Attending the course was a personal decision. He had some previous experience of teaching through the medium of Welsh, but he was keen to improve his Welsh and his confidence in his written skills. He was educated in English in the 80s and although a fluent Welsh speaker, he felt that he needed more information about the structure and grammar of the Welsh language. He had spoken to somebody who had previously attended the course, but there were also posters advertising the opportunity in the school as well as a high number of e-mails coming from the county via the management team.

He thought the course was 'excellent in every aspect' with regard to course content and the tutors. He is now far more aware of where people trip up linguistically. His language skills have improved and he is far more confident, especially in his written skills. He sees great advantages to bilingualism, and can see the effect on individuals. It is too early to tell whether the course has had an influence on pupils' attainment.

The tutors offered to visit him in the school but he has not got back in touch with the college. He has had a fair amount of support from the school's management team as they are aware of the importance of bilingualism in the school. More Welsh provision is needed in the school in order to meet the demand.

He sees that there is a lack of Welsh resources. He sees a lot of resources on YouTube in English but unfortunately, not in Welsh.

He is considering following a Welsh degree course in the future as he has earned a number of credits by following the higher course. He feels very positive after attending the course.

Participant 'B', Secondary School Teacher, attended the short higher course

> **0 hours** of Welsh-medium/bilingual teaching pre-course; **0 hours** post-course.

'B' is Head of English in a Welsh school since 2003 and has been teaching in the school since 1995.

'B' had studied some Welsh in school and learnt Welsh as an adult. Her motivation to attend the course was a desire to develop her career and her head teacher suggested that she

attended the course so that she could better cope with duties that involved the school's senior team. She was not confident in her written Welsh skills before attending the course.

She really enjoyed the course, and it was a lot better than she had anticipated. She felt that the language used on the course was of an advanced level, whereas the Welsh skills of the participants varied significantly. Despite this, she felt that she had managed to follow the content of the course and that her understanding and her grammar had improved significantly. The homework was structured specifically for each student, and sometimes the tasks were directly related to the work they were currently doing in school, so it was both useful and practical.

She would have liked to have had more time, a longer course and some follow-up after completing the course. She teaches English in English, but since attending the Sabbatical course, she interacts with children in Welsh in the registration class, when teaching the Welsh BAC and on a PISA course. She also manages the department's staff and co-ordinates pupils' activities. She has taken on additional management duties since completing the course.

With regard to her skills, she is far more confident in speaking and writing Welsh since attending the course. She is now giving presentations to school staff.

She is able to keep in touch with tutors via e-mail but has not done so as she receives a great deal of support from the Welsh department – who are happy to offer advice and correct and edit her written work when necessary. She also uses special software to help her with her work.

She gets frustrated with mutations at times and tends to forget the rules – she would like to do a refresher course every now and then. She would like to emphasise that she is very grateful to have had the opportunity to attend the course. It has made a big difference to her. She is not worried in meetings now as she understands everything that's going on and can contribute confidently.

Participant 'C', Secondary School Teacher in an English-medium school, attended the higher block course

> ➢ **4 hours** of Welsh-medium/bilingual teaching pre-course; now uses English and Welsh in all lessons.

'C' is Head of Modern Languages in an English-medium school, where about half the staff are Welsh-speakers. She learnt Welsh on an WLPAN course.

She was responsible for bilingualism in her previous role and she piloted a second language Welsh NVQ course in her previous school.

'C' saw the advert in the staff room, and for her, the appeal lay in the focus on professional language and school language, including how to speak to parents and staff.

She thought that the course was very good. A 3-month block course was far better than learning Welsh once a week. The tutors were good. There were four people on the course, each with different needs – 'C's needs focussed on grammar and the others wanted to improve their spoken Welsh. The tutors gave them different written work depending on their needs and interests. She thinks that the course should be compulsory for all, including head teachers and senior staff who come from outside Wales.

Since completing the course, she teaches two girls who speak Welsh in her GCSE German class and 'C' does a fair amount of work with them through the medium of Welsh. She enjoys the challenge involved in teaching the children. She encourages children in the classroom to do things bilingually, e.g. her year 7 French, and the children react very positively. She also promotes the Welsh language in her German and French classes.

She can now follow all staff conversations in Welsh, both informal and professional. She feels more of a part of the school's community. As a linguist, she enjoys grammar and having followed the course, has a greater understanding of the rules of the Welsh language. The course has helped her written skills.

She has been offered the opportunity to contact the University via e-mail but has yet to do so. The head teacher is supportive and the Welsh-speaking members of staff are pleased to be able to speak Welsh with her, but she would like to receive more training.

Participant 'Ch', Secondary School Teacher, attended the short higher course

> **21 hours** pre-course; **21 hours** post-course.

'Ch' is a physical education teacher in a Welsh-medium school and her motivation to attend the course was a lack of confidence in her Welsh. Despite being educated through the medium of Welsh, she was not confident in speaking or writing Welsh. She spent a number of years teaching in an English-medium school prior to this role. She felt that she needed to learn the rules of the Welsh language. Other teachers had completed the course in the past, and there was a waiting list in the school for those teachers who wanted to go on the course.

She described the course as 'a fantastic course with excellent tutors who explained things well'. It was easy to approach them with questions and 'Ch' felt comfortable in their company. She enjoyed and learnt a lot.

She is now far more confident in marking the children's work – not only the content, but the language as well. She doesn't worry about speaking to other teachers, and finds herself not only correcting the children's language, but also her own, as she speaks. She now points things out to other teachers as well – and describes this as the course's 'ricochet' effect. She is convinced that it has had an impact on the children's Welsh language skills.

Having completed the course, she understands that she is able to contact the tutors but has not done so. The school now runs a language improvement course, which she is following. She also asks the Welsh department to look over her written work if she wants to send something out, but has had feedback to say that her work does not need much editing anymore. Having said that, she feels she will need to follow another course in order to reinforce what she has learnt.

On a personal level, she has two children and believes that they have also benefitted from her attending the course.

Participant 'D', Primary School Teacher, attended the foundation course

> **1 hour** pre-course; **4 hours and three quarters** post-course.

'D' is a part-time year 1 teacher, and has been in her current role since 1989.

Nobody in the school speaks Welsh but all staff have attended the County's Welsh course. Most understand a certain amount of Welsh. Her head teacher told her about the course.

The head teacher suggested that she attend: *'my head teacher mentioned the course and when I looked into it I was excited at the possibilities and the professional development opportunities. I was given support and encouragement from the Head and the Athrawon Bro team'.*

She said that the course was excellent, but involved a lot of hard work. The tutors were all very supportive. The course taught Welsh to the participants but it didn't teach them to teach Welsh in the school. The best thing about the course was being able to take an entire term away from school to concentrate fully on the course.

'D' said that the course had affected her and that she now wanted to speak Welsh to everybody, but as everybody in the school is of a similar ability level, it is difficult to do. However, she would like to do more.

She is teaching a great deal more through the medium of Welsh than she did prior to the course and now understands mutations and much more about Welsh grammar in general. She feels that her contribution to the school has increased. In her questionnaire response, she explained, 'I use far more incidental Welsh in school. I use a far wider range of sentence patterns. I attend an evening class at Intermediate level and I join in with Welsh conversation activities on a regular basis'. She would like to think that it has had an effect on the pupils' attainment level, but it is very difficult to measure.

She has not had any support from her *athrawes fro*. When she asked, the *athrawes fro* replied that she had not been informed that she should offer support to those who had attended the course. She now attends a weekly evening class, which she finds difficult after working all day in school, but it is helping to increase her confidence. She says that short follow-up courses would be advantageous, especially if there was an opportunity to get further support or attend regular events with the same group of people that were on the course with her.

Participant 'Dd', Deputy Head teacher in a Primary School, attended the foundation course

➢ **1.5 hours** pre-course; **2 hours** post-course (for a term before retirement)

'Dd' is a newly-retired deputy head teacher, who spent 22 years in an English-medium primary school with around 100 children. His head teacher and one other teacher in the school could speak a fair amount of Welsh.

His motivation to attend the course was his interest in the language and the encouragement of the *athrawes fro*. He has already been on specific courses on how to teach some subjects through the medium of Welsh, and had studied the O Level Welsh course years earlier.

He 'enjoyed the course immensely', but believed that the varying ability levels of those on the course was an obstacle, especially at the beginning. Some were pure beginners whereas others had a fair amount of understanding of the language, and one of the attendees had even passed their Welsh A Level. No difference was made between people of differing ability levels, even though the tutors were very supportive of everybody from the start.

He has gained a lot of confidence since completing the course, and has applied for part-time posts where they say that some knowledge of the Welsh language would be desirable – he would not have done so prior to the course. Since the course, he has been offered assistant teaching posts in Welsh-medium schools through an agency, but as yet has not accepted them as he would like to complete an intermediate Welsh course in the local college first.

On his return to the school, there was an increase in the number of hours he taught through the medium of Welsh. He contributed to the bilingualism of the school by changing all the school's English signs to bilingual ones; he introduced Welsh words in staff meetings; he helped members of staff with their Welsh grammar and he led all the morning assemblies in Welsh after completing the course. He does not believe that his presence on the course has had an effect on the pupils' attainment levels, but he does believe that the pupils' attitude towards the Welsh language has changed. However, he was only back in the school for a term before he retired. He hopes that other teachers in the school will have the opportunity to attend the course.

The post-course support was good. An *athrawes fro* came to the school every fortnight and offered a lot of help. She was also one of the course tutors. The head teacher was very supportive.

The course was very intensive and challenging and asked a lot of those who attended. Homework was set every day. Much of the work was group work, and this led to the filming of

two lessons by each attendee. This all helped with his language skills and confidence, but in reality, he was tired by the end!

Participant 'E', Primary School Head teacher, attended the foundation course

> **1 hour** pre-course; **0-1 hour** post-course (now a non-teaching head teacher)

'E' is a head teacher in a primary school with 122 children. The school is in a very English-speaking area and none of the staff speaks Welsh. Two of the teachers have attended the Sabbatical course and 3 are attending evening classes. A language advisor also conducts weekly sessions with the teachers after school.

He had heard about other people going on the course and his incentive was a desire to improve his Welsh language skills. Although he does not speak much Welsh, both his parents are Welsh-speakers.

The course was very good, but not easy, and he is certain that it has improved his Welsh. He would have liked to have had more time on the course. The tutors were very good, but he noted that some of the students did not get on with all the tutors.

There have been changes in his use of Welsh, especially his incidental Welsh, e.g. morning assembly. He is far more aware of the language now. He believes that the children have benefitted and explained that he can now identify level 5 and can contribute to helping the children achieve this level. In the questionnaire, he explained that 'there is far more incidental Welsh and supportive influence on my school staff – I've been able to encourage one member of my staff to do the Sabbatical and a further 4 members of staff to enrol on Welsh courses (evenings / after-school)'.

With regard to post-course support, he explained that they have an excellent advisor who helps to develop skills in the school. A group from the Sabbatical Course came to observe him teaching but there has not been any other direct contact. The County suggested a scheme whereby Welsh schools twinned with English schools but unfortunately nothing came of it.

He believes that a course for head teachers would have been very useful. In the future, he would like to attend occasional one-day language refresher courses with the other members of the original group.

Participant 'F', Part-time Primary School Teacher, attended the foundation course

> **1.5 hours** pre-course; **1.5 hours** post-course, but reported increased confidence and an improvement in skills

'F' is a part-time year 5 teacher and leads on Welsh and physical education in the school. There are 180 children in the school but none of the other members of staff can speak Welsh. There is a lot of incidental Welsh in the school but the teachers are very much lacking in confidence.

She was very keen to do the foundation course, and had been on a Welsh learning course in Lampeter 20 years ago. She explained her motivation as follows: 'I became the co-ordinator and realised I wouldn't be able to achieve Level 5 in the school unless I improved myself'.

She described the course as excellent, although some of the tasks were pointless and irrelevant. They were a mixed group of 3 junior school teachers and 9 nursery / infant school teachers, and this became a bit of a problem as they tried to create two sample lessons from

each member of the group. It would have been better if every group contained either junior school or infant school teachers.

Since completing the course, 'F' is much more confident when speaking Welsh and uses Welsh in the classroom. However, children come to her in year 5 with very little knowledge of the basics of the language, and 'F' is disappointed that the rest of the staff know so little Welsh. Any Welsh before year 5 is incidental Welsh only. The school is focussing on numeracy and literacy at the moment and the hope is that Welsh will be the focus of attention in the future.

With regard to post-course support, the head teacher is supportive. The County only provides one half-day Welsh course per teacher per year (it used to be each term). The tutors sent an e-mail offering support, but 'F' has yet to take up this offer. *Athrawon bro* do not visit the school due to a lack of funding.

She feels that the course has made a difference to her personally, but not really to the school as a whole. She attended a moderation meeting in the secondary school recently and noticed that other schools in the area are far more advanced as regards Welsh language skills. She would like to see more members of staff attending the course.

Participant 'Ff', Primary School Teacher, attended the foundation course

> **1 hour** pre-course; **2 hours** post-course

'Ff' is a year 3 teacher in a school with around 155 pupils, and he leads on Welsh in the school. There are no Welsh speakers amongst the staff but one other member of staff does have some knowledge of the language.

As he leads on Welsh, he was keen to go on the course, which he described as a very enjoyable experience. He learnt a lot – not only how to teach Welsh as a subject, but also the grammar and mutations that he had ignored over the years. The tutors were excellent and very supportive. He had ample opportunity to teach lessons in front of the other members of the group, and also to observe in other schools. He explained that 'the opportunity to engage in teaching methodologies with other members of the course was a by-product, but a very rewarding aspect of the course.' However, some of the written activities on the course could have been more interesting.

He returned to the school with a greatly improved knowledge of the Welsh language and feeling very enthusiastic, and he now teaches Welsh to year 6. He now uses Welsh every day, and tries to speak the language as much as possible, including using his Welsh with other members of staff where possible. He now teaches Welsh for 2 hours a week, which is double the amount he taught before the course. He also monitors the use of Welsh across the school, e.g. in planning and in displays. He has set up a Welsh club in the school during lunch hour and arranges activities such as games on iPads.

It is difficult to tell whether the course has made a difference to the pupils' attainment level, but 'Ff' hopes that his enthusiasm will have an effect.

He is fortunate that he has ample opportunity to practice his Welsh as his wife is a Welsh speaker. He reads as much Welsh as possible and he would like to attend another course. He would appreciate follow-up sessions and he would also like to meet up more regularly with the people on his course in order to practise. An advisor visits the school once a month and the head teacher is very supportive.

Participant 'G', Primary School Teacher, attended the foundation course

> **1 hour** pre-course; **2 hours** post-course and more incidental Welsh

'G' is a year 2 teacher in a school with around 300 pupils, where she has worked for twenty years. She is the Welsh language co-ordinator but there is very little Welsh amongst the staff – one can understand the language.

She has tried to learn Welsh in an evening class in the past but has found it very difficult. Her children are in Welsh-medium education. Her head teacher encouraged her to attend the course.

The tutors were good but parts of the course were heavy and very difficult, and there was a lot to fit into one term. She welcomed the opportunity to learn grammar patterns. It was far more difficult than she expected.

She also felt that there were too many assessments and there was also a mixture of abilities on the course – she would have liked it if everybody on the course was of equal ability.

She believes that the course has been of benefit, both to her and to the school. She speaks far more incidental Welsh now, and is trying to elicit an interest in others in the school. She uses the language patterns she learnt on the course every day, as well as ideas from the course. Other teachers ask for her opinion on issues about the language.

She has established a St David's Day Eisteddfod in the school, as well as school-wide "Da chi'n siarad Cymraeg" certificates. She understands far more Welsh now than before and the rules make more sense even though speaking Welsh remains very difficult.

With regard to post-course support, the head teacher is very supportive and she receives support from an *athrawes fro* once a fortnight. She is looking forward to a follow-up meeting with other members of the group in June but she would like more opportunities for follow-up work. She's considering attending another course in the future.

Participant 'Ng', Deputy Primary School Head teacher, attended the foundation course

> **1-2 hours** pre-course; **2 hours** post-course

'Ng' is a deputy head teacher and has taught year 2 for 20 years. There are around 400 children in the school and she is responsible for Welsh and religious education. In the school, the teachers are all happy to learn Welsh and a number of them are fairly confident in the language. Before 'Ng' went on the course, one other teacher and a teaching assistant had been on the Sabbatical course. The *athrawes fro* brought the course to her attention.

She has a Welsh O Level, and did the WLPAN course a few years ago. Her Welsh-language ability was fairly good before the course but she was lacking in confidence.

The tutors were very good, and the group got along well. She enjoyed the course, and found it easy at the beginning but it became harder as time went by. The others found the course difficult. She felt that the varying abilities should have been addressed before the course as the range was too wide – some hadn't even done Stage 1 and 'Ng' thought that it was wrong to include them on the course. She felt there was too much pressure in relation to the assessments – especially when they were being filmed.

She believes that the children's attainment level has increased as a direct result of her enthusiasm e.g. an improvement in the abilities of the year 2 children when using the 1st and 2nd person, and male and female nouns. She uses far more Welsh in class now and tries to pass on ideas from the course. Other members of staff are trying to include more Welsh in the school assembly etc. She is keen to make it more visually obvious that this is a school in Wales. Welsh is now timetabled for 10 minutes a day for the whole school, and there are more resources available for everyone.

There has not been much support after the course. She is meeting with the rest of the group in June, and has met with some individuals socially. She started a Welsh evening class, but did not find it useful. She would have liked the university to have arranged follow-up in the form of evening classes.

She would certainly encourage others to go on the course.

Participant 'H', Primary School Teacher, attended the foundation course

> **1-2 hours** pre-course; **at least 5 hours** post-course, and "there is now an element of Welsh in all my lessons".

'H' teaches in a primary school with 75 pupils. It is an English-medium school but second language Welsh is strong there and three of the teachers are Welsh-speakers.

'H' wanted to improve her Welsh language ability and had heard about the course from colleagues in the area who had attended. The course was fantastic, the tutors were good and the length of the course was appropriate.

The element of preparing resources was good, although most of it related to Key Stage 2 and was not relevant to her. She would have liked to see more resources aimed at the Foundation Phase. Despite this, she explained in the questionnaire, *'I created 3 lessons during the course however when back in school the resources created are used in a number of lessons. I am able to re-use each resource with different learning objectives. The skills which I developed whilst creating the resources are transferable across the curriculum'.*

Her confidence in using Welsh has improved as a result of the course and she now spends more time teaching Welsh, and there has also been an increase in the use of incidental Welsh. Since attending the course, she has set up '15 minutes of Welsh' sessions across the school. She feels that the pupils are more enthusiastic about the language and she feels certain that the children's attainment levels have improved.

The other Welsh-speaking staff and head teacher are very supportive. She was about to attend a follow-up day in the university but she would like to have more follow-up days as well as getting the original group back together.

Participant 'I', Primary School Teacher, attended the foundation course

> **1 hour** pre-course; **1-2 hours** post-course

'I' teaches in an English-medium primary school where a number of the staff speak Welsh. She shares her time between teaching year 4 and teaching children with special needs.

She had always wanted to go on a course like this, and she has been attending evening classes. The *athrawes fro* has been supportive. Her own children are in Welsh-medium education.

The course was 'fantastic' and she would have liked it to be a year-long course. The course became quite complex quite quickly. The tutors were good and a variety of teaching methods were adopted. There was a good balance between learning the language academically and focussing on teaching to suit the needs of primary schools. The coursework was good.

Since the course, 'I' is more confident in using the language in everyday situations and she understands a great deal more. She uses the language in the classroom now, not only in Welsh lessons, but in teaching other subjects through the medium of Welsh. For example, she taught a mathematics lesson on calendars in Welsh, and in Geography lessons, she discusses the names of places and countries in Welsh. There is now more Welsh on the school walls and 'I' has changed from using bilingual commands in the playground to using Welsh only commands. She thinks that her use of Welsh has more than doubled, and says that the 'pupils' attainment level has certainly increased'.

In the past, Welsh has not been seen in a very positive light in the school, so there has been a big step change. These days, Welsh is a lot more fun for the children. The attitude of both children and staff towards Welsh has made the learning experience happier and more positive.

She has had support from the *athrawes fro* and a course tutor came to the school when she asked for help. The head teacher is very supportive and another teacher is about to start on the course. It was a very positive experience and she would like to attend a further course.

Participant 'L', Primary School Teacher, attended the foundation course

➢ **2 hours** pre-course; **4 hours** post-course.

'L' is a teacher in a large primary school with 650 children. She has been there for 8 years and she is the science and literacy co-ordinator. There are 5 Welsh-speakers amongst the staff.

'L' was interested in improving her Welsh. She is interested in bilingualism and she has attended evening classes with the intention of completing an MA course in bilingualism. The *athrawes fro* suggested the Sabbatical course; she had not heard of it before then.

She described the course as 'fantastic' with good and supportive tutors, and it was great to be able to concentrate properly on Welsh. It was beneficial to learn Welsh through the medium of Welsh. She explained that the course 'teaches you to increase your expectations of what you can achieve'. However, she believes that the course could have been set at a slightly higher level, as she and a number of others in the group had already reached that level in the past.

She feels that the course focusses on teaching all subjects through the medium of Welsh, but there is a reticence to allow this in her school. As the school is close to the English border, some children and governors have said that they don't want the children 'speaking all this Welsh'. 'L' strongly believes that all head teachers and deputy head teachers should attend a similar course before being allowed to lead a school in Wales.

Since completing the course, she is more confident in using Welsh and she now understands mutations. She can now see the mistakes made in the past, and the course has enabled her to improve her teaching. Her level of Welsh has improved and she can pass this on to the children. She believes that her year 4 class has made excellent progress and that their attainment level has increased significantly. They have good reading and writing skills, and now there is work to do to improve their spoken Welsh.

Since the course, she has not received enough support from within the school. She is frustrated that schools are willing to send their staff on courses but aren't willing to take the next step towards developing the Welsh language within the school. She suggested that there should be 'demo' lessons for head teachers and senior staff so that they can see how Welsh works in other schools. In her school, she believes that the head teacher supports the opinion of parents and governors, and overall, she believes that schools are content with bilingualism but not with teaching through the medium of Welsh.

She has spoken to the tutors a number of times and students from other courses have been to the school to observe her teaching. *Athrawon bro* came to see her after the course, but they have not encouraged her further. She would have appreciated follow-up courses.

Participant 'Ll', Primary School Teacher, attended the foundation course

➢ **1 hour** pre-course; **1 hour** post-course, but more incidental Welsh.

'Ll' is responsible for the Foundation Phase in a small rural school, which has 40 pupils and two teachers.

She had taken advantage of the local authority's Welsh training for teachers over the years but when the peripatetic service downgraded the school to a category that was to receive less support from the *athrawes fro*, she decided to go on the Sabbatical course. There was a fair amount of incidental Welsh in the school but 'Ll' alone had to teach Welsh. An *athrawes fro* comes once a term.

It was a challenging course that encompassed a lot in a short time. A lot of the work on the units was packed in towards the end, but she felt that her head was full of information by this point. The tutors were excellent and the course was interesting. There was a lot of homework and preparatory work, and not enough time to prepare during the day. As 'Ll' lives far away from where the course was held, and it took a long time for her to travel to the course, she had less time to prepare at home.

There was pressure to perform well when providing the sample lesson in front of the other attendees.

There were not enough resources for the Foundation Phase and she felt that not enough attention was given to the needs of Foundation Phase teachers on the course. She would also like to see Welsh learning resources that she could use in her local library.

She is quite a bit more confident in Welsh now, but there is nobody available in the school to check her Welsh. She is able to speak a little Welsh to the only first-language Welsh parent at the school.

She is keen to create a Welsh language ethos and environment. All the displays are now bilingual and for the first time they held a *Cymanfa Ganu* (Welsh hymn singing service) on St David's Day. 'Ll' hopes that the children will build on their Welsh language skills. She feels that their Welsh speaking skills have improved significantly, but there is still only one Welsh lesson a week in the school.

She has had a lot of support from the *athrawes fro* and the County arranged a reunion for everybody who attended the course. Her head teacher is very supportive. She is still nervous about the skill level of year 2 children, but she is receiving help from the *athrawes fro*.

In reality, she is not using all the Welsh she learnt on the course and ideally she would like to attend another course in order to reinforce what she has already learnt. She was keen to pass on the message: "don't forget about us!".

Participant 'M', Primary School Assistant, attended the entry level course

> **1 session** pre-course; **1 session** post-course, but more incidental Welsh.

'M' is a reception class and year 1 assistant. The head teacher encouraged her to attend the course and she was keen to learn more Welsh.

She enjoyed the course and the tutors were good. However, she did have some criticisms:

A lot of time on the course was spent on making displays and resources, but in her school, only children's work is displayed so these posters / materials were of no use to her.

Although the time spent on the computer was good, too much time was spent comparing websites.

She would have appreciated more encouragement to speak Welsh.

She now has more confidence in using Welsh with the children and she enjoys singing Welsh songs with them. She and the other assistant mainly teach Welsh in the year group and she believes that she has been able to contribute to the increase in the children's attainment, and the pupils are quite a bit more enthusiastic about Welsh. Almost all the displays are now bilingual and she is using a lot more incidental Welsh. She has introduced 'sentence of the week' throughout the school since attending the course.

The *athrawes fro* is a great help and the head teacher is supportive. She is able to contact the tutors via e-mail. She would like to attend Welsh top-up days if possible, and she would very much like to attend more training, although finding the time would be a problem.

Participant 'N', Primary School Assistant, attended the entry level course

> ➢ **2 hours** pre-course; **8 hours** post-course.

'N' works as an assistant across the school and her duties include teaching Welsh to year 6. There are 230 pupils in the school and one member of staff is a fluent Welsh-speaker.

She has an A Level in Welsh but has not used the language since then. She had a career change a few years ago and she wanted to learn a vocabulary that would be appropriate for children as well as improving her language skills. She is also currently studying for a BA degree.

She enjoyed the course but felt that some elements were missing – there should be more of an emphasis on singing and learning new songs. A wider range of materials could have been used and the course could have been more practical – e.g. by visiting a Welsh-medium school. The course was not all-encompassing and it should have included more relevant subjects and the vocabulary around those subjects.

Since the course, she is using a lot more Welsh, and in school, she is seen as somebody who is knowledgeable about the Welsh language. She has rediscovered a lot of her Welsh language skills and she has a better understanding of the language. She teaches 5 minutes of Welsh to a number of classes every day and she believes that the skill levels in year 6 have improved. She has set up a 'Clwb Hwyl a Sbri' and has arranged for year 6 to visit Llangrannog. Outside the classrooms, the Welsh language is more visible in displays around the school. 'N' has also introduced a 'language token' system throughout the school. There has been a campaign to encourage teachers to use more incidental Welsh due to the school improvement plan as well as her influence since attending the course – 'it's all about enjoying the language and being able to use it in the community'. Other teachers have since asked to attend the course.

She has not received any formal post-course support and the only contact she has had with the centre was when she was asked to do a presentation for the next wave of course attendees. The head teacher is very supportive and is keen for her to make the most of her new skills.

She would like to attend more Welsh courses in the future and ideally there would be a higher level course available for teaching assistants. She would like to formally record her thanks to Welsh Government for providing the course and the incentives.

Participant 'O', Primary School Assistant, attended the entry level course

> ➢ Incidental use of Welsh pre- and post-course.

'O' is a classroom assistant in the reception class and has been working in this city school for 24 years.

The head teacher always encourages the staff to use incidental Welsh and teaching in Welsh was always on his to-do list. When the college contacted the school to inform them of the course, she took up the offer.

The course was very good with excellent tutors. 'O' believed that a residential course would have been better in order to have been fully immersed in the Welsh language for a period of time.

Since attending the course, 'O' always greets the children in Welsh and encourages them to answer in full sentences. 'O' is using more incidental Welsh and believes that the children's attainment has improved and that they respond well in Welsh. Since the course, 'O' has also introduced 'Welsh speaker of the week' throughout the school.

Help is available from the tutors over the phone or e-mail if necessary and she receives invites to events at the college related to the course and learning Welsh. 'O' would like to attend a further course.

Participant 'P', Further Education Lecturer, attended the short higher course

> **0 hours** pre-course; **7 hours** post-course.

'P' is a lecturer in Information Technology and has been teaching at his college for 13 years.

Before the course, apart from having difficulty with his mutations, he was generally quite confident in his skills but felt that he needed to improve his Welsh overall. He knew of people who had attended the course in the past and had been keen to attend for quite a while. He had told the Bilingual Champion that he was interested in attending the course.

The course was excellent and he had nothing negative to say about it. The teaching was very good and the feedback had been fantastic; the staff were great. Everybody was treated as an individual on the course and work was set for each of them as individuals. The course was suitable for teaching methods in further education and they had an opportunity to teach in front of the other attendees. The length of the course was appropriate and there were no problems either in being released to attend the course or in arranging cover. The college had been very supportive.

Since the course, he has started teaching Welsh for Adults and is teaching on the Welsh BAC course. Where he has had time and opportunity, he has put more emphasis on bilingualism. He teaches slightly more in Welsh in the classroom. When he gets the chance, he teaches bilingually; but will often work with Welsh-speaking individuals in the class through the medium of Welsh. He tends to make more use of Cysill and Cysgair since attending the course.

It would have been good to have follow-up sessions after the course. He has had e-mails from the tutors offering help but has not yet taken advantage of these offers. When we spoke to 'P', his certificate had not yet arrived and he felt he needed evidence that he had completed the course.

Participant 'Ph', Further Education Lecturer, attended the short higher course

> **3 hours** pre-course; **6 hours** post course.

'Ph' is a land use engineer lecturer on a very Welsh-speaking campus. He teaches some agricultural classes through the medium of Welsh and some bilingually. Welsh language resources are available to everybody on the course if they wish.

'Ph' had himself been through Welsh-language education 30 years ago. He knew a few people who had attended the Sabbatical Course in the past and was keen to attend himself. His line manager was also keen for him to attend and in addition, he received encouragement from the Bilingual Champion.

The course was very good. He received 'a lot of help from the tutors and they pointed the practitioners in the right direction. 'Ph' believed that the course had changed over the years. It used to be a 3-month block course, and he would not have been able to attend a course that took him out of the college for such a long period. As it was, it was quite difficult to find a 'time slot' to attend the course, but there had been no problems in arranging cover while he was on the course.

He now uses more Welsh in his work and is translating much of the course content. His grammar is more correct. 'Ph' doesn't consider that there has been a change in his spoken

Welsh skills. He likes to think that his students' standard of Welsh has improved since he has been on the course. Also, since attending the course, he has become a member of the college's bilingualism board, which meets every month.

With regard to post-course support, he receives e-mails from university staff offering help but he is yet to take advantage of this. He receives a fair amount of support and help from the Bilingual Champion. He sees clear advantages of attending the course, and on a personal level, it has also helped him with his own children.

Participant 'R', Further Education Lecturer, attended the higher block course

> **18 hours** pre-course; **18 hours** post-course.

'R' is a BTEC Lecturer in Children's Care, Learning and Development for young students. She usually teaches bilingually but this year, everybody on the course is able to speak Welsh.

She learned to speak Welsh as an adult when she moved to live in Wales and she was worried about the standard of her written Welsh. In the past, she attended a language refresher course, where tutors were available to correct her work. But after the course ended, she needed somebody to correct her language and remind her of grammar rules.

The Bilingual Champion did not encourage her to attend the course, but she knew somebody who had attended it and heard about it through the college. She had been considering doing a course for a while, but courses in the past had meant distance learning and working on her own, and she preferred the structure of this course – a full week at the beginning and end and individual days in between. Managers were more than content for her to attend the course and were pleased that staff wanted to improve their language skills.

The course was very good. She appreciated being able to get an immediate response from the tutors about her work, and it was easy to ask them questions at any point. The course was suitable for further education lecturers; and it was also suitable for the teaching she does out in the community.

She does not think that there has been a change in her language skills since attending the course, but she does consider that she has a better understanding of providing a bilingual education. She has learnt a lot with regard to the written work.

Despite this, she avoids writing in Welsh as much as possible because it takes so much time to make sure that the work is correct. She's more prepared to adapt and try new things since attending the course. She hopes that the students' attainment level has improved since she has been on the course. There was talk of the college using her as a role model to show what's possible in terms of learning Welsh, but this has yet to happen.

Support is available if necessary, and if she requests it; but nobody has spelled out "what is available". The champions don't offer specific support other than general e-mails advertising courses. It is fortunate that there are plenty of opportunities to speak Welsh in the college: 'it's a social language and you can hear it spoken everywhere'. It would have been good to have a catch-up session after the course in order to hear the suggestions of others who had been on the course.

She has recently encouraged a teacher friend of hers to attend the course, and would recommend that everybody completes the course.

Department for
Digital, Culture
Media & Sport

Building an S4C for the future

An independent review

Euryn Ogwen Williams
December 2017

Building an S4C for the future

Presented to Parliament
by the Secretary of State for Digital, Culture, Media and Sport
by Command of Her Majesty

March 2018

Cm 9589

Contents

Foreword

To the Secretary of State for Digital, Culture, Media and Sport

You asked me to conduct an independent review of S4C which examines its remit, funding methods and governance. I am pleased to submit my final report to government which sets out my findings and recommendations.

S4C is the world's only Welsh language broadcaster. It occupies a unique position in the UK broadcasting landscape and is a driving force in promoting the Welsh language.

This review takes place at an exciting and challenging time for broadcasting. The sector is going through unprecedented change – choice dominates the market, with more high quality content available from a greater number of providers on an increasing variety of platforms. Established broadcasters like S4C have strong brands and a wealth of experience, but high quality, big budget global content from providers like Netflix presents a challenge for all broadcasters. Public service broadcasters need to work together to survive – embracing the enormous opportunities for partnership and collaboration, and harnessing the potential of digital innovation in this new era for broadcasting.

Public service broadcasting is the cornerstone of the UK media landscape. It plays a crucial role to ensure that UK audiences can access content across a wide range of different genres – from news and current affairs to children's programmes and documentaries. Ensuring that public service broadcasters can adapt and continue to remain relevant is a key challenge.

As the only Welsh language broadcaster S4C is perhaps the best example of why we must cherish and safeguard public service broadcasting for the future.

The Welsh language is one of the oldest living languages in Europe and a significant driving force of Welsh and British identity and consciousness in the 21st century. It is a language of daily discourse and debate, contemporary literature, business, sport and national celebration; the language of urban and rural Wales across generations of families. Core to S4C's unique public purpose is the vital role it plays in sustaining and promoting the Welsh language – reflecting the diverse cultures that use Welsh through the provision of high quality accessible content.

S4C's existence ensures that Welsh language content is not relegated to the dark corners of the broadcasting schedule. But the heart of S4C's challenge now is to attract new viewers outside traditional Welsh speaking television audiences – promoting diversity and plurality through the idea that the language belongs to everyone in Wales, whether they speak a lot, a little or none at all. This ambition is not just for S4C as a broadcaster. As the main funder and distributor of Welsh language content, this aim must be embedded throughout S4C's commissioning supply chain.

Underpinning this is S4C's status as an independent public service broadcaster. This review seeks to safeguard this independence for the future. A lot has changed since S4C began broadcasting in 1982, and we need to ask these questions now to ensure that S4C is in a stable position to continue to serve Welsh speaking audiences and attract new viewers.

This independent review considers three key issues, as set out in the terms of reference.

1. S4C's public service remit and its ability to deliver high quality content
2. Guaranteeing an S4C for the future through its funding methods
3. Securing an independent and effective S4C through its governance structure

I have spoken to and consulted a wide range of stakeholders – from S4C and its partners to schoolchildren and individual viewers. I was supported by officials from the Department for Digital, Culture, Media and Sport: Amy Forbes (as Secretary to the Review), Maria Alexandri and Ffion Williams. I am extremely grateful to them for their hard work and insight. Though I received this assistance, I emphasise that I take full responsibility for this review.

In this review I make a series of recommendations to address the terms of reference set by government. I hope you will agree these recommendations will better equip S4C for the modern age.

Euryn Ogwen Williams
Chair, S4C independent review

Executive summary

In August 2017 the government appointed Euryn Ogwen Williams as chair of the independent review of S4C. The government established this independent review to ensure that S4C continues to play a vital role as a public service broadcaster and has a strong and successful future delivering high quality content for Welsh speaking audiences.

The chair conducted an in-depth three month review which examined S4C's public service remit, its funding methods and governance structures. His findings and recommendations are set out in three chapters.

Chapter 1: Delivering high quality content and serving Welsh speaking audiences

The first chapter looks at S4C's current public service remit and considers whether changes to the remit, and how S4C delivers it, could help increase the organisation's public value.

The review concludes that S4C could and should do more to deliver greater public value. As a public service broadcaster S4C needs to adapt to the changing broadcasting environment, and must use new digital and online services to broaden its reach and appeal, not just in Wales but in the UK and abroad. Modernising the remit would allow S4C to prioritise digital innovation alongside linear broadcast as its strategic priority, including through the development of a digital hub with digital content production capability. But beyond simply changing the remit requirements, S4C needs to innovate and take more risks to most effectively deliver its remit. As part of this, S4C should invest more energy in developing partnerships: with the BBC, with the independent sector, and with stakeholders across Wales to take a more active role in wider initiatives to promote the Welsh language.

Chapter 2: Guaranteeing an S4C for the future

Chapter 2 considers S4C's current methods of funding. As per the terms of reference, the review does not consider levels of funding for S4C.

Ongoing debates about sufficient levels of funding are a distraction from the most important issue – ensuring S4C's funding is on a stable and transparent footing. S4C is funded primarily through the licence fee with a small additional grant-in-aid from DCMS. S4C's licence fee funding is fixed until 2021/22 – however, as with all government funding, this grant-in-aid funding for S4C is subject to change. This lack of certainty on the grant-in-aid has created a disproportionate level of anxiety and uncertainty among S4C and stakeholders that goes well beyond the impact of the actual sums involved. The only way to achieve funding stability for S4C is to provide S4C's public funding entirely through the licence fee. S4C's funding decisions should be aligned with the BBC's licence fee funding settlement from 2022/23 onwards. The government should review S4C funding as part of government's regular licence fee funding settlement negotiations with the BBC. This would give S4C the same funding stability and certainty as the BBC, giving it the freedom to make the creative and commercial choices it needs to thrive and succeed. In addition to this, as the recipient of substantial public funding, S4C should seek to deliver greater public value where possible, using its scale and resources to explore commercial avenues, invest and maximise commercial income. This should not be viewed as a criticism of S4C's current work but a recognition of the need for the organisation to respond to a fast-changing media landscape.

Chapter 3: Securing an independent and effective S4C

The final chapter looks at how to ensure S4C is flexible, forward looking, and properly and proportionately held accountable for delivering public value as the Welsh language public service broadcaster.

S4C needs to be bold and take measured risks to reach new audiences. It needs clear vision and leadership, which the review concludes can only be delivered by replacing the S4C Authority with a unitary board that includes executive management as well as non-executive members. Consideration should also be given to how external accountability and challenge could be strengthened: in terms of providing clarity on current regulatory and governance arrangements for S4C and whether it would be appropriate to appoint the National Audit Office as S4C's external auditor to improve transparency and parliamentary oversight on how S4C spends public money.

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The government should update S4C's public service remit to include digital and online services and remove the current geographical broadcasting restrictions. This will allow S4C to broaden its reach and offer its content on a range of new platforms in the UK and beyond.
Recommendation 2
S4C should establish an in-house digital hub to develop and improve S4C's digital footprint and form the basis of a Welsh language digital cluster.
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S4C should establish a language partnership with the Welsh Government and others to help deliver the Welsh Government's commitment to reach 1 million Welsh language speakers by 2050.
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S4C's public funding should be provided entirely through the licence fee from 2022/23 onwards, with all future funding decisions made as part of the BBC licence fee funding settlement.
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The S4C Authority should be replaced with a new unitary board comprising executive and non-executive directors.
Recommendation 7
The government should consider whether S4C's current financial audit arrangements are suitable, including whether it would be appropriate to appoint the Comptroller and Auditor General as S4C's external auditor.

Chapter 1: Delivering high quality content and serving Welsh speaking audiences

S4C: the Welsh language broadcaster

> **"Without a doubt, S4C is one of the essential cornerstones of our culture in Wales. Since its establishment in 1982, its value in terms of strengthening our identity and culture, as well as promoting the Welsh language has undoubtedly been valuable and far-reaching."**
>
> -- The National Library of Wales

S4C is a Welsh language public service broadcaster which provides a wide range of content in Welsh (including sport, drama, factual and entertainment) across traditional and digital platforms. S4C defines itself as a publisher-broadcaster which does not produce its own programmes but commissions all its content from the independent production sector, mainly in Wales.

S4C was established by the Broadcasting Acts of 1980 and 1981, and began broadcasting in Wales in 1982 – making it the third oldest UK broadcaster (after the BBC and ITV, and launching one day before Channel 4). It was built on a strong idea that developed in Wales over the previous decade that the Welsh language should have its own media presence to protect and develop the language in a more accessible and inclusive way.

In 1982 the media landscape was very different from today. There were only four analogue television channels and S4C shared its analogue terrestrial slot with Channel 4, who broadcast to the rest of the UK outside Wales.

Media consumption and viewing habits have changed enormously over the last 35 years. Huge progress in technological innovation has changed the way people access and consume content. Traditional linear broadcasters continue to dominate the landscape but the rise of digital is relentless and disruptive – the rapid growth of video on demand and online services, spectrum glut and mobile devices has changed consumption habits, and broadened viewer expectations and the kind of content consumers want (for example, short form and interactive content).

Public service remit and impact

S4C's public service remit is defined in primary legislation and requires S4C to provide 'television programme services of high quality with a view to their being available for reception wholly or mainly by members of the public in Wales'.[1] S4C is also subject to quotas set by Ofcom regarding news

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[1] Section 204(2) Part 3 and Schedule 12, Part 2 paragraph 3, Communication Act 2003.

and current affairs, original production, independent production, European programmes, European independents, recent works, subtitling, audio description and signing (as set out in detail in chapter 3).[2]

In 2016/17 S4C spent £67 million on Welsh language content. In terms of its reach, there was a slight decrease in average weekly reach in the UK and outside Wales in 2016/17, while numbers increased in Wales and among Welsh speakers in Wales (see figure 1 below).[3]

Figure 1: Average weekly television reach of S4C since 2013/14[4]
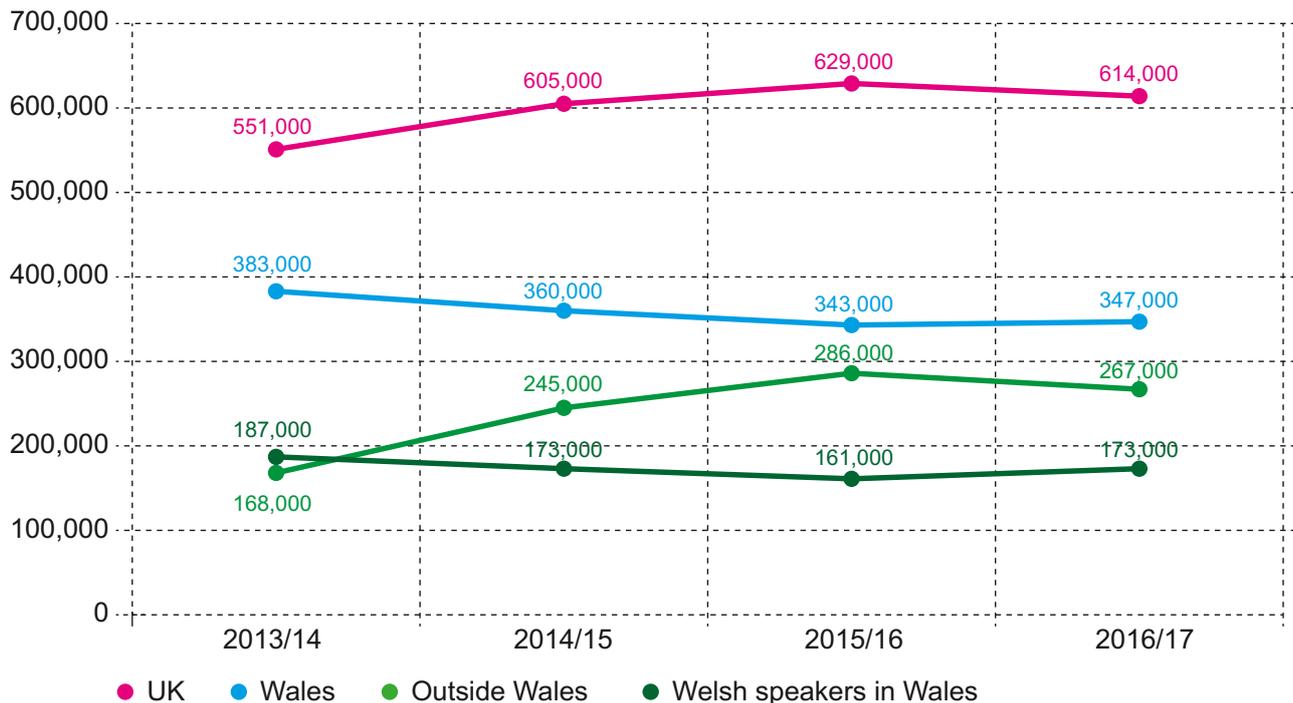
Remit reform

> **"S4C cannot continue solely as a television channel. Rather, the Welsh language needs an independent national broadcaster that operates across the different broadcasting platforms."**
>
> -- Mentrau Iaith Cymru

A number of review contributors suggested the public service remit set out in legislation is no longer fit for purpose because it is not flexible enough to take into account modern consumption trends and could unnecessarily restrict S4C in delivering content in a way that meets audience demand. This view is supported by the National Assembly for Wales' Culture, Welsh Language and Communications Committee recent report on the future of S4C.[5]

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[2] Ofcom (2017), Annual PSB Nations & Regions Compliance Report.
[3] S4C Annual Report and Accounts 2016/17.
[4] S4C Annual Report and Accounts 2016/17.
[5] National Assembly for Wales Culture, Welsh Language and Communications Committee (2017), *Future of S4C: Outside the Box.*

Specifically I received suggestions that two aspects of S4C's remit do not reflect current S4C activities or the changing broadcasting landscape.

1. Referencing only 'television programme services' does not take into account providing content through digital and online services.
2. Requiring S4C to provide programmes 'for reception wholly or mainly by members of the public in Wales' does not take into account Welsh speaking audiences outside Wales, or the fact that access to digital content cannot be restricted to Wales only.

What do S4C viewers think?

As part of the review I attended **two S4C viewer events** in Llangefni and Abergavenny to hear their views on S4C.[6] These sessions provided valuable insight on what people think of S4C programmes and how they consume content. It was interesting to hear that people watch an enormous variety of Welsh language content. Cyw for children was particularly praised, while younger viewers felt there is a lack of suitable programmes for them (although Hansh was popular). Most viewers I spoke to used video on demand and social media alongside television to watch programmes.

I also **visited schools in Anglesey and Cardiff** and spoke to 12-15 year olds – the first digital native generation. Our discussions chimed perfectly with the findings in Ofcom's Children and Parents: Media Use and Attitudes Survey 2017[7] which looked at a sample of 500 12-15 year olds in the UK. Ofcom found that 83% had their own smartphone and 55% their own tablet. 91% watch TV on a television for nearly 14.5 hours a week while 68% watch TV on other devices. 99% go online for nearly 21 hours per week and 90% use YouTube. Their mobile phone is the device they would miss most. This is the direction of travel for media usage in the next decade and confirms the view that linear television as well as digital platforms will be essential for S4C in the years ahead.

We also **conducted an online and postal survey of S4C viewers** (in association with S4C) to look at customer satisfaction and viewing habits.[8] I think these findings well illustrate changing audience habits and perceptions, and the need for S4C to improve its digital and online offer.

- **23%** of S4C viewers watch at least 1 hour of video on demand or online content each day, while only **6%** watch at least 1 hour of S4C content via video on demand or online each day.

- **34%** of S4C viewers watch S4C short-form content on BBC iPlayer at least once a month, and **19%** watch S4C short-form content on Clic (the S4C equivalent of BBC iPlayer).

S4C needs the freedom to best serve Welsh speaking audiences in an increasingly competitive and diverse broadcasting market. And as a modern public service broadcaster, it must use new digital and online services to broaden its reach and appeal. While S4C has taken some steps to adapt to market and technological changes, I agree with those who argue that an outdated remit has discouraged it from fully renewing and re-imagining itself, innovating and taking risks in a digital environment. Modernising the remit would remove this distraction and allow S4C to readjust its focus to prioritise digital innovation alongside linear broadcast as its strategic priority.

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[6] The Llangefni event took place on 26 October 2017 and 72 people attended. The Abergavenny event took place on 7 November 2017 and 65 people attended.

[7] Ofcom (2017), *Children and Parents: Media Use and Attitudes Report.*

[8] Panel Cyfryngau Cymru – Wales Media Panel, run by TRP Research, surveyed a total of 462 S4C viewers by online and post in September and October 2017.

Moreover, at a time when 43% of weekly S4C viewers are outside Wales,[9] S4C should also be able to provide content without the current geographical restrictions to provide programmes 'wholly or mainly' to people in Wales.

As a result I have concluded the government should update the remit to allow S4C to make its content available on a wider range of platforms – in Wales, across the UK and abroad. This also supports S4C's proposal in its recent vision document, *Pushing the Boundaries.*[10]

It is worth noting that other public service broadcasters' remits have been amended over time to accommodate technological innovation. For example, the government amended Channel 4's remit through the Digital Economy Act 2010 to encourage it to broadcast public service content across a broader range of platforms, including video on demand and digital services.[11] I believe it is now the time to ensure that S4C's remit is also brought up to date. Given the speed of market and technological changes I would also suggest the government keeps S4C's public service remit under regular review.

Recommendation 1

The government should update S4C's public service remit to include digital and online services and remove the current geographical broadcasting restrictions. This will allow S4C to broaden its reach and offer its content on a range of new platforms in the UK and beyond.

Expanding digital capacity

> **"In addition to investing in programmes, S4C must continue to explore, experiment, and invest in new platforms to ensure that Welsh content is available to the Welsh audience on the latest platforms, thereby competing with other broadcasters on the same terms".**
>
> -- Dr Elain Price, Non Vaughan Williams and Iwan Williams
> Department of Communications and Media, Swansea University

There is clearly a strong appetite for Welsh language content online and S4C has taken steps to respond to changing demand – for example, establishing a video on demand service in 2006, followed by the S4C Clic smartphone and tablet app in 2011; working with the BBC to show S4C content on BBC iPlayer; working with Amazon Fire and Samsung to integrate an S4C app; launching on YouView; and producing tailored content on social media.

As a result S4C's online presence has grown significantly in recent years. In 2016/17 there were 18 million viewing sessions of S4C content on Facebook and Twitter, and 7.6 million online viewing sessions of S4C content across S4C Online and BBC iPlayer.[12]
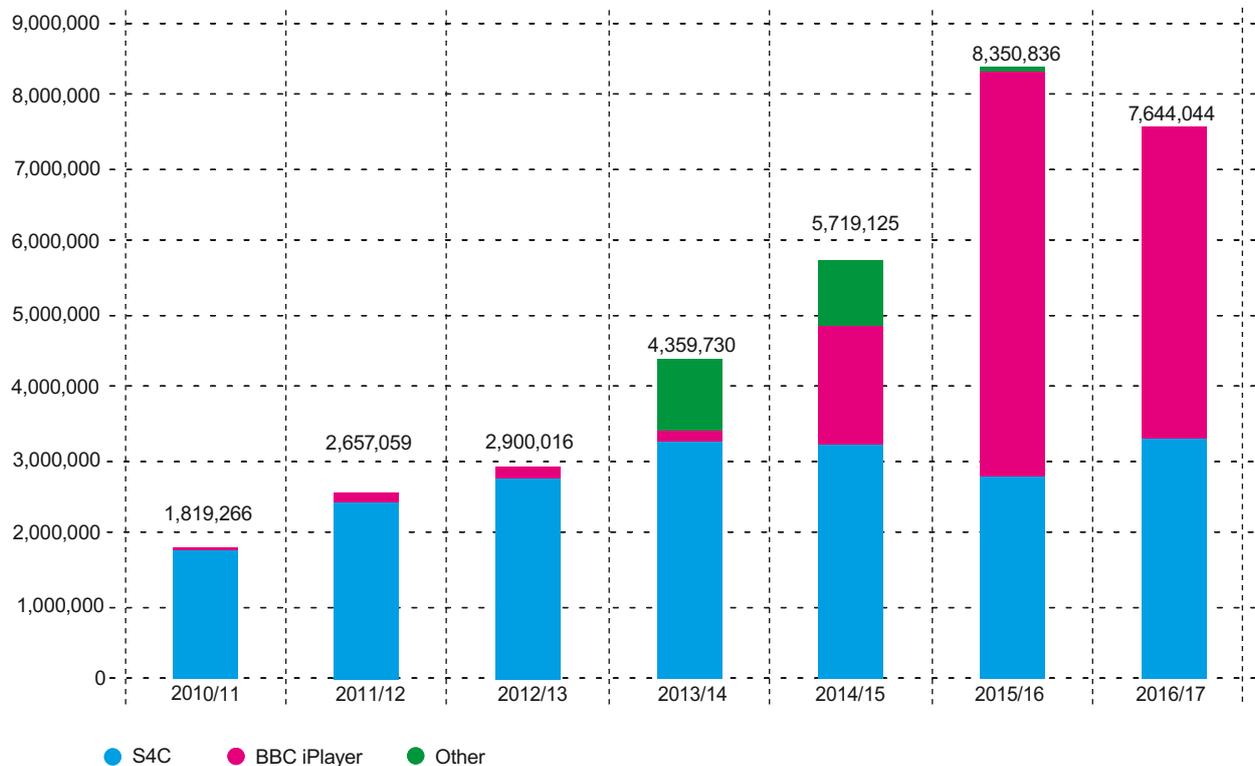
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[9] S4C Annual Report and Accounts 2016/17.
[10] S4C (2017), Pushing the Boundaries.
[11] Section 22 Digital Economy Act 2010.
[12] S4C Annual Report and Accounts 2016/17.

Figure 2: Viewing sessions for S4C programmes on S4C Online and BBC iPlayer[13]

But S4C could and should be doing more. Review contributors suggested that S4C's current digital marketing and distribution strategy is inconsistent and lacks direction. Digital should be at the heart of everything S4C does. It should be fully embedded across the business, with S4C working alongside its independent production partners to add value. A modernised remit (as set out in recommendation 1) would give S4C greater freedom to innovate and compete, and to respond quickly and effectively to changing technology and market trends.

S4C's smaller scale (relative to other public service broadcasters) means it has the flexibility to prioritise digital, and the quick turnaround and iterative nature of digital content creation is well suited to an in-house model. Establishing an in-house digital hub could therefore provide an opportunity for S4C to improve its digital footprint and help drive efficiencies. The digital hub should lead S4C strategy on digital content and distribution, exploring new services and platforms for a variety of audiences including children and learners.

S4C does not currently produce any in-house content – neither linear nor digital – and there is nothing to restrict S4C from developing capacity to produce in-house content. The mature independent sector and ITV Wales provide a range of programmes for S4C's linear schedule – and as S4C's economic and creative impact in Wales is based on this outsourcing, it would be disruptive and likely expensive to develop linear in-house content capacity.

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[13] S4C Annual Report and Accounts 2016/17.

Developing in-house digital content production would not have the same issues, but would be a bold change. In particular this would need to be developed with careful consideration of the impact on the independent sector. However digital production and development is best stimulated in clusters and S4C's role should be the focus and catalyst for Welsh language producers and developers all over Wales. Ultimately an in-house digital hub could support the provision of high quality Welsh language content across all platforms, particularly if linked to government regional hub projects, such as the Swansea Bay City Region Deal, the North Wales Economic Ambition Board or the government's proposed Cardiff regional tech hub to support the growth of digital clusters.

Protecting Welsh content for future generations

The National Library of Wales told me that S4C content plays an important role in defining Welsh national identity and culture and promoting the Welsh language.

The National Library is currently undergoing an ambitious project to digitise the BBC Wales archive to be available in publicly accessible digital hubs in Carmarthen, Wrexham and Cardiff. Making content more accessible is a key driver to promoting the language and I would encourage S4C and the National Library to work with the Welsh Government to explore how S4C Welsh language content can be digitised and made available to the public.

Recommendation 2

S4C should establish an in-house digital hub to develop and improve S4C's digital footprint and form the basis of a Welsh language digital cluster.

Delivering the new remit

"I think S4C must take a few risks."

-- Elfed Roberts
Chief executive officer, National Eisteddfod of Wales

Modernising S4C's remit and building in-house digital capability gives S4C the freedom to make strategic choices about the direction of its services and the content it commissions and distributes.

S4C has invested a lot of its energy since 2010 to protect its standing as an institution and many review contributors suggested that this had been at the expense of participating with others on initiatives to promote the Welsh language at a time of rapid change. S4C must be able to respond quickly, not fear failure, take risks with small sums of money, and be less hierarchical and prescriptive in its processes. Its current approach has not prevented the successful development of its presence on social media, but it must now do more and take the next step to engage with new audiences.

Some review contributors argue that updating S4C's remit would require an increase in its funding. I do not agree with this assessment. As suggested by a number of stakeholders, to deliver its new remit S4C needs to change its strategic outlook and approach, rather than receive additional funding. Harnessing the opportunities of digital, alongside leveraging the benefits from new and established partnerships

and maximising commercial income, are central to this. (While levels of funding are outside the scope of this review, chapter 3 considers funding methods in more depth.)

Discoverability: Search and access

Some review contributors raised concerns about S4C's prominence on electronic programme guides (EPGs) and smart TVs. There are no simple solutions to this issue, and indeed the Digital Economy Act 2017 placed a duty on Ofcom to undertake a review into EPG prominence regime by 2020. However I think the reforms outlined in my first and second recommendations will help equip S4C with the tools it needs to turn this threat into an opportunity. With a modernised remit and new digital focus, S4C can explore ways to improve its discoverability and make its content more accessible to a wide range of audiences across different platforms. Its strength lies in its unique and simple proposition – Welsh language content – and I would encourage S4C to explore all avenues to improve its prominence and visibility.

Partnerships

"A confident and independent S4C, free to work across all the digital media with a clear vision, new energy and in a strategic partnership with other organisations, including the Welsh Government, would have a huge impact on the future of the Welsh language and the target of a million speakers by 2050."

-- Professor Ruth McElroy and Hywel Wiliam
Faculty of Creative Industries, University of South Wales

A dominant theme from the vast majority of review contributors is that S4C must invest more in partnership – strengthening its current relationships and building new ones. Many stakeholders pointed to the need for S4C to alter its cultural outlook to recognise that partnership is not inherently a threat to independence – and some went so far as to criticise S4C for missing opportunities to work effectively with others. S4C straddles two areas: broadcasting and digital content, and the Welsh language. In both there are enormous pools of knowledge, expertise and experience, and opportunities for S4C to build profound and energetic partnerships for the benefit of all.

This section considers S4C's partnerships, how these have been working and whether there is scope to strengthen them further.

S4C's relationship with the BBC

S4C's most important current partnership is with the BBC. S4C currently receives £74.5 million from the licence fee each year which is distributed by the BBC. This level is specified in the BBC Framework Agreement and guaranteed until 2021/22.[14] The Framework Agreement sets out that S4C and the BBC have a shared objective: 'the BBC and S4C must have the shared aim of working together to observe and safeguard the independence of both'.

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[14] BBC Framework Agreement: An Agreement Between Her Majesty's Secretary of State for Culture, Media and Sport and the British Broadcasting Corporation (2017).

A strong partnership is good for both broadcasters, giving them the ability to share resources and expertise to enhance delivery. The BBC and S4C can drive efficiencies and value for money through collaboration, and work together to maximise prominence and consolidate their influence in the global market.

In November 2017, S4C and the BBC published a new Partnership, Funding and Accountability Agreement,[15] replacing the previous 2013-17 operating agreement. The new partnership agreement is a good example of effective collaboration: both broadcasters operate in a competitive market but acknowledge that in many areas they can deliver greater value for licence fee payers by working together.

The agreement sets out both broadcasters' commitment to working together to deliver high quality public services for Welsh speaking audiences for the duration of the new BBC Royal Charter until 2028. It also confirms the continuation of the joint Partnership Board between BBC Cymru Wales and S4C executives, which aims to identify and develop opportunities for efficiencies and strategic and creative collaboration between the two broadcasters, and includes formal arrangements to ensure both organisations are able to scrutinise how the partnership is working.

This unique strategic and creative partnership spans three principal areas:

a. S4C funding from the licence fee

As the recipient of licence fee funding directly from the BBC, the agreement sets out the accountability mechanisms for the BBC to ensure that its funding is being used properly and efficiently in the provision and broadcasting or other distribution of S4C services. This includes S4C submitting a financial assurance report to the BBC every 6 months.

b. Creative and editorial partnership

The BBC is required to provide S4C – free of charge – with at least 10 hours of television programmes in Welsh for broadcast on S4C. The agreement sets out how the BBC and S4C will work together to agree an annual programme plan for content. The BBC and S4C also jointly commission drama and factual content (such as Y Gwyll and Un Bore Mercher) and have worked together to jointly acquire the rights to sporting events like Pro 14 rugby and Six Nations Rugby with ITV.

A major element of the creative partnership is the BBC's provision of news content for broadcast on S4C. I am aware of two longstanding concerns about the quality of news on S4C. Firstly, there are concerns about a lack of plurality in Welsh language news content because it is all produced by the BBC (and broadcast on BBC Cymru Fyw, BBC Radio Cymru or S4C). Secondly, I also heard concerns about S4C news not being distinctive enough – for example, one review contributor said "it was BBC news on S4C". Comparisons were also made with Channel 4 and ITV News, both of which are clearly very distinctive even though both are produced by ITN.

No one I spoke to questioned the accuracy or veracity of S4C news content, but the BBC and S4C should consider how to address these concerns as part of their editorial discussions (while recognising S4C's editorial independence). It is worth noting that distinctiveness and serving the diverse communities of UK nations and regions are key public purposes for the BBC in its new Royal Charter so I would hope the BBC engages with this issue positively.

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[15] Partnership, Funding and Accountability Agreement between the BBC and S4C (2017).

c. Broader operational partnership

The new agreement guarantees that S4C content will continue to be accessible on BBC iPlayer until 2028 for the duration of the agreement, enabling S4C to continue reaching new audiences. S4C and the BBC have also agreed to co-locate and share technical services in the BBC's new broadcast centre in Cardiff from 2019.

Relationship with the independent production sector

Alongside the BBC, S4C has a longstanding partnership with the independent production sector in Wales. A dynamic independent production sector is vital for S4C's future. The sector produces high quality award-winning programmes that helps S4C compete for audiences in a global market, while providing an essential connection between S4C and the Welsh speaking community.

When S4C was created it had a statutory duty to acquire its purchased programmes on commercial terms, so the number of small production companies across Wales grew rapidly in the first few years of S4C's existence.[16] This duty sparked a new industry which became the eyes and ears of S4C in many Welsh speaking communities and extended S4C's economic impact in different parts of Wales. Indeed it is widely accepted across the Welsh creative industries that S4C investment was the most important factor in establishing Wales as a major centre for independent television and film production. The sector remains an important driver of employment in many parts of Wales and helps S4C continue to broadcast content that feels local, and the relationship is central to S4C's significant economic impact across Wales and the UK – independent research commissioned by S4C shows that every £1 spent by S4C creates a total value of £2.09.[17]

The Welsh production sector has changed hugely over the years as companies consolidate and move into different markets. These structural changes in the sector have helped stabilise the industry and sustained S4C output, but many review contributors told me that S4C's reliance on the bigger players has marginalised smaller production companies who feel ignored by S4C in favour of larger, more powerful companies.

S4C used to work to a 4-5 year production commissioning cycle which some review contributors argued in practice discriminated against smaller companies that did not have the capacity to work to these long timescales. While this strategy can deliver better value for money in some areas, S4C must look at ways to address this disparity and adopt a more inclusive commissioning strategy that effectively leverages the wealth of new ideas, skills and talent from smaller producers as well as the dominant players.

Alongside this is the role of TAC as the representative body for the Welsh TV production sector. S4C's relationship with TAC should be at the heart of its relationship with the independent production sector, yet smaller producers told me that S4C's direct engagement with the big producers has increasingly sidelined TAC and reduced its ability to effectively represent all its members. Both parties need to be more inclusive and play their part in nurturing and celebrating new talent and ideas, as a strong S4C-TAC partnership would likely produce even higher quality content, with the potential to deliver demonstrable social, economic and cultural value in Wales. Both S4C and TAC must take strong proactive steps to re-earn the trust of smaller producers, and re-establish TAC's role as an effective broker between S4C and the Welsh production community.

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[16] Section 48 (3) Broadcasting Act 1981 (since repealed and replaced with section 58 Broadcasting Act 1990).
[17] S4C Annual Report and Accounts 2016/17.

More broadly, many independent production companies said that S4C micromanages the production commissioning process which leads to duplication, frustration and higher costs. Elsewhere, small digital enterprises suggested there is a lack of transparency on how they can bid to produce S4C digital content. If it is to be a better partner, S4C should move away from rigid hierarchies and be more transparent and trusting. I would also hope the new digital hub recommended above will encourage S4C to think more about its digital offer and how it can establish stronger partnerships with other digital producers.

Alongside improving its existing relationships, S4C should explore other ways it can support the Welsh creative industries. An important area ripe for development is S4C's relationship with writers. A group of leading Welsh writers shared their concerns that the S4C ecosystem which nurtured and developed new Welsh writers over the years no longer exists. In the analogue world S4C was the main catalyst for professional Welsh creative talent. In the digital world, it should consider adapting its approach by being an active participant in partnerships with other organisations, particularly the Arts Council of Wales, Theatr Cymru, Welsh Books Council, Literature Wales, Radio Cymru and others on a range of different projects to develop creative writing talent for the future within a framework of rights that are appropriate in a digital world.

Promoting the Welsh language

> **"S4C has a key role to play in terms of promoting and developing the Welsh language to contribute to the Welsh Government's goal of having a million Welsh speakers by 2050."**
>
> -- Y Coleg Cymraeg Cenedlaethol
> (National Welsh College)

Wales is a bilingual country and the Welsh language has official status in Wales. To support this, in 2016 the Welsh Government committed to achieve 1 million Welsh speakers by 2050.[18] An important part of achieving this commitment rests with the Local Mentrau Iaith (Language Initiatives) – partnerships of local voluntary organisations, educational institutions and businesses established across Wales and supported by the Welsh Government and local government to promote the Welsh language.

S4C plays a vital role in reflecting Welsh culture and society and promoting the Welsh language, and this review is the right place to consider how S4C fits into the Welsh Government's language policy.

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[18] Welsh Government (2017) Cymraeg 2050: Welsh Language Strategy.

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S4C's influence on the Welsh language

A four year research project at Bangor University looked at the impact of watching Cyw (S4C's service for children) on the Welsh language awareness of 2-5 year olds from non-Welsh speaking homes.

Researchers found that children who watched Cyw performed better in Welsh language tests, increased their knowledge of Welsh vocabulary and could even recognise some language patterns. They recommended that Welsh language television programmes could be incorporated into the curriculum and wider strategies to promote the Welsh language.[19]

In our online and postal survey of S4C viewers, I also found firm backing for the idea that S4C is important to the Welsh language:

- 95% of S4C viewers agree or strongly agree that S4C plays an important part in keeping Welsh as a relevant and modern language.

- 94% of S4C viewers agree or strongly agree that S4C plays important part in the development of Welsh identity and culture.

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The clear alignment of interests between the Welsh Government's initiative and S4C presents a significant opportunity to explore ways that S4C can work with others to advance the Welsh language. There are a number of national organisations united by a common goal to promote the Welsh language. S4C clearly has a strong role to play in this space and should show leadership by establishing a partnership of prominent organisations who can leverage their scale to pool resources and aspirations to make a significant contribution to achieving 1 million speakers by 2050.

S4C already has formal partnerships with a number of leading organisations such as BBC Radio Cymru, Arts Council of Wales, Yr Urdd, Into Film and Theatr Genedlaethol Cymru, but it should seek to strengthen these and build others to catalyse the network effects of joint action. This partnership with the Welsh Government would structurally embed S4C and others in delivering the language mission – and would strengthen S4C's relationship with its audience as well as providing opportunities to explore potential efficiencies from improved collaboration.

Firmly embedding S4C as a central component of the Welsh Government's language mission had overwhelming support from most stakeholders. The partnership should be established by the end of 2018, working closely with the Welsh Government on ambitious national projects. S4C, the Welsh Government and other organisations should pool their resources to deliver effective projects and interventions to promote the language. This could include coordinating activities and events to raise the profile of the language, and working together on campaigns that promote the Welsh language to new audiences.

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[19] Bangor University (2017), Exploring minority language input sources as means of supporting the early development of second language vocabulary and grammar, 2011-2015. Available at: https://www.cambridge.org/core/journals/applied-psycholinguistics/article/exploring-minority-language-input-sources-as-means-of-supporting-the-early-development-of-second-language-vocabulary-and-grammar/FE8145EF906B547A53127874FCB42D95

> **"S4C has an important role, not only as an entertainment provider, as a champion for discussion and as a source of information, but also as a mirror of the development of the nation and the people of Wales."**
>
> -- Mudiad Meithrin
> (Nursery Movement)

It will be important to see this partnership as a long term project which addresses unmet needs – for example, S4C and BBC Radio Cymru should not expect to measure its success with immediate rises in audience figures. This will only work if there is commitment from the highest levels of each organisation to the partnership's goals, and acceptance of the principle that together they are stronger. It will not be a small undertaking but the potential benefits are huge if we can safeguard the Welsh language for generations to come.

Of course this partnership must do nothing to undermine S4C's status and current obligations as an independent public service broadcaster, nor the UK government's responsibility for broadcasting.

A small minority of review contributors suggested that responsibility for S4C should be devolved to the Welsh Government. The UK government position is clear that broadcasting is a reserved matter and will continue to be regulated at a UK level. This long-debated issue was carefully considered in the Silk Commission's 2014 report on devolution[20] and the UK government confirmed its current position in the St. David's Day Agreement 2015.

This is the right approach. It is my view that calls for devolving responsibility for S4C are a distraction from the crucial strategic priorities S4C should be focusing on, not just to serve audiences in Wales, but Welsh speaking audiences in the UK and abroad.

Recommendation 3
S4C should establish a language partnership with the Welsh Government and others to help deliver the Welsh Government's commitment to reach 1 million Welsh language speakers by 2050.

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[20] Paul Silk (2012 & 2014), Commission on Devolution in Wales (Part I & II).

Using Welsh in voice recognition

Voice recognition is becoming increasingly prevalent in the broadcast and digital content space. Content providers and platforms like Amazon, Google, Apple, Microsoft and Samsung have embedded virtual assistants to help users navigate their systems. As this technology embeds, consumers will come to expect voice recognition as the norm for navigation.

As part of the review I spoke to a group of Welsh speaking teenagers about how they consume content. When asked which language they would expect to use in 10 years' time to find content they unanimously said "Welsh, of course". This new generation of Welsh speakers have expectations about being able to engage with content in both Welsh and English.

Welsh is already available as a written language option on Apple, Google and Microsoft devices and applications, but steps must be taken to ensure that all platforms and providers offer a Welsh language option. S4C should work closely with the Welsh Government and others to identify opportunities for Welsh to become one of the languages of choice in voice recognition. Action should be taken now to ensure that Welsh is not left behind as technology evolves.

Chapter 2: Guaranteeing an S4C for the future

> **"S4C and its suppliers cannot continue without budget certainty and a funding model that is clear and sustainable."**
>
> -- Rondo Media

Scope of the review

Before expanding on my findings and subsequent recommendations, I think it is necessary to be clear that the review's terms of reference were explicit in asking me to examine S4C's current funding methods. This review will not consider levels of funding for S4C. This is clearly the right approach as it is for the Secretary of State to determine that S4C's funding is sufficient and adequate to deliver its remit.

Despite funding levels being clearly out of scope of the review, some contributors argued that S4C funding should return to pre-2010 levels, while others thought that S4C could receive less funding if it focused on digital content. My only comment on this issue is that I agree with the majority of contributors who said that actually the most important thing for S4C is funding stability and transparency.

S4C funding methods

For the first 10 years of its existence S4C was solely funded by the Independent Broadcasting Authority (IBA), based on a funding formula agreed by the IBA, S4C, Channel 4, ITV and the Home Office. The formula was based on the net advertising revenue of the ITV franchises that sold advertising for Channel 4 and S4C. Though the level of funding varied from year to year as advertising revenue changed, there was enough stability for S4C to forward plan. The government's role was to adjudicate between S4C and the IBA if a funding settlement could not be agreed, but it was never required to exercise this function.

As new satellite and terrestrial services grew and advertising revenue became less predictable, this funding model became unsustainable. Under the Broadcasting Act 1990, the IBA became the new Independent Television Commission (ITC) which licensed all commercial broadcasters, and public funding for S4C moved entirely to HM Treasury. Funding was calculated based on the final year of IBA funding and linked to inflation. Alongside this S4C was given the power to raise its own advertising revenue (which was over £10 million at the time). This dual funding stream continued for almost 20 years.

More recently S4C has been through a period of funding reform. Like many other publicly funded services, S4C's funding was reduced at Spending Review 2010. Alongside this, the Public Bodies Act 2011 gave responsibility to the Secretary of State for Digital, Culture, Media and Sport (DCMS) to ensure that S4C receives 'sufficient' funding to deliver its remit.[21] In 2013, S4C funding was almost entirely transferred from HM Treasury to the licence fee. In addition to this the government also provides

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[21] Section 31 Public Bodies Act 2011.

a small annual grant-in-aid from DCMS. In 2016/17, licence fee funding accounted for around 92% of total S4C public funding (£74.5 million) and the DCMS grant-in-aid amounted to around 8% of total S4C public funding (£6.762 million).

Figure 3: S4C public funding streams
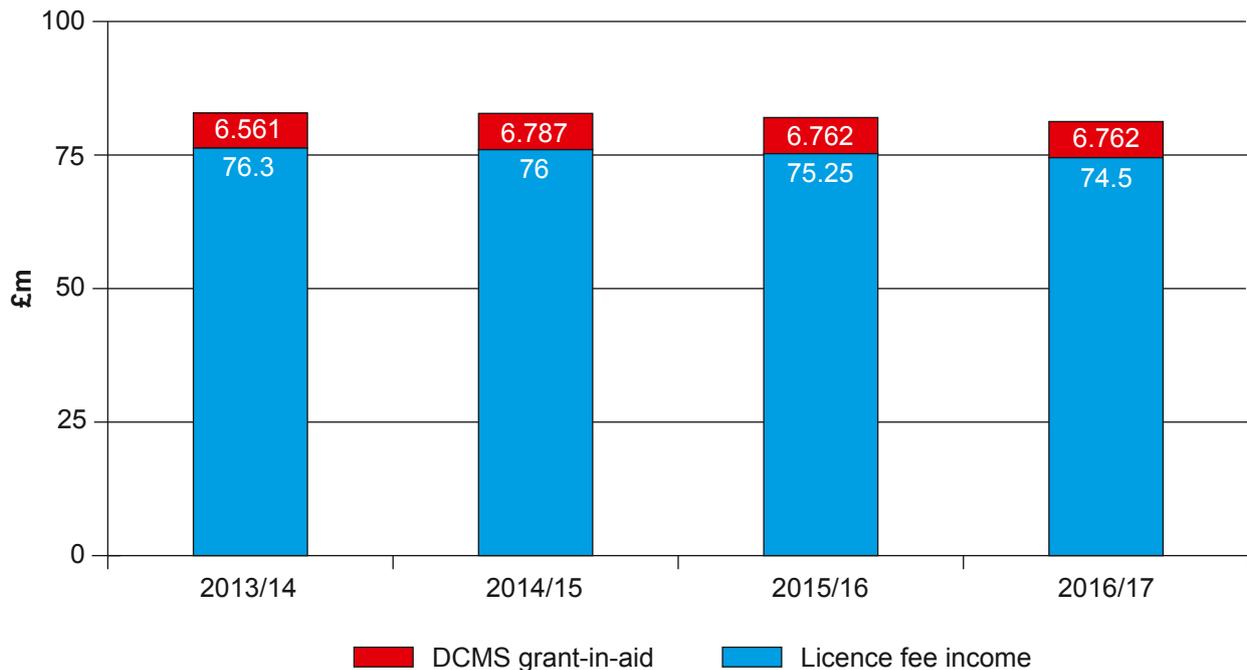
Some review contributors suggested that more clarity is needed as to what 'sufficient' funding means (as set out in the Public Bodies Act 2011). However my view is that discussions about sufficient levels of funding is a distraction from the real issue – ensuring S4C funding is on a stable and transparent footing. This echoes the key points made by the European Broadcasting Union (EBU) in its public funding principles for public service media:[22]

- **Stable and adequate:** A stable and predictable source of funding enabling full coverage of the public service remit in the digital media age.

- **Independent from political interference:** Not reliant on political favour, thereby promoting public trust in public service media and its role as a truly indispensable service.

- **Fair and justifiable:** Fair and objectively justifiable to the public and the market.

- **Transparent and accountable:** An open and clear funding mechanism holding public service media accountable to its audience.

In 2015 the government agreed with the BBC that S4C would receive £74.5 million in each financial year from the licence fee for the duration of the 2017/18 – 2021/22 licence fee funding settlement. This

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[22] Dr Richard Burnley (2017), Public Funding Principles for Public Service Media.

arrangement is set out in the BBC Framework Agreement.[23] This funding stream is fixed, stable and transparent and gives S4C the financial certainty to plan ahead.

However the additional DCMS grant-in-aid funding for S4C is not fixed nor stable. As with all government funding, it is subject to change with spending reviews, budgets and changing government priorities. This was the case at Spending Review 2015 where government funding for S4C was reduced while licence fee funding for S4C remained the same.

Using government funding as the secondary mechanism to fund the core remit of a public service broadcaster is therefore problematic because there is a limit to the level of certainty it can provide. In my view this lack of certainty regarding government funding has created a level of anxiety among S4C and stakeholders that goes well beyond the impact of the actual sums involved. This has in turn created an unnecessary distraction from the real challenges that S4C faces (as set out in chapter 1).

S4C needs funding stability to make the creative and commercial choices it needs to thrive in an increasingly competitive broadcasting market. Having considered a wide range of stakeholder views I have concluded the only way to achieve this is by removing the uncertainty of the DCMS grant-in-aid, and providing S4C's public funding entirely through the licence fee.

The current licence fee funding settlement for S4C is fixed in the Framework Agreement until 2021/22 and I am not recommending this settlement is changed. Instead I recommend that S4C funding decisions are aligned with the BBC's licence fee funding settlement. The government should review S4C funding as part of government's regular licence fee funding settlement negotiations with the BBC, which usually take place every five years or so (depending on the length of the BBC Charter). The next licence fee settlement period will begin in 2022/23. S4C is already primarily funded by the licence fee so this would require no structural changes to the current funding process.

The Framework Agreement states that following completion of the S4C review, the Secretary of State for DCMS (after consulting the BBC and S4C) must set out the process for determining S4C funding from the licence fee for 2022/23 to 2027/28.[24] My recommendation would therefore align with this requirement for the Secretary of State. Such a change would not undermine the Secretary of State's statutory duty to ensure sufficient funding for S4C, because government would still retain the mechanism to execute its determination of sufficient funding via its funding settlement negotiations with the BBC.

Full alignment with the licence fee would give S4C funding certainty for five years or so at a time. This gives S4C the same level of certainty as the BBC and removes the distractions which are preventing S4C from stepping up to the challenges it faces.

I know that S4C and some of its supporters believe the existence of government funding (on top of licence fee funding) protects S4C independence. I do not support this view, nor do I see how government funding could somehow safeguard S4C independence above and beyond what are very clear Framework Agreement obligations.

As outlined in chapter 1, S4C has a close and unique relationship with the BBC and the two broadcasters' recently published partnership agreement sets out how they will work together strategically, creatively and operationally to deliver public value for Welsh speaking audiences for the next decade. Central to this is the shared objective (set out in the Framework Agreement) to work together to observe and

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[23] Clause 39(3) BBC Framework Agreement.
[24] Clause 39(4) BBC Framework Agreement.

safeguard each other's independence.[25] My view is that providing S4C's public funding entirely through the licence fee complies with both the spirit and the letter of the new partnership agreement, and will support a successful future for S4C.

Recommendation 4

S4C's public funding should be provided entirely through the licence fee from 2022/23 onwards, with all future funding decisions made as part of the BBC licence fee funding settlement.

Commercial activity

> **"Like other public bodies we recognise the pressure to maximise public investment. S4C is in a better position than any to do this and should be allowed to raise commercial income where appropriate."**
>
> -- Arts Council of Wales

S4C's commercial activities are currently carried out through a small commercial arm (S4C Commercial) which is wholly owned by S4C. According to S4C's latest annual report, its commercial strategy includes selling advertising and sponsorship, developing the Cyw pre-school brand, and working with production sector partners to explore co-production and programme sales opportunities. Since 2010 the S4C Authority has had representation on the S4C Commercial Board and the Commercial Board also provides regular written reports to the Authority.

However a number of review contributors raised concerns there is not a strong enough link between the Authority and S4C Commercial to make full use of commercial opportunities and use commercial revenue to invest in S4C's core business. Although S4C Commercial reports to the Authority, commercial activity is not fully embedded as part of S4C's strategic direction. I strongly agree with this view and suggest that S4C explores ways to bring commercial enterprise into the heart of its public services with commercial strategy driven centrally by the Authority.

I would also encourage S4C to consider how S4C Commercial and the revenue it generates can be best used to invest in new projects and leverage the best returns. In particular I think it is important that S4C explores alternative ways to generate new income streams from content distribution, particularly on digital platforms. With stable public funding S4C needs to put new energy and thinking into innovative ways to add commercial value to the organisation.

Some review contributors also suggested that S4C and independent producers should work together to make more concerted efforts to generate commercial income from their content through international distribution. I agree this should be an area of focus for S4C. S4C's position as a minority language broadcaster in a bilingual community is its unique selling point and its formats will have value in other countries with similar arrangements.

I also believe S4C and independent producers should focus on opportunities to co-finance and co-produce projects, particularly on digital content. I argued in chapter 1 that S4C needs to shift its strategic focus to prioritise digital content alongside its traditional linear broadcast services. Digital content is an area which is ripe for commercial investment. For example, in November 2017 the government announced a £21 million investment to create a new network of regional tech hubs to support the

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[25] Clause 39(2) BBC Framework Agreement.

growth of the UK's pioneering and innovative digital companies and clusters. One of these hubs will be in Cardiff which would potentially be a strong new investment opportunity for S4C.

S4C receives a large amount of public money and is accountable to the licence fee payer and taxpayer for delivering value for money and high quality services. My view is that S4C should be using its scale and resources to explore all potential commercial avenues and seek to maximise commercial revenue, reinvest in its services and deliver even greater public value. The BBC is obviously a prime example of how this model can work in practice – and I see no reason why S4C cannot make demonstrable strides to improve its commercial offer as the world's only Welsh language broadcaster. I would note though that, like the BBC, S4C receives significant state subsidy and all its commercial undertakings should include careful consideration of the impact on the wider market.

S4C argues that its ability to undertake commercial activities is currently restricted because of limitations set out in legislation. Under the Communications Act 2003, S4C must write to the Secretary of State for DCMS to seek approval to undertake certain commercial activities. Any approval by the Secretary of State must be contained in an order.[26] This process does not prevent S4C undertaking commercial activity (for example, the Secretary of State laid an order in 2008 to allow S4C to invest in digital), but S4C contends it is a lengthy and convoluted process that is not compatible with the business model of a modern broadcaster. Some review contributors even said this process may have contributed to missed commercial opportunities.

It is important to remember that as a public body in receipt of licence fee and government funding, it is right that S4C is subject to a certain level of government oversight. In this case the key is ensuring this oversight is practical and proportionate, and does not unduly limit S4C's ability to compete and succeed.

Earlier in this chapter I argued that uncertainty around the definition of sufficient funding is distracting S4C from the real challenges it faces. I believe similar issues arise with regard to commercial activity as well. While the process of seeking approval from the Secretary of State certainly seems convoluted, I agree with some review contributors who suggested that the process has given S4C an excuse not to make generating commercial revenue a strategic priority. Nevertheless I do broadly agree the process could be simplified to support S4C to innovate and take the commercial decisions it needs to succeed in a fast-changing media landscape.

On this basis, I recommend the government considers how current requirements to approve S4C commercial activities can be relaxed to give S4C greater freedom to invest and generate commercial revenue. Greater commercial freedom would allow S4C to generate commercial income from its content and investments, deliver greater public value, strengthen S4C's financial stability and bring them in line with how other public service broadcasters operate.

Recommendation 5

The government should consider amending current approval requirements to give S4C greater freedom to invest and generate commercial revenue.

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[26] Section 206 Communications Act 2003.

Chapter 3: Securing an independent and effective S4C

> **"S4C should maintain its independence as a broadcaster from both BBC and government and be transparent in its governance and accountability. Fairness, transparency and accountability should be the core principles of any governance structure."**
>
> -- PACT

Governance and accountability

The Welsh language community is fond of its institutions but it is not resistant to change. As a community in Wales and beyond, it has embraced technological change but some of its institutions have found it difficult to adapt to the strains and stresses of the digital revolution. S4C has made some efforts to adapt but my discussions during the review have given me the impression that many people feel the organisation is slightly behind the curve. My ambition in this review is to create the environment where S4C is <u>institutionally</u> capable of getting ahead of the curve. This begins with governance and regulation.

In this section I will set out the current governance and accountability mechanisms and my assessment of the reforms needed to achieve a modern and well-functioning S4C. In doing so, I am also focused on the need for S4C to retain its operational and editorial independence in a globally-connected digital environment – something stressed by all contributors to this review.

S4C Authority

S4C's non-executive governing board is known as the S4C Authority. Its members are appointed by the Secretary of State for DCMS in consultation with the Wales Office and the Welsh Government. Vacancies are advertised publicly and appointments are made following a public appointments procedure.

The S4C Authority oversees S4C strategy and financial management, along with ensuring the organisation complies with its regulatory duties.[27] The Authority does not manage S4C on a day-to-day basis and is not involved in commissioning or editorial decisions – these management responsibilities are delegated to the executive team. Members of the executive team also attend Authority meetings. This structure is intended to ensure the S4C Authority remains at arm's length from executive team decisions, particularly in terms of content.

From my discussions during this review, it has become obvious the Authority in its current form is not the right structure to drive progress and change. The Authority model worked well when the IBA regulated S4C and the Authority focused on strategic oversight. However when the IBA was dissolved in 1992, the Authority took on regulatory responsibilities and became both cheerleader and regulator (as the former BBC Trust was). The Communications Act 2003 then transferred most regulatory responsibilities from the Authority to Ofcom. In 2011, following a period when the lines between the Authority and executives was less defined, the functions were divided into a two-tier structure with separate Authority

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[27] The duties of the S4C Authority are set out in the Communications Act 2003 and the Broadcasting Acts 1990 and 1996.

and executive Strategic Management Board, which I think has created uncertainty around who is responsible for what. Although in principle there should be a clear separation of duties, in practice there is inconsistency and confusion – particularly in terms of having an executive management board which is also responsible for strategy, alongside the Authority. This view is shared by many review contributors.

I have concluded this two-tier management structure is not the best way to ensure S4C's editorial and operational independence in the current media landscape. As I have argued in previous chapters, S4C needs to be bold and take risks to reach new audiences, new platforms and new ideas. It needs clear vision and leadership which I think can only be achieved by having a single board that includes executive management as well as non-executive members. This composition will help deliver a single vision with effective checks and balances and executive level buy-in embedded from the start.

On this basis I recommend the S4C Authority is replaced with a brand new unitary board, comprised of both executives and non-executives, capable of driving forward S4C's new priorities. This approach should reflect the principles of good governance set out in the Financial Reporting Council's UK Corporate Governance Code.[28] My view is that this would be a more efficient and robust way to lead the organisation at a time when strong leadership is needed to guide S4C through the challenges ahead.

Both executive and non-executive members should have clearly defined roles and responsibilities (where the executives manage and non-executives scrutinise and advise). The non-executives should constitute the majority of board members to support effective challenge to the chief executive and executive team. The non-executives should be a diverse group with a strong mix of varied and complementary skills, experience and backgrounds. A balanced and diverse board will be key to ensuring the success of S4C. Non-executives should be appointed in the same way as current Authority members – by the Secretary of State for DCMS in consultation with others. The non-executives should then appoint the executive members of the board.

The new unitary board should be responsible for discharging S4C's public service remit and ensuring it meets its regulatory duties. It should also oversee senior executive appointments, financial management and complaints.

Recommendation 6

The S4C Authority should be replaced with a new unitary board comprising executive and non-executive directors.

Regulatory framework

My discussions with review contributors highlighted the considerable uncertainty about S4C's regulatory arrangements and I want to take this opportunity to clarify the issue.

The Secretary of State for DCMS has powers to review S4C's fulfilment of its public service remit and to direct the S4C Authority to take remedial action in the event of a finding of failure to fulfil the remit.[29] The Secretary of State also has power to approve via order the provision of new services by the S4C Authority if certain conditions are met.[30]

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[28] Financial Reporting Council (2016), The UK Corporate Governance Code.
[29] Section 339-340, Part 3 Communications Act 2003.
[30] Section 205, Part 3 Communications Act 2003.

S4C's regulatory framework is set out in the Broadcasting Act 1990, Broadcasting Act 1996 and the Communications Act 2003. The Communications Act 2003 transferred the vast majority of regulatory functions to Ofcom and the self-regulatory responsibilities of the S4C Authority are now much reduced.

Ofcom has considerable experience and credibility, and has a general statutory duty to take into account the views and interests of those who live in different parts of the UK.[31] Ofcom ensures this through having a dedicated Advisory Committee for each of the nations, and representatives on the Content Board and Consumer Panel. Welsh ministers are also expected to appoint the first Welsh representative to the main Ofcom Board in 2018 as part of the government's wider devolution commitments.

S4C is not required under the statutory scheme to be licensed by Ofcom, but the statutory scheme does put in place many of the same obligations that licence holders are subject to. In short, Ofcom already has many of the same powers to regulate S4C that it has for the broadcasters it does licence.

Ofcom has duties to:

- assess S4C compliance with quotas set by the Authority and Ofcom, including independent production, original production, news and current affairs (see table 1 below);

- monitor compliance and consider complaints relating to Ofcom codes, including the Broadcasting Code (which covers issues such as standards, fairness and impartiality);

- report on S4C's performance against its obligations in its annual PSB Nations and Regions Compliance Report.

Ofcom can impose penalties of up to £250,000 on S4C for non-compliance with quotas.[32] Ofcom can also impose penalties in relation to a failure to comply with the standards code, the fairness code, and directions in respect of fairness matters, and the access code. In addition, the power to impose penalties applies to S4C compliance with advertising and sponsorship obligations, S4C duties to publicise complaints procedures, S4C obligations to monitor its programmes, S4C requirements to comply with international obligations, and S4C compliance in relation to video on demand programme services.

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[31] Section 3 (4)(I) Communications Act 2003.
[32] Note the ability to fine does not apply to European programming quotas under AVMSD compliance with the code on programme commissioning.

Table 1: S4C quotas[33]

Area	Annual quota	Performance in 2016
National and international news – All day	200 hours	273 hours
National and international news – Peak (1800–2230)	150 hours	206 hours
Current affairs – All day	60 hours	97 hours
Current affairs – Peak time (1800–2230)	30 hours	52 hours
Original production – All day	80%	83%
Original production – Peak time (1800–2230)	90%	100%
Independent production – All day	25%	94%
European programmes*	50%	97%
European independents*	10%	88%
Recent works*	50%	70%
Subtitling	53%	81%
Audio description	10%	10%
Signing	5%	5%

*European programming requirements – Quotas relate to the Audiovisual Media Services (AVMS) Directive which requires that the majority of programmes on each channel must be European (including from the UK) and at least 10% must be made by independents. Of these, the majority must have been made within the past five years.

To enable Ofcom to undertake these duties, S4C pays Ofcom a regulatory fee and provides information to Ofcom relating to these obligations.

The S4C Authority has more limited responsibilities. S4C's 2016/17 annual report states: 'The Authority has a statutory duty to ascertain the state of public opinion concerning programmes broadcast on S4C, any effects of such programmes on the attitudes or behaviour of viewers as well as the types of programmes that members of the public would like to be broadcast on S4C. The Authority is also responsible for ensuring that relevant provisions are in place to enable viewers to complain to S4C about its programming'. In addition the S4C Authority also has a duty to ensure that S4C meets its public service obligations and a duty to prepare statements of programme policy.

However this current framework is not necessarily clear to external stakeholders. Many review contributors suggested to me that as regulation of the BBC has moved to Ofcom, the same should apply to S4C. BBC regulation moved to Ofcom to provide a strong regulator to ensure the BBC delivers its mission and public purposes and it is right that, as the recipient of a substantial amount of licence fee and public money, S4C is also properly held to account for delivering its remit.

Taking into account the Secretary of State's powers and Ofcom's current regulatory responsibilities for S4C, as set out above, my view is the current regulatory framework provides clear lines of public accountability for S4C. However I would note that a strong new S4C unitary board (as recommended above) should take a proactive and robust role in ensuring that S4C is held accountable for delivering its public service remit and obligations.

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[33] See Schedule 12 Communications Act 2003.

Some review contributors also suggested that S4C, like other public service broadcasters, should have a service licence arrangement. While in principle this would align S4C with other broadcasters, it would not substantively alter Ofcom's current regulatory responsibilities. I have therefore concluded that additional regulatory arrangements are not necessary and would not add value to either S4C or Ofcom.

Ultimately I believe the current regulatory arrangements are broadly effective. However I would encourage S4C to work with Ofcom to consider how they could do more to inform stakeholders about the nature of their respective regulatory responsibilities.

Accountability

S4C is a public body and accountable to Parliament for its financial management. S4C must lay its annual report and accounts before Parliament each year and the S4C chief executive is the accounting officer responsible to the Public Accounts Committee. S4C is also accountable to the DCMS Select Committee and Welsh Affairs Select Committee.

As a recipient of licence fee funding, S4C is required to agree accountability arrangements with the BBC to give the BBC assurances that the funding it provides is being used properly and efficiently in the provision and broadcasting or other distribution of S4C services.[34] To support this the new BBC-S4C partnership agreement requires S4C to provide a financial assurance report to the BBC every 6 months.[35]

National Audit Office

The National Audit Office (NAO) scrutinises public spending for Parliament. This includes monitoring the spending of a number of public bodies and assessing whether the UK's principles of public spending (regularity, propriety, value for money and feasibility) are followed.

The NAO has no formal audit role for S4C. As S4C receives public funding, the NAO has some access to S4C's financial affairs in relation to economy, efficiency and effectiveness. This is set out in the new BBC-S4C partnership agreement.

'Subject to the relevant statutory provisions relating to the audit requirements upon S4C, the National Audit Office shall have access to the licence fee contribution provided to S4C for the provision of the S4C Services for the purpose of carrying out examinations into the economy, efficiency and effectiveness with which S4C has used its resources in discharging its functions.'[36]

The new BBC Charter and Framework Agreement established the NAO as the BBC's external auditor, with the government's White Paper noting this would provide a 'stronger element of scrutiny that is truly external' to the organisation.[37] I believe this argument is equally relevant for S4C as a body that receives considerable public funding, particularly in light of my earlier recommendation that S4C should have a unitary board with strengthened external accountability.

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[34] Clause 39(5) BBC Framework Agreement.
[35] Clause 4.5 Partnership, Funding and Accountability Agreement between the BBC and S4C (2017).
[36] Clause 4.7 Partnership, Funding and Accountability Agreement between the BBC and S4C (2017).
[37] Department for Culture, Media & Sport (2016), A BBC for the future: A broadcaster of distinction.

S4C is currently required by statute to appoint external auditors to audit its statement of accounts.[38] It is worth noting that Grant Thornton LLP has been S4C's external auditors since S4C's creation. Although S4C has provided assurances that the team working on their accounts changes regularly and that the firm was chosen (from tender) on merit every time, there are risks around familiarity in the audit process which can arise when an auditor remains with an organisation for a long time.

I have therefore concluded the government should consider whether S4C's current financial audit arrangements are suitable, including whether it would be appropriate to appoint the NAO as S4C's external auditor to provide greater transparency and support parliamentary oversight of this public spending, and enhance the consistency of NAO oversight on the licence fee. The government may also wish to consider the case for NAO to undertake value for money studies of S4C activities.

Of course it is important to emphasise the NAO would not question the appropriateness of S4C's objectives as set by Parliament, nor would it question the merits of S4C's editorial or creative judgements, but instead focus on whether S4C delivers its objectives in a cost-effective way.

Recommendation 7

The government should consider whether S4C's current financial audit arrangements are suitable, including whether it would be appropriate to appoint the Comptroller and Auditor General as S4C's external auditor.

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[38] The statutory provisions (set out in para. 12(2) of Schedule 6 of the Broadcasting Act 1990) require Secretary of State approval for the appointment.

Conclusion

In 2022 S4C will have been broadcasting to Welsh speaking audiences for 40 years. Whether it is still relevant in the changing media landscape will depend on how the organisation responds to the challenges and opportunities it faces over the next five years.

It is very clear from the written submissions and discussions I had with a wide range of stakeholders that S4C plays a vital role in the economic, social and cultural fabric of Wales and still commands significant support. However almost all review contributors were clear that S4C needs to do more.

Central to this challenge is the need for innovative thinking. S4C needs to move away from the organisation's established orthodoxy of the last 35 years to remain relevant and competitive while staying true to its core purposes. This means recalibrating its strategic priorities to increase its focus on digital content and platforms alongside traditional linear broadcast, developing and maintaining strong relationships with a wider range of partners, and making more concerted efforts to maximise commercial income and investment. This will not just require strategic change but a real cultural shift in S4C from the top down.

Structural changes in the broadcasting sector means that S4C will have to work smarter to compete. This means taking significant steps to improve S4C's digital offer to ensure that it adapts to increasing audience fragmentation and caters to changing consumption habits. Modernising S4C's public service remit and establishing an in-house digital hub will help S4C respond to the opportunities of the new digital age, and ensure that it can maintain its current audience while broadening its appeal to new generations of viewers.

Alongside this is S4C's relationship with the rest of the sector. My clear message is that S4C must be a better partner and collaborate more effectively with all areas of the sector. S4C's unique position as the Welsh language broadcaster comes with a responsibility to support the creative ecosystem of which it is an intrinsic part. As well as partnerships with big players like the BBC, S4C should explore all avenues for collaboration to support and nurture the Welsh broadcasting sector and wider creative industries. Partnership is not just good for the sector but vital for S4C as well. In a world where the broadcasting sector needs to work together to survive, effective collaboration will be crucial to helping S4C achieve its long-term strategic objectives to broaden its audience while providing opportunities to identify synergies and efficiencies.

Beyond S4C's remit, strategy and partnerships I have concluded the most important thing the organisation needs to thrive is funding stability and certainty. The vast majority of S4C funding already comes from the licence fee, but the small additional amount of government funding from DCMS has created a disproportionately high level of anxiety among S4C and its stakeholders. In my view the best way to address this issue is for S4C public funding to be provided entirely through the licence fee, to give it the same funding certainty as the BBC and align the two broadcasters to support their new partnership agreement. Alongside this I think S4C should be doing more to supplement its public funding and deliver greater value for money by maximising commercial revenue and exploiting commercial opportunities.

To support my recommendations on funding methods, I have also made recommendations to address the concerns raised by many review contributors about S4C's current governance arrangements. I share the concerns of many stakeholders that the S4C Authority is no longer the right structure to drive

change and a new unitary board that includes executives is required to provide the strong leadership needed to steer S4C through the challenges ahead. My second recommended governance reform is for government to consider whether S4C's current financial audit arrangements are sufficient and whether the National Audit Office should become the external auditor of S4C, which would ensure full accountability for the way S4C spends public money. In response to the lack of clarity on the division of responsibilities between the S4C Authority and Ofcom, I have also set out my understanding of the current regulatory landscape and do not recommend any immediate change.

Of course this is all within the context of S4C's broader purpose to promote the Welsh language. I have argued that S4C has a central role to play in helping the Welsh Government deliver its vision to achieve 1 million Welsh speakers by 2050, and I hope the partnership I have recommended comes to fruition and yields the progress we need to bolster the Welsh speaking population.

S4C is at a fork in the road. It can either choose to continue as it always has and risk losing its relevance, or change and adapt to the new landscape. Throughout its history S4C has been most effective when it had the confidence to take chances, and the organisation needs to find this confidence again to deliver added value as the Welsh language broadcaster. As S4C embarks on the next stage of its journey, it must continue to deliver high quality content to serve Welsh speaking audiences and value for money, as it pursues its long term strategic vision with the confidence to embrace the opportunities of the digital age as a modern digital broadcaster.

Appendix A: Terms of reference

S4C was created by the Conservative Government in 1982, and this UK Government remains committed to supporting the valuable service S4C provides to Welsh speaking audiences. We want to see the channel thrive and flourish in the 21st century and embrace the opportunities of a digital age.

Background

S4C is a Welsh language broadcaster, mainly funded by the TV licence fee, but also supported by grant-in-aid from the UK government. S4C also generates some additional income through commercial activities, providing around 2% of the channel's funding.

The government has committed to undertaking an independent review of S4C's remit, governance and funding.

1. Objectives

a. To conduct a review to:

1. examine S4C's remit, including with respect to online services, and consider whether changes are required in light of changing viewing habits and technological developments
2. examine S4C's current governance structure and accountability models
3. examine S4C's partnership with the BBC and its current funding methods

b. To make recommendations to the Government within 3 months.

2. Key considerations

In assessing the objectives above (1a –b), the review will consider the following factors:

a. S4C's role in promoting, and its impact on, the Welsh language and wider place in Welsh culture and society

b. S4C's contribution to the Welsh economy

c. S4C's relationship with the independent production sector and other broadcasters and cultural institutions, including whether its partnerships are working effectively and to maximum effect

d. Audience opinions, satisfaction and viewing figures of both Welsh speaking viewers, learners and the non-Welsh speaking population, both in Wales and across the UK

e. S4C's editorial independence, and appropriate transparency and accountability arrangements

f. The way in which the S4C is governed and held accountable, including how the S4C Authority is operating and whether alternative models of governance should be considered

g. The way in which S4C is regulated and the role of Ofcom

h. Value for money, efficiency and the role of the NAO

i. The way S4C is currently funded, including the licence fee, grant-in-aid and commercial sources, and its financial relationship with the BBC from 2022/23

j. The extent of S4C's commercial freedoms

3. Process

The review should seek evidence from a wide range of stakeholders, including the Welsh public, key industry and Welsh language stakeholders, other broadcasters, the UK and Welsh governments, as well as other interested parties in Wales and across the UK.

4. Output

A report setting out an assessment of the current remit, governance and accountability structures and funding methods, as well as proposals for the most appropriate remit, regulatory, governance and funding models for the future of S4C, including key findings, conclusions and any other supporting information. The report must be submitted to the Secretary of State for Digital, Culture, Media and Sport within 3 months, prior to publication.

Appendix B: Parties consulted

Organisations that Euryn Ogwen Williams met during the review

Organisations	Representatives
Arts Council of Wales	• Phil George (Chair)
BBC	• Elan Closs Stephens (BBC Board member for Wales) • Rhodri Talfan Davies • Rhys Evans • Sian Gwynedd
BECTU	• David Donovan
Equity	• Simon Curtis
ITV	• Phil Henfrey, Geraint Evans, Huw Rossiter
MG Alba	• Donald Campbell (CEO)
National Assembly for Wales	• Bethan Jenkins AM (Chair of the Culture, Welsh Language and Communications Committee) • Steve George
National Eisteddfod of Wales	• Elfed Roberts (CEO)
Ofcom	• Aled Eirug (Welsh member of Ofcom Content Board) • Glyn Mathias (Chair of the Welsh Advisory Board) • Rhodri Williams, Tom Walker
PACT	• Wil Stephens, Rosina Robson
S4C	• Huw Jones (Chairman) • Owen Evans (CEO) • Ian Jones (former CEO) • Amanda Rees (Creative Content Director) • Rhodri ap Dyfrig (Online Content Commissioner)
Smorgasbordstudio	• Dylan Griffith
TAC	• Gareth Williams • Iestyn Garlick • Nia Thomas
TG4	• Padhraig O'Ciara (Chair of the Celtic Media Festival)
University of South Wales – Centre for Media and Culture in Small Nations	• Professor Ruth McElroy • Hywel Wiliam • Dr. Helen Davies
Welsh Government	• Alun Davies AM • Bethan Webb (Deputy Director Welsh Language) • Dr. Hywel Owen • Paul Kindred

Organisations	Representatives
Welsh Language Commissioner	• Meri Huws • Anna Rolewska
Writer's Guild – Welsh Committee	• Committee members including: • Manon Eames • Sion Eirian • Siwan Jones • Wil Roberts • Roger Williams
Urdd Gobaith Cymru	• Aled Sion • Mai Roberts

Individuals and organisations that submitted written evidence

1. Anna McMorrin MP
2. Arts Council of Wales
3. Bangor University – Dr. Alison Mawhinney & Carys Aaron, School of Law
4. BBC
5. BECTU Cymru
6. Boom Cymru
7. Cardiff University – School of Journalism, Media and Culture
8. Chwarel
9. Cwmni Tinopolis Cymru
10. Dyfodol i'r Iaith
11. Equiniti
12. Equity
13. Huw Marshall – Consultant
14. Institute of Welsh Affairs
15. ITV Cymru Wales
16. Learned Society of Wales
17. Liberty Global – Guto Harri, Managing Direction of External Communications
18. Llangollen International Musical Eisteddfod
19. Menter Brycheiniog a Maesyfed
20. Menter Iaith – Bro Dinefwr
21. Menter Iaith – Cwm Gwendraeth Elli
22. Menter Iaith – Flint & Wrexham
23. Menter Iaith – Gorllewin Sir Gâr
24. Menter Iaith – Neath & Port Talbot
25. Menter Iaith – Newport
26. Mentrau Iaith Cymru
27. Merched y Wawr
28. Mudiad Meithrin
29. Museum of Wales
30. National Centre for Learning Welsh
31. National Library of Wales
32. NFU Cymru
33. PACT
34. Patrick Irwin

35. Paul Lewis, Yellow Ducks Productions
36. Plaid Cymru – Ben Lake MP and Dai Lloyd AM
37. Rondo Media
38. S4C – Amanda Rees, Creative Content Director
39. Sharp Clinical Services
40. Swansea University – Department of Communications & Media
41. TAC (Teledu Annibynnol Cymru)
42. Telesgop
43. Undeb yr Annibynwyr Cymraeg
44. Uned Iaith Cyngor Gwynedd
45. University College London – Prof. Tegid Wyn Jones, Department of Physics & Astronomy
46. University of South Wales – Professor Ruth McElroy, Hywel Wiliam, Dr. Christina Papagiannouli & Dr. Helen Davies, Centre for Media and Culture in Small Nations
47. Urdd Gobaith Cymru
48. Wales Pre-School Providers' Association
49. Welsh Language Commissioner
50. Welsh Language Society
51. Wesley Clover Corporation
52. What Next? Cardiff
53. Y Coleg Cymraeg Cenedlaethol

Events attended

Ysgol Bodedern, Anglesey: Focus group with Year 8 children – 26 October 2017
Ysgol Bro Edern, Cardiff: Focus group with Year 8/9 children – 15 November 2017
S4C viewers evening, Llangefni, Anglesey – 26 October 2017
S4C viewers evening, Abergavenny – 7 November 2017
Dathlu'r Gymraeg Conference – 9 November 2017

Other evidence considered

TRP Research Wales Media Panel of 462 Welsh speakers in September & October 2017
S4C Public Survey 2016

National Assembly for Wales Culture, Welsh Language and Communications Committee inquiry into S4C: oral and written evidence and the Committee's final report (Outside the Box: The Future of S4C) published in August 2017.

29.03.2018

The independent review of S4C by the Department for Digital, Culture, Media and Sport

Dear friend

We were pleased this morning to receive the official report and recommendations of the independent review of S4C chaired by Mr Euryn Ogwen Williams. The report can be read here.

We welcome the announcement today that S4C's Exchequer funding will be maintained at the current level for the rest of this Spending Review period. This will provide stability for S4C over the coming years to help us face the substantial challenges which lie ahead. We also welcome the Government's wish to secure S4C's funding stability for the long term. Given S4C's longstanding and valued partnership with the BBC, the recommendation that we should receive the whole of our funding from the licence fee will inevitably be a controversial step. The challenge will be to ensure three crucial principles, namely funding stability, S4C's independence and the provision of adequate funding.

Throughout, the review demonstrates how essential S4C is considered to be in the life of modern Wales and to the future of the Welsh language. What comes over very clearly is the wish on all sides for S4C to do more – more, in terms of creating digital content; more, in terms of contributing to sustaining and developing the language and the numbers of its speakers; more, in terms of being an effective partner to other bodies in related areas. The challenge, of course, is to do so without weakening the richness of the present provision.

Many of the report's recommendations run in parallel with internal work streams already in place. They all deserve our careful consideration. We will be looking at the detail and the Government's response over the coming weeks before responding in more detail.

Thank you for your continued support of S4C -in particular during the period of the review. If you would like to discuss the report or our response to its recommendations, please do not hesitate from contacting us or Steve Thomas, strategy and policy consultant and Catrin Hughes Roberts, director of partnerships, through glesni.parry@s4c.cymru or 02920 741243.

Yours sincerely

Huw Jones
Chair, S4C Authority

Owen Evans
Chief Executive, S4C

Department for
Digital, Culture
Media & Sport

Government response to the S4C independent review: 'Building an S4C for the future'

29 March 2018

Government response to the S4C independent review: 'Building an S4C for the future'

Presented to Parliament
by the Secretary of State for Digital, Culture, Media and Sport
by Command of Her Majesty

29 March 2018

Foreword from Secretary of State for Digital, Culture, Media and Sport

S4C is the world's only Welsh language broadcaster. In fulfilling this role, and fulfilling it well, S4C has a unique cultural and social value, as well as making a vital economic impact. This government is committed to the future of Welsh language broadcasting and we are proud to support the valuable service S4C provides to Welsh speaking audiences in Wales, the UK and abroad. S4C is a core part of our ecosystem and I want to see it thrive and embrace the opportunities of the new media landscape.

This is a challenging yet exciting time for broadcasting. Like our other public service broadcasters, S4C needs to adapt to rapid technological and market change. It needs a clearly defined role in the face of strong competition, delivering for audiences with original content and imaginative distribution. And crucially S4C needs to make sure it provides value for money for the public that funds it.

My predecessor appointed Euryn Ogwen Williams as chair of the independent review of S4C. Euryn's in-depth knowledge and understanding of the broadcasting sector, the Welsh language, and Welsh culture and society made him the ideal candidate to lead this important review, and I am extremely grateful to him for his hard work and dedication in producing this comprehensive review.

This review delivers this government's manifesto commitment. The review is a thorough and insightful examination of three key issues as set out in the review terms of reference: S4C's public service remit and its ability to deliver high quality content; S4C's funding methods; and its governance structure.

The review challenges S4C to be better and I see the review's recommendations as central to achieving this aim. S4C provides hugely valuable and high quality content and services - from children's programmes and documentaries, to being a trusted source of news in Wales. However I agree with the Chair's overall conclusion that S4C needs to do more to adapt to the changing media landscape and remain relevant as an independent modern public service broadcaster in the UK

S4C receives a substantial amount of public money - over £81 million in 2016/17 - and I agree with the review that it should be doing more within its current stable funding envelope to deliver for Welsh speaking audiences. It should not be afraid to take risks where commercial broadcasters are unwilling or unable to do so. This will require clear strategic leadership and vision, working more smartly to exploit the opportunities of digital innovation, and being a better partner in supporting the sector rather than competing with it. In particular I note the Chair's conclusion that S4C has invested a lot of its energy since 2010 to protect its standing as an institution at the expense of collaboration. Clearly this is an outlook that must change.

The Chair is entirely correct that the next few years will be a key test for S4C and I recognise that root and branch changes in S4C's outlook and strategic approach are required to deliver these reforms. I also share the Chair's view that S4C, as well as working harder to maximise

commercial revenue, needs funding stability and certainty to thrive during what will be a period of rapid change.

With that in mind, the government is committing to maintaining S4C's Exchequer funding at its current level of £6.762 million for 2018/19 and 2019/20. This will give S4C the funding certainty it needs for the next 2 years to deliver these much-needed reforms. I expect S4C to take immediate action to re-prioritise existing resources and allocate new funding to take forward the reforms recommended in this review, particularly on improving its digital and commercial arms. Alongside this, I share the Chair's view that there may be opportunities for S4C to drive efficiency savings in its business and I expect S4C to demonstrate value for money. With that in mind I fully support the Chair's recommendations that S4C's current governance and accountability arrangements should be strengthened.

This is an exciting opportunity for S4C to embrace innovation and collaboration. I look forward to seeing S4C flourish as the cornerstone of the Welsh broadcasting sector and creative industries.

Rt Hon Matt Hancock MP
Secretary of State for Digital, Culture, Media and Sport

Government response to the S4C independent review

Summary

The independent review presents a strong and sensible package of reforms which have the potential to deliver real change to make S4C a better organisation that more effectively serves Welsh speaking audiences.

The government accepts all of the recommendations for government made by the S4C independent review. Alongside this we also expect S4C to take forward the relevant recommendations and suggestions in the review. The government expects S4C to respond quickly and has asked S4C to provide a detailed implementation plan by July 2018 on how it will deliver the necessary reforms.

Given the wide-ranging nature of these recommended reforms, S4C may wish to consider appointing an external specialist advisor or establishing a short-term external advisory panel to assist them through this transitional phase. This will be particularly valuable to support the organisation in areas where the requisite skills may not already be available - for example, on driving commercial success and digital innovation. However any appointments of this nature should carefully consider the value for money case.

While some of these recommendations will likely require legislative change when parliamentary time allows, the government fully expects S4C to work flexibly in the interim to deliver these reforms as much as possible within the constraints of the current statutory framework.

Recommendation 1

The government should update S4C's public service remit to include digital and online services and remove the current geographical broadcasting restrictions. This will allow S4C to broaden its reach and offer its content on a range of new platforms in the UK and beyond.

The government accepts this recommendation. S4C was established in 1982 when the broadcasting sector looked very different. Its current public service remit reflects a bygone era and we agree that it should be updated to include digital and online services and to remove the current geographical restrictions. We agree with the Chair's assessment that S4C could and should be doing more to innovate to broaden its reach and appeal, to deliver its duties effectively as a modern public service broadcaster.

Updating the remit will allow S4C to make its content available on a wider range of platforms - in Wales, across the UK and abroad. However S4C should not use an outdated remit as an excuse not to continue its focus on delivering better digital and online services now. The government is clear that the current public service remit has not prevented S4C from moving into the online and digital space already - it already has a growing online and digital presence, particularly through social media and Clic (S4C's on-demand service), and its content is already

available outside Wales. We also agree with the Chair's assessment that updating the remit does not require an increase in S4C funding, but rather a change in S4C's strategic outlook and approach.

Delivering this recommendation will likely require legislative change which government will take forward when parliamentary time allows. However we are clear that S4C should begin work now to prioritise digital innovation as a strategic focus.

Recommendation 2

S4C should establish an in-house digital hub to develop and improve S4C's digital footprint and form the basis of a Welsh language digital cluster.

The government welcomes this recommendation. We agree with the Chair's assessment and note his findings that S4C's current digital marketing and distribution strategy is inconsistent and lacks direction. S4C is not currently doing enough to adapt to a digital marketplace. We agree that digital should be fully embedded across the business and S4C should be doing more as a catalyst for digital production in Wales to add value to the sector. As the Chair notes, developing capacity to produce in-house digital content will help S4C drive efficiencies, improve its digital footprint and help stimulate a cluster for Welsh language producers and developers all over Wales.

The government also agrees the digital hub should be developed with careful consideration of the impact on the vibrant Welsh independent production sector which already produces high quality award-winning content. We look forward to receiving an update from S4C on how it will deliver this recommendation.

Recommendation 3

S4C should establish a language partnership with the Welsh Government and others to help deliver the Welsh Government's commitment to reach 1 million Welsh language speakers by 2050.

The government welcomes this recommendation. We agree that S4C plays a vital role in reflecting Welsh culture and society and promoting the Welsh language. We recognise this is a matter for S4C but it is important that any partnership with the Welsh Government focuses on areas where there is a clear devolution link such as education. The government notes the Chair's suggestion that S4C should establish this language partnership by the end of 2018, and we look forward to receiving an update from S4C on progress in due course.

In terms of broader partnerships, the government supports the Chair's findings that S4C must invest more in partnership by strengthening its current relationships and building new ones. We agree that S4C needs to alter its cultural outlook to recognise that partnership is not inherently a threat to independence. S4C should have a more outward focus and make the most of the opportunities that collaboration can bring. S4C has a wealth of knowledge and expertise which it

should be using to support others in the sector. In short, S4C must be a better partner which aims to support the sector rather than compete with it.

In particular, the government was concerned about the Chair's findings that S4C's production commissioning processes lack transparency and appear to favour larger independent production companies. S4C should be doing more to support the entire sector where possible and we expect S4C to consider these findings and make changes where necessary. Alongside this, we also welcome the Chair's suggestion that S4C and TAC (as the representative body for the Welsh TV production sector) must take strong proactive steps to re-earn the trust of smaller producers that feel marginalised by S4C's reliance on the bigger players, and reestablish TAC's role as an effective broker between S4C and the Welsh production community. We also agree that S4C should explore ways it can support the wider Welsh creative industries.

S4C has a strong creative and strategic partnership with the BBC which continues to deliver high quality output in Welsh. This is a relationship that is good for both broadcasters who can work together to drive efficiencies, and collaborate to maximise impact. The government safeguards this relationship through the BBC Charter, which sets out a clear commitment to the Welsh language and states the BBC and S4C must have the 'shared aim of working together to observe and safeguard the independence of both'.[1]

However we also note the Chair's findings on concerns about a lack of plurality in Welsh language news content because it is all produced by the BBC (and broadcast on BBC Cymru, BBC Radio Cymru or S4C), and the findings about audience perceptions that S4C news is not distinctive enough. The government respects the editorial independence of both broadcasters, and hopes the BBC and S4C carefully consider the issues raised in the review.

While its partnership with the BBC is crucial, S4C must look to collaborate with other organisations with shared interests. For example, outside Wales we think there is considerable scope for S4C to improve its relationships with other minority language broadcasters (such as MG Alba, the Gaelic language broadcaster) to share knowledge and best practice, and explore opportunities for collaborative working.

The government looks forward to an update from S4C on how it will substantively improve its partnership and collaborative working with the Welsh creative industries and beyond.

Recommendation 4

S4C's public funding should be provided entirely through the licence fee from 2022/23 onwards, with all future funding decisions made as part of the BBC licence fee funding settlement.

The government accepts this recommendation. We agree with the Chair's conclusion that discussions about sufficient levels of funding for S4C are an unnecessary distraction from the

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[1] BBC Framework Agreement (2017)

real challenges that S4C faces, and the need to ensure S4C funding is on a stable and transparent footing.

S4C is already primarily funded by the licence fee which provides significant funding stability. In 2016/17, 92% of S4C's public funding came from the licence fee (£74.5 million) and 8% from the additional DCMS grant-in-aid (£6.762 million). The level of licence fee funding for S4C is guaranteed until 2021/22.

The government agrees that providing S4C's public funding entirely through the licence fee from 2022/23 (and removing the additional DCMS grant-in-aid) would provide S4C with even greater funding stability and certainty, which gives it the freedom to make the creative and commercial choices it needs to thrive in an increasingly competitive broadcasting market. This reform would provide a single fixed, stable and transparent funding stream which would give S4C the same funding certainty as the BBC.

The Chair is clear that he does not agree with the argument from S4C and some of its supporters that the existence of government funding (on top of licence fee funding) somehow further protects S4C independence. The government strongly supports this assessment and is clear this reform will not in any way undermine S4C's independence. The BBC Framework Agreement sets out very clear obligations for the BBC and S4C to work together to observe and safeguard each other's independence. Alongside this, the recently published BBC-S4C partnership agreement sets out the strategic, creative and operational partnership between the two broadcasters to deliver public value for Welsh speaking audiences for the next decade. We believe these current arrangements are sufficient to ensure the independence of both broadcasters.

The Secretary of State for DCMS has a statutory duty to ensure sufficient funding for S4C. We agree with the Chair's assessment that this reform does not undermine this duty because government still retains a mechanism to execute its determination of sufficient funding via our funding settlement negotiations with the BBC.

The current licence fee settlement period is 2017/18 to 2021/22, and the government has agreed the level of the licence fee for this period with the BBC. The government will not reopen the current licence fee funding settlement and the BBC and S4C's licence fee funding for this period will not change. The government will review S4C's licence fee funding for the next licence fee settlement period beginning in 2022/23 (and ending in 2027/28). This will take place as part of the government's broader licence fee funding settlement negotiations with the BBC which will likely begin in 2021. The government has consulted the BBC and S4C about this process.

The government remains clear that as a substantial recipient of public money, S4C must deliver efficiencies and demonstrate greater value for money. The S4C Authority is ultimately accountable for how the organisation spends public money and we expect the Authority to be able to demonstrate progress in these areas.

Recommendation 5

The government should consider amending current approval requirements to give S4C greater freedom to invest and generate commercial revenue.

The government accepts this recommendation. We note the Chair's findings that S4C is not making full use of commercial opportunities and using commercial revenue to invest in the core business.

The government recognises the Chair's concerns that S4C is currently not doing enough to supplement its substantial public funding with income generated through commercial enterprise. While there is a formal process in place for government to approve certain commercial activities, as is necessary for public sector bodies, this is not an unusually onerous process. S4C has successfully gained government approval for commercial activities in the past, but has chosen not to pursue this avenue on a regular basis in recent years.

However we will consider how current approval requirements might be amended to give S4C greater freedom to invest and generate commercial revenue. We will work with S4C to consider whether it is feasible to devise a revised approval mechanism that is practical and proportionate, while retaining an appropriate level of government oversight and accountability. This will likely require legislative change to be taken forward when parliamentary time allows.

More broadly, we agree with the Chair's conclusion that S4C should be doing more to use its scale and resources to explore commercial avenues and maximise commercial revenue. This would strengthen S4C's financial stability and bring them in line with other public service broadcasters like the BBC.

The government welcomes the Chair's suggestion that S4C explores ways to bring commercial enterprise into the heart of its public services with commercial strategy driven centrally by the S4C Authority. We expect the S4C Authority to take control and ensure S4C Commercial works smarter and harder and uses its existing commercial fund effectively and to maximum benefit. The government also supports the Chair's suggestions for S4C to leverage commercial returns through international distribution, and co-producing and co-financing projects, particularly in digital content. Of course all S4C commercial activity should carefully consider the impact on the market and the consistency of such activities with their functions.

The government expects S4C to take immediate action to address the Chair's findings and recommendations in this area. Generating meaningful commercial revenue to supplement public funding is a core function of a modern public service broadcaster, and we expect S4C to deliver.

Recommendation 6

The S4C Authority should be replaced with a new unitary board comprising executive and non-executive directors.

The government accepts this recommendation. We agree with the Chair's conclusion that the current two-tier structure of a separate S4C Authority and executive Strategic Management Board is not the right structure to drive progress and change. We were particularly concerned by the Chair's findings that there is inconsistency and confusion on the respective duties of the S4C Authority and executive management board.

As the Chair argues, S4C needs to be bold and take risks to reach new audiences, new platforms and new ideas. This requires clear vision and leadership which the S4C Authority in its current structure is not equipped to do.

We will replace the S4C Authority with a new unitary board with both executive and non-executive directors. It will be responsible for discharging S4C's public service remit and ensuring it meets its regulatory duties. It will also oversee senior executive appointments, financial management and complaints. We agree that non-executives should constitute the majority of board members to provide effective challenge to the chief executive and executive team. We also agree these non-executives should be a diverse group with a strong mix of varied and complementary skills, experience and backgrounds.

The current S4C Authority structure is set out in legislation[2] and formally changing this structure will likely require legislative change which we will deliver when parliamentary time allows. However the government will agree interim arrangements with S4C to develop a shadow unitary board to ensure the existing S4C Authority operates as effectively as possible within the confines of the current statutory framework. We expect S4C to implement this shadow unitary board by September 2018.

Recommendation 7

The government should consider whether S4C's current financial audit arrangements are suitable, including whether it would be appropriate to appoint the Comptroller and Auditor General as S4C's external auditor.

The government accepts this recommendation and will give detailed consideration to the case for appointing the Comptroller and Auditor General (C&AG) as S4C's external auditor. The government fully respects S4C's objectives and editorial judgement, but S4C receives substantial public funding and we agree with the Chair's conclusion that there should be greater external accountability and scrutiny on whether S4C delivers its objectives in a cost-effective way. We note the Chair's findings that S4C has had the same external auditors for over 35 years and the potential risks around familiarity in the audit process which can arise when an auditor remains with an organisation for a long time.

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[2] Section 56 Broadcasting Act 1990

The C&AG leads the National Audit Office (NAO), and appointing the C&AG as S4C's external auditor would improve transparency and parliamentary oversight. The government established the NAO as the BBC's external auditor in the new BBC Charter - doing the same for S4C would make NAO oversight of the licence fee more consistent and bring S4C's accountability arrangements in line with the BBC. The government notes that appointing the C&AG as S4C's external auditor should also include giving the NAO the power to undertake value for money studies of S4C activities.

The government will undertake further work in consultation with the C&AG to consider the merits of appointing the C&AG to this role, including examining the scope of any potential role. Delivering this recommendation would likely require legislative change, and the government would explore possible options which could be taken forward when parliamentary time allows. In the interim, we will work with S4C to consider whether any informal arrangements can be put in place to secure greater financial accountability.

On broader governance and accountability arrangements, the government notes the Chair's conclusion that the current regulatory arrangements for S4C are broadly effective. However we were concerned that these arrangements are not necessarily clear to stakeholders, many of whom are seemingly unaware that Ofcom already has regulatory responsibilities for S4C, alongside those held by the S4C Authority. Transparency is key and the government welcomes the Chair's suggestion that S4C works with Ofcom to consider how they could do more to inform stakeholders about the nature of their respective regulatory responsibilities. We look forward to receiving an update from S4C and Ofcom on how they will do this.

Areas beyond the scope of the independent review

Devolution
The Chair notes that a small minority of review contributors suggested that responsibility for S4C should be devolved to the Welsh Government. The government is clear that broadcasting is and will remain a reserved matter, regulated by the UK government. Broadcasters make an enormous contribution to the UK's economic and cultural landscape and it is right that the UK government retains responsibility for the sector. The government agrees with the Chair's assessment that calls for devolving responsibility for S4C are a distraction from the strategic priorities that S4C should be focusing on.

Level of S4C public funding
The level of public funding for S4C is outside the scope of this independent review and not an area under consideration by the Chair. It is for the Secretary of State for DCMS to determine that S4C's funding is sufficient and adequate to deliver its remit. To ensure stability for S4C, the government committed to freeze S4C's Exchequer funding at the current level until the review was completed.

We agree with the Chair's conclusion that updating S4C's public service remit does not require additional public funding. However we acknowledge that delivering other reforms such as developing an in-house digital content production hub may require S4C to re-allocate its existing resources.

As with all Exchequer funding, S4C's funding from government is subject to regular review. As part of an annual review process, the government considered S4C's current funding position and has decided to maintain S4C's Exchequer funding at the current level for the rest of this Spending Review period. This means the DCMS grant-in-aid to S4C will be £6.762 million per annum for 2018/19 and 2019/20. As with all other government funding, S4C's grant-in-aid for 2020/21 and 2021/22 will be determined at the next Spending Review. After 2022, all public funding for S4C will come from the licence fee, in line with recommendation 4.

We expect this additional funding to be allocated to taking forward the reforms in this review. The government believes this approach will give S4C the funding stability and certainty it needs for the next 2 years to deliver these much-needed reforms.

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Agenda Item 7.1

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