Consultation on the Devolution of Broadcasting

Culture, Welsh Language and Communications Committee

January 2020
1. Introduction

The BBC has been a cornerstone of Welsh life since the first broadcast in Wales nearly a century ago and BBC Wales is the country’s principal public service broadcaster.

The Royal Charter is the constitutional basis for the BBC. It sets out the BBC’s Aims, Mission and Public Purposes. The Charter also outlines the Corporation’s governance and regulatory arrangements, including the role and composition of the BBC Board.

The current Charter began on 1 January 2017 and ends on 31 December 2027.

The BBC will not offer any view on the advisability - or otherwise - of devolving broadcasting since to do so would risk undermining the BBC’s commitment to impartiality on what is, clearly, a matter of public significance and ongoing political debate.

However, to allow an informed debate to be conducted by the Committee, we believe it is valuable to set out some facts and figures about the BBC in Wales and to provide consistent data and a shared resource of information for interested parties. The information within this document relates to 2018/19, the period of the most recent BBC Annual Report & Accounts.

This document sets out:

- the overall performance of the BBC in Wales;
- the BBC’s pan-UK services in Wales, together with their audience impact and spend in Wales;
- the BBC’s services for Wales, including their spend, hours of output and audience impact;
- the BBC’s relationship with S4C
- the BBC’s commitment to the Welsh language
- the BBC’s activities in Wales that go beyond broadcasting, such as its partnerships;
- accountability and regulatory obligations specific to Wales;
- the availability and distribution of BBC services in Wales, both pan-UK and Wales-only;
- operational information about BBC Wales.

2. Governance and accountability arrangements specific to Wales

2.1 Governance and accountability

The BBC Charter – which lasts 11 years – strengthened the accountability of the BBC to the National Assembly/Senedd. This duty makes the BBC accountable to the legislature and not the government.
Specifically, the Charter sets out a number of governance and accountability arrangements which include recognition of Wales alongside the other nations. The duties placed on the BBC in respect of Wales include:

- That a non-executive member of the BBC Board must be designated the Board member for Wales;
- The BBC must lay the Annual Report before the National Assembly for Wales on the same day as, or as soon as possible after, it has been laid before the UK Parliament;
- The BBC must also send the Annual Report as soon as possible to the Welsh Ministers.
- The BBC must lay the group accounts and the report of the Controller and Auditor General before the National Assembly for Wales on the same day, or as soon as possible after, those documents have been laid before the United Kingdom Parliament;
- The BBC must comply with a request of the National Assembly for Wales or a committee of the National Assembly for Wales in the same way that it must comply with a request of either House of the UK Parliament or one of the committees concerning matters relating to Wales. These obligations include a requirement:
  - to attend its proceedings for the purpose of giving evidence, and
  - to submit reports

2.2 Wales Committee

The Wales Committee is a sub-committee of the BBC Board and is responsible for advising the Board on the BBC’s performance and services in Wales and whether it meets the needs of audiences and delivers the BBC’s mission, public purposed and the commitments sets out in the Annual Plan.

The Committee is chaired by the Board member for Wales, Elan Closs Stephens.

The Committee also oversees the BBC’s audience engagement strategy in Wales.

2.3 BBC Cymru Wales

The editorial and operational responsibility for delivering BBC Wales strategy is delegated to the BBC Wales Executive Team, led by BBC Wales Director, Rhodri Talfan Davies.

3. The BBC Mission, Public Purposes and Regulation

3.1 The BBC’s Mission

The mission of the BBC is to act in the public interest, serving all audiences through the provision of impartial, high-quality and distinctive output and services which inform, educate and entertain.
3.2 The BBC’s Public Purposes

The BBC is obliged to deliver 5 Public Purposes which include the provision of impartial news, learning content and a commitment to distinctiveness.

The 4th Public Purpose includes a specific duty on the BBC to:

“...reflect, represent and serve the diverse communities of all the United Kingdom’s nations and regions and, in doing so, support the creative economy across the United Kingdom: the BBC should reflect the diversity of the United Kingdom both in its output and services. In doing so, the BBC should accurately and authentically represent and portray the lives of the people of the United Kingdom today, and raise awareness of the different cultures and alternative viewpoints that make up its society. It should ensure that it provides output and services that meet the needs of the United Kingdom’s nations, regions and communities. The BBC should bring people together for shared experiences and help contribute to the social cohesion and wellbeing of the United Kingdom. In commissioning and delivering output the BBC should invest in the creative economies of each of the nations and contribute to their development”.

3.3 Regulatory Framework

Ofcom regulates the BBC in a manner which is consistent with the BBC Charter and Framework Agreement.

Ofcom must have regard, in carrying out its functions, to the following as appear to them to be relevant in the circumstances:

- the objective of the BBC to fulfil its Mission and promote its Public Purposes;
- the desirability of protecting fair and effective competition in the United Kingdom;
- the requirement for the BBC to comply with its duties under the Charter, including its general duties.

Ofcom also sets an Operating Licence for the BBC which contains regulatory conditions it consider appropriate for requiring the BBC:

- to fulfil its Mission and promote the Public Purposes;
- to secure the provision of distinctive output and services;
- and to secure that audiences in Wales, Scotland, Northern Ireland and England are well served.

The Operating Licence, as it relates to Wales, carries specific conditions in respect of hours of English language television, news programming and radio news hours BBC Wales must broadcast. Additionally, there are conditions for the provision of certain aspects of online content.

3.4 Annual Plan

The BBC is also required to prepare and publish an annual plan for each financial year.
The Annual Plan includes the creative remit for that year as well as provision for the United Kingdom’s nations and regions, including Wales.

4. Overall performance of the BBC in Wales

The BBC’s aim is to provide licence fee payers in Wales with distinctive programmes and services on television, radio and online. On average, it reaches 93% of the Welsh public every week across all platforms and services. The average time spent by audiences with BBC TV and Radio is 20 hours and 14 minutes per week, per person, significantly higher than the UK average of 16 hours and 49 minutes.

In the table below, and throughout this document, audience performance is compared to that of the whole of the UK for the year 2018/19.

Pan-BBC reach

<table>
<thead>
<tr>
<th></th>
<th>UK adults</th>
<th>Welsh adults</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall BBC average weekly reach %</td>
<td>91%</td>
<td>93%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>UK adults</th>
<th>Welsh adults</th>
</tr>
</thead>
<tbody>
<tr>
<td>BBC TV and BBC Radio average weekly time per head hh:mm</td>
<td>16:49</td>
<td>20:14</td>
</tr>
</tbody>
</table>

Sources: Ipsos MORI CMI diary, BARB, RAJAR, BARB Establishment Survey

Pan-BBC quality figures

<table>
<thead>
<tr>
<th>Age 16+ General Impression of the BBC Mean score out of 10</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
</tr>
<tr>
<td>7.0</td>
</tr>
</tbody>
</table>

Source: The BBC Accountability and Reputation Tracker survey by Kantar Media for BBC

Mean score out of 10 where 1 = extremely unfavourable and 10 = extremely favourable.

5. The BBC’s pan-UK services

All the BBC’s pan-UK – or network – services are available across Wales.

- On television that means: BBC One, BBC Two, BBC Four, CBBC, CBeebies, BBC News and BBC Parliament

Online that means: BBC Online and BBC iPlayer.

BBC One and BBC Two are adapted for viewers in Wales – with BBC Wales-commissioned programming scheduled across both channels in Wales.

5.1 BBC Network Television

The BBC’s TV services have a weekly reach of 80% in Wales, with viewers tuning in for an average of 8hrs 42mins each week.

Viewers in Wales watch, on average, 1 hour 12 minutes more BBC TV output per week than UK audiences.

**BBC TV Quality Measures**

**Average Weekly reach and Average Weekly Time Spent per User**

<table>
<thead>
<tr>
<th>Audience</th>
<th>Average Weekly Reach (%)</th>
<th>Time Spent (per user) (hh:mm)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>UK</td>
<td>Wales</td>
</tr>
<tr>
<td>All BBC TV</td>
<td>78</td>
<td>80</td>
</tr>
<tr>
<td>BBC One</td>
<td>66.7</td>
<td>70</td>
</tr>
<tr>
<td>BBC Two</td>
<td>41.3</td>
<td>43</td>
</tr>
<tr>
<td>BBC Four</td>
<td>11.8</td>
<td>11</td>
</tr>
<tr>
<td>CBBC</td>
<td>3.4</td>
<td>3</td>
</tr>
<tr>
<td>CBeebies</td>
<td>6.3</td>
<td>5</td>
</tr>
<tr>
<td>BBC News Channel</td>
<td>8.2</td>
<td>10</td>
</tr>
<tr>
<td>BBC Parliament</td>
<td>0.7</td>
<td>1</td>
</tr>
</tbody>
</table>

*Sample size for time per use too low to report

Source: BARB

**Appreciation Index (AI)**

<table>
<thead>
<tr>
<th>AI out of 100</th>
<th>UK</th>
<th>Wales</th>
</tr>
</thead>
<tbody>
<tr>
<td>All BBC TV</td>
<td>80.0</td>
<td>81.2</td>
</tr>
<tr>
<td>BBC One</td>
<td>79.6</td>
<td>80.8</td>
</tr>
<tr>
<td>BBC Two</td>
<td>81.8</td>
<td>82.9</td>
</tr>
<tr>
<td>BBC Four</td>
<td>82.1</td>
<td>84.1</td>
</tr>
</tbody>
</table>

Source: Pulse panel of Welsh adults 16+, by GfK for the BBC.

The Appreciation Index (AI) is an average score - out of 100 - based on scores respondents give to programmes they watched on the previous day (respondents give the programme a score out of 10 and the average of all the marks is multiplied by 10 to give an AI out of 100).
5.2 Network production and commissioning in Wales

Wales provides some of the BBC’s most popular programmes. From drama to factual on TV and radio, they are a cornerstone of the schedule. Over the past ten years, the film and television sector in Wales has been grown substantially. A number of interweaving initiatives have contributed to the rich landscape of production we see today.

The BBC’s strategic decision to spend more of the production revenues outside of London helped catalyse this growth. This commitment has seen both the BBC and a range of independent companies produce some of the corporation’s most iconic and popular TV programmes in Wales.

Over the years, these have included global hit series, *Doctor Who*; the cornerstone of BBC One’s Saturday night schedule, *Casualty*; and Hartswood’s award-winning reworking of Sir Arthur Conan Doyle’s classic, *Sherlock*. This creative and economic story now continues with *His Dark Materials*.

BBC Wales has also seen a large increase in the number of locally-commissioned programmes being shown on network channels. They include the recent hit drama *Keeping Faith* on BBC One (a back-to-back production with S4C), *Hidden* (another co-production with S4C) on BBC Four, hard-hitting documentaries including *Gareth Thomas: HIV and Me* on BBC One and *Wales: Land of the Wild* on BBC Two.

Production from Wales for the BBC’s UK TV networks accounted for nearly £54m in 2018 - contributing 6.3% of the BBC eligible network spend. The BBC has consistently exceeded its network production target of 5% for Wales over the last ten years.

5.3 BBC Network Radio

The BBC’s pan-UK radio services reach around 69% of the audience in Wales, higher than across the UK (63%). Listeners in Wales spend on average 11 hours and 49 minutes listening to BBC Radio, 2 hours and 16 minutes higher than the UK figure of 9 hours and 33 minutes. The average appreciation score for all BBC radio is marginally higher than the UK average.

**BBC Radio Reach**

<table>
<thead>
<tr>
<th>Audience</th>
<th>Average Weekly Reach (%)</th>
<th>Time Spent (per user) (hh:mm)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>UK</td>
<td>Wales</td>
</tr>
<tr>
<td>All BBC Radio</td>
<td>63%</td>
<td>69%</td>
</tr>
<tr>
<td>BBC Radio 1</td>
<td>17%</td>
<td>21%</td>
</tr>
<tr>
<td>BBC Radio 1 Extra</td>
<td>1.9%</td>
<td>1%</td>
</tr>
</tbody>
</table>
**Ymateb gan BBC / Response from BBC**

<table>
<thead>
<tr>
<th>Programme</th>
<th>Usage</th>
<th>Time</th>
<th>AI Out of 100</th>
</tr>
</thead>
<tbody>
<tr>
<td>BBC Radio 2</td>
<td>27.2%</td>
<td>11:55</td>
<td>80.7</td>
</tr>
<tr>
<td>BBC Radio 3</td>
<td>3.5%</td>
<td>06:08</td>
<td>78.4</td>
</tr>
<tr>
<td>BBC Radio 4</td>
<td>19.3%</td>
<td>10:59</td>
<td>81.6</td>
</tr>
<tr>
<td>BBC Radio 4 Extra</td>
<td>3.8%</td>
<td>06:17</td>
<td>79.3</td>
</tr>
<tr>
<td>BBC Radio 5 Live</td>
<td>9.2%</td>
<td>06:38</td>
<td>82.4</td>
</tr>
<tr>
<td>BBC Radio 5 Sports Extra</td>
<td>1.9%</td>
<td>03:08</td>
<td>80.7</td>
</tr>
<tr>
<td>BBC Radio 6 Music</td>
<td>4.4%</td>
<td>09:20</td>
<td>73.0</td>
</tr>
<tr>
<td>BBC Asian Network</td>
<td>1.1%</td>
<td>05:12</td>
<td>&lt;1%</td>
</tr>
</tbody>
</table>

*Sample size for time per use too low to report

Source: RAJAR
Adults 15+. Q1 data run on a 12 month weight.

**Appreciation Index (AI)**

<table>
<thead>
<tr>
<th>Programme</th>
<th>UK</th>
<th>Wales</th>
</tr>
</thead>
<tbody>
<tr>
<td>All BBC Radio</td>
<td>80.7</td>
<td>81.6</td>
</tr>
<tr>
<td>BBC Radio 1</td>
<td>78.4</td>
<td>78.9</td>
</tr>
<tr>
<td>BBC Radio 2</td>
<td>81.6</td>
<td>82.4</td>
</tr>
<tr>
<td>BBC Radio 4</td>
<td>80.7</td>
<td>81.2</td>
</tr>
<tr>
<td>BBC Radio 5 Live</td>
<td>79.3</td>
<td>73.0</td>
</tr>
</tbody>
</table>

Source: Pulse panel of Welsh adults 16+, by GfK for the BBC.

Appreciation Index (AI): average out of 100 based on scores respondents give to programmes they watched on the previous day (respondents give the programme a score out of 10 and the average of all the marks is multiplied by 10 to give an AI out of 100).

In 2018/19, BBC Wales produced over 450 hours of content for the BBC’s network radio services, of which over 350 hours were for BBC Radio 3 and around 100 hours for BBC Radio 4.

Programmes such as *Curious Under the Stars* are a mainstay on Radio 4 with four series being produced during the last year. The *Mabinogi* series was launched on Radio 3, and was also available as a podcast.

The network radio factual team produce a number of notable programmes for Radio 4 and Radio 3 as well as commissions from BBC World Service. Highlights include programmes about devolution; *Trampolene* front man Jack Jones; women in Welsh culture, and Welsh writers at Hay.
5.4 BBC Online

BBC Online reaches 51% of the Welsh public every week. This is slightly higher than the UK average.

<table>
<thead>
<tr>
<th>BBC Online People Reach</th>
<th>Age 16+</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>UK</td>
</tr>
<tr>
<td>BBC Online</td>
<td>48.1%</td>
</tr>
</tbody>
</table>

Source: BBC Compass 2018/19 16+ Reach 1-minutes+.

6. BBC Services for Wales

6.1 English language Television and BBC iPlayer content

BBC Wales provides a national television service for Wales across BBC One Wales, BBC Two Wales and BBC iPlayer with programming that is tailored to the specific needs and tastes of audiences in Wales. This includes lives news and sport, as well as documentaries, comedy, drama and entertainment.

BBC One Wales and BBC Two Wales are watched by 76% of the audience in Wales each week, with a further audience reached on BBC iPlayer.

The remit of both BBC One Wales and BBC Two Wales is to complement the network BBC One and Two schedules by providing mixed-genre programmes which appeal to Welsh audiences. These programmes displace or replace content otherwise available on BBC One across the rest of the UK.

The service provides Welsh viewers with programmes that reflect Welsh life and it is the BBC’s primary outlet for television coverage of major Welsh events such as the Royal Welsh Agricultural Show and the National Eisteddfod.

Programmes include the flagship news programme, *BBC Wales Today*. Its 6.30pm news programme has a reach of 39% and is the most watched TV news programme in Wales; popular drama series *Keeping Faith* and *Hidden*; long-running lifestyle series such as *Weatherman Walking* and the consumer programme *X-Ray* as well as comedy such as *Tourist Trap*. Ground-breaking documentaries on BBC One and Two Wales include *Gareth Thomas: HIV and Me* and *Sam Warburton: Full Contact* and *Wales: England’s Colony*?

On BBC iPlayer, requests for BBC Wales content increased three-fold to 44 million in 2018, thanks to the success of a range of series including *Keeping Faith* and *Hidden*. Both series – locally co-commissioned with S4C – featured in the UK top ten new drama premières on BBC iPlayer in 2018.
In 2018/19 BBC Wales produced 636 hours of originated output, broadcast on BBC One and Two Wales. This included 382 hours of News and Current Affairs, 143 hours of Sport and 36 hours of drama, comedy, music and arts.

Approximately 24% of qualifying output on BBC One and Two Wales was produced by a total of 39 independent production companies.

The spend on programmes for BBC One Wales amounts to around £33m per annum.

6.2 Radio services

**BBC Radio Wales**

BBC Radio Wales is a speech-led radio service, offering a wide range of genres and reflecting the news, issues, events, cultures and interests of the people of Wales. In addition to its coverage of local and national importance and interest, the service also addresses matters of UK and international significance from a Welsh perspective.

In 2018/19, BBC Wales broadcast 7,309 original hours of content. This included 1,826 hours of news and current affairs.

Across the year 18% of content on BBC Radio Wales was produced by 32 independent production companies.

Last year, BBC Radio Wales had a budget of £15m covering content, distribution, infrastructure and support costs.

BBC Radio Wales reaches 12.6% of the Welsh population each week, with listeners tuning in to the station for 7 hours 43 minutes a week on average.

**BBC Radio Cymru**

BBC Radio Cymru is the BBC’s national Welsh-language speech and music station, offering a wide range of programmes to reflect the news, current affairs, events, culture and interests of the people of Wales.

In 2018/19, the station broadcast 7,260 hours of originated content, which included 1,177 hours of news and current affairs.

Across the year, 21% of content on BBC Radio Cymru was produced by 34 independent production companies.

BBC Radio Cymru has an annual budget of £14m covering content, distribution, infrastructure and support costs.

BBC Radio Cymru reaches 17.5% of those who understand Welsh each week, with listeners tuning in to the station for an average of 12 hours and 5 minutes per week.
BBC Radio Wales Reach and Time Spent

<table>
<thead>
<tr>
<th>Audience</th>
<th>Average Weekly Reach (%)</th>
<th>Time Spent (per user) (hh:mm)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>UK</td>
<td>Wales</td>
</tr>
<tr>
<td>BBC Radio Wales</td>
<td>12.6%</td>
<td></td>
</tr>
<tr>
<td>BBC Local Radio</td>
<td>13.1%</td>
<td></td>
</tr>
</tbody>
</table>

BBC Radio Cymru Reach and Time Spent

<table>
<thead>
<tr>
<th>Audience</th>
<th>Average Weekly Reach (%)</th>
<th>Time Spent (per user) (hh:mm)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>UK</td>
<td>Wales</td>
</tr>
<tr>
<td>BBC Radio Cymru</td>
<td>17.5%*</td>
<td></td>
</tr>
</tbody>
</table>

Reach definition; 15+ minutes for all services and audiences age 15+.
Sources: RAJAR (Radio reach and time per listener; data based on Total Survey Area – TSA).

* BBC Radio Cymru: RAJAR data (reach and time per listener) based on 'Understand Welsh'. BBC Radio Cymru reaches 4.4% of the overall 15+ population in Wales who listen for 10:21 a week on average.

BBC Radio Wales and BBC Radio Cymru
General Impression

<table>
<thead>
<tr>
<th>Age 16+</th>
<th>General Impression</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Mean score out of 10</td>
</tr>
<tr>
<td>BBC Radio Cymru</td>
<td>7.3</td>
</tr>
<tr>
<td>BBC Radio Wales</td>
<td>7.1</td>
</tr>
</tbody>
</table>

Source: The BBC Accountability and Reputation Tracker survey by Kantar Media for BBC
Mean score out of 10 where 1 = extremely unfavourable and 10 = extremely favourable.

6.3 BBC Wales Online and Cymru Fyw

BBC Wales Online and Cymru Fyw provide a comprehensive service offering innovative and distinctive online content that reflects the news, current affairs, issues, events, cultures and interests of the people of Wales.
In 2018, the average weekly browsers for BBC Wales Online (English language) content was 4,617,382. This includes 3,201,165 weekly browsers for our English language News content.

In 2018, the average weekly browsers for BBC Wales Online (Welsh language) content was 198,036. This includes 48,161 weekly browsers for Cymru Fwyw.

In 2018, the average weekly browsers for all BBC Wales Online (both languages) was 4,778,376

6.4 Bitesize

BBC Bitesize is a pan-UK service to support studying and education. In Wales there is a bespoke service to support pupils studying in Wales in line with the curriculum, across the key stages, GCSE and A-level. Bitesize also produces educational packages to coincide with Welsh events and landmarks and this year, for example produced material to coincide with the Hidden Heroines series which focused on Women in Wales.

6.5 The Sesh

BBC Sesh is a social media channel from BBC Wales - aimed at young adults - showcasing the country’s most exciting new talent. BBC Sesh posts daily videos on social media platforms including Facebook, Instagram, Twitter and YouTube. Launched in April 2018, Sesh has worked with and developed more than 120 new contributors from across Wales and has generated almost 90m video views to date. It’s biggest audience are between 18-34 years old.

7 The BBC and S4C

Here we describe BBC Wales’ creative partnership with S4C, and clarify the direct funding relationship between the BBC Trust and S4C Authority.

7.1 The BBC's programming supply to S4C

At the heart of the BBC’s relationship with S4C is what’s known as the ‘contributed programming’. The 1990 Broadcasting Act requires that the BBC provides no less than 520 hours of content per annum to S4C. This creative partnership has been at the heart of Welsh language broadcasting since 1982, and supports the public purposes of both organisations.

In 2018/19 BBC Wales provided 557 hours of original programming for S4C. These programmes included some of the cornerstones of S4C peak-time schedule including the longest-running TV soap Pobol y Cwm and the flagship news programme Newyddion.

The value of this programming in 2018/19 is £22m.
7.1.2 News and current affairs

The 9pm *Newyddion* programme remains at the core of our provision for S4C. The award winning *Newyddion 9* sets a high standard and the audience appreciation and viewing figures are fairly constant.

Anchored by Bethan Rhys Roberts and Rhodri Llywelyn, the programme features analysis of the day’s main new stories. It also breaks new ground with reports into original Welsh stories.

Other news and current affairs programmes include the topical panel show *Pawb a’i Farn*. We also provide live programmes from the political party conferences.

Each weekday, we also provide a news bulletin tailored for younger audiences, *Ffeil*.

In December 2019, we produced a live overnight results service for S4C for the General Election.

7.1.3 Drama

*Pobol y Cwm* follows the highs and lows of the community of Cwmderi and is no stranger to controversial storylines and difficult themes. These include alcoholism and domestic violence. *Pobol y Cwm* has received national awards from the charity Mind for the way it has portrayed some of these challenging issues.

The series is S4C’s most popular year-round weekday series and is the cornerstone of the nightly schedule.

7.1.4 Sport

Live sport is a major part of our programming supply to S4C. Each year, it includes Pro 12 and Principality Premiership rugby games, live coverage of all Wales’ home Six Nations matches, as well as all Autumn International matches.

As we look ahead to the Euro 2020 football championships, BBC Wales will provide live programmes from the Welsh matches, as well as digital content for other platforms.

7.1.5 National Eisteddfod

Coverage of the National Eisteddfod of Wales continues to be a cornerstone of our programming for S4C. Hosted by expert and emerging, new presenters the comprehensive coverage totals around 100 hours and the programmes are a mix of competitions and analysis and a lighter look at the Maes and the fringe activities.

7.1.6 Factual programmes

The BBC also produces one-off documentary programmes for the channel such as *Zimbabwe, Taid a Fi* which saw journalist Seren Jones return to Zimbabwe where her mother was born and she secured an interview with the President Emmerson Mnangagwa.
### 7.1.7 Further editorial collaboration

Beyond the statutory 520 hours, BBC Wales also works closely with S4C on programming projects that can benefit both Welsh and English speaking audiences. For example, the successful drama series *Keeping Faith/Un Bore Mercher* and *Hidden/Craith* are co-commissioned by the BBC and S4C, and are now distributed worldwide.

The BBC’s content for S4C is produced by in-house production teams, and complements the independently produced programming slate which makes up the remainder of the S4C service.

### 7.2 Providing additional value to S4C

Beyond the direct costs of producing 520 hours of output for S4C, the BBC provides additional value to the channel in a number of significant ways.

These additional sources include:

- **Access to the BBC Newsgathering operation** – The *Newyddion 9* news programme, produced by the BBC for S4C, is able to access the BBC’s global newsgathering operation at no extra cost to report on major international events.

- **Sports programming** - The BBC provides S4C with live international sports programming without passing on any of the rights costs incurred by the BBC. This includes rights for live programming from the Six Nations, Autumn Internationals and Euro 2020.

- **iPlayer access** – S4C is a full iPlayer channel giving it wide-spread access to audiences across the UK. The cost of iPlayer is charged to S4C on a ‘not for profit’ basis in recognition of the unique partnership which exists between the BBC and S4C.
Access to BBC Archive – S4C commissioned programmes are allowed to use a very significant part of the BBC Cymru Wales programming archive on terms unavailable to other broadcasters.

7.3. Central Square

BBC Wales is relocating its main production centre to Central Square, in the heart of Cardiff city centre.

Triggered by the ageing condition of the technology infrastructure at Llandaff and the constraints of working in a poorly configured building, the new building will be half the size of the existing facilities and new technology will make it cheaper to run our television, radio and online services. As part of the new development, some S4C staff will co-locate within the new complex

S4C technical staff transferred to the employment of the BBC earlier this year as part of the channel’s preparation for co-locating with the BBC in Central Square, Cardiff at the beginning of 2020. From then on the BBC will be responsible for broadcasting and distributing S4C content, on television and online

7.4. Licence Fee funding of S4C

In addition to the statutory supply of programming from the BBC, S4C also receives direct licence fee funding from the BBC, worth £74.5m per annum to S4C in 2018/19. This sum is fixed until the end of the current licence fee period in 2021/22.

The new BBC Royal Charter (2017) confirms that the Licence Fee should continue to support and underpin the delivery of S4C. The Charter also notes that the 'BBC and S4C must have the shared aim of working together to observe and safeguard the independence of both, and to make the best use of such funding in the interests of audiences (and in particular those who speak Welsh), so far as is consistent with their respective obligations'.

7.5 Accountability arrangements

In 2017, the S4C Authority and the unitary Board of the BBC published a new agreement which replaced the operating agreement which has formed the basis of the relationship between the S4C Authority and the BBC Trust from 2013 to the end of March 2017.

The Partnership, Funding and Accountability Agreement lists how the two broadcasters commit to working creatively together for the benefit of viewers and the Welsh-speaking audience.

The BBC’s commitment to developing and establishing constructive and fair partnerships is one of the key features of its Charter. The commitment to provide funding for S4C as part of the framework agreement was made at the same time.

The agreement is based on, and defines, three essential elements:
Ymateb gan BBC / Response from BBC

- The funding which S4C will receive from the television licence fee, and the nature of its accountability to the BBC for this funding
- The statutory contribution of ten hours of weeks’ programming made by the BBC to S4C, and
- The nature of the broader operational partnership which will include the provision of technical facilities by the BBC to S4C

The partnership agreement will last until the end of the BBC’s charter period, namely 2028.

8. Central Square

The BBC is investing around £100m into its new, state of the art broadcast centre in the heart of Cardiff’s city centre. The new BBC Wales broadcast centre is essential to replace the outdated technology and facilities at Llandaff and it will be roughly half the size of Central Square.

A report for BBC Wales y BOP Consulting has found that the development of Central Square is on course to add £1.1 billion to the GVA of Cardiff City region, and an additional 1,900 FTE jobs in the city over ten years.

A creative hub for the industry, Central Square will be the BBC’s most open building to date. Located in the centre of Cardiff, the public will be able to walk freely around the ground floor, and our partners in the independent sector will have free access to the building. Some S4C staff will also relocate to the building and it will become the broadcaster’s base in Cardiff.

Central Square has the most advanced technology of any broadcast centre in the UK. The Live IP core will enable BBC Wales to use the facilities at Central Square more flexibly.

9. The Welsh language

The BBC’s commitment to the Welsh language is significant.

9.1 BBC Radio Cymru

BBC Radio Cymru is the BBC’s national Welsh-language speech and music station, offering a wide range of programmes to reflect the news, current affairs, events, culture and interests of the people of Wales. In 2018, BBC Radio Cymru 2 was launched offering listeners choice in the morning with news and current affairs on Radio Cymru and music and chat on Radio Cymru 2.

The station broadcasts a wide range of programmes daily as well as live coverage of major events such as the National Urdd Eisteddfod and the National Eisteddfod of Wales. Music is an integral part of the schedule and the station broadcasts more Welsh language music than any other broadcaster.
Programmes for S4C

Many of the programmes produced by BBC Wales provide the cornerstone of S4C’s schedule. These include the long-running drama *Pobol y Cwm* as well as the daily news programme, *Newyddion* which provides news and views from across Wales and beyond.

The partnership between S4C and BBC Wales extends far beyond the 10 hours a week of programming provided by the BBC each week from co-productions such as *Keeping Faith/Un Bore Mercher* to sharing playout facilities in Central Square, providing savings to both broadcasters.

BBC Cymru Fyw

The BBC’s Welsh language online provision is BBC Cymru Fyw. It provide as comprehensive service offering innovative and distinctive online content that reflects the news, current affairs, issues, events, cultures and interests of the people of Wales in the Welsh language.

BBC Sounds

In 2018, the BBC launched its new BBC Sounds platform which presented another opportunity to reach new Welsh language audiences. Bespoke content commissioned for the platform is aimed primarily at those aged under 35 and recent titles to feature on the platform include *Wythnos yng Nghymru Sydd* by Iwan England, *Nid Rwan ond Nawr* a Welsh history series with comedian Tudur Owen and Dyl Mei and *Siarad Secs* with Lisa Angharad. Further new content is planned for the year ahead.

Bitesize

BBC Bitesize is a pan-UK service to support studying and education. In Wales there is a bespoke service – in both English and Welsh - to support pupils studying in Wales in line with the curriculum, across the key stages, GCSE and A-level. There is also bespoke content for those studying Welsh as a subject both first and second language.

Learning Welsh

Our services support those learning Welsh through a variety of programmes and initiatives. For example, in October 2019, BBC Radio Cymru devoted a week to those learning Welsh. The station provided a platform for more learners’ voices as well as providing useful content for Welsh learners.

It took place to coincide with Diwrnod Shwmae Su’mae, and was a partnership between BBC Radio Cymru and the National Centre for Welsh Learning.

The BBC also produces a weekly news programme – *Yr Wythnos* – particularly aimed at Welsh learners, which is broadcast on S4C.
10. The BBC’s cultural impact in Wales

In addition to its programme and content output for local, network and international audiences, BBC Wales works with others in the industry and with its audiences in a number of ways that bring value to the community.

10.1 Working with the industry

The BBC commissions and acquires content across a range of genres of its BBC Network and BBC Wales programming. These genres include Drama, Comedy, Factual, and Daytime content.

BBC Commissioning needs to meet various requirements set out in the Communications Act, the 2016 Charter and Agreement and our current Operating Licence.

These include:

- Eventually securing competition for all relevant TV programmes by 2027;
- Ensuring that 25% of TV programmes are made by independent producers each year overall, as well as on both BBC One and BBC Two individually;
- Ensuring we commission 50% of production spend and 50% of hours outside of London – with a requirement that 5% of relevant Network TV spend and 4% (rising to 5%) of broadcast Network TV hours are produced in Wales;
- Ensuring that competition is fair, reasonable, non-discriminatory and transparent.

We commission from a range of producers including our in-house public service production teams, BBC Studios, and a large number of independent producers.

In addition to our commissioning processes we communicate regularly with the sector and provide opportunities for independents to take part in training and other industry events.

Our new broadcast headquarters in Cardiff’s Central Square will also be opened up to become a resource for independent companies.

10.2 Skills and training

The creative industry sector has grown dramatically in Wales over the past decade and BBC Wales is proud to have played a significant part in this. This commitment is reflected in a wide range of talent development programmes that are developed in partnership with the wider sector.

BBC Wales is also proud of its track record of attracting new talent into the business to equip a new generation to make their mark in the industry and plug gaps in the skills market.

10.2.1 Apprenticeships

Currently, BBC Wales offers more than twenty-five apprenticeships each year across a wide range of production and technical areas.
These range from training opportunities in production and journalism to broadcast operations and digital content-making. Our apprenticeships allow individuals to gain unique experiences and to work with some of the biggest names in the industry. Once the apprentices have finished their course, we offer entry-level roles that they are able to apply for with their new skills and qualifications.

Many of the apprentices who have finished their placements continue to work in the industry, either at the BBC or in the local market as freelancers or for independent companies.

This year, the BBC will take another major strategic step in its commitment to Wales with the opening of its new broadcast centre at Central Square in Cardiff. This will complete a major programme of reinvestment and modernisation across Wales, delivering some of the most advanced broadcast and production facilities anywhere in Europe.

As part of our plans, we are providing new training opportunities to over 250 people, including an additional 20 full time, paid trainee and apprenticeship placements with the organisation. Working with Cardiff and Vale College, these new openings are focused on providing opportunities to individuals from communities and backgrounds that have traditionally felt locked out of the creative industries.

**10.2.2 BBC Writersroom Wales**

The Writersroom in Wales is a BBC initiative to support new and established Welsh writers through a variety of workshops, awards and mentoring.

The inaugural Wales Writer in Residence award ceremony took place recently with Holyhead-born writer Rhiannon Boyle chosen to be the first Writer in Residence from an impressive longlist of 17 entries. Rhiannon is now developing drama ideas with BBC Studios before spending six months with partner organisation National Theatre Wales. Matthew Hall, writer of *Keeping Faith* and one of the judges is also offering mentoring sessions and Rhiannon’s winning script ‘Safe from Harm’ is due to broadcast on BBC Radio 4 in 2020. Next year’s Writer in Residence award has just been announced.

The Wales Writers Festival recently took place at the National Museum of Wales with a full day of sessions created to inform and inspire writing talent in Wales. Russell T Davies gave the opening keynote speech followed by sessions on comedy writing, Welsh language scripting and Andrew Davies’s fascinating insights on his writing career. The finale was an ‘in conversation’ with Ruth Jones and Rob Brydon.

**10.2.3 Uprising**

In recent years, the Uprising charity has been working to provide leadership training and skills development for young people from ethnic minority and socially disadvantaged backgrounds. Its mission is to equip young people with the knowledge, networks, skills
and confidence to fulfil their leadership potential, find new opportunities and transform the world around them through social action. A number of organisations in Cardiff, including BBC Wales has partnered with Uprising providing mentoring and development opportunities for young leaders. 10.2.4 It’s My Shout

The It’s My Shout development programme provides practical opportunities in television and film production targeting individuals and groups that would not normally have access to such opportunities. BBC Wales is a partner and sponsor of the scheme (along with S4C) - providing mentoring and training both in front of and behind the camera for the participants. Every year, It’s My Shout produces short 30 minutes films in Welsh and English, six of which are broadcast on BBC Two Wales and are subsequently available on BBC iPlayer. Side-by-side there is also a scheme for emerging talent looking for documentary ideas. These are also broadcast on BBC Two Wales.

10.2.5 Ffilm Cymru Wales - Beacons

The Beacons project – a partnership between BBC Wales and Ffilm Cymru – aims to shine a light on outstanding film talent from Wales, drawing attention to writers, directors and producers, helping them establish their credentials for feature production. This year, between six and ten short films of up to 30 minutes in length and in English or Welsh will be made.

10.3 Local News Partnerships

The Local News Partnerships (LNP) between the BBC and the UK regional news industry aim to support public service reporting, sustain local democracy and improve skills in journalism

The BBC has committed to a number of projects over the Charter period:

- Delivering a News Hub to give external media organisations access to BBC video and audio material for use online.

- A Shared Data Unit - staffed by the BBC alongside reporters on secondment from local news providers - to share data journalism with news organisations across the media industry.

- The employment of up to 150 Local Democracy Reporters, who cover councils and other public services on behalf of the BBC and local news organisations; in Wales, there are 11 reporters The Local News Partnerships (LNP) between the BBC and the UK regional news industry aim to support public service reporting, sustain local democracy and improve skills in journalism covering all 22 local councils as well as a range of other civic bodies.
10.4 **Children in Need**

BBC Children in Need is the BBC’s UK corporate charity. It provides grants to projects in the UK which focus on children and young people who are disadvantaged.

On Children in Need night (16 November 2019), more than £2.3m was raised in Wales taking the UK total to £47.9m.

BBC Children in Need currently funds 184 projects in Wales worth a total of £11,393,164 that benefit 20,000 children in all 22 local authorities.

10.5 **BBC National Orchestra of Wales**

Formed in 1928, the BBC National Orchestra of Wales has established itself on the international stage, in the recording studio, and is an integral part of the cultural landscape in Wales.

Part of BBC Wales and supported by the Arts Council of Wales, the Orchestra is an ambassador of Welsh music, championing contemporary composers and musicians. Lisa Tregale takes over as Director of BBC NOW and Chorus of Wales in early 2020 with Ryan Bancroft starting as the principal conductor in September 2020.

BBC NOW reaches audiences live in the concert hall, on BBC radio and TV and digitally through live streamed concerts.

Alongside its busy schedule of concerts around Wales, BBC NOW performs annually at the BBC Proms in London and bi-annually at BBC Cardiff Singer of the World. It also works closely with its resident chorus BBC National Chorus of Wales.

In December 2018, BBC NOW toured to four cities in China with conductor Xian Zhang, working with the British Council in China as part of their Inspiring Women in the Arts campaign. In 2015, as part of an extensive tour in South America, the orchestra visited the Welsh colony in Patagonia, where musicians worked in schools and with the community celebrating 150 years of the Welsh settlers in this region

BBC NOW also has a busy and innovative learning programme. Building on its ground-breaking work with special educational needs schools and Deaf, deafened and hard of hearing adults and children, BBC NOW performed the first ever Relaxed Prom in 2017, which won the 2018 Fantastic for Families Award for Best Family Event.

10.6 **Horizons/Gorwelion**

Horizons, a project delivered annually by BBC Wales in partnership with Arts Council of Wales, is designed to support the development of new, independent contemporary music in Wales. A selection of 12 bands and musicians each year are chosen by experts to become part of the project, where they will receive guidance and support in crafting careers in the music industry.
The Horizons 12 are offered opportunities to play at a wide range of festivals and record radio sessions. Last year’s 12 even recorded their own tracks at the famous Rockfield Studios.

10.7 National Broadcast Archive for Wales

The National Broadcast Archive for Wales aims to be a "chronicle of the life of the nation" and "Wales' national memory".

The archive, the first of its kind in the UK, will be at four digital hubs at the National Library of Wales in Aberystwyth, Wrexham, Carmarthen and Cardiff.

Additionally, the National Broadcast Archive partnership will see a range of face-to-face activities with digitised archive content being taken to a number Wales’ communities. The National Broadcast Archive will also offer 1,500 clips and programmes from the BBC Wales archive.

Under plans now being rolled out, the BBC’s content is joining ITV, S4C and screen and sound archives collected at Aberystwyth. The Archive will house the totality of the BBC Wales archive in both digitised and original form.

The project has received nearly £5m from the National Heritage Lottery Fund, £1m from the Welsh Government, £2m from the library’s private funds and £2.5m of digital content and support from the BBC.
### 11. Availability and distribution of BBC services in Wales

In Wales, the BBC’s pan-UK and Wales-only services are made available on the following platforms (percentages refer to number of households covered and are taken from Ofcom’s 2019 Connected Nations and Media Nations reports except where stated):

<table>
<thead>
<tr>
<th>Service Description</th>
<th>Terrestrial transmission</th>
<th>Satellite transmission</th>
<th>Cable transmission</th>
<th>BBC iPlayer/Sounds via broadband</th>
<th>BBC Sounds via mobile networks</th>
</tr>
</thead>
<tbody>
<tr>
<td>BBC Network television services in SD</td>
<td>Freeview at 98%</td>
<td>Sky &amp; FreeSat at 98%</td>
<td>Virgin Media at 23%</td>
<td>97%</td>
<td>-</td>
</tr>
<tr>
<td>BBC One Wales (HD)</td>
<td>Freeview at 98%</td>
<td>Sky &amp; FreeSat at 98%</td>
<td>Virgin Media at 23%</td>
<td>97%</td>
<td>-</td>
</tr>
<tr>
<td>BBC Two Wales (HD)</td>
<td>Freeview at 98%</td>
<td>Sky &amp; FreeSat at 98%</td>
<td>Virgin Media at 23%</td>
<td>97%</td>
<td>-</td>
</tr>
<tr>
<td>CBBC (HD)</td>
<td>Freeview at 98%</td>
<td>Sky &amp; FreeSat at 98%</td>
<td>Virgin Media at 23%</td>
<td>97%</td>
<td>-</td>
</tr>
<tr>
<td>BBC Four, CBeebies, BBC News (HD)</td>
<td>Freeview at 50%</td>
<td>Sky &amp; FreeSat at 98%</td>
<td>Virgin Media at 23%</td>
<td>97%</td>
<td>-</td>
</tr>
<tr>
<td>Radio 1, Radio 2, Radio 4</td>
<td>FM at 96% DAB at 92% Freeview at 98%</td>
<td>Sky &amp; FreeSat at 98%</td>
<td>Virgin Media at 23%</td>
<td>97%</td>
<td>69%</td>
</tr>
<tr>
<td>Radio 3</td>
<td>FM at 92% DAB at 92% Freeview at 98%</td>
<td>Sky &amp; FreeSat at 98%</td>
<td>Virgin Media at 23%</td>
<td>97%</td>
<td>69%</td>
</tr>
<tr>
<td>Radio 4 LW</td>
<td>MW/LW at 100% DAB at 92% Freeview at 98%</td>
<td>Sky &amp; FreeSat at 98%</td>
<td>Virgin Media at 23%</td>
<td>97%</td>
<td>69%</td>
</tr>
<tr>
<td>Radio 5 Live</td>
<td>MW at 90% DAB at 92% Freeview at 98%</td>
<td>Sky &amp; FreeSat at 98%</td>
<td>Virgin Media at 23%</td>
<td>97%</td>
<td>69%</td>
</tr>
<tr>
<td>Radio Wales</td>
<td>FM at 91% MW at 96% DAB at 83% Freeview at 98%</td>
<td>Sky &amp; FreeSat at 98%</td>
<td>Virgin Media at 23%</td>
<td>97%</td>
<td>69%</td>
</tr>
<tr>
<td>Radio Cymru</td>
<td>FM at 96% DAB at 83% Freeview at 98%</td>
<td>Sky &amp; FreeSat at 98%</td>
<td>Virgin Media at 23%</td>
<td>97%</td>
<td>69%</td>
</tr>
<tr>
<td>Radio Cymru Mwy (2)</td>
<td>DAB at 83% Freeview at 98%</td>
<td>Sky &amp; FreeSat at 98%</td>
<td>Virgin Media at 23%</td>
<td>97%</td>
<td>69%</td>
</tr>
<tr>
<td>Radio 4 Extra, Radio 5 Live Sports Extra, BBC Asian Network, BBC World Service, Radio 1Xtra, Radio 6Music</td>
<td>DAB at 92% Freeview at 98%</td>
<td>Sky &amp; FreeSat at 98%</td>
<td>Virgin Media at 23%</td>
<td>97%</td>
<td>69%</td>
</tr>
</tbody>
</table>

1 For Broadband, access to a download speed of 10Mbit/s or higher; for mobile, premises covered by all operators
2 Launched in November 2018
3 Based on BBC coverage calculations
4 Decreased from 92% following reallocation of transmissions to Radio Wales (BBC coverage calculation)
5 Increased from 79% following reallocation of transmissions from Radio 3
6 Note – this will reduce from 2020 by 4% to 92%, this has not yet been made public
7 Launched in January 2018
12. Operations

12.1 Licence fee

For 2018/19 the fee for a standard UK TV licence is £150.50

<table>
<thead>
<tr>
<th>Estimated income</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td>£3,690m</td>
</tr>
<tr>
<td>Wales</td>
<td>£184m</td>
</tr>
</tbody>
</table>

These numbers are estimated as figures for each nation have been calculated by applying the proportion of licensed premises to the total number of licences in force. The exact number of licences in force varies on a daily basis. The numbers of licensed premises are different to the number of licences in force as, in some cases, a premise may need more than one licence. Figures exclude concessionary licences for those living in residential care.

12.3 Expenditure in Wales

<table>
<thead>
<tr>
<th></th>
<th>2018/19 (£m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Network content</td>
<td></td>
</tr>
<tr>
<td>TV</td>
<td>49</td>
</tr>
<tr>
<td>Radio</td>
<td>3</td>
</tr>
<tr>
<td>Online and Red Button</td>
<td>1</td>
</tr>
<tr>
<td><strong>Total network spend</strong></td>
<td><strong>53</strong></td>
</tr>
<tr>
<td>Local content</td>
<td></td>
</tr>
<tr>
<td>TV – BBC One</td>
<td>25</td>
</tr>
<tr>
<td>TV – BBC Two</td>
<td>8</td>
</tr>
<tr>
<td>Radio Wales</td>
<td>15</td>
</tr>
<tr>
<td>Radio Cymru</td>
<td>14</td>
</tr>
<tr>
<td>Online and red button</td>
<td>11</td>
</tr>
<tr>
<td><strong>Total local spend</strong></td>
<td><strong>73</strong></td>
</tr>
<tr>
<td>National Orchestra of Wales</td>
<td>5</td>
</tr>
<tr>
<td>S4C (BBC Wales programmes)</td>
<td>22</td>
</tr>
<tr>
<td>Development</td>
<td>1</td>
</tr>
<tr>
<td>Distribution</td>
<td>25</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>179</strong></td>
</tr>
</tbody>
</table>

12.4 Staff

In the year 2018/19 BBC Wales employed 1,231 employees, 990 of which are employed to directly support the services produced in Wales.