

Take 2: Public Service Broadcasting in Wales

March 2026

On 15 and 22 January 2026, the Committee heard oral evidence from ITV, the BBC, S4C, Ofcom and Channel 4 on the future of Public Service Broadcasting in Wales.



Chair's foreword

Two years ago, our Committee carried out an inquiry into Public Service Broadcasting (PSB) in Wales. In our State of Play report, we concluded that the supply of media content in Wales is inadequate, but that there was no clarity as to where the necessary improvements would come from.

Despite broadcasting being a matter reserved to Westminster, it has a significant effect on devolved areas and on Welsh civic life. We have revisited our work in this area in order to review the progress being made by public service broadcasters. We were grateful to the broadcasters, academics, and Ofcom who gave evidence to the Committee.

This update brings together both the Committee's response to the UK Government Green Paper consultation on the BBC Royal Charter Review and the recommendations from our scrutiny of the broadcasters.

We remain of the view that the supply of media content for Wales is inadequate.

The BBC and S4C remain as vital to civic life in Wales as ever. But despite the proliferation of digital video and audio services, Welsh life remains under-represented in broadcast media.

This inadequate media content diminishes Wales on a civic and democratic level, as people cannot see themselves on their screens. Moreover, it leaves citizens as being less well-informed about the political structures that govern their lives.

Accuracy regarding news and current affairs is as important as impartiality. Reflecting the devolved nature of the UK is not simply a case of adding "in England" to a news bulletin, but of re-thinking how political news is presented to reflect the reality of how the UK is governed. Audiences in Wales and beyond need news and current affairs to better reflect the devolved nature of the UK.

It is unclear where improvements to the supply of media content for Wales will come from. Rather than drive improvements, Ofcom's regulation seems designed to maintain the status quo. The BBC and S4C are dealing with long-term funding cuts, whilst ITV does not seem to see increasing content for Wales as being in their shareholders' interests.

The UK Government must take responsibility for driving meaningful improvements in media content for Wales, rather than managing the current state of inadequacy.

A handwritten signature in black ink, appearing to read 'Delyth Jewell'.

Delyth Jewell MS

Committee Chair

Key recommendations:

- Network news providers should keep driving improvements in their reporting of devolved policy issues.
- BBC, ITV and Channel 4 should increase network spend in Wales.
- Ofcom should use both its regulatory levers and substantial influence to improve the provision of media content for Wales.

In relation to the Charter review the Committee recommends that:

- Universal provision should remain the cornerstone of BBC and S4C provision.
- During the next Charter period, the BBC and S4C should receive at least current funding amounts increased by CPI.
- S4C needs to be guaranteed adequate funding. This should represent an increase on current levels, following significant long-term cuts to the broadcaster's funding and the increased costs of serving audiences across multiple digital platforms.
- The BBC and S4C should be funded by a universal mechanism (with exceptions for those who are unable to pay).

Summary of recommendations to public service broadcasters

ITV

Recommendation 1: ITV should develop a strategy, with targets, to increase its network spend in Wales.

Recommendation 2: ITV should increase its spend on content for Wales, and have a strategy to do so consistently across the rest of its licence period.

Recommendation 3: ITV should make all of its PSB content for audiences in Wales prominent on ITVX for users in Wales.

Recommendation 4: Network news providers, including the BBC and ITN, should keep driving improvements in their reporting of devolved policy issues.

Recommendation 5: ITV should take note of Professor Cushion's research into how news social media content reflects devolution across the UK and drive improvements in this area.

BBC

Recommendation 1: The BBC's spend on English-language television content in Wales should grow year-on-year until it approaches parity with the BBC's spend on English language content in Scotland. The BBC should outline to this Committee how it will achieve this.

Recommendation 2: Network news providers, including the BBC and ITN, should keep driving improvements in their reporting of devolved policy issues.

Recommendation 3: The BBC should take note of Professor Cushion's research into how news social media content reflects devolution across the UK and drive improvements in this area.

S4C

Recommendation 1: S4C should provide empirical evidence (such as headline results of staff surveys) that monitors the state of its workplace culture.

Recommendation 2: S4C should explain what engagement it has had with the UK Government, including meetings with the Secretary of State, whilst the Green Paper proposals were being developed.

Channel 4

Recommendation 1: Channel 4 should provide the Committee with the results of its work with Media Cymru to understand representation of Wales on Channel 4, and details of any work planned to increase this.

Recommendation 2: Whilst noting the positive impact of the steps that you have taken to develop a presence in Cardiff, the Committee would urge Channel 4 to build on this work by establishing a Welsh hub.

Recommendation 3: Channel 4 should develop a specific strategy, with clear targets, to increase its network spend in Wales.

Recommendation 4: Network news providers, including Channel 4, should keep driving improvements in their reporting of devolved policy issues.

Recommendation 5: Channel 4 should take note of Professor Cushion's research into how news social media content reflects devolution across the UK and drive improvements in this area.

Ofcom

Recommendation 1: Ofcom should use both its regulatory levers and substantial influence to improve the provision of media content for Wales.

Recommendation 2: Ofcom should provide current staffing levels for its offices across the UK, and explain how the seniority of staff in Wales compares with other offices across the UK. It should provide the median pay for its Cardiff office, and how this compares with the UK Ofcom median pay.

Recommendation 3: Ofcom should increase its number of employees in Wales.

Recommendation 4: Ofcom should work with ITV to increase its UK network spend in Wales.

Recommendation 5: Ofcom should revise the draft code of practice on prominence and accessibility on connected television platforms so that UK

PSBs receive equivalent prominence as they do at present under the Electronic Programme Guide code.

Recommendation 6: Ofcom should revise the draft code of practice on Prominence and accessibility on connected television platforms so that S4C receives greater prominence within Wales than it does across the UK as a whole. S4C should also receive prominence across the UK, in recognition of its audiences outside of Wales.

Recommendation 7: Ofcom should make it clear that it supports PSBs in their negotiations with television platforms. To this end, Ofcom should provide clearer guidance, so that there is less scope for disagreement between PSBs and platforms.

Recommendation 8: Ofcom should continuously review UK network news coverage of devolved policy issues. It should report to back to this Committee (and a future Senedd committee) outlining how it will do this.

1. The Committee's response to the UK Government's public consultation on the BBC Charter renewal and green paper

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The Rt Hon Ian Murray MP
Minister of State (Minister for Creative Industries, Media
and Arts)
Department for Culture, Media and Sport

4 March 2026

Dear Minister,

BBC Royal Charter Review and Green Paper consultation

We would be grateful if you would please consider the following letter as the Committee's response to the consultation on the BBC Royal Charter Review and Green Paper.

Funding

The BBC and S4C remain as vital to civic life in Wales as they ever have been. But despite the proliferation of digital video and audio services, Welsh life remains under-represented in broadcast media. Publicly funded broadcasting remains the cornerstone of provision about Wales – from news content about devolved politics to telling Welsh stories in drama, documentary and comedy. It is crucial that during the next Charter period the BBC and S4C should receive at least current funding amounts increased by CPI.

S4C needs to be guaranteed adequate funding. This should represent an increase on current levels, following significant long-term cuts to the broadcaster's funding and the increased costs of serving audiences across multiple digital platforms.

Evidence we have taken has shown that the licence fee is an increasingly contested funding mechanism. What is crucial is that the funding mechanism is universal (with exceptions for those who cannot pay). Universal provision is central to the BBC and S4C. Advertising and subscription models create incentives for broadcasters – such as maximising viewers at all costs and catering to subscribers – which are incompatible with the concept of universal provision. We therefore recommend the following:

Recommendation 1: During the next Charter period, the BBC and S4C should receive at least current funding amounts increased by CPI.

Recommendation 2: S4C needs to be guaranteed adequate funding. This should represent an increase on current levels, following significant long-term cuts to the broadcaster's funding and the increased costs of serving audiences across multiple digital platforms.

Recommendation 3: The BBC and S4C should be funded by a universal mechanism (with exceptions for those unable to pay).

The BBC's remit

As outlined above, universality should remain the cornerstone of BBC and S4C provision. Addressing market failure – such as Welsh language provision and local content about Wales – is crucial to the BBC in Wales and S4C, but so is popular content that brings audiences together. For example, we have supported efforts by public service broadcasters to ensure that national sporting fixtures, such as the Six Nations Rugby Championship, remain free-to-air.

Accuracy when it comes to news and current affairs should be considered as being as important as impartiality. Too often, the BBC still broadcasts as though it were broadcasting to audiences in England alone: that is, too often we see the broadcaster explaining that a certain UK Government policy applies only in England, without having the curiosity to explore what is happening in other UK nations. Reflecting the devolved nature of the UK is not simply a case of adding “in England” to a news bulletin, but of re-thinking how political news is presented to reflect the reality of how the UK is governed. Audiences in Wales and beyond need news and current affairs to better reflect the devolved nature of the UK. The BBC has made progress in this regard, which needs to be accelerated under the next Charter period.

There remains a shortfall in the representation of Welsh life on the BBC. We note that the BBC currently spends twice as much on television content for local audiences in Scotland as it does on local content in Wales. The need to reflect the nations of the UK – in both accurate reporting of devolution and non-news content – should be foregrounded in the next Charter. We therefore recommend the following:

Recommendation 4: Universal provision should remain the cornerstone of BBC and S4C provision.

Recommendation 5: Accuracy regarding news and current affairs should be regarded as being as important as impartiality. To this end, the BBC should continue to drive improvements in its reporting of devolved policy issues.

Recommendation 6: The need to reflect the nations of the UK – in both accurate reporting of devolution and non-news content – should be foregrounded in the next Charter.

Supporting the creative industries

The BBC's network spend in Wales has been central to developing the screen industries in Cardiff and beyond. S4C was described by its CEO, Geraint Evans, as an "economic catalyst for Wales", supporting the production sector across the nation. Both broadcasters have created employment for a skilled workforce, which has attracted further activity to the production sector.

The BBC's role as an economic catalyst in Wales should be maintained in the next Charter period. Current population-share based quotas for network spend and hours in the UK nations should be maintained.

S4C's valuable role stimulating economic activity across Wales underlines the importance of providing adequate funding for the broadcaster. We therefore recommend the following:

Recommendation 7: The BBC's role as an economic catalyst in Wales should be maintained in the next Charter period. Current population-share based quotas for network spend and hours in the UK nations should be maintained.

Recommendation 8: The valuable contribution S4C makes to stimulating economic activity across Wales should be recognised, and the broadcaster should be provided with adequate funding to sustain this.

Institutional structures and engagement with Wales

Too often, the BBC has been subjected to political influence by the UK Government, or indeed important decisions about its funding and remit have been made contrary to the wishes of devolved governments across the UK.

Justin Lewis, who is Professor of Communication and Creative Industries at the Cardiff School of Journalism, Media and Culture, told us that:

"What we will really need to see, and this is absolutely crucial, is a set of structures created that puts the decision making about both funding and governance of the BBC at much more of an arm's length from the Westminster Government than it currently

is. Other countries across Europe do that. I think we should learn from those and follow suit, because it seems to me ridiculous that every 10 years, the BBC's existential existence is up for grabs."

In its 2021 report, , our predecessor Committee called for an "an independent funding commission established with distinct Welsh representation." We support this recommendation, which we believe would help insulate the BBC from political interference and better reflect the devolved nature of the UK.

We are disappointed that neither you, nor indeed a colleague was able to attend a meeting of our Committee to discuss these matters. Whilst we acknowledge that broadcasting is currently a reserved power, it has significant implications for devolved areas, and Welsh civic life. It is appropriate that the UK Government discusses these matters with the national parliament of Wales. It is crucial that engagement with the Senedd is improved as the Charter renewal process develops. We therefore recommend the following:

Recommendation 9: The UK Government should establish an independent commission to determine the funding and remits of the BBC and S4C, with distinct Welsh representation. Decisions made by such a body should seek consent from representatives of all UK nations. Welsh appointees to this Committee should be made by the Welsh Government and subject to a pre-appointment hearing of the appropriate Senedd committee.

Recommendation 10: A UK Government Minister should attend a Committee of the next Senedd to discuss the BBC Royal Charter Review.

Yours sincerely,



Delyth Jewell MS

Chair

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

2. The Committee's letter to the UK Government

The Rt Hon Ian Murray MP
Minister of State (Minister for Creative
Industries, Media and Arts)
Department for Culture, Media and
Sport

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4 March 2026

Dear Minister,

Broadcasting in Wales

Our Committee has recently completed a series of scrutiny sessions in which we have considered the current state of broadcasting in Wales. We were disappointed that neither you, nor indeed a colleague was able to attend one of these sessions. Whilst we acknowledge that broadcasting is currently a reserved matter, it is an area that has a significant effect on both devolved areas and Welsh civic life. We expect engagement with our successor committee to improve, not least given the importance of the BBC Charter renewal to Wales.

The supply of media content for Wales is inadequate

As a Committee, we consider that the supply of media content for Wales is inadequate. We stated this conclusion in our 2024 [State of Play](#) report, and we remain of this view after our recent sessions with broadcasters, academics, and Ofcom.

This inadequate media content diminishes Wales on a civic and democratic level, as people cannot see themselves on their screens and are less well-informed about the political structures that govern much of their lives. The Welsh Government, this Committee, and the Independent Commission on the Constitutional Future of Wales have all raised concerns about the insufficiency of Welsh media content.

We remain unclear as to from where any significant improvements to the supply of media content for Wales will come. Ofcom regulation seems designed to maintain the status quo rather than driving improvements. The BBC and S4C are working within long-term cuts to their funding from the UK Government. ITV does

not appear to see increasing provision for Wales as being in the interest of its shareholders. Ultimately, responsibility for generating improvements lies with the UK Government. We call on you to drive improvements to the supply of media content for Wales, rather than managing the current state of inadequacy.

We have set our recommendations for the BBC, S4C, ITV, Channel 4 and Ofcom in the attached letters.

Yours sincerely,



Delyth Jewell MS

Chair

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

3. ITV

Magnus Brooke,
Group Director of Strategy, Policy &
Regulation, ITV
Zoe Thomas,
Head of News and Programmes,
ITV Cymru Wales
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13 February 2026

Public Service Broadcasting in Wales

Dear Magnus and Zoe,

Thank you for your appearance before the Committee on 15 January 2026. We have a number of recommendations and further queries which we set out below.

Network content

In our 2024 report, [State of Play](#), the Committee recommended:

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

The current channel 3 licence in Wales, which was renewed in 2024 for ten years, does not include this requirement. The licence includes a broader requirement that at least 35 per cent of originated network content is made outside of the M25 area.

In 2024, according to Ofcom figures, ITV's network spend in Wales was 0.8 per cent of the UK total (see graph at Annex A), which was a slight increase from 2022, when the figure was close to 0.

We remain of the view that ITV's network spend in Wales is unacceptably low, and following our meeting, are not reassured that ITV has a meaningful plan to increase it.

You outlined two visits that ITV commissioners had to Wales, one to meet Creative Wales, and the other to meet producers. You described the positive effect of this work on network commissions from Wales, and said “maybe we’ll do another of those journeys, but I don’t think we need to do it again quite so soon.” Rather than focusing on increasing the small proportion of network commissions from Wales you said that “the strategy very simply is to get the best ideas from wherever they come.” You said that you “don’t have a target for any individual nation.”

You explained that the 2025 numbers will “confirm a very substantial increase” to network spend in Wales to “about 1.3 per cent”, and also that “we’re massively over-delivering on our out-of-London content obligation.” The fact that you are “over-delivering” on making content beyond the M25 makes the low proportion of spend within Wales even more striking.

The BBC explained to us on 22 January how shifting network production out of London - to the extent that Wales now has a larger than population share of BBC UK network production by spend and hours - required long-term planning and senior executive focus. They told us that “having that leadership for a sustained period of time backing the principle has embedded it; it’s baked it in now to the BBC.”

In 2017, our predecessor committee said:

“The sort of laissez faire approach described by ITV Cymru Wales has not led to Welsh voices being adequately represented on the ITV network.”

Unfortunately, almost a decade later, we think this analysis remains true. The outcome of this hands-off approach is largely stagnant spending levels in Wales, whilst network spending from the BBC and Channel 4 is either close to or above Wales’s UK population share of 5 per cent. The consequence of this is reduced economic activity in Wales, and an absence of Welsh representation across the UK network.

Recommendation 1: ITV should develop a strategy, with targets, to increase its network spend in Wales.

You told us about seed funding for “small independent producers, outside of London and the south-east, to come up to develop ideas.” This sounds like a promising initiative. We would be grateful if you could provide figures for how this funding has been distributed across UK nations.

¹ Culture, Welsh Language and Communications Committee [The Big Picture: The Committee’s Initial Views on Broadcasting in Wales](#), February 2017, p 28

Content for audiences in Wales

The Channel 3 licence for Wales requires ITV to provide four hours of news and 90 minutes of non-news programming for Wales every week. This licence was renewed in 2024 for ten years, with the commitments for Wales maintained at the same level.

According to Ofcom data, ITV's annual spend on non-network, first-run, UK-originated content for Wales has remained around £6.3 million since 2018 (a real-terms decrease of 26 per cent) (see graph at Annex A).

This real-terms cut in spending, compounded by the rate of above-inflation increases in television production costs, can only have led to a diminution in the quality or quantity of ITV content for audiences in Wales.

Recommendation 2: ITV should increase its spend on content for Wales, and have a strategy to do so consistently across the rest of its licence period.

We discussed the prominence of ITV Wales content on your streaming service, ITVX. Your answers focused on the prominence of ITV Wales news content, saying:

"If you look at the news rail on ITVX, we made a decision to put regional news very prominently."

Audiences in Wales deserve to see their lives reflected on screen, in more than news content. Given the arguments ITV advances about the need for its content to be featured prominently on online platforms, including YouTube, we are disappointed that ITV does not seek to make all of its PSB content prominent on its own streaming service.

Recommendation 3: ITV should make all of its PSB content for audiences in Wales prominent on ITVX for users in Wales.

Network news

In our 2024 report, we recommended:

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

We discussed the extent to which network news accurately reflects the devolved nature of the UK with Professor Stephen Cushion. He told us:

"Over recent years, standards have slipped a little bit, and it's perhaps a time to reset and to rethink again, particularly as we

approach an election campaign in Wales and Scotland coming up, to reset and to actually think through again how network news are presenting politics across the UK.”

You described the work that ITV does to educated network news journalists about devolution, saying “There’s constant dialogue between us (*in Wales*) and the network newsroom.”

Too often, network news providers still broadcast as though doing so to audiences in England alone: that is, they explain that a certain UK Government policy applies only in England, but do not show the curiosity to explore what’s happening in other UK nations. Reflecting the devolved nature of the UK isn’t simply a case of adding “in England” to a news bulletin, but re-thinking how political news is presented to reflect the reality of how the UK is governed. This is an issue of accuracy, not just for audiences in Wales, but across the UK. We reiterate our previous recommendation:

Recommendation 4: Network news providers, including the BBC and ITN, should keep driving improvements in their reporting of devolved policy issues.

Professor Stephen Cushion of Cardiff University’s School of Journalism, Media and Culture, in his evidence to us, also mentioned ongoing research into how broadcasters’ social media posts reflect devolution, noting that “there is an awful lot—far more than we’ve ever found before—of headlines that simply make devolution invisible.”

Recommendation 5: ITV should take note of Professor Cushion’s research into how news social media content reflects devolution across the UK and drive improvements in this area.

Thank you for your comments on Ofcom’s current consultation on prominence rules, and the BBC Charter Review Green Paper. We will consider these comments in our responses to the Ofcom and UK Government on these matters.

Yours sincerely,



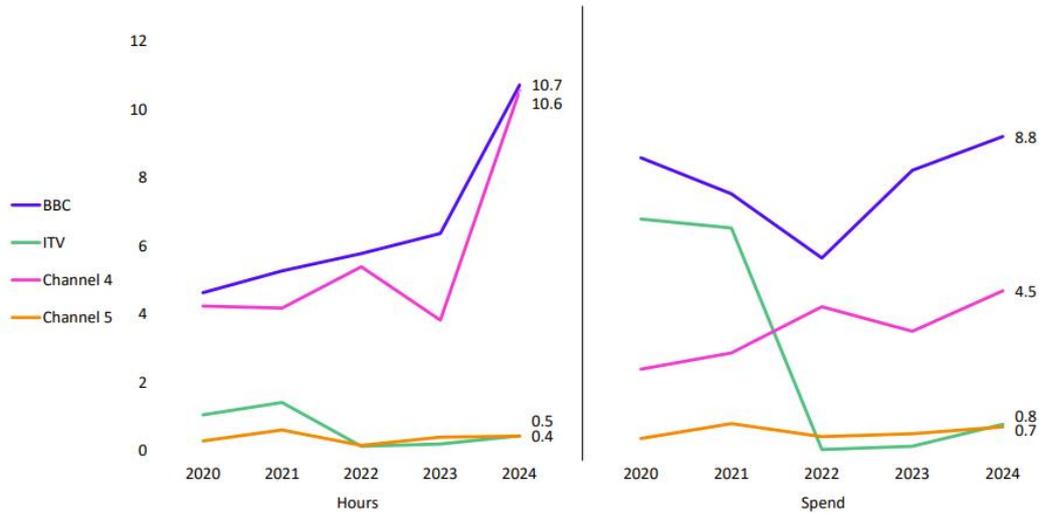
Delyth Jewell MS

Chair

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

Annex A

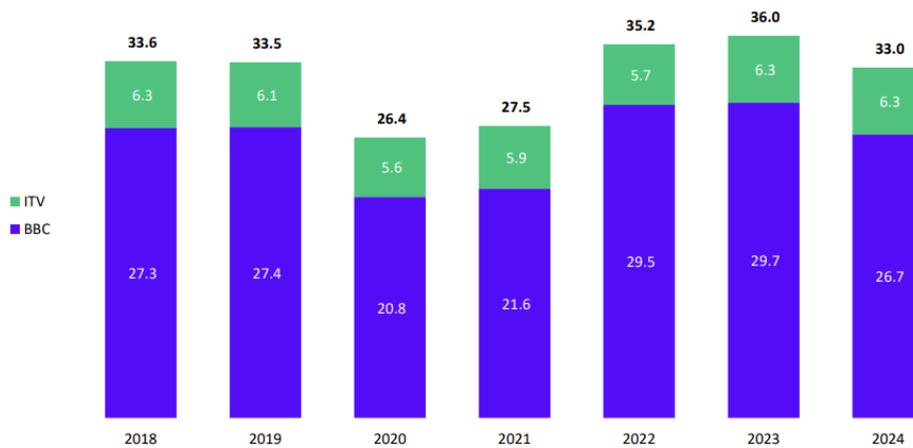
1. Proportion of qualifying network production allocated to Wales, by PSB: 2020-2024 (%)



Source: Ofcom/broadcasters.

Source: Ofcom, Media Nations Wales 2025

2. BBC and ITV Cymru Wales spend on non-network first-run UK-originated content for Wales: 2018-2024 (£m)



Source: Ofcom/broadcasters.

Source: Ofcom, Media Nations Wales 2025

4. BBC

Tim Davie CBE,
Director General, BBC
Rhuanedd Richards,
Interim Director of Nations, BBC
Garmon Rhys,
Interim Director, BBC Cymru Wales
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Public Service Broadcasting in Wales

Dear Tim, Rhuanedd and Garmon,

Thank you for your evidence on 22 January 2026.

The Committee would like to thank Tim Davie for his clear commitment to Wales during his tenure as Director General. As Professor Justin Lewis told us recently, "over the last ten years, and especially the more recent period, we've seen quite meaningful devolution to Central Square in Cardiff and BBC Wales." Although we feel that there is yet more work to be done, the BBC as it relates to Wales is in a markedly better place than it was a decade ago: the results are there to be found in spending figures, jobs, and on our screens. We have appreciated the positive engagement with the Senedd over this period and Mr Davie's personal appearances to give evidence to this Committee. We would expect that the next Director General continues in this positive manner.

There are a few further areas of questioning which we wanted to raise with you, which are set out below.

Content for audiences in Wales

In its 2024 report, [State of Play](#), the Committee recommended:

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

In 2024-25, the BBC's spend on English language TV content for audiences in Wales was £31 million (which was a slight decrease on spend in 2023-24 when it was £32 million).

In Scotland – which has a separate TV channel, BBC Scotland – spend on English language TV for Scottish audiences was £76 million in 2024-25, over double the equivalent spend in Wales.

In 2023, Rhuanedd Richards told the Committee:

“We have managed to increase our spend on English-language television last year, and this year I believe we’ll see further growth. And that’s really my aim: if I’ve got a target, it’s year-on-year growth.”

We discussed the comparative levels of spending on local content in Wales and Scotland. Mr Davie told us:

“There are differences in the broadcasting shape. There are differences in the population numbers. There are all kinds of differences.”

We do not think that the fact that Scotland has a population 74 per cent larger than Wales justifies the BBC spending over 100 per cent more on content for local content in Scotland than Wales. Wales has the same breadth of devolved political institutions as Scotland, which require the same journalistic coverage, regardless of population size. Ms Richards told us (in 2023) that she hoped to see year-on-year growth on this spend in Wales: This hasn’t happened. We reiterate the recommendation from our 2024 report:

Recommendation 1: The BBC’s spend on English-language television content in Wales should grow year-on-year until it approaches parity with the BBC’s spend on English language content in Scotland. The BBC should outline to this Committee how it will achieve this.

Network news

In our 2024 report, we recommended:

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

We discussed the extent to which network news accurately reflects the devolved nature of the UK with Professor Stephen Cushion of Cardiff University’s School of Journalism, Media and Culture. He told us:

“Over recent years, standards have slipped a little bit, and it’s perhaps a time to reset and to rethink again, particularly as we

approach an election campaign in Wales and Scotland coming up, to reset and to actually think through again how network news are presenting politics across the UK.”

He mentioned ongoing research into how broadcasters’ social media posts reflect devolution, noting that “there is an awful lot—far more than we’ve ever found before—of headlines that simply make devolution invisible.”

You described the work the BBC does to educate network news journalists about devolution, and said “I recognise the issue, and there’s more to do.”

Accurately reporting about the devolved UK is wired into the current BBC Charter. It says that the BBC should “help people understand and engage with the world around them” and “reflect, represent and serve the diverse communities of all of the United Kingdom’s nations and regions.”

Yet too often the BBC still broadcasts as though to audiences in England: that is, by explaining that a certain UK Government policy applies only in England, but not having the curiosity to explore what’s happening in other UK nations. Reflecting the devolved nature of the UK isn’t simply a case of adding “in England” to a news bulletin, but re-thinking how political news is presented to reflect the reality of how the UK is governed. This is an issue of accuracy, not just for audiences in Wales, but across the UK.

We reiterate our previous recommendation:

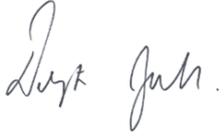
Recommendation 2: Network news providers, including the BBC and ITN, should keep driving improvements in their reporting of devolved policy issues.

As noted above, Professor Cushion’s research has also highlighted how, on social media, headlines provided without context often “make devolution invisible.”

Recommendation 3: The BBC should take note of Professor Cushion’s research into how news social media content reflects devolution across the UK and drive improvements in this area.

Thank you for your comments on Ofcom’s current consultation on prominence rules, and the BBC Charter Review Green Paper. We will consider these comments in our responses to the Ofcom and UK Government on these matters.

Yours sincerely,



Delyth Jewell MS

Chair

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

5. S4C

Delyth Evans, Chair
Geraint Evans, Chief Executive
S4C
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13 February 2026

Public Service Broadcasting in Wales

Dear Delyth and Geraint,

Thank you for your appearance before the Committee on 22 January 2026. As we mentioned during the meeting, we have some additional questions, which are set out below.

Performance

We discussed the trends in viewing figures that S4C (and indeed all public service broadcasters) are experiencing.

The Committee understands that this reflects wider changes to viewing habits, driven by developing technology and increased competition from global streaming platforms.

Nevertheless, we remain concerned that, whilst other PSBs do also lose viewers to these global players, in those instances, viewers are essentially moving from one English language service to another. When viewers leave S4C, on the other hand, they are also leaving behind Welsh language programming. This is therefore a unique risk to S4C's purpose.

We noted your response to these challenges in developing content on platforms beyond traditional television, commissioning digital content and working to make such content available on multiple platforms.

Furthermore, we discussed the need for legislation to keep pace with the changing broadcasting landscape and would be grateful if you could set out in more detail any legislative changes that would help S4C compete in the marketplace in the coming years.

Prominence

We discussed the implementation of the Media Act 2024 and the effects that it has on prominence of different channels.

As you explained to the committee, “visibility is viability”. You expressed your view that the implementation of the Media Act must ensure that S4C is adequately visible and accessible to audiences in Wales and across the UK as platforms develop rapidly.

In this context, you set out for the Committee the continuing importance of Clic, the opportunity that the Media Act could present for Clic to have increased visibility on smart television, and your concerns about Ofcom’s draft code of practice on Prominence and Accessibility on connected Television platforms .

We also discussed the recent agreement between you and the BBC about the prominence of S4C on iPlayer. We were reassured to hear that the agreement will give S4C more prominence on iPlayer itself, and that you will be curating your content on iPlayer.

We were struck from your evidence about the fact that you were not certain about Ofcom’s support when it comes to negotiations with television platforms. We were also surprised that Ofcom did not seem to be aware of your concerns with its draft prominence code of practice. These omissions suggested to us that the relationship between S4C and Ofcom was not as strong as we would expect. We will be raising all these concerns directly with Ofcom and suggesting that they hold meetings with you as a priority to see how these concerns can be addressed. Specifically, we will be recommending that:

- Ofcom should revise the draft code of practice on Prominence and Accessibility on connected television platforms so that UK PSBs receive equivalent prominence as they do at present under the Electronic Programme Guide Code.
- Ofcom should revise the draft code of practice on Prominence and Accessibility on connected television platforms so that S4C receives greater prominence within Wales than it does across the UK as a whole. S4C should of course also receive prominence across the UK, in recognition of its audiences outside of Wales.
- Ofcom should make it clear that it supports PSBs in their negotiations with television platforms. To this end, Ofcom should provide clearer guidance, so that there is less scope for disagreement between PSBs and platforms.

Culture

Although this was not the main focus of our session on this occasion, we discussed the progress that has been made under your leadership since the events that took place in 2023. We were pleased to note that you feel that good progress has been made in developing, embedding and monitoring a new culture at S4C.

We were reassured to hear that you consider this to be an important ongoing task, and we urge you to continue to give it your highest priority. No doubt a future Senedd committee may wish to return to this in future scrutiny sessions.

We are keen to see evidence to support the anecdotal evidence you gave us that good progress has been made, so that we can have reassurance that past problems are unlikely to be repeated:

Recommendation 1: S4C should provide empirical evidence (such as headline results of staff surveys) that monitors the state of its workplace culture.

Charter review

The Committee has previously expressed its view that the UK Government should significantly increase S4C's funding and should consider funding S4C according to a formula, to give S4C greater certainty over future funding.

The UK Government's review of the licence fee funding model will "explicitly consider the funding arrangements of Welsh language broadcasting". The Committee will make sure that its views are expressed to the UK Government as part of this review.

In the context of the Charter review and the issues surrounding budgets, we considered your relationship with the BBC and the potential for joint working to drive efficiency. We would encourage both broadcasters to continue to explore where S4C and the BBC can reduce duplication and unnecessary costs. We would be grateful if you could send us further information relating to the financial relationship between the two broadcasters.

It is crucial that S4C has a strong voice in the Charter Renewal process. To this end, we would be grateful if you could explain how the UK Government has engaged with you in developing the Green Paper.

Recommendation 2: S4C should explain what engagement it has had with the UK Government, including meetings with the Secretary of State, whilst the Green Paper proposals were being developed.

We touched briefly on your relationship with Creative Wales and the potential that exists in terms of developing content. You explained that Creative Wales has funded a number of productions that wouldn't have happened without that funding. We would be grateful if you could provide us with some written information relating to that.

Thank you once again for your evidence.

Yours sincerely,

A handwritten signature in black ink, appearing to read 'Delyth Jewell'.

Delyth Jewell MS

Chair

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

6. Channel 4

Geoff Cooper, Chair
Priya Dogra, Chief Executive
Channel 4
By email only

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13 February 2026

Public Service Broadcasting in Wales

Dear Mr Cooper and Ms Dogra,

I wish to thank Channel 4 for giving evidence to our Committee on 22 January 2026. This is the first time that Channel 4 have done so and we were pleased that Jo Street, Kevin Blacoe and Pete Andrews were able to join us.

Representing Wales

You explained to us the importance of Welsh representation and that you “celebrate Wales, Welsh culture and storytelling through the mix of programmes that we commission and broadcast”. The Committee noted some of the examples of commission spend in Wales and of portrayals of Welsh life.

The Committee was pleased to note that spending on “Welsh content” has risen from £4 million in 2014 to over £15 million in 2024, though it was not clear whether you were referring to content made in Wales, or about Wales.

We discussed whether you had a specific figure for the percentage of Welsh representation of your output.

We were also interested in the work that you are taking forward with Media Cymru to better understand the qualitative aspects of representation. The Committee would be grateful to be kept informed of this work.

Recommendation 1: Channel 4 should provide the Committee with the results of its work with Media Cymru to understand representation of Wales on Channel 4, and details of any work planned to increase this.

Activity in Wales

We note that, in the new licence requirements, Channel 4 must now annually produce 12 per cent, by both hours and spend, of its UK content outside of England. We note Ofcom's [report](#) that network production in Wales for Channel 4 increased in 2024: network hours increased to 10.6 per cent and spend rose to 3.4 per cent.

You explained to us that Channel 4 has made strides in recent years in moving outside of London, establishing bases in Leeds, Manchester, Glasgow and Bristol.

The Committee has noted the positive impact of your *4 All the UK* strategy and the increase in investment in skills and content production in Wales. You told a positive story about the impact of your work in the Tramshed to deliver the Paris Paralympics from Cardiff and the impact this has had supporting local skills and employment.

Recommendation 2: Whilst noting the positive impact of the steps that you have taken to develop a presence in Cardiff, the Committee would urge Channel 4 to build on this work by establishing a Welsh hub.

Recommendation 3: Channel 4 should develop a specific strategy, with clear targets, to increase its network spend in Wales.

Network news

In our 2024 report, [State of Play](#), we recommended:

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

We discussed the extent to which network news accurately reflects the devolved nature of the UK with Professor Stephen Cushion of Cardiff University's School of Journalism, Media and Culture. He told us:

"Over recent years, standards have slipped a little bit, and it's perhaps a time to reset and to rethink again, particularly as we approach an election campaign in Wales and Scotland coming up, to reset and to actually think through again how network news are presenting politics across the UK".

We discussed Channel 4's approach to news reporting. Accepting that you do not provide a Wales specific news service, we discussed whether you have any plans to expand the outlook of the news programme with a view to increasing reporting of domestic news from a Welsh perspective.

Too often, network news providers still broadcast as though doing so to audiences in England alone: that is, they explain that a certain UK Government policy applies

only in England, but do not show the curiosity to explore what's happening in other UK nations. Reflecting the devolved nature of the UK isn't simply a case of adding "in England" to a news bulletin, but re-thinking how political news is presented to reflect the reality of how the UK is governed. This is an issue of accuracy, not just for audiences in Wales, but across the UK.

Whilst the Committee acknowledges the excellent work of your journalists, including some who are based in Wales, there is an opportunity, particularly in a year of devolved elections, to increase reporting of devolved matters. You said that you would write to the committee with more details about this.

Recommendation 4: Network news providers, including Channel 4, should keep driving improvements in their reporting of devolved policy issues.

Professor Cushion's research has also highlighted how, on social media, headlines provided without context often "make devolution invisible."

Recommendation 5: Channel 4 should take note of Professor Cushion's research into how news social media content reflects devolution across the UK and drive improvements in this area.

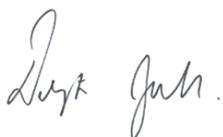
Prominence

We discussed the implementation of the Media Act 2024 and the effects that it has in terms of the prominence of different channels.

You explained to the Committee the importance of prominence to ensure that the public service content that you make is adequately visible and accessible to audiences in Wales and across the UK as platforms develop rapidly. The Committee agrees that this is of vital importance.

Thank you for your comments on both this and on the BBC Charter Review Green Paper. We will consider these comments in our responses to the Ofcom and UK Government on these matters.

Yours sincerely,



Delyth Jewell MS

Chair

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

7. Ofcom

Philip Henfrey, Wales Director
Cristina Nicolotti Squires, Group Director for Broadcast and
Media
Ofcom
By email only

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13 February 2026

Public Service Broadcasting in Wales

Dear Philip and Cristina,

Thank you for your evidence on 22 January 2026. We have a number of recommendations and further queries which we set out below.

Overview

In the Committee's 2024 report, [State of Play](#), we recommended:

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

As a Committee, we agree with the view of our predecessor committee that the supply of media content for Wales is inadequate. In our 2024 report we said that "It is hard to see improvements coming from Ofcom regulation of broadcast media in Wales." Following our meeting on 22 January, we are still of this view.

We are concerned that your analysis of broadcasting in Wales is overly optimistic. You said you were "seeing more content being created in Wales" and noted that "Wales accounted in 2024 for 6 per cent of network hours and 5 per cent of qualifying network spend."

Conversely, and to take another figure, public service broadcasting (PSB) spend on first-run, UK-originated content for Wales was £33.1 million in 2024, compared with £33.6 million in 2018 (figures in Ofcom's Media Nations: Wales 2025), which represents a real-terms reduction of about 28 per cent. People in Wales continue to be under-served in terms of media content about their lives.

This represents a disadvantage to Wales and its people on both a civic and democratic level, because people can't see themselves on their screens, and are

less informed about the political structures that govern much of their lives. The Welsh Government, this Committee and the Independent Commission on the Constitutional Future of Wales have all raised concerns about the insufficiency of Welsh media content. We are concerned that Ofcom's analysis is based on narrow metrics and misses this bigger picture.

A [2023 Freedom of Information response](#) showed that, at the time, about 1 per cent of Ofcom's staff were based in Wales. 16 were based in Cardiff, compared with 68 in Edinburgh and 13 in Belfast. We find it hard to justify this low proportion of staff based in Wales, especially given the additional needs in Wales of catering to Welsh language audiences.

Recommendation 1: Ofcom should use both its regulatory levers and substantial influence to improve the provision of media content for Wales.

Recommendation 2: Ofcom should provide current staffing levels for its offices across the UK, and explain how the seniority of staff in Wales compares with other offices across the UK. It should provide the median pay for its Cardiff office, and how this compares with the UK Ofcom median pay.

Recommendation 3: Ofcom should increase its number of employees in Wales.

ITV network spend in Wales

In our 2024 report, *State of Play*, the Committee recommended:

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

The current channel 3 licence in Wales, which was renewed in 2024 for ten years, does not include this requirement. The licence includes a broader requirement that at least 35 per cent of originated network content is made outside of the M25 area.

In 2024, according to Ofcom figures, ITV's network spend in Wales was 0.8 per cent of the UK total (see graph at Annex A), which was a slight increase from 2022, when the figure was close to 0.

We remain of the view that ITV's network spend in Wales is unacceptably low, and following our meeting, are not reassured that ITV has a meaningful plan to increase it.

In our meeting you said that you “looked at their evidence last week, and there is an intent there (*to increase network spend in Wales*)” and that you “want to see them reflecting the audiences and audiences' lives, in a way that also is sustainable.”

We are disappointed that you seemed content that only 0.8 per cent of ITV's UK network spend is within Wales. We appreciate that ITV's current licence does not compel them to spend more within Wales, but we feel that Ofcom has substantial influence that it could use to encourage ITV to spend more in Wales. We feel that in this, as in other areas (such as discussions of prominence guidelines), Ofcom seems to be operating more as an advocate for the broadcasting industry than a representative of audiences and citizens.

Recommendation 4: Ofcom should work with ITV to increase its UK network spend in Wales.

Prominence and accessibility on connected television platforms - Draft code of practice and draft guidance on the agreement objectives

On 14 January 2026, Ofcom launched a consultation: [Prominence and accessibility on connected TV platforms - Draft code of practice and draft guidance on the agreement objectives](#). Ofcom explained:

“The Media Act 2024 introduced essential new rules to help make public service content easier to find and discover on the connected TV platforms that people increasingly use to choose and access TV programmes. These connected TV platforms must also take steps to incorporate accessibility features.

“Under the new regime, for the first time, providers of the most-used connected TV platforms must make sure that BBC iPlayer and other public service broadcaster (PSB) TV players as designated by Ofcom, as well as the public service content and any public service channels they include, are available and prominent on their platforms.”

We discussed these proposals with witnesses. The BBC felt that “Our biggest issue is speed. We need the pace.”

S4C had specific concerns:

“There's no regionalisation that's being mandated across all tech platforms. So, that is, you could have a situation where, shall we say, Roku, to discuss your example, may decide that S4C won't

get any further prominence in Wales than it gets across the whole of the UK.”

“From what we understand, with the draft prominence code, will be able to reorder these tiles or delete the tiles. Now, that is not going to give us prominence.”

“There's no guarantee that the PSB rail will be on the homepage.”

“We do feel that our current prominence could be diminished unless these securities are put in place.”

“We were definitely not convinced that Ofcom would do our work for us with the tech platforms.”

This is a summary of S4C's concerns, and we urge you to watch the session and meet S4C to discuss these concerns in detail.

We discussed some of these concerns with you. On the subject of regionalisation, you said “some of the TV platforms are able to do nationalisation/regionalisation, and some aren't.” We are concerned that you may be accepting the position of television platforms without pushing back in the interests of UK audiences. In a world of hyper-personalised digital services, it doesn't seem beyond the abilities or resources of a multi-national company to provide regional services across the UK.

S4C, as the only broadcaster which operates solely in the Welsh language, is particularly vulnerable to a loss of prominence in the multi-channel, multi-platform world. As its Chair told us, “visibility is viability.” We feel that their views are a litmus test for the suitability of your proposals, which in their current state, has not been met. A central principle, we think, is that S4C – and the other PSB channels – should not have their current prominence diminished under the new code of practice.

We are troubled that S4C were not certain of Ofcom's support in negotiations with TV platforms. As a publicly-funded, minority language broadcaster, there will be a financial asymmetry between S4C and the multi-national companies it is dealing with. Disagreements between PSBs and platforms seems likely, with Professor Justin Lewis telling us: “I do worry a little bit about global platforms being a little bit cute about the way that they interpret prominence.”

S4C needs a strong regulator, with audiences at its heart, to make this a fair negotiation. S4C would benefit from clearer guidance. Ambiguity creates opportunities for disagreement with TV platforms, which could be costly and time-consuming for S4C to resolve.

You told us that you were “not prescribing on any PSB that you have to be a part of this, because at the end of the day, a PSB can take a decision, because there are requirements on the PSBs.” We think that Ofcom will have failed significantly if its designs a prominence system that PSBs do not think it is worth signing up to. We urge you to address concerns raised by PSBs so that this does not happen.

Recommendation 5: Ofcom should revise the draft code of practice on prominence and accessibility on connected television platforms so that UK PSBs receive equivalent prominence as they do at present under the Electronic Programme Guide code.

Recommendation 6: Ofcom should revise the draft code of practice on Prominence and accessibility on connected television platforms so that S4C receives greater prominence within Wales than it does across the UK as a whole. S4C should also receive prominence across the UK, in recognition of its audiences outside of Wales.

Recommendation 7: Ofcom should make it clear that it supports PSBs in their negotiations with television platforms. To this end, Ofcom should provide clearer guidance, so that there is less scope for disagreement between PSBs and platforms.

Network news

In our 2024 report we recommended:

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

We discussed the extent to which network news accurately reflects the devolved nature of the UK with Professor Stephen Cushion of Cardiff University’s School of Journalism, Media and Culture. He told us:

“Over recent years, standards have slipped a little bit, and it’s perhaps a time to reset and to rethink again, particularly as we approach an election campaign in Wales and Scotland coming up, to reset and to actually think through again how network news are presenting politics across the UK.”

He mentioned ongoing research into how broadcasters’ social media posts reflect devolution, noting that “there is an awful lot—far more than we’ve ever found before—of headlines that simply make devolution invisible.”

Too often, network news providers still broadcast as though doing so to audiences in England alone: that is, they too often merely explain that a certain UK Government policy applies only in England, but do not show the curiosity to explore what is happening in other UK nations. Reflecting the devolved nature of the UK isn't simply a case of adding "in England" to a news bulletin, but re-thinking how political news is presented to reflect the reality of how the UK is governed. This is an issue of accuracy, not just for audiences in Wales, but across the UK, and so is a matter which should concern Ofcom. We reiterate our previous recommendation:

Recommendation 8: Ofcom should continuously review UK network news coverage of devolved policy issues. It should report to back to this Committee (and a future Senedd committee) outlining how it will do this.

Thank you for your comments about the BBC Charter Review Green Paper. We will consider these comments in our response to the UK Government.

Yours sincerely,



Delyth Jewell MS

Chair

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

Annex 1: List of oral evidence sessions.

The following witnesses provided oral evidence to the committee on the dates noted below. Transcripts of all oral evidence sessions can be viewed on the [Committee's website](#).

Date	Name and Organisation
15 January 2026	<p>Magnus Brooke, Group Director of Strategy, Policy & Regulation, ITV</p> <p>Zoe Thomas, Head of News and Programmes, ITV Cymru Wales</p> <p>Professor Stephen Cushion, Director of Research Development and Environment and Impact, Cardiff School of Journalism, Media and Culture, Cardiff University</p> <p>Professor Justin Lewis, Professor of Communication and Creative Industries, Cardiff School of Journalism, Media and Culture, Cardiff School of Journalism, Media and Culture, Cardiff University</p> <p>Carwyn Donovan, Wales Negotiations Officer, Bectu</p>
22 January 2026	<p>Tim Davie, Director General, BBC</p> <p>Rhuanedd Richards, Interim Director of Nations, BBC</p> <p>Garmon Rhys, Interim Director, BBC Cymru Wales</p> <p>Geraint Evans, Chief Executive, S4C</p>

Date	Name and Organisation
	<p data-bbox="448 264 762 338">Delyth Evans, Chair, S4C</p> <p data-bbox="448 376 927 450">Philip Henfrey, Wales Director, Ofcom</p> <p data-bbox="448 488 1385 595">Cristina Nicolotti Squires, Group Director for Broadcast and Media Ofcom</p> <p data-bbox="448 607 1374 725">Jo Street, Director of Commissioning Nations and Regions, and Head of Lifestyle, Channel 4</p> <p data-bbox="448 763 1166 837">Kevin Blacoe, Head of Partnerships and Skills, Channel 4</p> <p data-bbox="448 875 911 949">Pete Andrews, Head of Sport, Channel 4</p>