

S4C plays a crucial role in ensuring the prominence of the Welsh language and in supporting Welsh democracy. The broadcaster is central to fulfilling the Welsh Government's strategic ambitions in relation to the Welsh language, most recently its commitment to creating one million Welsh speakers by 2050. Therefore, the health of S4C is closely connected to the vibrancy of Welsh language, culture and identity, and so we welcome efforts to ensure the sustainability of the broadcaster for the future. Our submission addresses the following themes:

1. Funding S4C
2. Independence & governance
3. S4C's relationship with the BBC
4. S4C's remit & visibility in a digital economy
5. Sustaining Welsh talent

1. Funding S4C:

As detailed in the Committee's own recent report on broadcasting in Wales (CWLC 2017), funding for S4C has declined in real terms since 2010 with a reduction of approximately 36 per cent in that time period. Further substantial cuts to S4C's budget, in tandem with cuts to the BBC's central budget, would have a detrimental impact on the quality and range of original content commissioned by S4C.

It is our view that stability in the financial arrangements of S4C would allow the broadcaster to effectively plan across the multiple genres it currently commissions. Research highlights the importance of long-term strategic planning within key genres such as drama where complex forms of co-production and co-financing are increasingly the norm (McElroy & Noonan 2016). Therefore, we advocate for greater certainty around the arrangements for S4C's core funding in the coming years.

We also believe that future intervention must address the need for sufficient levels of funding. Appropriate funding would allow S4C to continue to

deliver on the range of public service genres it currently provides including news, current affairs, drama, arts, factual entertainment and children's content. In our view it is essential that there is substantial Welsh language provision in all of these genres in order to serve the diverse needs of the entire community. Minority language broadcasters like S4C must address a broad range of ages and interests, while fulfilling both a remit to attract audiences with one to ensure the vibrancy and functional resilience of the language. Therefore, the unique contribution of the broadcaster to the UK's creative and social identity, and the challenges it faces in fulfilling that remit, must be taken into account during discussions of funding arrangements.

As noted in the CWLC (2017) report, repeated content now accounts for 57 per cent of S4C's output. We believe that a stable and appropriate funding arrangement for the broadcaster is critical to the greater commissioning of original content. Although often an economic necessity, repeated content is not always valued by audiences and also limits genuine engagement between the broadcaster and the production sector. Collaborations with independent production companies allow both producer and broadcaster to deliver projects of scale and creative ambition and generate revenue from secondary rights and overseas sales of content and formats.

Research testifies to the importance of public service broadcasters like S4C to the sustainability of the Welsh television sector, but also to the indigenous creative economy (McElroy, Noonan & Blandford 2015; McElroy & Noonan 2016). This impact is in terms of measurable economic value (e.g. local commissioning, engaging freelancers) and it is reported that for every £1 invested by S4C in the UK & Welsh economy £2.09 worth of financial value is created (S4C Annual Report 2015/16: 67). Furthermore, there is considerable indirect impact through the work of S4C, for instance in the promotion of Welsh culture and landscape to potentially global audiences through their commissioning strategy, such as in the case of the quality drama *Y Gwyll* (McElroy, Noonan & Blandford 2015; McElroy & Noonan 2016). Therefore the economic and creative robustness of S4C would contribute to the sustainability of the entire creative economy here in Wales.

2. Independence and Governance:

In our view S4C should remain an independent, publically funded broadcaster with its own systems of governance in place. Given the

complexity of its remit, it is essential that it retain its autonomy and editorial decision-making in order to fulfill its contribution to Wales and its communities. However, such independence should also allow for appropriate forms of accountability and transparency given the substantial amount of public monies involved.

We welcome the committee's interest in exploring the devolution of S4C, and perhaps ultimate responsibility for all broadcasting, to Wales. This issue is complex and raises many further areas for consideration at both policy and regulatory levels. We would encourage further public discussion and research into this potential change particularly around the implications for funding, the regulatory arrangements, the issue of spectrum allocation and how this would impact the wider Welsh media landscape. The School of Journalism, Media and Culture is well-positioned to facilitate this debate and we welcome the opportunity to contribute further.

3. S4C's Relationship with the BBC

The particular media ecology within Wales means there is a critical need for plurality of provision. It is clear that S4C's relationship with the BBC has been cooperative over the last few years and evidence of successful areas of collaboration exist. Research highlights the benefits to both organizations sharing resources such as around the production of *Pobol Y Cwm* in the BBC's Roath Lock Studios as part of the statutory arrangement (McElroy, Noonan & Blandford 2015; McElroy & Noonan 2016). Benefits from this arrangement include the realisation of economic efficiencies and enhanced production values along with the sharing of resources including skilled labour. A constructive relationship between Wales' principal Welsh language media providers has the potential to amplify Welsh content and visibility, and to deliver real economic value especially in key genres such as drama and news.

However, we would encourage the committee and the DCMS review to remain vigilant over the coming years particularly as a result of the new BBC Charter, the creation of a new Unitary Board for the BBC and the shift in regulatory responsibilities to OFCOM. Any new agreements covering the BBC's statutory supply and its operational arrangements with S4C will need to be monitored closely in order to ensure value for money for licence fee

payers, whilst protecting S4C's independence as a Welsh language public service broadcaster.

4. S4C's remit & visibility in a digital economy

A growing question for policy makers across Europe is how might the principles traditionally enshrined in public service broadcasting be successfully translated into the online world. One of the most obvious responses to this is the transition from public service broadcasting (PSB) to framing institutions as public service media (PSM) providers.

Therefore, we would like this committee and the DCMS review to adapt the remit of S4C to allow it to fully leverage the benefits of multiplatform provision. We support any change to policy that allows S4C to further cultivate a strong digital presence and enables it to create more digital content for distribution on new platforms and to new audiences. This is essential in order to appeal to a wide audience both within Wales and beyond its borders and, critically, to ensure its appeal to the next generation of S4C viewers. S4C's Clic player and the carrying of content on the BBC's iPlayer service will be essential to ensuring the visibility of the Welsh language and content in a digital media environment, though of course there are cost and revenue implications with these strategies. More routine use of video on demand services will allow greater creative freedom (e.g. the commissioning of short form content in Welsh language), greater cost efficiencies and extract better value from traditional linear content. For the community of Welsh speakers S4C should not simply be a television service but a multi-media provider.

However, while such a vision is attractive, practical obstacles do exist. In 2015/16 a number of academia/industry knowledge exchange events were held in Cardiff and Denmark on the challenges facing small nation's broadcasting.¹ Issues raised by some of the representatives of the broadcasters who were present related to the gatekeeping activities of some hardware manufacturers (e.g. smart TVs) and online platforms whose primary operating language is often English. This is an issue also raised in the Committee's report (CWCL 2016) and we agree with the recommendation that the UK government and Ofcom consider amending Ofcom's Code of

¹ These events were part of an AHRC funded network project. For more information see: <https://smallnationstv.org/>.

Practice in this area, but in addition we would like to see the inclusion of this issue in the Digital Economy Bill.

We also consider that the sharing of best practice and expert dialogue across policy-makers in other minority language markets (e.g. Ireland, Denmark) would allow a more effective lobby in this domain, thereby benefitting S4C in the long term. Of course, Brexit will undoubtedly impact on this ambition, but we believe that a stronger multilateral voice encompassing both policy and regulation would gain more traction in discussions with major global corporations like Google, Samsung and Apple.

5. Sustaining Welsh Talent

The future of S4C is absolutely central to the sustainability of an indigenous creative workforce as a resource for Wales, and for promoting Welsh culture and identity to the world.

Demand for Welsh medium education at HE level is increasing. In 2014/15 there were 6,355 students at Welsh HEIs receiving some form of teaching through the medium of Welsh – a 21 per cent increase since 2013/14 (Welsh Government 2016). At the School of Journalism, Media and Cultural Studies we have seen a 100 per cent increase over the past two years in the number of students enrolled on Welsh language modules. Our cohort represents a diverse cross-section of first language Welsh speakers and those for whom Welsh is a second language.

We are deeply committed to nurturing and shaping future talent and we believe it is vital that Wales has a healthy labour market to retain bright graduates. Welsh language media is a destination for many of our graduates and S4C is vital in this regard, both as a direct employer but also through the commissioning of independently produced content, and language and communication services.

Both staff and students at Cardiff University directly benefit from regular partnership opportunities, knowledge exchanges and work placements with S4C and the wider Welsh media. This year the School, the National Eisteddod,

C4CJ² and S4C will collaborate on a project at the National Eisteddfod. 'Llais y Maes' is an innovative digital news service in which our students will receive first hand training in both digital and journalistic skills. On top of this, an ongoing collaboration between JOMEC and ITV allows students on our 'Ystafell Newyddion' modules to publish original content on S4C's website, through their youth current affairs programme 'Hacio'. These activities successfully and directly encourage young people to communicate professionally through the medium of Welsh, developing both their confidence and digital skills. This also contributes to the resilience and prestige of the language. As argued by Moring (2013: 35) 'In simple practical terms, media can be seen as one of the many activities that affect our daily language use, informing it, renewing it and reforming it'.

A linguistically diverse and digitally literate labour force has real value for the Welsh economy. We believe that collaborations like those above allow institutions such as Cardiff University and S4C to directly enhance the creative economy in Wales. We believe that an S4C which is financially and operationally positioned to supplement formal training, share specific expertise and resources (e.g. around digital commissioning and production) and which expands the reach of emerging creative professional working within the medium of Welsh, has a vital role to play in the creative and cultural provision of Wales.

Conclusion

In sum, we believe the following are crucial to the future of S4C:

- Stable core funding that allows for strategic and ambitious planning in an increasingly competitive media landscape.
- An independent S4C that is accountable in its distribution of resources.
- Close ongoing cooperation between BBC and S4C to ensure creative and cost benefits.

² C4CJ (Centre for Community Journalism) researches into this area of journalism and offers networking, information and training for hyperlocal and community journalists. More information available here: <https://www.communityjournalism.co.uk/en/>

- Maintenance of a range of programme genres within the output of S4C, coupled with an emphasis on first-run content.
- Expanding its remit to enable the service to play a more central role in the digital infrastructure of the Welsh language.
- Close cooperation with Welsh language education providers and S4C in order to enhance the creative labour market in Wales.

References

- Culture, Welsh Language and Communications Committee (CWLC) (2017) *The Big Picture: The Committee's Initial View on Broadcasting in Wales*. Available at: www.assembly.wales/laid%20documents/cr-ld10916/cr-ld10916-e.pdf
- Centre for Media and Culture in Small Nations (2016) *Television from Small Nations building a network for cultural and commercial success*. Available at: <https://smallnationstv.files.wordpress.com/2015/09/television-from-small-nations-report.pdf>
- McElroy, R; Blandford, S & Noonan, C (2015) *Television Drama Production in Wales BBC Wales: Roath Lock Studios*. Centre for the Study of Media and Culture in Small Nations. Available at: http://culture.research.southwales.ac.uk/media/files/documents/2015-11-11/Television_Drama_Production_in_Wales.pdf
- McElroy, R. & Noonan, C. (2016) Television Drama Production in Small Nations: mobilities in a changing ecology. *Journal of Popular Television*: special issue, vol. 4, no. 1: pp 109–127.
- Moring, T. (2013) Media Markets and Minority Languages in the Digital Age. *Journal on Ethnopolitics and Minority Issues in Europe*. Vol. 12, no 4; pp: 34–53
- Noonan, C. & Powell, S. (2016) *A Future for Public Service Television: Content and Platforms in a Digital World*. Submission to the Future of TV Inquiry. Available at: <http://futureoftv.org.uk/wp-content/uploads/2016/05/Sian-Powell-and-Caitriona-Noonan.pdf>

- Welsh Government (2016) *Statistical Bulletin: Welsh Language in Higher Education Institutions*. Statistics for Wales. 29 Sept: SB43/2016.

Biography

Sian Morgan Lloyd is Programme Director for Welsh-medium provision at the School of Journalism, Media and Cultural Studies. The Coleg Cymraeg Cenedlaethol currently funds her position. Previously, Sian worked as deputy editor and reporter on award winning current affairs programme 'Y Byd ar Bedwar' and for ITV News and factual programming.

School of Journalism, Media & Cultural Studies, Cardiff University

Dr Caitriona Noonan is Lecturer in Media and Communication at the School of Journalism, Media and Cultural Studies (JOMEC) at Cardiff University. Before joining academia Caitriona worked as a market adviser in the area of digital and broadcast media for Enterprise Ireland, the trade development agency of the Irish government. Caitriona's research expertise lies in the areas of television production cultures and creative labour. She sits on the steering group of the Centre for the Study of Media and Culture in Small Nations.

School of Journalism, Media & Cultural Studies, Cardiff University