

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 fulfilling 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.

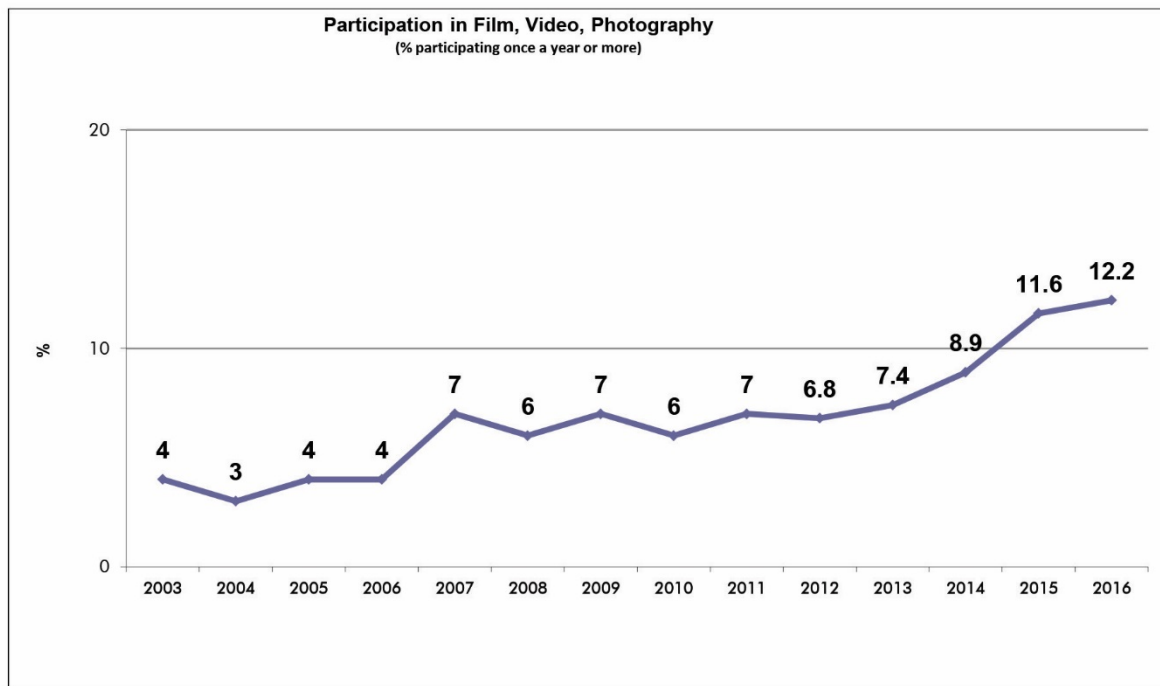
3. Why Film?

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.

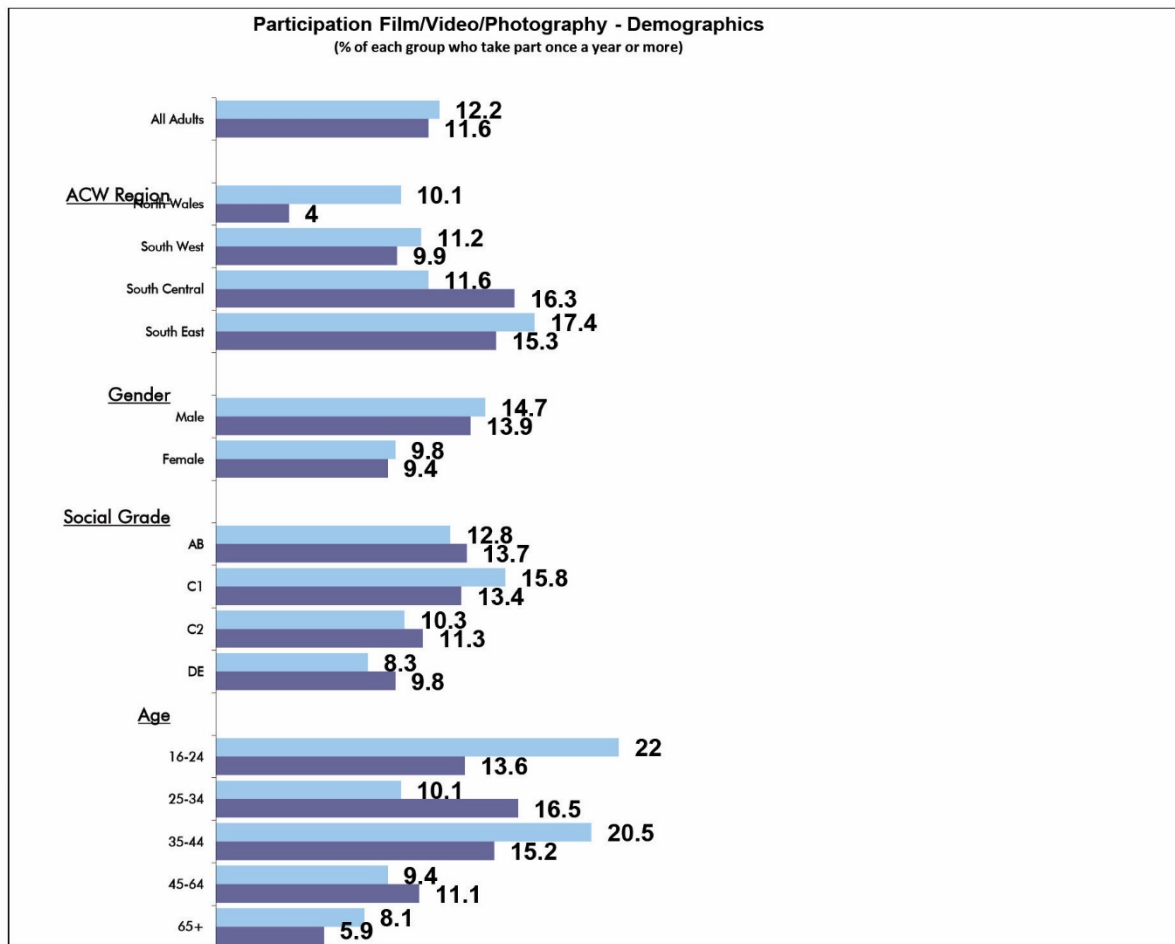
In our 2016 national Omnibus Surveys of Attendance and Participation, half of adults (51.0%) went to see a film at least once a year. This is an increase of 1.4 percentage points from 2015 (49.6%)¹. In terms of adult participation, Film, Video & Photography experienced the second highest increases from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



Base: All Adults (at least 1,000 per wave)

Source: Wales Omnibus survey 2003-2016

¹ Arts Council of Wales Adult's Omnibus Survey 2016



Base: All Adults (2015: 1,000 / 2016: 1,004)

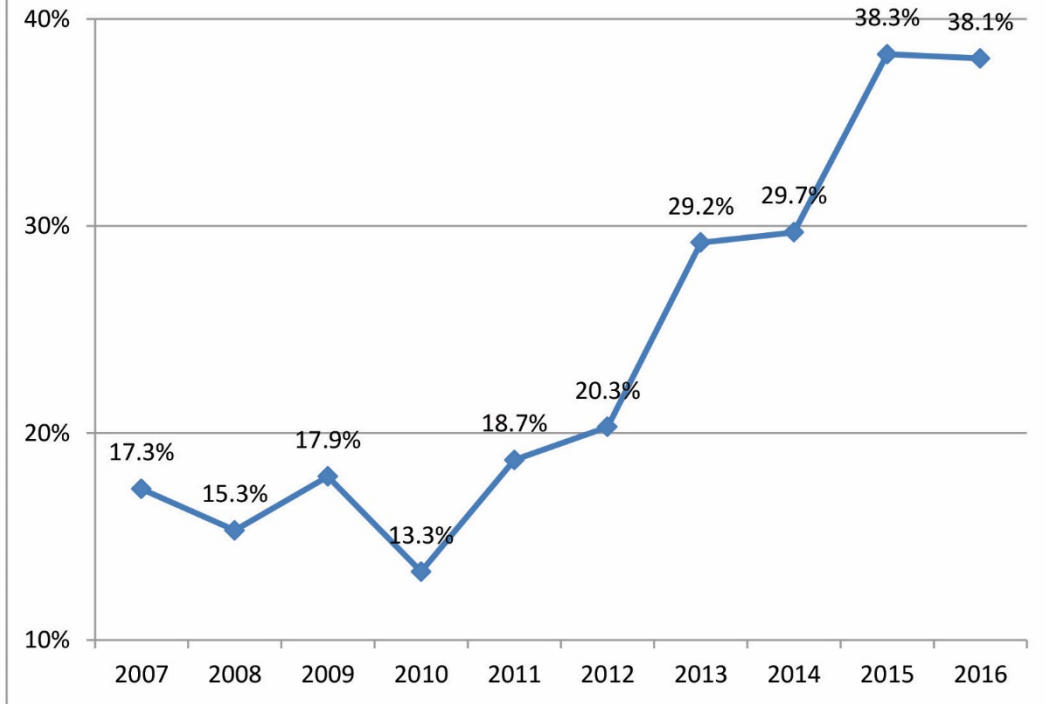
Source: Wales Omnibus survey 2015-2016

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 settings². Of note too is the fact that 45.2% took part in the closely related field of digital arts.

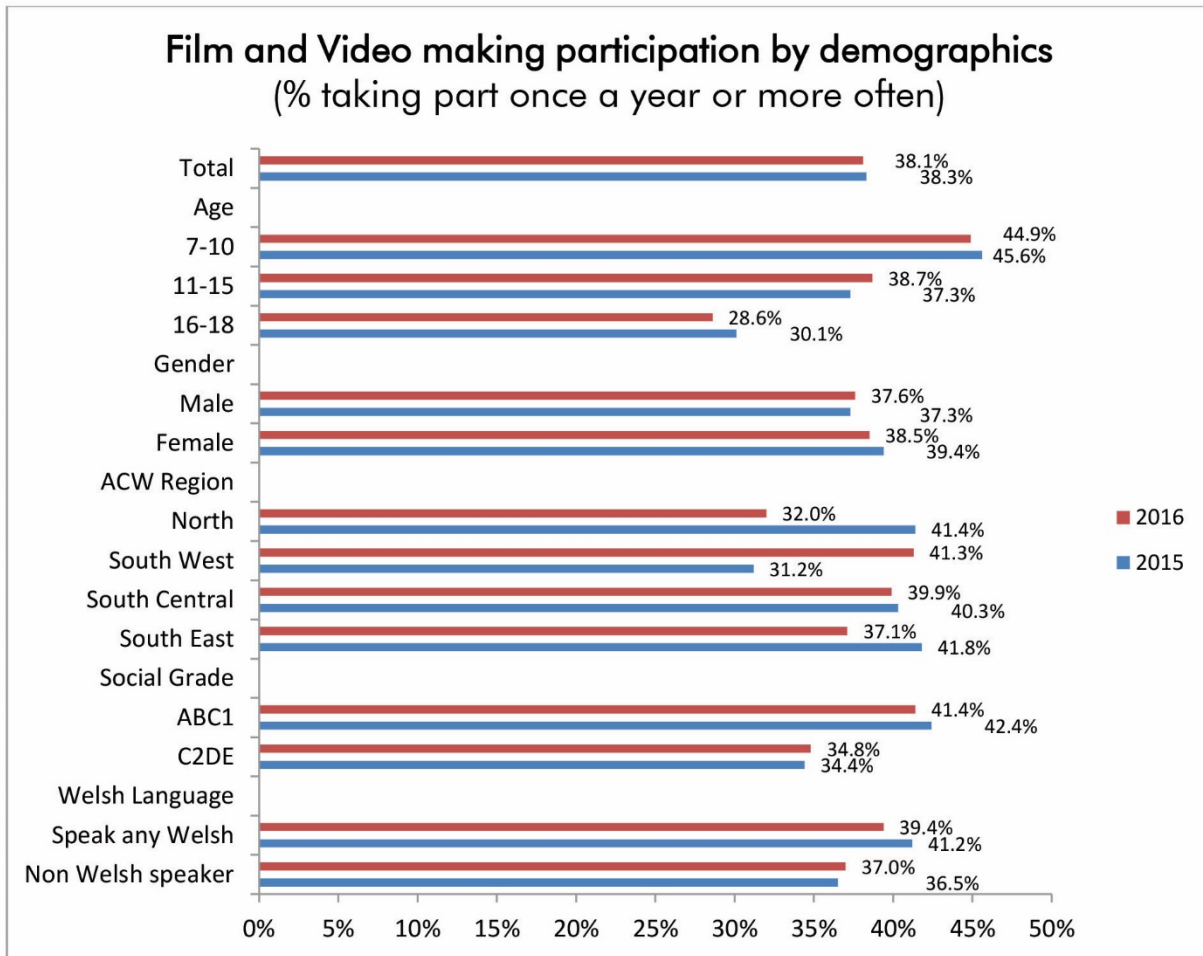
Overall we've seen an upward trend children's participation since 2010

² Arts Council of Wales Children's Omnibus data 2016

Film and Video Making Participation (% taking part once a year or more often)



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



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 consultants³ 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.

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 2010⁴. 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

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 (FCW).

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

British Film Institute (BFI)

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.

Welsh Government

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.

The Other UK Nations

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.

England:

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.

Scotland:

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”.

Northern Ireland:

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 through 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 le le le 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 well as seed funding for short film (Cinematic).

“Foot in the Door” is FfCW’s new training initiative 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 Fishguard, 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.