

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

Meeting Venue:

Committee Room 2, Senedd

Meeting date: 17 January 2024

Meeting time: 09.30 – 12.30

For further information contact:

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Hybrid

Pre-meeting registration

(09.15 – 09.30)

1 Introductions, apologies, substitutions and declarations of interest

(09.30)

2 Welsh Government Draft Budget 2024–25: evidence session with the Deputy Minister for Arts, Sport and Tourism and the Minister for Economy

(09.30 – 11.00)

(Pages 1 – 69)

- Dawn Bowden MS, Deputy Minister for Arts, Sport and Tourism, Welsh Government
- Vaughan Gething MS, Minister for Economy, Welsh Government
- Jason Thomas, Director – Culture, Sport and Tourism, Welsh Government
- Dean Medcraft, Director – Finance and Operations, Welsh Government

Attached Documents:

- Research brief: Welsh Government Draft Budget 2024–25: Deputy Minister for Arts, Sport and Tourism and the Minister for Economy



- Welsh Government: Minister for Economy and Deputy Minister for Arts, Sport & Tourism – Memorandum on the Draft Budget proposals for 2024–25
 - Welsh Government: Annex A – Overview of Culture and Heritage Finances
 - Welsh Government: Annex B – Action level commentary
 - Welsh Government: Annex C – Projects funded by the media investment budget (31 November 2023)
 - Welsh Government: Annex D – Welsh screen fund investment (as of 6 December 2023)
 - Welsh Government: Annex E – Bad Wolf Studios investment (31 November 2023)
- Letter from Creu Cymru: Welsh Government Draft Budget 2024–25 – 20 December 2023
- Correspondence from Music Venues Trust: Welsh Government Draft Budget 2024–25 – 2 January 2024
- Correspondence from Andrew Green: Welsh Government Draft Budget 2024–25 – 5 January 2024 [translated internally]
- Letter from Addoldai Cymru: Welsh Government Draft Budget 2024–25 – 8 January 2024
- Letter from Heneb: Welsh Government Draft Budget 2024–25 – 9 January 2024
- Letter from the Royal Commission on the Ancient and Historical Monuments of Wales (RCAHMW): Welsh Government Draft Budget 2024–25 – 10 January 2024

3 Papers to note

(11.00)

3.1 Allegations concerning bullying at S4C

(Pages 70 – 71)

Attached Documents:

- Letter to the Department for Culture, Media and Sport: Allegations concerning bullying at S4C – 11 January 2024

3.2 Arts Council of Wales: Investment Review

(Pages 72 – 78)

Attached Documents:

- Correspondence from the Romani Cultural and Arts Company to the Arts Council of Wales: Arts Council of Wales: Investment Review – 9 January 2024
 - Annex 1: Arts Council of Wales funding per organisation 2013–14 to 2022–23
 - Annex 2: Gypsy–Roma–Traveller projects

3.3 Public service broadcasting in Wales

(Page 79)

Attached Documents:

- Letter from the Deputy Minister for Arts, Sport and Tourism: Public service broadcasting in Wales – 11 January 2023

4 Motion under Standing Order 17.42 (vi) and (ix) to resolve to exclude the public from the remainder of this meeting and for the beginning of the following meeting (24 January 2024)

(11.00)

Break

(11.00 – 11.15)

5 Welsh Government Draft Budget 2024–25: consideration of evidence

(11.15 – 11.45)

6 Legislative Consent: Data Protection and Digital Information Bill: consideration of the Supplementary Legislative Consent Memorandum (Memorandum No.3)

(11.45 – 12.05)

(Pages 80 – 93)

Attached Documents:

- Legal advice note: Legislative Consent: Data Protection and Digital Information Bill
- Business Committee report: Timetable for consideration: Supplementary Legislative Consent Memorandum (Memorandum No.3) on the Data Protection & Digital Information Bill

7 Public service broadcasting in Wales: consideration of the key issues

(12.05 – 12.30)

(Pages 94 – 130)

Attached Documents:

- Key issues paper: Public service broadcasting in Wales

Document is Restricted

Culture, Communications, Welsh Language, Sport, and International Relations Committee – 17 January 2024

Minister for Economy and Deputy Minister for Arts, Sport & Tourism

Memorandum on the Draft Budget proposals for 2024-25

1.0 Introduction

This paper provides information to the Committee regarding our spending plans as the Minister for Economy and the Deputy Minister for Arts, Sport & Tourism in respect of the culture, creative, heritage and sport budgets within our portfolio. The spending plans are set out in the Draft Budget for 2024-25, published on 19 December 2023. This paper also provides an update on specific areas of interest to the Committee.

A breakdown of changes to the budget allocations (as relevant to Arts, Culture, Heritage, Creative Industries and Sport) by spending area, Action, and BEL for 2023-24 and future years is provided at **Annex A**.

A commentary explaining the changes to each Action relevant to this Committee is also provided at **Annex B**. A transparent narrative explanation has been provided to explain increases and reductions, where not covered in the evidence paper. This only covers the budgets that are being scrutinised as part of this committee. Further details on budget decisions are provided in the updates on areas of interest to the Committee.

1.1 Commentary on Actions and detail of Budget Expenditure Line (BEL) allocations Resource and Capital Budget – Economy MEG

The table below provides an overview of indicative plans for the Economy MEG published in draft Budget 2024-25

Economy MEG – Summary	2024-25 Indicative Final Budget Feb 2023 Restated	2024-25 Changes	2024-25 Draft Budget December 2023
Resource	482,434	-43,532	438,902
Capital	100,492	2,000	102,492
Total Resource & Capital	582,926	-41,532	541,394
Resource AME	58,525	0	58,525
Capital AME	0	0	0
Total AME	58,525	0	58,525
Total – Economy MEG	641,451	-41,532	599,919

Resource

The Economy Resource budget stands at £438.902m for 2024-25.

The Resource budget for the Economy MEG has decreased by £43.532m in 2024-25 when compared to the 2024-25 indicative final budget baseline.

The Welsh Government has undertaken a reprioritisation exercise following the announcement of the Autumn statement to release funding from within portfolios for reallocation across Government due to the increase pressure on the Welsh Government budget and public services in Wales. The Welsh Government published its budget on 19 December as this budget provided as much support as possible to put our public services, people, businesses, and communities first.

As a result of the reshaping of the Welsh Government budgets, the Resource budget for the Economy MEG has decreased by £43.532m in 2024-25 when compared to the 2024-25 indicative final budget baseline. An allocation of £6.4m has been received from central reserves for the Borders programme, which is offset by a return to reserves of £49.932m for the Economy MEG's contribution.

These changes for budget lines relevant to this Committee are summarised in **Annex A** and **Annex B**.

Capital

The Economy capital budget stands at £102.492m for financial year 2024-25. There has been an increase of £2m because of a Financial Transaction repayment for the Cadence Project.

Annually Managed Expenditure – AME

The AME budget of £58.525m provides cover for charges that are outside the control of the portfolio, such as impairments on the property portfolio, pension valuation fluctuations for National Museum of Wales, the National Library of Wales, Sport Wales and Careers Wales. This budget is agreed with the Treasury each year and is fully funded. The AME draft Budget figures reflects the forecasts submitted to the Office for Budget Responsibility in September 2023.

2023-24 Forecast

As outlined in **Annex A**, the forecast revenue out-turn for 2023-24 is £130.704m, compared to the First Supplementary Budget of £130.727m.

The forecast capital out-turn for 2023-24 is £48.358m, compared to the First Supplementary Budget of £50.939m. **The variance is due to the a £3m early repayment of Capital FT from the Welsh Rugby Union and a £0.6m pressure on Support for Local Culture and Sport in relation to re-profiled Co-operation agreement projects.**

2022-23 Final Outturn

An outturn position of £137.263m was reported against the culture, heritage, and sport resource budgets for financial year 2022-23.

An outturn position of £41.408m was reported against the culture, heritage, and sport capital budgets for financial year 2022-23.

1.2 Budget Changes

Resource

The Resource budget for the budgets relevant to this Committee has decreased by £15.579m in 2024-25 when compared to the indicative final budget restated baseline. The decreases relate to reductions due to the Welsh Government reprioritisation exercise.

As part of the Economy MEG's contribution towards the reprioritisation exercise, there has been a 10.5% revenue reduction to Creative Wales and all Culture and Sport Arm's Length Bodies (ALB), the National Library of Wales, Amgueddfa Cymru-National Museum Wales, Arts Council of Wales, Sport Wales, and the National Botanic Gardens of Wales. The Royal Commission on the Ancient and Historical Monuments of Wales) and Cadw have faced a higher reduction of 22%. For Cadw, the ability to generate additional income through increases in admission charges to monuments will help cover some of the additional inflationary pressures that will be faced.

The £14m allocation for culture from the Co-operation Agreement in financial year 2024-25 has been predominantly maintained, with the exception of a reduction of £1.233m towards the Culture Strategy and £0.140m against Welsh place names and support for Heritage sector. A reduction of £0.376m has been applied against the Fusion programme and £0.327m against the National Contemporary Art Gallery, but delivery will still be maintained.

Further detail on funding within Budget expenditure lines (relevant to this Committee) is outlined below. My officials are undertaking detailed work as part of the business planning process for 2024/25 and so consequently, we have kept the narrative at a broad level.

Investing in our internal agencies, national organisations and local sectors is vital and recognises the importance of the arts, culture, sport, and heritage for our wellbeing goals: a Wales of vibrant culture and thriving Welsh language; a healthier Wales and a Wales of cohesive communities.

Investment in the long-term sustainability of our national organisations demonstrates our commitment to preserving our culture and heritage for future generations and our commitments for these organisations to better reflect the diverse communities across Wales. Decarbonisation is a priority for the budget decisions to achieve [Net Zero Wales](#) will enable the organisations to address environmental concerns, particularly CO2 emissions and energy efficiency. During the pandemic the organisations have adapted their offer to the public by making more of their collections available digitally and moved to offering educational and entertainment programmes online so that individuals and families could enjoy culture and heritage at home. The capital budgets will enable further investment in technology for recovery, wider access and

preservation of the collections. The additional allocations from the Co-operation Agreement are particularly important in helping to drive forward these initiatives.

Internal agencies:

The Creative Wales brand supports the international strategy in raising Wales' profile to the world, not only as a centre for creative excellence, but as a great place to visit and live. Creative and cultural investment is vital for regeneration across Wales and capital funding of £15m over three years will support productions and initiatives in both Welsh and English.

Significant development and conservation programmes are planned for our heritage sites with a Cadw budget of £30m over three years, including major development work at Caerphilly Castle.

National cultural organisations:

In 2024-25 we will provide £68.964m revenue and £7.650m capital collectively to our four national culture bodies (the National Library of Wales, Amgueddfa Cymru-National Museum Wales, Arts Council of Wales, and Royal Commission on the Ancient and Historical Monuments of Wales) and the National Botanic Garden of Wales. For capital, we have allocated £5m to Amgueddfa Cymru and £2m to the National Library of Wales to support the maintenance of their historic estates and small allocations to the other three bodies. We have also made awards for specific projects named in the Programme for Government, digitisation, and decarbonisation from the Support for Local and Culture allocations.

Culture:

The support for local culture and sport budget of £6.668m revenue and £24.7m capital in 23/24 will support the culture strategy and investment in theatres and museums and the wider culture sectors. It makes provision for our Programme for Government commitments on racial equality and implementation of the Anti-racist Wales Action Plan, the five major strategic capital investments (National Contemporary Art Gallery Wales, Football Museum for Wales, Theatr Clwyd, Museum of North Wales and National Slate Museum), provision for investments in developing our national culture bodies, and the development of and our local culture sectors, especially museums and collections. Funding will also be allocated to the Transformation Capital Grant

Sport:

The £20.978m revenue and £8.016m annual capital budgets will provide a significant investment in community as well as elite sports facilities to provide modern and sustainable environments for sports participation, and to nurture and develop talented athletes. It will also ensure Wales is well positioned to compete internationally and to help host international events, providing opportunities to promote Wales brand on the international stage in the future. The £3m allocation as part of the Co-operation Agreement (£9m over 3 years) has been maintained.

Culture, heritage, the creative industries, the historic environment, and sport are essential components of our national life and an integral part of our individual and collective mental and physical well-being. Museums, archives, libraries, arts and sports clubs, facilities and historic sites are the focal point for many communities throughout Wales. Almost all of our support for these sectors helps people to access and enjoy the best of Wales, enhancing quality of life, as well as our education, history, visitor economy and our place in the world. Culture is one of the Wellbeing of Future Generations Goals, and critical to the delivery of the six other goals, in what it can contribute towards wider life and the economy.

What we will do and how we will do it

Our [Programme for Government 2021 – 2026](#) recognises the crucial role that these sectors deliver. See section 4.0 for more information.

Welsh Government have reshaped our budget to provide extra funding and protection for the services which matter most to you. We have done so in line with our priorities:

- Protect core, frontline public services as far as possible.
- Deliver the greatest benefit to households which are hardest hit.
- Prioritise jobs, wherever possible.
- Work in partnership with other public sector bodies to face this financial storm together.
- Refocus funding away from non-devolved areas, which the UK Government should be funding.

Investment is primarily delivered through our internal agencies (Cadw and Creative Wales) and five arm's length bodies (the National Library of Wales, Amgueddfa Cymru – National Museum Wales (7 museums), the Arts Council of Wales, Sport Wales and the Royal Commission on the Ancient and Historical Monuments of Wales). Alongside the National Botanic Garden of Wales, investment in Cadw delivers our heritage ambitions with Capital investment in local museums, archives, and libraries sector via our Capital Transformation Grant programme. Creative Wales leads on, and coordinates, activity, and policy for the creative sectors.

These organisations deliver on the cross-government priorities to support the delivery of key strategies including [Net Zero Wales](#), the Anti-racist Wales Action Plan and [Cymraeg 2050](#). Each of the arm's length bodies are committed to carbon efficiency providing detailed sustainability reports in their annual accounts. An additional £11.75m is allocated to the five public bodies and Cadw via the Co-operation Agreement with an equitable grant in aid / funding uplift (excluding non-cash) to develop a new culture strategy, reflecting Wales' diversity, a thriving Welsh language, our arts, culture and heritage sectors and our duties under the Wellbeing of Future Generations Act. We will ensure the financial sustainability of national cultural institutions as we implement the strategy, and we will also develop the proposals for a national contemporary art gallery.

Cadw will complete phase 1 of the capital investment at Caerphilly Castle (works to the inner ward buildings and Great Hall) and commence phase 2 (the new build visitor centre). This major investment will transform the visitor experience and make the castle a 'must see' attraction in the Caerphilly area. Further capital investment will also allow Cadw to continue its statutory responsibility to conserve and maintain the monuments in its care, keep them safe for people to visit and reduce the carbon footprint of its visitor centres.

Sport is an intrinsic part of our nation's identity. It brings our communities together and provides people with transferrable skills to enhance their learning and find a job or career. Through the many thousands of activities across Wales, sport also supports the growth of Welsh speaking communities by providing opportunities for people to use it on a daily basis as a living, modern language. We will continue to support our communities, clubs, and facilities which will continue to enhance our sense of identity, physical and mental well-being, and will ensure the sector adds value to our health and happiness. The spending

plans for sport, maintained investment levels in the three-year capital budget, enabling the Welsh Government to continue to invest, through its delivery partner, Sport Wales, in the people and places to provide inclusive and equal opportunities for people to lead healthy and active lives, and to realise their sporting potential.

The creative industries and culture sectors according to 2022 data, 3,545 businesses make up the creative industries sectors in Wales, an increase of 8.9% from 2017. Creative industries businesses accounted for 3.3% of total registered businesses in all industries in Wales in 2022. The creative industries in Wales (based on businesses included in the IDBR) generated an annual turnover of £1.4billion in 2022 (down 19.5% from 2021). The wider Welsh economy (including small businesses which are not included in the IDBR) also saw a decrease in turnover, decreasing by 11.2% over the same period to £116.4bn.

In terms of business size, the 2022 data showed that 1% of creative industries businesses were medium and large (50+ employees), 6% small (10-49 employees), 80% micro (1-9 employees) and 14% had zero employees. This compares to figures for all industries in Wales that show 2% of businesses were medium and large, 9% were small, and 89% were micro including zero employees. Data source: Annual Population Survey. Years refer to calendar years (e.g., 2022 refers to the year ending December 2022) unless specified otherwise. As of 2022, 32,500 people were employed in the creative industries sectors supported by Creative Wales. Employment in the creative industries in Wales is down by 6.9% from the previous year, where on average, employment across all industries in Wales has remained constant (up by 0.4%). For the UK, employment in the creative industries, as defined by DCMS is up 4.3% from the year ending June 2021 to the year ending June 2022.

We have a statutory responsibility to continue to support our national cultural sponsored bodies, as well as the local culture sectors, who all play a key role in delivering government priorities and Programme for Government commitments, resulting in better quality of life for so many of our population. We have asked these bodies to all prioritise improving access and tackling inequalities, decarbonisation, and digital improvements over the next three years.

Capital investment is provided to the local museums, archives, and libraries sector via our Capital Transformation Grant programme, and via the Arts Council of Wales to the arts sector, including theatres. We propose to extend and develop these schemes to address the range of Programme for Government commitments, enabling a greater range and diversity of applications and better alignment with Programme for Government priorities. We are revisiting these schemes to put decarbonisation and digital at the centre, to ensure that investments are sustainable and that they tackle inequalities, particularly race inequalities and disability discrimination.

The rationale for investing in culture, heritage, sport, and creative sectors.

The [Economic Mission](#) has already set Wales on a path that links our pandemic response with long term, active industrial policies. Over the next two years, we will progress our economic mission, focusing on the levers that can help young people plan ambitious futures in Wales. This will draw upon international best practice, whilst responding to the evolving labour market to support the conditions needed for businesses to thrive.

The [Programme for Government](#) includes a commitment to progress the Economic Mission and significant cultural commitments, recognising the important role of culture for well-being

and providing employment opportunities. As the response to the pandemic testified, culture and heritage are central to what matters to people, what they enjoy doing, their mental wellbeing and physical health.

The culture, creative, sport and heritage sectors play a vital role in supporting the economy of Wales. They create jobs in the creative industries (media, journalism, and publishing), heritage, traditional building construction and repair, and the arts, sport and cultural sectors. Sport Wales has recently published the Social Return on Investment (SROI) study for sport in Wales, conducted by the world leading Sport Industry Research Centre at Sheffield Hallam University. The findings of the report show that for every £1 spent on sport and active recreation in Wales, £4.44 worth of social benefits are generated. This demonstrates the incredible annual contribution sport makes to health, and other areas, particularly the potential sport has to be the most effective preventative health tool at our disposal. Our cultural attractions help sustain 12,110 businesses in the tourism industry and creative industries employ 32,500 people. They demonstrate strong economic benefits in terms of the visitor economy, regeneration and place-making and strong environmental benefits through decarbonisation and support for biodiversity and the natural environment.

Our culture, heritage, sport, and creative industries are central to the Wales brand and promoting Wales in the UK and internationally. These sectors have faced significant challenges. The ongoing impact of rising costs is particularly high across the portfolio, highlighting organisations and sectors struggling to recover financially from the pandemic, where falls in attendance numbers mean a reduced ability to generate income. Large increases in energy prices are adding significant pressures on budgets. Increased living costs are also impacting on the recruitment and retention of staff and volunteers, as people struggle to afford travel costs and child-care, or opt for better paid work. In some instances, the combined result of these challenges is reduced programmes of activity across Wales. Less disposable income means people are also having to tighten belts and spend less on leisure activities. Significant increases in supply chain costs, particularly in relation to materials and labour, are also impacting on capital projects and maintenance work. The impact of these challenges will continue into the future as we aim to support our sectors in recovery.

3.0 Response to Specific Information Requested by the Committee

3.1 Information on how the delivery of the Arts, Culture and Heritage portfolio and their associated outcomes are monitored and evaluated to demonstrate value for money.

Key priorities for each arm's length body are set out in their remit letters, which they use as a basis for their operational plans and key performance indicators. The Deputy Minister meets at least biannually with each of the organisations, and officials formally monitor progress against their operational plans at quarterly monitoring meetings and more regularly through close working relationships with the senior executive teams at the arm's length bodies. At the invitation of the bodies, officials also attend Board meetings as observers, allowing Welsh Government to maintain a good overview of potential issues. Monthly grant in aid claims are scrutinised to ensure that progress is being achieved against specified lines of expenditure.

Cadw has its own internal agency board with non-executive members. It meets quarterly and part of its role is to scrutinise Cadw's performance against its business plan and

financial reporting and provide challenge and advice. In December 2022, The Deputy Minister announced a review of Cadw's current governance arrangements and the wider provision of public heritage services across Wales. The intention was to assess the success of these arrangements after having been in place for five years. The [report of this review was published on the 5th December 2023](#) and a response to the recommendations will be published in early 2024. The review complemented the achievements of Cadw in recent years and concluded that Cadw's mission and purpose was best served by remaining, at this moment, as an internal agency of Welsh Government. However, it also made 29 recommendations that range in scope and include several that are intended to help clarify the role of the Cadw Board and the ways in which government procedures might be adapted to allow Cadw to operate even more effectively. Several recommendations make suggestions on how the ways in which Cadw works with its partners can be reinforced and others consider how some of Cadw's wide-ranging activities can be enhanced to assist its core purpose.

Each major project has governance arrangements in place related to the specific project. These are frequently reviewed to ensure they reflect the stage of the project. Major capital investments are supported by business cases which are scrutinised to ensure they are robust. This includes a range of Welsh Government officials and independent review via gateway reviews. Smaller capital and revenue grants and contracts are awarded based on either an open application process or a direct commission. They are monitored by officials throughout the project life cycle, with agreed deliverables and check in points.

Major projects and activity are monitored using the Business Information Report Tool (BIRT). An Evidence Plan presents the research, evaluation, and data collection projects that the Culture Division is either undertaking or committed to. It is updated yearly, based on discussions with staff and wider stakeholders, to ensure activity is supporting key divisional priorities and Programme for Government commitments.

3.2 Details of specific policies or programmes within the relevant MEGs (relevant to Arts, Culture and Heritage) that are intended to be preventative and how the value for money and cost benefits of such programmes are evaluated.

Arts, culture, sport, and heritage play an important role in tackling disadvantage and preventing poverty. Participating in cultural activities (such as volunteering at a museum or playing music) can boost skills, self-esteem, learning and aspiration, particularly in areas experiencing economic disadvantage.

Health and wellbeing

The importance of culture to promoting positive wellbeing and physical health was dramatically underlined by the pandemic, and again this year in relation to the sector response to the rising costs of living. Culture and heritage provide an outlet for many during these difficult and uncertain times, and our sector always demonstrates innovative and creative responses to supporting individual and community well-being.

Some examples of how our sectors have delivered preventative policies and programmes in 2023/24 include:

- Establishing warm hubs in libraries – these have continued beyond the initial funding period.

- Providing books on prescription through the ‘Reading Well’ scheme.
- Developing the House of Memories Cymru app which uses museum collections to support people living with dementia.
- Continuing with the Arts Council of Wales partnership with Health Boards to provide a range of tailored programmes to support well-being.
- Supporting the framework for Social Prescribing through tailored volunteer programmes.

2024/25 looks challenging in terms of the financial flexibility available to our sectors to support preventative activity outside of their core purposes, but the focus on well-being, and on delivering a number of Welsh Government policy priorities such as ARWAP, the LGBTQ+ Action Plan, the Age-Friendly Wales strategy, and tackling loneliness and isolation are already deeply embedded in day-to-day activity.

Examples of projects that will be funded directly in 2024/25 include extending the books on prescription offer in collaboration with Child and Adolescent Mental Health Services: (CAHMS) and the Reading Agency. Evaluation of books on prescription is undertaken by the Reading Agency as part of the grant monitoring. We will continue to work with local museums to promote the use of the Welsh Government funded House of Memories Cymru App, which uses museum collections to support people with dementia. HARP - Health Arts Research People is one arts example of interventions to prevent ill-health, a collaboration with the NHS to develop new approaches to health, wellbeing, and creativity.

Sport can be the nation’s most effective preventative health tool, but greater cross-sector prioritisation is needed to create the long-term sustainable shifts in participation. The Healthy and Active Fund and Healthy Weight: Healthy Wales Delivery Plan are two examples of success in this area. Sport Wales will also continue to invest funding and resource in the Welsh Government’s ‘Healthy Weight: Healthy Wales’ delivery plan, including the delivery of the 60+ Active Leisure scheme.

The Fusion Programme

The budget makes provision for continued support for the Fusion Programme in 2024-25 and its work in engaging with individuals and communities in areas of deprivation.

The Fusion programme aims to be a catalyst for positive change for health, wellbeing, and poverty, through cultural activity. The programme has continued to engage with local communities and culture heritage organisations to form partnerships, and to identify and enable opportunities, including new ways of delivering cultural activities and to increase and widen participation in cultural activities.

Employment Opportunities

The Economic Action Plan and the Employability Plan are underpinned by the evidence that well paid work is the best route out of poverty and the greatest protection against poverty for those at risk. By supporting jobs and sustainable growth, particularly with Creative Wales investments and opportunities to work in the wider arts, culture and heritage sectors and taking action to try to alleviate some of the challenges faced by people when accessing jobs, we aim to reduce the likelihood of families experiencing poverty and avoid the long-

term costs that poverty bring to society. We continue to create opportunities for individuals and families with initiatives and targeted investment across Wales.

3.3 Information on allocations (and their location) in your portfolio to provide for legislation which has the potential to impact in the financial year 2024-25 as relevant to Arts, Culture and Heritage.

Through our legislative programme and our Co-operation Agreement commitment with Plaid Cymru we will introduce a statutory registration and licensing scheme for all visitor accommodation in 2024. Creation of this legislation will be subject to further conversation and, of course, ongoing annual budget discussions. For 2024-25 this work will be delivered within the budget allocation for tourism and discussed annually as part of our budget discussions.

3.4 Implications of the ongoing effect of the COVID-19 pandemic, the UK exit from the EU and the cost-of-living crisis on the Arts, Culture, Heritage, Creative Industries and Sport portfolios and how the Welsh Government will manage ongoing impact.

Cadw, Amgueddfa Cymru, the National Library, the National Botanic Garden of Wales and Arts Portfolio Wales organisations may be adversely affected from fewer visitors, particularly overseas visitors. This position will continue to be monitored closely. For example, the restrictions due to the pandemic have had a significant impact on the number of visitors and commercial income levels at Cadw sites over the last two years.

Spotlight on Museums 2022 indicated that: Museum visitor levels overall have recovered to 69% of pre Covid-19 levels. National Trust, independent and university museums are at over 80% recovery Museum Spotlight Survey: 2022 | GOV.WALES

In 2022/23 there was 1,308,628 visits across all Amgueddfa Cymru sites and 2,322,184 visits to the Museum's website. For 2023/24, Amgueddfa Cymru's target for number of visits to its sites is 1.46m. Up to the end of October, it had 1,075,825 visits which means it is on course to meet or exceed its target. The Museum's target for number of website visits is 1.9m. Up to the end of October, it had over 1,578,027 visits which means it is on course to exceed its target. During 2022-23, there were 52,546 visits to the National Library and for the first five months of the 2023-24 financial year 38,767 have visited the Library.

The local arts, heritage and culture sectors have benefitted from the Cultural Recovery Fund, and other sources of Covid relief funding including the Economic Resilience Fund and the furlough scheme. It is too early to assess the full impact of the pandemic on these sectors. The sector was amongst the last to re-open and the impact of the pandemic is likely to be felt for some time and until public confidence returns. We have seen reductions in visitors and volunteers.

The portfolio has greatly benefited over the years from EU funding for certain projects. Cadw in particular has benefited with investment in the visitor infrastructure of monuments in west and north Wales. However, Cadw is not able to benefit directly from the UK government's Shared Prosperity Fund.

The impact of the pandemic on public libraries has seen a shift to increased usage of online resources, that has continued to rise despite a return to physical visits and loans. This has implications for budget provision, as electronic resources are more expensive. Demand is outstripping provision in terms of increased wait times for popular resources.

The UK Government announced in December 2020 that a replacement for the Creative Europe programme would not benefit from direct funding as part of the comprehensive spending review, the Culture element has not been supported directly however the creative film and screen element has. Opportunities still remain to access a very limited fund via the Shared Prosperity Fund.

The Creative Europe programme has been superseded by the Global Screen Fund (GSF) which has run since 2021, with a budget of circa £7m per annum. While a small number of Welsh businesses have benefited from this programme, the overall benefit to Wales continues to be limited. Officials continue to provide feedback to DCMS and the BFI about the need for devolved nations to be more involved in the programme delivery. There has been no direct replacement to date for the Creative Europe cultural sub-programme and that the Welsh Government continues to engage with DCMS and other devolved nations to raise issues and identify options for support for the sector.

Sectors across the creative industries continue to be affected by increasing costs. This includes broadcasters and Film and TV productions concerned that increased costs and inflationary issues are adding to existing budget challenges and wider impacts on trainees on screen productions who are struggling with the cost of living. The music sector and publishing sectors are also being affected by increasing costs related to energy prices and the cost of materials.

3.5 Information on allocations in your portfolio to deliver the Culture Strategy for Wales and an update on development of the Culture Strategy, and any allocations for the coming financial year to take forward its actions.

Officials have worked to develop a draft Culture Strategy in 2023.

The work to develop a strategy was based on an extensive engagement exercise, led by our external contractor The Means, and their associates. During November 2022 through to April 2023, The Means engaged with representatives of our cultural sectors, with cultural arm's length bodies, and with community representatives from across Wales. In addition, officials led on an engagement process which included conversations with staff at our cultural bodies, with digital experts, with social partners, and policy teams across the Welsh Government. In all, over 400 people participated in the engagement conversations. In May 2023, a draft structure was developed for the strategy built around four ambition statements. This was tested with trusted partners, including social partners, for their feedback prior to drafting the strategy.

A draft of a complete strategy was developed and tested with policy leads, social partners, and trusted partners in the autumn of 2023.

This work to develop the strategy has been overseen by a Steering Group, with regular updates being provided to Ministers and the Plaid Cymru Designated Member across the year.

We are now at a stage where we have a revised draft strategy and a draft implementation plan. Unfortunately, the budget settlement for our cultural bodies in Wales is now confirmed and they will be facing a reduction of 10.5% in 2024/25. The Welsh Government budget which supports our local cultural sectors is also facing a 22.3% reduction. These are extremely challenging figures which will lead to job losses, with many of our sector organisations now considering their future viability.

We need to consider the implications of the re-shaping of our indicative spending allocations within our budget, following the reduction of £1.233m towards the Culture Strategy, in consultation with the Designated Member.

We have outlined an ambitious and comprehensive vision for the culture sector in the draft strategy, and we are still determined that this should lay the foundations for our sector over the next seven to ten years but cannot ignore the challenges that are being set out for the 2024/25 budgets.

Specific areas:

Cadw

3.6 Allocations and commentary in respect of Cadw including revenue generation targets, and recent annual income generation figures.

The Cadw commercial income figure for 2019-20, immediately prior to the pandemic, was £8m – a record for Cadw. Income has recovered strongly since restrictions were eased, to an actual figure for 2022/23 of £9.6m, and a forecast figure for this year in excess of £10m.

We are forecasting further increases in commercial income during 2024/2025 – with a stretching income generation target of c £10.8m. We will seek to deliver this target through:

- Increases in admission charges and membership costs by an average of 6.2%
- A number of new income generating initiatives – for example introducing car parking charging where possible
- Marketing campaigns – with an emphasis on where we have made significant investment in the visitor offer such as the recently opened major work at Caernarfon Castle and Tretower Court

This stretching income target should be sufficient to cover many of the inflationary pressures that Cadw continues to face on pay and other costs, particularly utilities costs and the costs of maintaining sites. However, there are some concerns about the impact which the cost-of-living crisis may have on visitor numbers and retail spend.

The income target for 2024/2025 will not be sufficient to cover the reduction of £2.123m that has been applied against the Cadw revenue budget. This results in a 22% reduction compared to the indicative Final Budget restated baseline. The reduction made is the Economy MEG contribution towards the wider Welsh Government reprioritisation exercise.

Core statutory commitments – such as regulatory and planning work and maintaining and providing safe public access to monuments will be prioritised. Most of these activities we undertake directly, although some are delivered indirectly through others - notably the Welsh Archaeological Trusts. Consequently, the budget reductions will have a significant impact on a number of other work programmes such as life-long learning, educational visits, volunteering and participation, monument interpretation, non-income generating events and support for third-sector organisations. Some of the

reductions in a number of these programmes will have a longer-term impact on future income generation – but wherever possible direct income generating activities will need to be protected. However, the budget reduction in budget will impact on the opening times of many of our smaller visitor centres throughout Wales – with some possibly having to close altogether – again with an impact on income generation.

More broadly, Cadw is working for an accessible and well-protected historic environment for Wales. It looks after, and provides access for the public to, 132 monuments across Wales. Capital expenditure on the conservation of monuments, health and safety measures and investment in visitor facilities remains an important priority. However, increasing costs and inflationary pressures have had an impact on what can be delivered with the capital budget of £10m for 2024/25. For example, this will not be sufficient to fully deliver the Caerphilly Castle development as well as essential Health and Safety and conservation work elsewhere. Consequently, only phase 1 of the Caerphilly project will be fully complete in 2024/2025 and Phase 2 will extend into subsequent years.

3.7 Allocations towards funding for owners of historic assets

There are more than 30,000 listed buildings and 4,200 scheduled monuments in Wales, and the majority are in private ownership. Most of those owners conscientiously care for their properties, which constitute a precious legacy for present and future generations.

Cadw has published an extensive range of guidance and signposting to available grant funding which can be downloaded without charge from the Cadw website. The listing of a building or the scheduling of a monument brings no entitlement to grant assistance. As with any building, the maintenance liability is a matter for the owner. However, Cadw does have grant schemes and in each case value for money judgements are made on the submission of costed estimates by the applicant, assessed by Cadw's Inspectors.

Cadw currently has the following capital grant schemes:

- **Historic Buildings Capital Grants** - for the repair of listed buildings at risk or in a vulnerable condition
- **Historic Buildings Maintenance and Repair Grants** – for small scale maintenance and repairs
- **Urgent Works for Buildings at Risk** – Grants for Local Authorities to meet the costs of preparing and serving Urgent Works Notices to secure the condition of at risk and vulnerable listed buildings.
- **Ancient Monument Grants** – to support owners of monuments in repair works and the conservation of sites ranging in date from the Neolithic to buildings of the industrial revolution.

The total value of capital grants for owners of historic assets for 2022/2023 was £2.831m. During 2023/2024, an initial allocation of £1.800m was set, although forecast allocations for the end of 2023/2024 will likely exceed £2.000m. The intention is to set a similar allocation for 2024/2025.

National Museum Wales and National Library of Wales.

3.8 Allocations and commentary in respect of the National Museum of Wales and the National Library of Wales, including any revenue generation targets.

The National Library of Wales and Amgueddfa Cymru are pro-active in delivering Government priorities and engaging the people of Wales in cultural activities as well as important facilitators for projecting Welsh culture internationally.

This is an extremely challenging time for our arm's length bodies. In addition to reductions to their budgets, they are facing significant inflationary pressures and pay increases. They are also experiencing increased costs for utilities and capital projects. This is particularly acute for those with the historic estates (Amgueddfa Cymru and the National Library) who have seen particularly large increases in costs.

There has been a reduction of £2.992m against the 2024-25 indicative final budget for the National Museum for Wales and a reduction of £1.301m for the National Library. Both the reductions have contributed towards the Welsh Government re-prioritisation exercise.

The Library does well in attracting charitable donations and bequests but finds the commercial income generation target challenging, with less on-site options for generating revenue when compared to the Museum with its shops and cafes across seven sites. The Library has recently established a department with its aim to lead and support transformative fundraising across the organisation. Both the Library and Amgueddfa Cymru are continuing to undertake detailed planning and mapping exercises in light of the current financial climate.

The National Library's capital budget for financial year 2024-25 is maintained at £2m. A further £1.55m from the Support for Local Culture and Sport BEL 6170 will enable digitisation and decarbonisation projects as well as helping to increase its storage capacity.

Amgueddfa Cymru's capital budget is maintained at £5m for financial year 2024-25. The budget will help to address some of the maintenance challenges of operating in historic buildings and the need to keep our national collections safe, plus a further allocation of £0.300m from the Local Culture and Sport BEL to enable decarbonisation projects.

Royal Commission for Ancient and Historic Monuments of Wales

In 2024/25 the Royal Commission will see a reduction of 22% to its indicative revenue grant in aid allocation for 2024/25. This significant reduction is being made due to increase costs elsewhere in Welsh Government, including the funding needed for the NHS. Officials are working with colleagues at the Royal Commission to consider the impact of this reduction and to plan accordingly. Like this financial year, the Royal Commission will receive a capital allocation of £0.05m plus a further award of £0.045m from the Support for Local Culture and Sport BEL 6170 to digitise the national aerial photographic collection.

Libraries and Museums

3.9 Allocations and commentary in respect of the Libraries and Museums Strategies.

The draft budget total allocations for Support for Local Culture and Sport are revenue £6.668m and capital £24.7m capital, excluding support for the ALBs and the National Botanic Gardens of Wales specified in the respective BEL lines.

While a challenging settlement, funding has been allocated to enable us to support local museums, archives and libraries in line with our responsibilities as the development agency for the local culture sector. Our funding will ensure the management, preservation, protection and accessibility of both physical and digital assets within archives, museums and library collections. We will work with key sector support bodies to build capacity and resilience, to ensure that statutory obligations are met, and professional standards maintained for the benefit of users.

Public libraries are a statutory requirement under the 1964 Public Library and Museums Act and Ministers have a responsibility to 'superintend' public library provision. For archives there are statutory responsibilities in relation to provision for local government records and for Places of Deposit under the Public Records Act 1958. Ensuring the discharge of these statutory requirements is a key activity within the budget allocation.

We support collaborative initiatives to provide efficiency, value for money, service resilience and ensuring equality of access to collections across the sectors. We invest in digital collection building and skills to enhance resilience, access to resources, and to increase engagement.

We intend to continue our Capital Transformation Grants programme to fund capital developments and improvements, including digital projects, to support decarbonisation and those to promote equalities. Funding for this is included within the Local Culture and Sport budget.

3.10 Funding allocated to take forward recommendations in the Review of Local Museums

The viability of the Review's key recommendations hinged on implementation of the creation of three regional bodies. This remains a decision for local authorities across Wales. The Welsh Government explored the recommendation further via the feasibility study 'To Create and Run a Regional Museum Structure', completed in summer 2019. Both the original Review and this feasibility study recognised that the recommendations had significant cost implications and since 2015 the creation of regional bodies was not deemed a priority by local authorities.

As noted above, the draft budget for supporting the local sectors will be reduced by 22.3%. It is therefore challenging to allocate funding to take the Expert Review's recommendations forward, or to revisit them under the Culture Strategy as was originally planned.

In 2023-24 further work was undertaken that supported several of the Review's recommendations. Welsh Government published a new significance toolkit to aid museums to identify and safeguard items of significance and to support the rationalisation of

collections. It continued to offer a workforce training and development programme and also worked in partnership with other sector bodies to fund an update to the Association of Independent Museums' research and guidance on museum admission policy and practice. In 2024-25 and taking account of the challenge inherent in the budget reductions, the Welsh Government will continue to support the local museum sector through offering a workforce development programme. It will also seek to promote the use of the significance toolkit, to facilitate progress towards the Review recommendation around understanding the nationally significant collections held across Wales within local museums.

Arts and Arts Council of Wales

3.11 Allocations and commentary in respect of the Arts Council of Wales

Under the arm's length funding principle, our primary investment in the arts in Wales is channelled through the Arts Council of Wales.

This is an extremely challenging time for our cultural arm's length bodies including the Arts Council of Wales. In addition to budget reductions, ACW and the arts sectors it supports face significant inflationary pressures.

There has been a reduction of £3.570m against the 2024-25 indicative final budget for the Arts Council of Wales which has contributed towards the Welsh Government re-prioritisation exercise. The draft budget revenue allocation for the Arts Council of Wales is £30.429m.

ACW completed its Investment Review based on its indicative GIA allocations, and made indicative awards, subject to the outcome of the appeals process and confirmation of its budget for 24/25. In light of this budget, officials/ the Welsh Government are aware that ACW may now need to reevaluate the detail of the investment review awards in order to best enable it to continue to deliver vital support for the arts sector within these parameters.

The Arts Council of Wales capital budget for financial year 2024-25 is maintained at £400,000. In addition, we have made an allocation towards capital maintenance in theatres, concert halls and performance venues from BEL 6170 as well as for the National Contemporary Art Gallery. Funding to support the redevelopment of Theatr Clwyd will continue to be made through ACW.

3.12 Allocations and commentary in respect of funding to promote access to the arts.

Working with the Arts Council of Wales we will continue to support and promote the vital contribution that the arts make to Wales.

Increasing and diversifying levels of access and participation in the arts continues to be a priority in the Government's Remit letter to the Arts Council of Wales. The Arts Council of Wales uses the majority of its grant-in-aid to core fund strategic arts organisations, and we expect them to continue to prioritise access and engagement work.

Our investment in major culture capital projects, especially Theatr Clwyd and the National Contemporary Art Gallery is designed to tackle inequalities and provide better access, including particularly in North and Mid Wales.

3.13 Allocations and commentary in respect of funding aimed at using arts and culture to tackle poverty.

The budget makes provision for continued support for the Fusion Programme in 2024-25 and its work in engaging with individuals and communities in areas of deprivation.

The Arts Council of Wales is a strategic partner in the Fusion programme, supporting organisations to participate by providing practical advice and brokering introductions between Fusion partners and artists/arts organisations in their areas.

3.14 Allocations and commentary in respect of funding aimed at encouraging/enabling arts organisations to generate more of their own income.

The Arts Council of Wales offers the opportunity for any organisation to apply for business development funding via the Create programme which is open year-round. These types of applications often focus on how an organisation operates and connected to that, how its financial model works and can be improved.

All ACW grant applications ask for a budget, and this is reviewed as part of the process. Nearly all applications require the organisation to raise a proportion of its own funding, and this also forms part of the decision-making process.

Creative Wales - Media and broadcasting

3.15 Allocations and commentary in respect of Creative Wales (including funding to be distributed by Creative Wales).

The Draft Budget total allocations over three years for Creative Wales are revenue £21.364m and capital £15m (including the Books Council of Wales). In 2023-24 Creative Wales total budget allocation is £7.119m revenue & £5m capital (£12,119m).

The focus of our investment is on the priority sectors of screen (Film & TV), music, digital and publishing alongside the broadcasting and journalism commitments set out in the Co-operation Agreement as well as delivering on the Programme for Government commitments in improving skills for the industry.

Since April 2023, we have invested in 9 capital projects totalling £6.7m in Creative Wales capital funding and over £83.2m in projected Welsh spend and creating 50 new jobs. The aim of the scheme is to support the growth of Wales as a destination for the production of world class content. The funding supports Wales-based production and games development companies who are looking to develop productions intended for international audiences and create jobs also for those productions from outside of Wales that are seeking to film in Wales.

Working with Ffilm Cymru (FfC) £1.3m has been allocated to 5 projects in 2022/2023 and work continues with the FfC team on a pipeline of projects which are expected to be presented for consideration to the December 2023 board panel to reallocate the balance of funding already committed as well as remaining balance of the overall programme.

With the growth in productions looking to film in Wales we also have a strategic priority to invest in our studio infrastructure. Following our investment in Aria Studios in North Wales last year, Creative Wales has invested in Great Point Studios alongside Cardiff Capital

Region, for a major expansion of the site. Building work is yet to start but will see this site expanded to a total of 257,000 sq ft.

We continue to provide funding to support the commercial music sector, with £0.700m in capital funding to support venues, recording studios and rehearsal rooms via the Music Capital Fund 2023 to 17 business. This is in addition to the £0.200m revenue via strategic support to programmes such as Focus Wales, PRS Momentum and Power up, BBC comedy festival and Beacons programme delivery.

The additional funding for broadcasting and media will support action to strengthen the media in Wales as set out in the Co-operation Agreement with Plaid Cymru.

Support for skills and talent development in the creative industries is a *Programme for Government* commitment and Creative Wales is committed to supporting and nurturing both the current and future workforce.

This financial year there have been 73 trainees on paid placements on Creative Wales funded productions with an additional 45 trainees committed to date on current funded productions including: Out There, Maid of Sker (game) and Tŷ Gwyrdd. This includes entry level and upskilling placements as well as apprentices from the CRIW Shared Apprenticeship Scheme (Sgil Cymru). There are paid trainees on all films funded via our agreement with Ffilm Cymru Wales All placements are monitored, and productions are visited to gain employer/employee feedback. Creative Wales are working closely with other industry stakeholders to look at creating meaningful career pathways for trainees.

There are currently 17 high quality skills and training projects being delivered via the Creative Skills Fund (CSF) which was launched in September 2022.

In addition to the 17 projects, Creative Wales is supporting four additional skills partnership projects including a wellbeing facilitator programme, a new six-month course; *O'r Sgript i Sinema* being delivered by NFTS Cymru Wales, in conjunction with S4C, which is designed to help writers develop their cinematic voice in the Welsh language. Creative Wales is also continuing to support Culture Connect Wales for a third year. The project aims to support diverse talent across Wales to find opportunities in film & TV. Creative Wales is one of five partners who support this project alongside BBC Cymru Wales, ITV Cymru, S4C and C4.

Diversity and inclusivity is embedded in activity and the Creative Wales Non-Executive Board have set this as their number one priority. Creative Wales' ambitions for a more diverse and inclusive creative industries sector in Wales clearly align to the Programme for Government's commitments to maximise fairness for all, eliminate equality and to celebrate diversity.

3.16 An update on plans to provide further support to English-language journalism “similar to the Welsh language model”.

In 2022/23 independent community journalism was supported through a £0.100m award to PING! News to deliver the Journalism Accelerator Fund, a follow-on project to the Wales Public Interest Journalism Fund supported by the 2021/22 budget. To date, the Journalism Accelerator Fund has supported ten publications from across Wales to increase the provision of locally relevant public interest news and promote growth in the Welsh community news sector. In addition, the three dedicated journalism pilot projects; the

Independent Community News Network led dedicated Senedd reporter post and the Inclusive Journalism Cymru led Inclusive “Media Development Lab” project funded through the 2022/23 budget and the Cardiff University’s Sector Data Research project, funded through the 2023/24 budget continue to deliver. Work is underway to commit the remaining 2023/24 media financial support budget.

3.17 Allocations and commentary in respect of any funding for the media and broadcasting.

To date, in 2023-24 a total of £3.,760m was awarded to the Books Council of Wales to support the publishing sector in Wales. This included revenue funding for the Digital Welsh-language News Service. The budget for the Books Council of Wales for 2024-25 will be agreed as part of the formal budget publication. We continue to use the Memorandums of Understanding with the BBC and S4C to guide co-commissions and support increased partnership working on broadcasting issues and funding opportunities for Welsh organisations. This approach has supported a suite of productions in 2023/24, including *Pren ar y Bryn / Tree on a Hill* and *Men Up*. Our production funding continues to attract a high volume of new enquiries and we maintain a broad pipeline of national and international potential projects.

3.18 Allocations and commentary in respect of broadcasting and communications actions in the Cooperation Agreement, and what they are intended to achieve.

To date, in 2023-24 a total of £0.216m has been committed to support delivery of the broadcasting and journalism commitments in the Co-operation Agreement, as follows:

Activity	Funding
Expert panel administration and reports	£10,658
Support for the development of the AM platform	£173,799
Cardiff University’s Sector Data Research project	£31,750

In 2024-25 an annual budget of £1m for broadcasting and £0.100m for journalism has been set aside, as set out in the Co-operation Agreement budget. In addition, £0.700m has been allocated to Welsh language film and content through the Co-operation Agreement. Decisions on activities and projects to be supported by these budgets will be taken following agreement of the Welsh Government’s response to the recommendations set out in the Broadcasting Expert Panel report and in the context of the recommendation set out in the Wales Public Interest Journalism Working Group’s report. Funding is intended to support improvements in the broadcasting and communications framework in Wales, to close the information deficit and develop existing and new enterprises to improve Welsh journalism and support Welsh-based media.

Creative Wales - Support for film and television production

3.19 The latest revenue and projected revenue figures, and occupancy rates for Pinewood Studios/Seren Stiwdios since the commencement of the Management Services Agreement in November 2017.

The Great Point lease for Seren Stiwdios commenced 1st October 2020 and ended when the studio was sold. Rent received up until the sale is as follows:

01.10.20 – 30.09.21 -	£0.319m
01.10.21 – 30.09.22 -	£0.478m
01.10-22 to 21.08.23	£0.683m

The studio has hosted 2 major productions to date, HAVOC for Netflix and Black Cake for Hulu alongside a number smaller number of productions including 'The Famous Five'.

3.20 The latest figures for the Media Investment Budget, including total investment, return on investment and Welsh spend (broken down by project) and the same figures for investments in screen productions made by Creative Wales.

To confirm, the total recouped to date in 2023/2024 is £40,690.63 via the Media Investment Budget which was a commercial investment fund for TV and film. The fund is now closed and has been for several years. Due to the time that has lapsed since this fund was closed, it is now considered unlikely that there will be much further recoupment via this fund.

A summary of the Media Investment Budget is included at **Annex C**.

3.21 The latest figures for production funding provided by the Welsh Government including total investment and Welsh spend (broken down by project).

Since 2020 this is at £22.1m in production funding (which now also games investment as a result of amended criteria) and this has supported 39 projects and will generate over £269m into the Welsh economy. Since 2020 Creative Wales have supported a total of **341** paid placements on funded productions.

A list of the projects is provided at **Annex D**.

3.22 The latest figures for the Wales Screen Fund including total investment and Welsh spend (broken down by project).

All production supported prior to the launch of Creative Wales in 2020 can be seen in Annex C. To clarify, there is no Wales Screen Fund, this is the subsidy control mechanism used to support production funding.

3.23 The latest figures regarding the Welsh Government's loan to Bad Wolf Studios including total repayments and Welsh spend (benchmarked against Welsh Government targets).

Total interest due on the loan arrangement is £1.064m and repayments commenced in 2020-21. **Bad wolf has repaid £669,314 of the interest loan and have a balance of £394,686.** The latest financial detail is provided at **Annex E**.

3.24 A description of the strategy and targets for investments in screen productions made by Creative Wales.

We launched our new production funding model in May last year. The aim of the scheme is to support the growth of Wales as a destination for the production of world class content. The funding supports Wales-based production and games development companies who are looking to develop productions intended for international audiences and also for those productions from outside of Wales that are seeking to film in Wales. Whilst one of the main outputs continues to be the impact on the Welsh economy through spend on crew, facilities, locations etc, the fund also seeks to maximise the amount of training and skills development opportunities available on funded productions. The fund prioritises content that shows the best of Wales in Culture, language and geography, but also prioritises the development of a sector that provides equal and diverse opportunities for a long term, skilled employment base and one that looks after the wellbeing of existing staff. Also, in July 2022, Welsh Government entered into an agreement with Ffilm Cymru to administer the grant funding for feature films on our behalf. To date, £1.3m has been allocated to 5 projects in 2022/2023 and work continues with the Ffilm Cymru team and project board on these projects.

3.25 An assessment of the impact of production funding provided via Ffilm Cymru, and allocations for the coming financial year.

We will be evaluating the programme at the end of pilot two-year period.

4.0 Programme for Government commitments

4.1 Ensuring that Black, Asian, and Minority Ethnic histories are properly reflected throughout our cultural and heritage sectors including in National Museums [and Ensure the history and culture of our Black, Asian, and Minority Ethnic communities are properly represented by investing further in our cultural sector and museum network”];

The Culture, Heritage and Sport commitments in the [Anti-Racist Wales Action Plan \(ArWAP\)](#), and associated specific Programme for Government commitments aim to make a measurable difference to the lives of Black, Asian and Minority Ethnic. Our work has focused on widening access, participation, and engagement of Black, Asian, and Minority Ethnic people as well as building capacity and capability of our cultural and heritage sectors in tackling both institutional and systematic racism. To achieve this, we have committed capital and revenue funding of a total of just over £5m over financial years 2023-25 to support our national, local, regional and grassroots cultural, heritage and sport organisations. Included in the total allocation is a contribution of just over £1.3m from the Co-operation agreement budget to support this work.

All projects receiving funding have a focus on co-production, demonstrating a commitment to placing lived experience at the centre of policy / service design, development, and delivery. We know that co-production with Black, Asian and Minority Ethnic is not a matter for diversity and inclusion; it is a strategic imperative that leads to more equitable and culturally appropriate services and where our heritage offers a more balanced and authentic account of our past.

Significant strides have been made within the culture and heritage sectors delivering against our ArWAP goals and actions and related PfG commitments. Last year, the Arts

Council of Wales and Amgueddfa Cymru published a joint [Widening Engagement Action Plan 2022-25 | Arts Council of Wales](#), which is underpinned by work to address the current inequalities experienced by people, groups and communities, particularly those currently under-represented, in access to and participation in the arts. Whilst Cadw is finalising guidance for public bodies on public commemorations in Wales. This follows on from the monuments and street names audit that identified numerous examples of commemorations in public spaces that could be considered contentious. The guidance has gone through a public consultation and the intention is to publish it early in the New Year.

4.2 Creating a Creative Industry Research and Development Fund

Creative Wales have not specifically designed a new R&D fund. R&D was included as a key priority area as part of the development funding programme. 2021/22 Development funds have been fully allocated for delivery throughout 2021/22 and 22/23 to the value of £1.1m to 51 creative companies. In July 2023 a second round of development funds was launched and 35 projects totalling over £0.980m for spend in 2023/24 and 2024/25.

The £50m media.cymru programme is funded through £22m from UK Research and Innovation's (UKRI) flagship Strength in Places Fund, £3m from Cardiff Capital Region, £0.500m from Welsh Government, through Creative Wales, and £23m match funding from industry and university partners. The Media Cymru programme, supported by Creative Wales, includes a work package to deliver a Wales wide R&D fund for the Creative Industries. This will be delivered between 2022 and 2026 and £0.100m has been claimed to date and a further £0.100m profiled for 2023/24 FY.

A pioneering sustainable research project for the screen industry run by the BFI and BAFTA Albert has been secured to Wales, following a successful bid from Creative Wales with delivery partners Ffilm Cymru and Clwstwr. The report has now been published and we are working on the recommendations.

4.3 National Music Service

The National Music Service, funded by the Welsh Government Education Directorate over the period 2022-23 to 2024-25, is progressing a wide-ranging programme to support music education and activities. The establishment of the Service in May 2022 fulfilled a Programme for Government commitment. A key focus of activity, as set out in the [National Plan for Music Education](#), is on provision in schools and settings, with the 'First Experiences' and 'Music Pathways' programmes being rolled out across all local authority areas.

At its establishment, it was outlined that the funding for the National Music Service over the three-year period would be in total £13.5 million (equating to £4.5million per annum). However, in the light of the wider Welsh Government budget position, it is planned that the allocation for the Service for 2024-25 will be reduced by £500,000 (that is to say, a budget of £4 million).

4.4 Investing in Theatr Clwyd

The redevelopment of Theatr Clwyd is a programme for government commitment. We have awarded a total of £26.5m (2021/22-24/25), including £23.5m from the Co-operation

Agreement towards this project, which will be administered by the Arts Council of Wales, and including £7.768m in 2024/25. This reflects a change to the profile of spend to more accurately reflect the development timetable.

During 2023-24, significant progress has been made on site, the demolition phase of the project has now been completed and the construction phase has commenced. The Theatr Clwyd team continue to progress with the fundraising campaign for the redevelopment project, with the public fundraising campaign now launched. Following a thorough review, and a successful Gateway 3 assurance review, the Welsh Government have also now approved the Full Business Case for the project.

4.5 Establishing a Football Museum for Wales

In February 2023, a further £5.458m was announced for the Football Museum for Wales, to take it through content development, construction to delivery and opening (scheduled for March 2026), within this the allocation for 2024-25 is £4,258,120.

During the course of 2023-24 the project team at Wrexham Museum have progressed the building and content designs for the new Football Museum for Wales, developed the Full Business Case for the project, activity planning pre- and post-opening and the museum business plan.

Construction phase drawings and specifications for the future museum building, and design drawings for the galleries and public spaces have been finalised. Following a PIN notice to the market for the construction work contractor, tenders will be issued for the construction phase in early January.

Collecting and engagement activity has raised the profile of the project, and ensures the objects and stories required for the museum are sourced, aiding the content development work to enable diverse stories of the game, the grassroots and the international, the fan and the player stories are represented. During the year the Museum acquired a large, important collection from Alun Evans/FAW President.

The Wrexham team continue to progress fundraising for the project, including their National Lottery Heritage Fund application. Funding from the UK Shared Prosperity Fund was secured this year.

A Gateway 3 assurance review of the full business case will be held in February 2024. On 4 November 2023, Wrexham Museum closed to the public to enable preparation works for the redevelopment.

4.6 Establishing a National Contemporary Art Gallery

The development of a National Contemporary Art Gallery for Wales is a commitment in our Programme for Government and in the Co-operation Agreement with Plaid Cymru. It has three distinct elements, supported by an online gallery resource named Celf ar y Cyd:

1. A network of galleries across Wales will provide free access to the national collection and bring contemporary art closer to communities.
2. Host galleries the organisations which currently host the national collection of Welsh art i.e., National Museum, Cardiff and National Library of Wales, Aberystwyth.

3. An anchor gallery to provide a prominent public face for the national contemporary art gallery.

The **Celf ar y Cyd** digital platform was launched in June 2023, and by the end of October 2023 contained over 33,500 images. It has been accessed by 6,500 new users with 44,000 page views. Both Amgueddfa Cymru and the National Library will have their collections digitised and added to the site by the end of March 2025.

We are considering plans from six potential **Anchor Gallery** candidate sites across Wales. The search for an anchor gallery remains at an early stage. We anticipate that following the decision on a site, we will consider more practical and operational issues, developing further with stakeholders, the concept and role of the Anchor Gallery.

We hope to make a decision on a preferred site to develop early in the next calendar year following consideration of the proposals received. Until a preferred site is identified, it is not possible to identify the level of investment required to support the development, affordability or operational models for any future anchor gallery.

The **dispersed model** for the National Contemporary Art Gallery for Wales is being taken forward as a critical first phase, consisting of a number of nine sites across Wales. This work is being led by a collaboration between the Arts Council of Wales, Amgueddfa Cymru and the National Library of Wales.

The geographically dispersed model will allow greater access to both contemporary art and the national collection by communities across Wales, bringing art closer to the people of Wales, in a far more equitable way.

A conditional grant award has been made to take this work forward and costs for the project will be finalised in February 2024.

Between 2017 and 2023, expenditure on the various elements of this programme totalled £1.76m, with £1.36m being capital expenditure. The grant award now made provides a further £6,290,259 to support the project through to its completion in March 2025.

Annex A - Overview of Culture and Heritage Finances

ECONOMY							
RESOURCE							
Budget Expenditure Line	2022-23 Final Outturn	2023-24 1st Supp Budget	2023-24 Forecast Outturn Period 7	2023-24 Final Budget Feb 23 Restated	2024-25 Indicative Final Budget Feb 23	Change	2024-25 Draft Budget Dec-23
	£000s	£000s	£000s	£000s	£000s	£000s	£000s
Arts Council of Wales	£33,313	£33,157	£33,157	£33,314	£33,999	-£3,570	£30,429
Arts Council of Wales - Non cash	£31	£260	£260	£119	£119	£0	£119
Amgueddfa Cymru - National Museums of Wales	£32,070	£27,222	£27,222	£27,222	£28,496	-£2,992	£25,504
Amgueddfa Cymru - National Museums of Wales - Non cash	£2,546	£2,400	£2,400	£2,400	£2,400	£0	£2,400
National Library of Wales	£13,300	£11,862	£11,862	£11,862	£12,394	-£1,301	£11,093
National Library of Wales - Non cash	£1,816	£1,250	£1,250	£1,250	£1,250	£0	£1,250
Support for Local Culture and Sport	£4,638	£6,629	£5,549	£6,429	£8,583	-£1,915	£6,668
Creative Wales	£9,971	£6,969	£7,831	£7,119	£7,169	-£753	£6,416
Action: Support for Culture and the Arts	£97,685	£89,749	£89,688	£89,715	£94,410	-£10,531	£83,879
Cadw	£8,516	£9,206	£9,106	£9,206	£9,513	-£2,123	£7,390
Cadw - Non cash	£5,112	£5,480	£5,531	£5,480	£5,480	£0	£5,480
National Botanic Garden of Wales	£594	£587	£587	£587	£587	-£62	£525
Royal Commission on the Ancient and Historical Monuments for Wales	£1,635	£1,727	£1,705	£1,727	£1,815	-£402	£1,413
Royal Commission on the Ancient and Historical Monuments for Wales - Non cash	£145	£134	£239	£134	£134	£0	£134
Action: Support the Historic Environment	£16,002	£17,134	£17,168	£17,134	£17,529	-£2,587	£14,942
Sport Wales	£22,942	£23,065	£23,065	£23,065	£23,439	-£2,461	£20,978
Sport Wales - Non Cash	£634	£779	£783	£779	£779	£0	£779
Action: Sports and Physical Activity	£23,576	£23,844	£23,848	£23,844	£24,218	-£2,461	£21,757
Total Culture, Arts and Sports Budgets	£137,263	£130,727	£130,704	£130,693	£136,157	-£15,579	£120,578

ECONOMY

CAPITAL

Budget Expenditure Line	2022-23 Final Outturn	2023-24 1st Supp Budget	2022-23 Forecast outturn as at Period 7	2023-24 Final Budget Feb 23	2023-24 Indicative Final Budget Mar-22	Change	2024-25 Draft Budget Dec-23
	£000s	£000s	£000s	£000s	£000s	£000s	£000s
Arts Council of Wales	821	400	400	400	400	0	400
Amgueddfa Cymru - National Museums of Wales	4,270	5,000	5,000	5,000	5,000	0	5,000
National Library of Wales	3,923	2,000	2,000	2,000	2,000	0	2,000
Support for Local Culture and Sport	7,032	21,500	21,920	21,500	24,700	0	24,700
Creative Wales	4,558	5,000	4,999	5,000	5,000	0	5,000
Action: Support for Culture and the Arts	20,604	33,900	34,319	33,900	37,100	0	37,100
Cadw	10,957	10,000	10,000	10,000	10,000	0	10,000
National Botanic Garden of Wales	1,200	200	200	200	200	0	200
Royal Commission on the Ancient and Historical Monuments for Wales	50	50	50	50	50	0	50
Action: Support the Historic Environment	12,207	10,250	10,250	10,250	10,250	0	10,250
Sport Wales	9,552	8,016	8,016	8,016	8,016	0	8,016
Sports Capital Loans Scheme	-955	-1227	-4227	-1227	-1231	0	-1231
Action: Sports and Physical Activity	8,597	6,789	3,789	6,789	6,785	0	6,785
Total Culture Arts and Sports Budgets	41,408	50,939	48,358	50,939	54,135	0	54,135

Total Resource and Capital	209,640	181,632	179,062	181,632	190,292	-15,579	174,713
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ECONOMY

AME – RESOURCE

Budget Expenditure Line for Sponsored Bodies Pensions		2023-24	2023-24	Changes	2024-25
		Final Budget Restated	Indicative Final Budget Restated		Draft Budget
		Feb-23	Feb-23	Dec-23	
		£000s	£000s	£000s	£000s
Amgueddfa Cymru - National Museums of Wales Pension Provision – AME		15,000	15,000	0	15,000
National Library of Wales Pension Provision – AME		9,000	9,000	0	9,000
Action:	Museums and Libraries Pensions	24,000	24,000	0	24,000
Sport Wales Pension Provision – AME		5,000	5,000	0	5,000
Action:	Sports and Physical Activity	5,000	5,000	0	5,000
Total	Culture, Arts and Sports Budgets	29,000	29,000	0	29,000

ANNEX B - Action level commentary

Resource

Support for Culture and the Arts Action

- There has been a net reduction to the Action of £10.531m from the indicative final budget 2024-25. The indicative budget for 2024-25 stands at £83.879m. The net reduction relates to reprioritisation of £10.531m funding to support wider Welsh Government priorities.

Support for the Historic Environment Action

- There has been a net reduction to the Action of £2.587m from the indicative final budget 2024-25. The total funding per annum is at £14.942m in 2024-25. The net reduction relates to additional allocation to our sponsored bodies to support pay and inflationary costs as a result of the increased costs associated with the cost-of-living crisis.

Sports and Physical Activity Action

- There has been a net reduction to the Action of £2.461m from the indicative final budget 2024-25. The total funding per annum is at £21.757m in 2024-25. The net reduction relates to additional allocation to our sponsored bodies to support pay and inflationary costs as a result of the increased costs associated with the cost-of-living crisis.

Capital

Support for Culture and the Arts Action

- There has been no change to the Action from the indicative final budget 2023-24. The total funding per annum is maintained at £37.1m in 2024-25.

Support the Historic Environment Action

- There has been no change to the Action from the indicative final budget 2023-24. The total funding per annum is maintained at £10.25m in 2024-25.

Sports and Physical Activity Action

- There has been no change to the Action from the indicative final budget 2023-24. The total funding per annum is maintained at £6.785m in 2024-25.

Annex C - PROJECTS FUNDED BY THE MEDIA INVESTMENT BUDGET (31 November 2023)

Project	Investment Value (£)	Nov 23 Amount recouped (£)	Net Gain/ Loss to date Nov 23 (£)	Targeted Welsh spend (£)	Welsh spend to date (£)
Under Pinewood Management					
Take Down	3,144,000	1,123,590	-2,020,410	1,000,000	1,089,000
Their Finest	2,000,000	2,050,000	50,000	1,300,000	1,618,000
The Collection	1,750,000	381,193	-1,368,807	5,500,000	5,187,000
Show Dogs	1,566,000	0	-1,566,000	4,737,000	4,338,000
Journey's End	850,000	631,000	-219,000	1,500,000	903,000
Don't Knock Twice	630,000	658,557	28,557	63,000	641,000
Minotaur	26,000	0	-26,000		N/A
Lionel the First	25,000	0	-25,000	N/A	N/A
Total	9,991,000	4,844,340	-5,146,660	14,100,000	13,776,000
Under Welsh Government Management					
Trampires	2,000,000	0	-2,000,000	1,600,000	1,621,000
Eternal Beauty	1,050,000	780,590	-269,409	1,214,000	1,255,000
Bang	350,000	0	-350,000	1,500,000	2,562,000
Tiny Rebel	318,000	30,000	-288,000	25,000	26,000
Goose Green	25,000	0	-25,000	N/A	N/A
Almost Never (formerly True Believers)	622,000	0	-622,000	2,118,000	2,118,000
Six Minutes To Midnight	750,000	660,870	-89,129	3,880,000	3,520,000
Total	5,115,000	1,471,460	-3,643,538	10,337,000	11,102,000
Overall Total	15,106,000	6,315,800	-8,790,200	24,437,000	24,878,000

Annex D - WELSH SCREEN FUND INVESTMENT (as of 6 December 2023)

Financial Year of Offer	Name of Production Company (SPV)	Production Title (Wales Screen Fund)	Value of Offer £m	Anticipated Spend £m
2012/13	Tonto Films and Television Ltd	Da Vinci's Demons Series 1	0.495	3.823
2012/13	Urban Myth Films	Atlantis Series 1	0.25	4.026
2012/13	Pesky Productions Ltd (Boj & Buddies)	Boj & Buddies	0.2	1.003
2012/13	Fiction Factory (Hinterland Films Ltd)	Hinterland Series 1	0.215	3.691
2012/13	Tonto Films and Television Ltd (DVDS2)	Da Vinci's Demons Series 2	0.99	15
2013/14	Avanti Media Group	Wonder World	*0.127	0.763
2013/14	Urban Myth Films	Atlantis Series 2	0.25	4.026
2013/14	Lime Pictures Limited	Rocket's Island	*0.143	0.966
2013/14	Mirror Productions	Petroleum Spirit	0.051	0.358
2013/14	Modern Television	A Poet In New York	0.053	0.855
2013/14	Adastra Creative and Shrinking Cap Productions Ltd	Grandpa in my pocket	0.129	1.612
2013/14	Three Stones Media (The Rastamouse company)	Rastamouse Series 4	0.145	0.885
2013/14	Pure Grass Films Ltd (Drake Equation Ltd)	The Drake Equation	*0.74	5.208

2014/15	Lime Pictures Limited	Rocket's Island Series 4	0.07	0.7
2013/14	Lupus Films	Toot the Tiny Tugboat / Ethel & Ernest	0.55	3.034
2013/14	Green Bay Media Ltd	Castle Builders	0.045	0.32
2013/14	YJB Films (From a Jack to a King Ltd)	From a Jack to a King	0.1	1.229
2013/14	Hartswood Television Ltd	Lady Chatterleys Lover	0.125	0.813
2014/15	Gritty Realism Productions Ltd	Heart of Darkness	0.15	1.794
2014/15	TCFTV UK Productions	The Bastard Executioner	2.5	10
2014/15	Cwmni Da Cyf	Country Fair	0.125	1.019
2014/15	Animortal Studio (Trampires Ltd)	Trampires	0.674	6.738
2014/15	Tiger Aspect Productions (Tiger Aspect (D&F) Ltd)	Decline and Fall	0.1	1.8
2014/15	RF Movie Productions Ltd	Robin Friday - The Movie	*0.2	1.95
2014/15	Touchpaper Televison Ltd	Coming up	0.08	0.809
2014/15	Fiction Factory Films Ltd (Hinterland Films 2 Ltd)	Hinterland 2	0.304	5.3
2014/15	Fiction Factory Films Ltd (Hinterland Films 3 Ltd)	Hinterland 3	0.25	4.21
2015/16	Bad Wolf Ltd	Bad Wolf Productions	9	133
2015/16	Hartswood Films (Sherlock TV Ltd)	Sherlock Season 4	0.24	2.409
2015/16	Heel Stone Pictures Ltd	Crossing the Border	0.202	2.519

2015/16	Ninth Floor UK Productions Limited	Will Season 1	1.5	18.761
2015/16	Lookout Point Ltd (Pinewood Films 14)	The Collection	0.6	5.5
2015/16	Red & Black Films (Don't Knock Twice Ltd)	Don't Knock Twice	0.075	0.63
2015/16	Vertigo Television Ltd	Britannia VFX	1.1	11.149
2016/17	Beakus Ltd	Toggle Top	0.076	0.944
2016/17	Cloth Cat Animation Ltd (Clothcat LBB Ltd)	Luo Bao Bai	0.225	3.183
2016/17	Riverstone Pictures (Showdogs Ltd)	Showdogs	0.362	4.737
2016/17	Vox Pictures (Keeping Faith Ltd)	Keeping Faith	0.328	4.25
2016/17	Green Bay Media	Mountains and Life	0.03	0.54
2016/17	New Pictures (Requiem Productions Ltd)	Requiem	0.4	5.016
2016/17	Severn Screen Ltd (Apostle Films Ltd)	Apostle	0.385	5.767
2017/18	World Productions (BTK 2016 Ltd)	Born to Kill	0.2	2.5
2017/18	The Forge Entertainment Ltd	Kiri	0.2	2.382
2017/18	Coracle Pictures Limited (Denmark)	Denmark	0.085	1.383
2017/18	Rondo Media Cyf	The Wall	0.045	0.363
2017/18	Touchpaper Television Ltd	4Stories	*0.04	0.631
2017/18	Illuminated Productions Ltd	The Rubbish World of Dave Spud	0.09	0.906

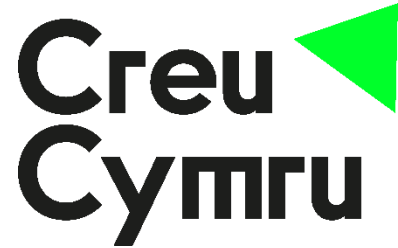
2018/19	Eleven Film Ltd	Schooled	0.485	3.879
2018/19	Boom Cymru	15 days	0.089	1.074
2018/19	Dream Horse Films Limited, Popara Films Ltd and Popara Films (DH) Limited	Dream Horse	0.35	4.384
2018/19	JJ Productions Ltd (Short Form Film)	Jamie Johnson Series 4	0.156	1.927
2018/19	Mad as Birds Ltd and Reliance Entertainment Productions Six Ltd	Six Minutes To Midnight	0.4	3.879
2018/19	Keeping Faith (Series 2) Productions Ltd (Vox Pictures)	Keeping Faith Series 2	0.3	4.654
2018/19	Hat Trick Productions	Warren	0.109	1.304
2018/19	Monterey Productions Ltd (HBO)	Brooklyn	0.22	2.412
2018/19	GOL Production Ltd (Pulse Films)	Gangs of London	0.35	4.209
2018/19	Iele Productions	Merched Parchus	0.041	0.444
2018/19	Blacklight TV	4Stories series 2	0.102	1.574
2019/20	All That Limit	Brave New World	2	20
2019/20	Joio	Bang Series 2	0.19	2.3
2019/20	JJ Productions Ltd (Short Form Film)	Jamie Johnson Series 5	0.06	1.827
2019/20	Vox Pictures (Keeping Faith Series 3)	Keeping Faith Series 3	0.24	3.965
2019/20	WP Productions Ltd (World Productions)	The Pembrokeshire Magic	0.2	2.135

2020/21	Hartwood TV Ltd	Road & Beatrix: The Case Of The Curious Mouse	0.225	2.247
2020/21	Illuminated Productions Ltd	The Rubbish World of Dave Spud Series 2	0.14	1.407
2020/21	Joio Cyf (Joio (Bang 2) Ltd)	Bang Series 2	0.19	2.302
2020/21	Lupus Films (Kensukes Kingdom Ltd)	Kensukes Kingdom	0.1	0.841
2020/21	Little Door Productions Ltd (Little Door (The Pact) Ltd)	The Pact	0.595	5.953
2020/21	One Tribe TV Limited	Wonders of the Celtic Deep	0.077	0.618
2020/21	Eleven Films (Starco TV 3 Ltd)	Sex Education Series 3	0.432	5.186
2020/21	WOTW2 Ltd- Urban Myth films	War of the Worlds Series 2	0.75	7.344
2020/21	Barking Lion Productions	The Trapper Keeper	4	40.159
2020/21	Bad Wolf (HDM3) Ltd	His Dark Materials Season 3	2	21.075
2020/21	Havoc Film Ltd	Havoc	2.15	25.004
2020/21	Short Form Film (JJ Productions) Ltd.	Jamie Johnson Series 6 & 7	0.335	4.651
2021/22	REP Productions SF Limited	The Almond and the Seahorse	0.1	0.935
2021/22	Cwmni Da Cyf	Rain Stories	0.042	0.337
2021/22	The Light Ltd/Y Golau Cyf	The Light/ Y Golau	0.528	5.289
2022/2023	Sex Education S4	Eleven Film	0.45	6.169
2022/2023	Wolf	Hartwood	0.5	6.004
2022/2023	The Pact S2	Little Door	0.33	5.502
2022/2023	The Truth About My Murder	Yeti	0.25	0.342
2022/2023	American Doomsday / Super Volcano	Wildflame	0.07	0.416
2022/2023	Black Cake	CBS UK Productions/Kapital Ent.	0.75	10
2022/2023	4 Stories: On the Edge S4	Blacklight TV	0.07	0.882
2022/2023	Un Nos ola o Leuda/One Moonlit Night	Afanti Media	0.12	0.959

2022/2023	Steel Town Murders (aka Kappen)	Severn Screen	0.4	5.2
2023-2024	Newffion	Ceidiog	0.4	0.24
2023-2024	Pren ar a Bryn / Tree on a Hill	Fiction Factory	0.5	6.262
2023-2024	The Way	Little Door / Red Seam	0.51	5.282
2023-2024	Lost Boys and Fairies	Duck Soup Films	0.5	5.148
2023-2024	Creisis	Boom Cymru	0.169	2.038
2023-2024	Until I Kill You aka Delia	World Productions	0.2	2.615
2023-2024	The Rubbish World of Dave Spud S3	Illuminated Productions Ltd	0.12	1.148
2024-2025	Men Up	Boom Cymru	0.15	1.95
2024-2026	Bad Wolf Slate Funding	Bad Wolf Productions	4	60
2024-2025	Mini Buds	Bumpy Box (*repayment)	0.13	0.47
TOTAL (excluding withdrawn offers* and new wider funding May 2022)			50.819	592.444

Annex E – BAD WOLF STUDIOS INVESTMENT (31 November 2023)

Investment	Investment Value (£)	Drawn down to date (£)	To be drawn down in future years (£)	Accrued interest @ 7.52% to date (£)	Paid interest @ 7.52% to date (£)	Bad Wolf match funding (£)	Expected Welsh Spend (£)	Achieved Welsh Spend (£)
Repayable Advance	4,500,000	4,500,000	-	1,063,937	669,250	-	54,000,000	54,000,000
Further Grant	4,500,000	4,500,000	-	N/A	N/A	-	79,000,000	79,496,087
Purchase of Buildings 1 and 2, Trident Park	6,000,000	6,000,000	-	N/A	N/A	-	N/A	N/A
Acquisition fees	30,000	30,000	-	N/A	N/A	-	N/A	N/A
Studio Fit out Works	2,650,000	2,650,000	-	N/A	N/A	2,800,000	N/A	N/A
Pinewood Studio Wales Fit out Works	667,588	667,588	-	N/A	N/A	692,412	N/A	N/A
SAWS	80,000	40,000	-	N/A	N/A	-	N/A	N/A
Deposit	N/A	N/A	N/A	N/A	N/A	250,000	N/A	N/A
Youth Drama Network	20,000	20,000	-	-	N/A	-	N/A	N/A
His Dark Materials Season 3	2,000,000	2,000,000	-	-	-	-		
Total	20,447,588	20,407,588	0	1,063,937	669,250	3,742,412	154,074,843	133,496,087



*Yn Gosod y Llwyfan I'r Celfyddydau Perfformio yng Nghymru
Setting the Stage for the Performing Arts in Wales*

Creu Cymru expresses its deep concern at the proposed 10% cut to the Arts Council of Wales announced by Welsh Government, and urgently calls for an end to the downward trend in public investment for culture in Wales.

The Creative Industries in Wales provides 80,000 jobs, (the music, performing and visual arts sector employs more than 7,000 people across Wales), and has an annual turnover of about £4 billion. They make a vital contribution to our health and well-being, national economy, and international reputation. The return on investment in the cultural sector, in terms of economic, social, and international benefits, far outweighs the current levels of expenditure.

It makes no economic sense to reduce investment in a sector which generates £1.40 additional spend for local economies for every £1 spent on a theatre ticket, adding up to £1.94bn per annum of extra value added to local economies by theatre audiences.

Compared with the start of the decade, Government funding of the Arts Council of Wales in 2020 was 21% lower than investment in 2009/10.

We urge Welsh Government to honour their commitment to culture and the Well-being of Future Generations (Wales) Act and follow up their exemplary support of the sector in response to the impact of COVID-19.

This is a particularly difficult moment for both freelancers (which can make-up up to 70% of our workforce), and for organisations: with ongoing recovery from the pandemic, cost of living, energy costs, long-term underfunding (including significant reduction from local authorities over the last decade), and the fallout from the Investment Review alongside a crumbling infrastructure: all contributing to a very challenging landscape.

Wales Millennium Centre are looking at reduced opening times and a cut in their non-commercial activity.

Michelle Perez, General Manager from Theatr Iolo said "A 10% cut would have a dramatic impact on Theatr Iolo, it would equate to one redundancy of a staff member from our already small core team of 5 people. Or it would mean at least one of our studio touring shows, would have to be cut each year. This reduction in our programme would mean reaching less and less children across the whole of Wales, with live theatre and cultural activities including the children who live in areas of significantly less investment or who are disadvantaged in some way.

David Wilson, Director of Aberystwyth Arts Centre said "Following a funding standstill outcome from the investment review we were already doing all we can to mitigate the impact of the resultant real terms cuts the news of this further cut is increasingly disheartening for Aberystwyth Arts Centre and for cultural life in mid-Wales. If we receive a reduction of (10%), it will take us back to the level of financial support we had in (2007)".

Geinor Styles, Artistic Director of Theatr na nŌg states:

“Our original funding offer was already a cut in real terms, a 10% cut to our funding offer is a 40% cut in reality and will have a devastating impact to our work. Losing another c.£32K means we would need to cut our provision to young people, our Welsh language work or our main scale touring— As a small, producing company we don’t have the resources in-house to go after further funding; if we can’t find the money then the Board and Senior Management will have to make some difficult decisions as to how we continue.

In a country that values the arts and the contribution it makes for future generations, on its well-being and the Welsh language, further cuts will be detrimental to achieving its aims”.

There is already a recruitment freeze across many organisations. Across the sector we could see anything from 3-10% job losses from salaried staff and a knock-on effect to the freelance workforce.

The culture sector has been in a steady decline for over a decade due to the erosion caused by standstill funding. By taking decisive action on culture spend and investment in its budget for 2024-25, Welsh Government would ensure its long-term recovery, secure Wales’s place as a cultural world leader and unlock enormous benefits for Wales’s society and economy.

The Welsh Government has an annual budget of 21 billion. The Arts Council of Wales received £33.3 million in 2023/24, a 1.5% decrease from the previous year. Cultural spending as a proportion of the Welsh Government budget represents less than 0.15% of total overall expenditure – one of the lowest in Europe, where the average is 1.5% with some reaching 2.5%.

We encourage the Welsh Government to continue to collaborate with UK government in securing cultural tax reliefs, and to support the sector in making the case for their permanent extension.

We urge the Welsh Government to recognise the value and impacts of the culture sector, that it has a workforce that has been experiencing consistently low and fixed pay levels and a freelance workforce that is particularly precarious and vulnerable, and to work collaboratively to deliver solutions to secure its sustainable future such as a commitment to no further cuts and to work with the sector to find solutions that meet the needs of the sector whilst providing meaningful experiences and changing the lives of the people in Wales.

Cofion cynnes,



Louise Miles-Payne, Cyfarwyddwr / Director, Creu Cymru

Correspondence from Connect

Dear Ms Jewell,

I hope you're well and had a lovely Christmas.

I'm emailing on behalf of Music Venue trust regarding the announcement in December that Business Rate relief for pubs, shops and restaurants is due to be cut from 75% to 40%.

We appreciate that the Welsh Government are facing difficult decisions and that their view is that the discount, brought in during the pandemic, was never intended to continue indefinitely. In 2023, however, more than one venue has closed every week. If we do not act, particularly on business rates, we will face the worst years for closures since the creation of the Music Venue Trust (MVT) in 2014.

As we're sure you agree, we strongly believe that planned rises in business rates are an immediate threat to GMVs, penalising them and preventing their ability to mature into a resilient and sustainable cultural sector.

The inevitable outcome of this cut in Business Rate relief will be a large number of venue closures. In turn, this means no financial return for the Welsh Government as there won't be any Business Rates from closed premises.

This Autumn, the Chancellor of the Exchequer Jeremy Hunt, announced on behalf of the English parliament that the Retail, Hospitality and Leisure scheme would be extended for another financial year. The Retail, Hospitality and Leisure scheme affords a 75% Business Rate Relief to Grassroots Music Venues in England and Wales. This was a welcome announcement as it removes £15 million in pre-profit taxation for the sector and eases financial burdens on over-stretched venues.

The position of the Welsh Government to cut business rates relief at a time when the Grassroots Music Sector is in crisis is extremely concerning. It places the long-term resilience of Welsh GMVs at a severe and direct competitive disadvantage when compared to their cultural counterparts in England that will continue to be entitled to rate relief, resulting in very significant national disparity between costs associated with touring. This will have a direct impact on the number of events that will be staged in Wales, reducing supply, cutting economic activity, and negatively impacting on jobs, especially in the 'gig economy'.

The Grassroots sector is a highly competitive market, with extremely tight margins on high-risk activity. Frequently, the sector operates to a model that simply tries to avoid excessive losses when supporting artists at the beginning of their career. This comes at a time when GMVs already face sustained challenges.

While the cultural offer of Wales's grassroots live music plays a vital role in the research and development of our live music and contributes to the sector's £500 million annual contribution to the UK economy, for the actual venues the delivery of live music has shrinking margins. Our Annual Report published the startling fact that the average profit margin of a GMV is 0.2%.

As you will know from your work with the Culture, Communications, Welsh Language, Sport, and International Relations Committee, the closure of a single venue represents a huge loss to the local community, to the music sector, and to the future of Welsh talent. In light of this, Welsh Grassroots Music Venues deserve to be operating within a level playing field and therefore we strongly urge you to act to conserve the current rate of Business Rate relief for GMVs in Wales. We can provide a full cost analysis of the impact of such an intervention, and full details of exactly which creative spaces and communities would benefit.

A decision to provide such a relief to Welsh venues will be welcomed by artists and audiences across the country. We have written to both the Deputy Minister for Arts, Sport and Tourism and the Minister for Finance and Local Government to this effect.

We would be pleased to meet with you to discuss this further. Please let me know if that would be of interest and I would be delighted to arrange.

Best wishes,

Sophie Brownlee
Associate Director
Connect

This document provides a translation of correspondence received from Andrew Green.

Correspondence from Andrew Green

Dear Delyth

I am very concerned about the effects of the deep cuts in the budgets of all the public cultural institutions planned by the Government for 2024-25. The word is that a great many specialist workers will probably lose their jobs, and that a great many services will come to a standstill.

I understand that the Senedd committee responsible for culture intends to discuss the draft budget soon. Would it be possible for you, as Chair of the committee, to convey my concerns (and the concerns of many others, I'm sure) to the members?

This short article expresses my concerns:

[Why is the Welsh Government at war with culture? : gwallter](#)

Best regards,

Andrew Green.





8th January 2024

Delyth Jewel MS
Chair, Culture, Communications, Welsh Language, Sport, and International Relations Committee,
Senedd Cymru Welsh Parliament.

Dear Ms Jewell,

Welsh Government Draft Budget 2024-25

On behalf of the trustees and staff of Addoldai Cymru - the Welsh Religious Buildings Trust - I am writing with regard to your Committee's scrutiny of the Welsh Government Draft Budget for 2024-25, and in particular to the Draft Budget's potential impact on the work of Cadw and the RCAHMMW, and their support for heritage organisations in Wales.

Addoldai Cymru is a charity established by the Welsh Government through Cadw in 1999 in response to the increasing problem of closures amongst Wales' rich heritage of Nonconformist chapels. As well as raising awareness of that heritage, which has been described as the "National Architecture of Wales", Addoldai Cymru has been charged with taking into care chapels or other non-Anglican religious buildings of exceptional architectural or historical quality that have become redundant; furthermore Addoldai Cymru is a prescribed charity under the Redundant Churches and other Religious Buildings Act 1969 which permits the transfer of a religious building at less than full market value. To date, 11 highly listed chapels have been taken into care, and each has required considerable capital expenditure on essential repairs.

Since 1999, Addoldai Cymru has developed a close relationship with both Cadw and the RCAHMMW. From the outset, the Trust's costs have been supported by an annual revenue grant from Cadw, which is then allocated between core running costs and building overheads. The current (2023-24) grant represents 88% of our revenue income. Meanwhile, the Trust houses on its own website the RCAHMMW's detailed database of the 6,500+ Nonconformist chapels that have been erected in Wales.

My fellow trustees and staff are alarmed by the proposed allocations to both bodies that are set out in the Draft Budget, particularly since both are liable to a cut well in excess of that affecting other bodies within the Culture directorate. In our view, Cadw performs its wide range of activities in support of Wales' built heritage exceptionally well on a budget proportionately lower than the equivalent bodies in England and Scotland, and this is borne out by the recently published independent review. RCAHMMW's comparatively small staff perform work of outstanding quality. Our concern is not only that the fine work and expertise of these two bodies may be harmed, but also clients such as ourselves may suffer irreparable damage should the full extent of the proposed budget cut be passed on. An extract from our draft business plan for 2024-25 is attached, and this shows that winding up the charity has become a real possibility for trustees. We would welcome an opportunity to present our case to the Committee.

Yours sincerely,
Robert Scourfield, Chair.

post@addoldaicymru.org | (01656) 734940

YMDDIRIEDOLAETH ADDOLDAI CYMRU
CAPEL SALEM, STRYD PICTON, NANTYFFYLLON
MAESTEG, PENYBONT AR OGWR, CF34 0HH
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WELSH RELIGIOUS BUILDINGS TRUST
SALEM CHAPEL, PICTON STREET, NANTYFFYLLON
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Heneb: the Trust for Welsh Archaeology

The Corner House

6 Carmarthen Street

Llandeilo

Carmarthenshire SA19 6AE

Delyth Jewell MS

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

Welsh Parliament

Cardiff Bay

CF99 1SN

Dear Ms Jewell,

9 January 2024

Heneb: the Trust for Welsh Archaeology. Funding Arrangements

I write on behalf of the Board of Trustees of the newly formed Heneb: the Trust for Welsh Archaeology to express concern about the significant level of cut to the funding settlement for Cadw in the draft budget for 2024/25. We feel that we should explain our anxiety about the likely implications for the management of archaeology in Wales, both on the work of Cadw and of the Trust, given the inevitable reduction in funding that Cadw will be able, in turn, to offer to the Trust.

As you will be aware, the four Welsh Archaeological Trusts (Clwyd-Powys, Dyfed, Glamorgan-Gwent and Gwynedd) were formed by Government in the mid 1970s to counteract threats to the preservation of the historic environment in Wales. This was part of a UK-wide response to the increasing pressure from development, but the system adopted in Wales was unique. The four trusts from the start supplied a unified and consistent service throughout the whole country, developing, over nearly 50 years, to add planning advice, conservation and survey, community and educational projects to their initial programmes of pure excavation. For many years the trusts have undertaken the maintenance of the Historic Environment Record on behalf of Welsh Ministers, upon whom this statutory responsibility rests, thereby ensuring the continuation of sustainable development, and economic growth. The system rapidly became, and remains, the most successful model for archaeological services in the UK, flourishing as the trusts responded effectively to objectives set by the Welsh Government such as sustainable development, the Well-being of Future Generations, increasing the opportunities for participation within communities, especially those hard to reach or disadvantaged, as well as the championing of regional identities.

Ever mindful of the need for the four trusts to demonstrate their efficiency and to become more financially resilient, the Boards of Trustees, over the last two years, have been working towards merger as a means to improving output, increasing our archaeological offer and developing new specialisms. This is much needed to ensure that the provision of archaeological services in Wales remains on an equal footing with their counterparts elsewhere in the United Kingdom. Consequently,

we have decided to merge to form the new pan-Wales Heneb: the Trust for Welsh Archaeology, which should become fully operational on 1 April 2024.

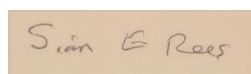
The trusts currently employ in the region of 80 people from all parts of Wales, notably in less affluent areas, and work in partnership with local authorities and other bodies to create an environment better maintained and enjoyed for communities. The work of the trusts has always been supported and encouraged by Cadw, the government body that supplies about half of the trusts' budget – the half that undertakes those advisory, protection and community-based projects mentioned above. We are very concerned that the proposed cut to the government funding of Cadw of over 22% will have a severe impact upon the output of the new pan-Wales Trust Heneb, and may jeopardise programmes of work so painstakingly developed over the last decade in response to Welsh Government objectives.

Cadw has considerable success in implementing its conservation programmes, as identified in the recently published 2023 Independent Review of its Governance Arrangements. It has a significant positive impact upon tourism in Wales, and is a very evident advertisement for approachable and accessible Welsh culture. Yet Cadw appears to be faced with a cut of 22.3%, higher than any other similar department, which seems to us to be counterproductive. We fully understand the necessity for stringent economies at this time, and you may be assured that we in Heneb will continue to work hard to overcome and mitigate the impact of any reduction in our funding. Nonetheless, while we note that the majority of other Culture sector bodies are also receiving a cut in their funding, at 10.5% this is considerably less than that proposed for Cadw and the Royal Commission, even though, as with Cadw, they have a similar capacity to attract other revenue streams.

If the cut of over 22% is implemented this will undoubtedly impact upon its grant aid to the trusts and could pose an adverse impact upon the successful operations of the merged Trust Heneb. We are fearful that this will require significant numbers of redundancies from all part of Wales and our CEOs, having studied the figures, suggest that it will result in the elimination of most of the non-statutory elements of the Trust's programmes. This will leave Heneb merely able to continue to undertake for Welsh Ministers their statutory responsibilities of the maintenance of the Historic Environment Record, planning advice and development control.

We would be most grateful were you to feel able to provide appropriate challenge on the proposed Cadw budget when you come to scrutinise the draft budget settlement in your forthcoming session with Ministers. We are fully appreciative of the difficult decisions government has to make at this time but the level of cut proposed for Cadw seems disproportionate and will have inevitable and serious consequences for third sector heritage bodies such as ourselves and on the management and celebration of the Welsh historic environment.

Yours sincerely

A rectangular box containing a handwritten signature in cursive script that reads "Sian E Rees".

Sian E Rees (Interim Chair of Heneb; the Trust for Welsh Archaeology)

cc Dawn Bowden Deputy Minister for Arts, Sport and Tourism
Tom Giffard, Shadow Minister for Culture Tourism and Sport
Heledd Fychan, Plaid Cymru Spokesperson on Culture
Jason Thomas, Director of Culture, Sport and Tourism

To the Chair and members of the Senedd Culture,
Communications, Welsh Language, Sport, and
International Relations Committee:



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Hefin David MS, Hefin.David@senedd.wales

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Comiswn Brenhinol Henebion Cymru
Royal Commission on the Ancient and
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CC Dawn Bowden MS,
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The Rt Hon Mark Drakeford MS,
Correspondence.Mark.Drakeford@gov.wales

Date: 10/01/2024

Dear Delyth,

The future of the Royal Commission on the Ancient and Historic Monuments of Wales

I am writing to you in your capacity as Chair of the Senedd Culture Committee to ask if you would consider asking Welsh Government to think again about the Royal Commission's baseline grant when you meet to scrutinise the 2024–25 budget on 17 January 2024.

The Government has announced that our budget next year will be cut by 22 per cent to £1.413m. Cadw faces the same percentage cut and three other cultural institutions in Wales are being cut by 10 per cent – the National Library, the National Museum and Arts Council Wales. Culture (along with Rural Affairs, down by 10.47 per cent) appears to have been singled out for particularly deep cuts compared with the very much smaller reductions – all less than 5 per cent – to the other ministerial portfolios.

A more equitable reduction in our budget of 10 per cent would still leave us struggling, but it would buy us the necessary breathing space to avoid precipitate decisions and enable us to work with Cadw and others to plan for an orderly strategic solution to the future of the heritage sector. If we cannot secure an improved grant settlement, we will need to take immediate steps to reduce our headcount from 28 to 20 in order to avoid running out of money just before Christmas 2024.

The Royal Commission has won many plaudits in recent years. We secured a Euro 6m grant to fund our CHERISH climate change project and we are leading the sector's contribution to the Government's adaptation plan. We compiled the dossier of evidence that resulted in the award of World Heritage status to Welsh slate industry. We are currently engaged in a much-praised community archaeology project to investigate the history of Pendinas, one of Wales's most impressive hillforts. We are contributing to the Anti-Racist Wales Action Plan by recording the lived experience of those Ugandan Asians who found sanctuary in Wales after being expelled by Idi Amin in 1972. This acclaimed project has the potential to be the first of many celebrating the contribution of diaspora communities to the social, economic and cultural life of the nation.

We have encouraged young people to engage with Welsh culture through our Unloved Heritage project, and we are helping to protect the Welsh language through our historic placenames list, which is used by local authorities for naming new streets, housing, industrial and shopping estates. We are working with the Foundation for Jewish Heritage to turn the Merthyr synagogue into a Heritage Centre presenting the centuries-old history of the Jewish community of Wales. With the rapid increase in the closure of places of worship in Wales we are the only body recording their interiors and finding homes for their archives ahead of their redevelopment. The historic environment data that we supply to planners and conservation officers is vital to their response to the threat to upland archaeology from large-scale tree planting and to maritime archaeology from wind turbines and aggregates extraction.

We had been looking forward to playing a leading role in the delivery of the ambitious and visionary Culture Strategy that was to have been launched this year and we were in the process of integrating the People's Collection Wales into the Royal Commission, combining our expertise in recording buildings and archaeology with their skills in capturing oral history, 'lived experience' and intangible heritage.

All of this work is now under threat. With a much-reduced team, our capacity to continue with many elements of our work will be severely constrained, doing long-term damage to a centre of excellence that is held in high regard in Wales and internationally. I personally have worked hard over the last nine years to restore morale at the Commission and to give colleagues a clear sense of purpose following the decision to halt the planned merger with Cadw in 2014. Our Welsh Government sponsor division has many times acknowledged that we deliver value for money and our outstanding achievements are plain for everyone to see in our annual reports. The Royal Commission makes a major contribution to the growing sense of Welsh nationhood and distinctiveness, and it should be a matter of pride for Welsh Government that their investment has achieved so much (needless to say, the money cultural bodies receive is infinitesimally small and would not keep the NHS in Wales going for more than a few minutes).

I will end by contrasting the cuts we are being asked to bear in Wales with the additional public spending on arts, heritage and culture in Scotland (increases are also planned in England and Northern Ireland next year). When the Scottish Deputy First Minister announced an extra £15.8 million in spending on the arts and culture in Scotland on 19 December 2023, she promised that this was the first step towards doubling expenditure to at least £100 million by 2028–29. She said: ‘the transformational power of our culture is immense’, not only for enabling ‘individuals and organisations to realise their potential’, but also for ‘attracting people from all over the world who want to come here and experience it first-hand’.

Yours sincerely,

A handwritten signature in purple ink that reads "Christopher Catling". The signature is fluid and cursive, with the first name "Christopher" written in a larger, more prominent script than the surname "Catling".

Christopher Catling
Secretary and CEO



Rt Hon Lucy Frazer MP
Secretary of State for Culture, Media and Sport
UK Government

11 January 2024

The working environment and atmosphere at S4C

Dear Lucy,

I am writing to you following the Committee's evidence session with Rhodri Williams and Chris Jones, as Chair and Lead Non-Executive Member of the S4C Board, today (11 January 2024).

S4C is a unique institution, and its success is key to Wales as a nation. The channel's work over the past four decades in providing Welsh language content is vital, as is S4C's role in supporting the cross-party aim of ensuring that there are a million Welsh speakers by 2050.

As a Committee, we believe that recent events at the channel represent an appalling episode in the history of S4C. It has become apparent from recent events that there has been serious failures in both the executive and non-executive levels of leadership at the channel. This has already seen two senior executive leaders leave the organisation. Leadership of the organisation, however, is not only limited to the executive team.

The Board, in our mind, also has a role in providing leadership. There are clear examples whereby the Chair of the Board should have been aware of the working environment at the channel. In an organisation the size of S4C, it should have been apparent to the Chair that there were significant problems. The high numbers of staff leaving the channel should have rung alarm bells. The fact that this did not happen suggests a failure of oversight and governance on the Chair's behalf. In that regard, we recommend that a new Chair should be appointed to lead the Board of S4C as it seeks to repair and renew its reputation.

Furthermore, we find it wholly unacceptable that neither you, as Secretary of State, nor indeed your predecessors, have seen fit to meet the leadership of S4C, a UK public service broadcaster, over whose governance you have ultimate responsibility. As was made clear to us today, requests were made for a meeting to be held between S4C and the Secretary of State to discuss the ongoing situation. We were astonished to find out that those requests were not accepted. In our view, the principle of S4C's governance being a matter reserved to the UK Government has been undermined by this apathy. We would therefore urge you to ensure that the Welsh Government has a formal role in the appointment of the next Chair of S4C, so that there is a joint responsibility between DCMS and the Welsh Government for making the appointment.

Yours sincerely,



Delyth Jewell MS
Committee Chair

Croesewir gohebiaeth yn Gymraeg neu Saesneg.

We welcome correspondence in Welsh or English.

Agenda Item 3.2

Correspondence from the Romani Cultural and Arts Company to the Arts Council of Wales

Happy new year. Thank you for your message.

I am pleased to hear that you agree that there is much more to do in relation to engagement through the arts with Gypsy, Roma and Traveller (GRT) communities, and that the Arts Council of Wales (ACW) is keen to work with the Romani Cultural and Arts Company (RCAC) in a strategic relationship involving resourcing and funding.

In response to a recent FOI request made by the RCAC to ACW regarding budget spend on GRT projects between 2013 and 2023 (see below), I was concerned to note that only two organisations have been primarily providing events relating to GRT communities. These are the RCAC and Head4Arts; Head4Arts seem not to be funded moving forward according to the recent ACW Investment Review 2023 (see attached).

The response from ACW to the FOI request stated that the ACW are reliant upon individual organisations' own recording of details regarding targeted activity with GRT communities. This oversight is unacceptable as it means that organisations are not able to quantify the proportion of activity relating to GRT communities (or any other community) and therefore remain unaccountable in the amount of public funds being made available for specific communities. That this kind of monitoring is not mandatory is of great concern.

The FOI response also states that ACW does not ask for budget value from core funding to be recorded against activity as 'this would be difficult for the Portfolio organisations to calculate accurately'. This should not be difficult to arrange as organisations should be able to track where funds have been spent even in terms of apportionment of running costs, which is what the RCAC currently does.

I am surprised and disappointed by the information arising from the FOI request, specifically that the proportion of budget spend is not required to be broken down into specifics relating to demographics particularly in relation to under-represented communities. Without this information it is impossible to quantify budget spend in real terms therefore placing no accountability on organisations for rates of inclusion within their programming, audience and staffing.

This lack of monitoring and accountability was also revealed by our (ACW/RCAC) Sites of Inclusion Report: https://www.romaniarts.co.uk/wp-content/uploads/2022/10/REPORT-Sites-of-Inclusion_Gypsy-Roma-and-Traveller-Participation-in-the-Arts-Sector-of-Wales.pdf

The FOI request looked at a ten year window. It is important to note that some of the organisations covered in the FOI request have been funded for more than thirty years.

The FOI data also makes it clear that there has never been a GRT run organisation that has been core funded by ACW. And this continues to be the case. As the only GRT run organisation, the RCAC stands alone in providing arts activities for GRT communities by GRT communities.

In the light of the lack of funding and the consequent lack of provision made clear through the FOI request we feel that **Welsh Government** needs to intervene immediately in order to hold ACW accountable for their decision making.

We look forward to a fully transparent investigation into the current situation regarding the monitoring of funding by ACW Portfolio clients so that a strategy with clear deliverables can be implemented before the new financial year April 2024. As ACW Portfolio clients begin their new funding round it is crucial that they be made accountable for their budget spend/provision on minority/GRT events, audiences and staffing. **This is tax payers money after all.**

We also feel that there should be a public apology from Welsh Government for their failure in holding the ACW accountable for their decision making and their distribution of public money.

Kushti Bok; be well
Good luck and good health

Isaac Blake (he/him)
Director

The Romani Cultural and Arts Company

	2013 ~ 2014	2014 ~ 2015	2015 ~ 2016	2016 ~ 2017	2017 ~ 2018	2018 ~ 2019	2019 ~ 2020	2020 ~ 2021	2021 ~ 2022	2022 ~ 2023	Total
Aberystwyth Arts Centre	560,000	546,000	534,534	518,498	536,645	536,645	536,645	542,548	542,548	550,686	5,404,749
Artes Mundi Prize Limited	147,500	146,025	142,958	142,958	147,962	147,962	147,962	149,590	149,590	151,834	1,474,341
Artis Community Cymuned	205,500	203,445	199,173	193,198	199,960	199,960	199,960	202,160	202,160	205,192	2,010,708
Arts Care Gofal Celf	132,500	131,175	128,420	128,420	132,915	132,915	132,915	134,377	134,377	136,393	1,324,407
Arts Connection - Cyswllt Celf	65,000	64,350	62,999	62,999	65,204	65,204	65,204	65,921	65,921	66,910	649,712
Ballet Cymru	200,000	198,000	193,842	243,842	252,376	252,376	252,376	255,152	255,152	258,979	2,362,095
BBC National Orchestra of Wales	844,525	823,412	806,120	777,906	805,133	805,133	805,133	813,989	813,989	826,199	8,121,539
Blackwood Miners' Institute	-	-	-	125,000	129,375	129,375	129,375	130,798	130,798	132,760	907,481
Canolfan Gerdd William Mathias Cyf	80,000	79,200	77,537	77,537	80,251	80,251	80,251	81,134	81,134	82,351	799,646
Canolfan Ucheldre Centre	75,000	74,250	72,691	72,691	75,235	75,235	75,235	76,063	76,063	77,204	749,667
Chapter Cardiff Ltd.	686,000	668,850	654,804	635,160	657,391	657,391	657,391	664,622	664,622	674,591	6,620,822
Clwyd Theatr Cymru TYP	232,850	230,522	225,681	-	-	-	-	-	-	-	689,053
Community Music Wales	105,000	103,950	101,767	101,767	105,329	105,329	105,329	106,488	106,488	108,085	1,049,532
Cwmni Theatr Arad Goch	378,250	352,935	345,523	335,157	346,887	346,887	346,887	350,703	350,703	355,964	3,509,896
Cwmni'r Frân Wen	190,075	237,075	232,096	225,133	233,013	233,013	233,013	235,576	235,576	239,110	2,293,680
Dawns i Bawb	85,000	84,150	82,383	82,383	85,266	85,266	85,266	86,204	86,204	87,497	849,619
Dawns TAN TAN Dance Ltd.	90,000	89,100	87,229	-	-	-	-	-	-	-	266,329
Disability Arts Cymru	170,000	168,300	164,766	159,823	165,417	165,417	165,417	167,237	167,237	169,746	1,663,360
Earthfall Dance Ltd.	245,000	242,550	237,456	-	-	-	-	-	-	-	725,006
Eleni Dance Ltd	75,287	74,534	72,969	72,969	75,523	75,523	75,523	76,354	76,354	77,499	752,535
Ffotogallery	205,000	308,950	290,688	192,727	199,472	199,472	199,472	201,666	201,666	204,691	2,203,804
g39	70,000	69,300	67,845	67,845	70,220	70,220	70,220	70,992	70,992	72,057	699,691
Galeri Caernarfon Cyf	325,000	321,750	314,993	305,543	316,237	316,237	316,237	319,716	319,716	324,512	3,179,941
Glynn Vivian Art Gallery	125,000	123,750	121,151	121,151	125,391	125,391	125,391	126,770	126,770	128,672	1,249,437
Hafren	106,680	105,613	103,395	103,395	107,014	107,014	107,014	108,191	108,191	109,814	1,066,321
Head4Arts	150,000	148,500	145,382	145,382	150,470	150,470	150,470	152,125	152,125	154,407	1,499,331
Hijinx Theatre	160,000	158,400	155,074	150,422	155,687	155,687	155,687	157,400	157,400	159,761	1,565,518
Impelo	112,250	111,128	108,794	108,794	112,602	112,602	112,602	113,841	113,841	115,549	1,122,003
Jukebox Collective	-	-	-	162,000	167,670	167,670	167,670	169,514	169,514	172,057	1,176,095

Live Music Now Wales	45,000	44,550	43,614	43,614	45,140	45,140	45,140	45,637	45,637	46,322	449,794
Llantarnam Grange Arts Centre	85,000	84,150	82,383	82,383	85,266	85,266	85,266	86,204	86,204	87,497	849,619
Llenyddiaeth Cymru Literature Wales	851,915	830,617	743,174	717,163	742,264	742,264	742,264	750,429	750,429	761,685	7,632,204
Mid Wales Opera	104,000	102,960	100,798	100,798	104,326	104,326	104,326	105,474	105,474	107,056	1,039,538
Mission Gallery	95,000	94,050	92,075	92,075	95,298	95,298	95,298	96,346	96,346	97,791	949,577
MOSTYN	400,000	396,000	387,684	376,053	389,215	389,215	389,215	393,496	393,496	399,398	3,913,772
Music Theatre Wales	270,000	222,750	218,072	211,530	218,934	218,934	218,934	221,342	221,342	224,662	2,246,500
National Dance Company Wales	915,000	867,125	835,209	805,977	834,186	834,186	834,186	843,362	843,362	856,012	8,468,605
National Theatre Wales	1,685,000	1,642,875	1,608,375	1,552,082	1,606,405	1,606,405	1,606,405	1,624,075	1,624,075	1,648,436	16,204,133
National Youth Arts Wales	-	-	-	-	377,697	350,000	350,000	353,850	353,850	359,260	2,144,657
NoFit State Community Circus Ltd	200,000	198,000	193,842	188,027	194,608	194,608	194,608	196,749	196,749	199,700	1,956,891
Oriel Davies Gallery	321,400	227,700	222,918	216,230	223,798	223,798	223,798	226,260	226,260	229,654	2,341,816
Oriel Myrddin Trust	47,000	46,530	45,553	45,553	47,147	47,147	47,147	47,666	47,666	48,381	469,790
Peak Cymru	-	-	-	75,000	77,625	77,625	77,625	78,479	78,479	79,656	544,489
Pontardawe Arts Centre	63,000	62,370	61,060	61,060	63,197	63,197	63,197	63,892	63,892	64,850	629,715
Pontio Arts	-	285,000	279,015	270,645	280,118	280,118	280,118	283,199	283,199	287,447	2,528,859
Rhondda Cynon Tâf County Borough Council	155,000	153,450	150,228	145,721	150,821	150,821	150,821	152,480	152,480	154,767	1,516,589
Rubicon Dance	200,000	198,000	193,842	188,027	194,608	194,608	194,608	196,749	196,749	199,700	1,956,891
Ruthin Craft Centre	400,000	396,000	387,684	376,053	389,215	389,215	389,215	393,496	393,496	399,398	3,913,772
Sherman Theatre	1,228,000	1,145,625	1,121,567	1,087,920	1,125,997	1,125,997	1,125,997	1,138,383	1,138,383	1,155,459	11,393,328
Sinfonia Cymru	115,000	113,850	111,459	210,459	217,825	217,825	217,825	220,221	220,221	223,524	1,868,209
St. David's Hall	65,000	-	-	-	-	-	-	-	-	-	65,000
Swansea Grand Theatre	73,000	-	-	-	-	-	-	-	-	-	73,000
SWICA Carnival	90,000	89,100	87,229	-	-	-	-	-	-	-	266,329
Taliesin Arts Centre	253,000	223,740	219,041	212,470	219,906	219,906	219,906	222,325	222,325	225,660	2,238,279
Tanio	180,000	178,200	174,458	169,224	175,147	175,147	175,147	177,074	177,074	179,730	1,761,201
The Riverfront Theatre and Arts Centre - Newport Live	125,000	123,750	121,151	121,151	125,391	125,391	125,391	126,770	126,770	128,672	1,249,437
Theatr Bara Caws	287,556	284,680	278,702	270,341	279,803	279,803	279,803	282,881	282,881	287,124	2,813,574
Theatr Brycheiniog	230,000	198,000	193,842	188,027	194,608	194,608	194,608	196,749	196,749	199,700	1,986,891

Theatr Clwyd	1,645,000	1,603,875	1,570,194	1,741,999	1,802,969	1,802,969	1,802,969	1,822,802	1,822,802	1,850,144	17,465,723
Theatr Felinfach	60,000	59,400	58,153	58,153	60,188	60,188	60,188	60,850	60,850	61,763	599,733
Theatr Ffynnon	75,000	74,250	72,691	-	-	-	-	-	-	-	221,941
Theatr Genedlaethol Cymru	1,052,942	1,052,942	1,030,830	994,751	1,029,567	1,029,567	1,029,567	1,040,892	1,040,892	1,056,505	10,358,455
Theatr Iolo	246,225	261,225	255,739	248,067	256,749	256,749	256,749	259,573	259,573	263,467	2,564,116
Theatr Mwdan	245,000	272,550	266,826	258,821	267,880	267,880	267,880	270,827	270,827	274,889	2,663,380
Theatr na nÓg	324,850	321,602	314,848	305,403	316,092	316,092	316,092	319,569	319,569	324,363	3,178,480
Torch Theatre Company Ltd	460,000	455,400	445,837	432,462	447,598	447,598	447,598	452,522	452,522	459,310	4,500,847
Touch Trust Ltd.	150,000	148,500	145,382	-	-	-	-	-	-	-	443,882
trac cymru	80,000	79,200	77,537	77,537	80,251	80,251	80,251	81,134	81,134	82,351	799,646
Ty Cerdd	338,000	324,720	237,901	153,164	158,525	204,525	204,525	206,775	206,775	209,877	2,244,787
Valleys Kids	122,000	120,780	118,244	118,244	122,383	122,383	122,383	123,729	123,729	125,585	1,219,460
Venue Cymru	78,000	-	-	-	-	-	-	-	-	-	78,000
Volcano Theatre Company Ltd	215,000	212,850	208,380	202,129	209,204	209,204	209,204	211,505	211,505	214,678	2,103,659
Wales Millennium Centre	4,000,000	3,907,500	3,831,743	3,708,132	3,837,917	3,837,917	3,837,917	3,876,834	3,876,834	3,930,487	38,645,281
Welsh National Opera	4,755,808	4,636,913	4,539,538	4,380,654	4,533,977	4,533,977	4,533,977	4,583,851	4,583,851	4,652,609	45,735,155
WJEC CBAC Ltd.	250,000	247,500	251,303	322,303	-	-	-	-	-	-	1,071,106
Ystradgynlais Miners' Welfare and Community Hall Trust Ltd	-	-	-	40,202	41,609	41,609	41,609	42,067	42,067	42,698	291,861
Total	28,403,113	27,853,493	27,108,391	26,162,304	27,122,099	27,140,402	27,140,402	27,435,649	27,435,649	27,842,787	273,644,289

Year	Type of Project	Organisation	Project Title	Project description
2023/24	Children & Young People	Head4Arts	Cwm Crachen Art Session	Provision of participatory craft activities held at the GRT site in Nantyglo. The aim is to improve the well being on the young people on site and to make participatory creative activity more accessible.
2023/24	General Participation	Head4Arts	GRT History Month Celebrations	Crafts based on GRT Heritage and traditional music sessions on GRT sites in Merthyr Tydfil and Blaenau Gwent
2023/24	Film	Chapter Cardiff Ltd.	Leaving to Remain + Q&A	Documentary made by British Roma people about their struggles and mental well being post-Brexit and during Covid.
2022/23	Exhibitions	The Riverfront - Newport Liv	Gypsy Makers 5	The exhibition featured work by artists from Gypsy, Roma, Traveller communities
2022/23	Children & Young People	Head4Arts	Cwm Crachen Crafts	Provision of participatory craft activities held at the GRT site in Nantyglo - weekly sessions are split into 3 hourly blocks targeted at: young adults / home educated children / after school arts club. The aim is to improve the wellbeing of young people & to make participatory creative activity more accessible.
2022/23	Children & Young People	Head4Arts	Cwm Crachen Arts Award	Working with a small group of home educated young people from the GRT site in Nantyglo - participants are working towards a Bronze Arts Award as part of this programme
2022/23	Children & Young People	Head4Arts	Arts Activities @ Glyn Mill	Provision of participatory craft activities held at the GRT site in Merthyr Tydfil
2022/23	Children & Young People	The Riverfront	Roma Arts Club	We have been working in partnership with the Roma Back to Nature project. We provide support and space for the workshops that take place weekly in the building. These include weekly dance sessions as well as the recording studio sessions. The coordinating group also meet weekly to plan the activities and events that they will be working toward. For example, the group worked toward a large performance as part of IWD and are also planning a day conference event showcasing their creative activities in the Summer.
2022/23	Children & Young People	Head4Arts	Cwm Crachen Crafts (Summer)	Provision of participatory craft activities held at the GRT site in Nantyglo - weekly sessions are split into 3 hourly blocks targeted at: young adults / home educated children / after school arts club. Partly funded by the Summer of Fun programme which aimed to improve the wellbeing of young people
2022/23	Children & Young People	Head4Arts	Cwm Crachen Arts Award	Working with a small group of home educated young people from the GRT site in Nantyglo - participants are working towards a Bronze Arts Award as part of this programme
2022/23	Children & Young People	Head4Arts	Arts Activities @ Glyn Mill	Provision of participatory craft activities held at the GRT site in Merthyr Tydfil
2022/23	General Participation	The Riverfront	Save our Seas	This project has been developed with visual artist Stephanie Roberts. Working alongside open access sessions, as well as with focussed groups of people (Roman Group/ Newport Youth Council/ Roots project, Steph has created a piece to respond to the issues surrounding the protection of our waters, using hand drawn iconic fish taken from our recently closed Newport Centre.
2022/23	General Participation	Head4Arts	Gypsy Traveller Month Celebrations	Craft and music activities as part of GRT History month celebrations with the community based on the Glyn Mill site Merthyr Tydfil. Activities offered for families and suitable for all ages to take part together
2022/23	General Participation	The Riverfront - Newport Liv	Gypsy Stars Choir	
2019/20	Children and Young People	Community Music Wales	Unedig	Multilingual project entitled Unedig. This ACW Lottery funded project was completed during this 6 months. This project saw us working with young people who were from the Gypsy Traveller communities and also from other migrant communities including Italy, Portugal and Poland. This project was aimed at bringing communities together to write and perform new music bringing their languages and culture together. It culminated in a final performance at the Red house as part of The Merthyr Rising festival
2021/22	Children & Young People	Artis Community Cymuned	Barnardos Young Carers Upcycling Workshop	
2021/22	Children & Young People	Head4Arts	GRT Event	
2021/22	Children & Young People	The Riverfront - Newport Liv	Creative Play Packs	
2021/22	Children & Young People	Ballet Cymru	Duets Scholars	
2021/22	Children & Young People	Ballet Cymru	Duets workshops	
2021/22	Children & Young People	Jukebox Collective	Ballet Cymru	
2021/22	Children & Young People	Jukebox Collective	Kids club	
2021/22	Children & Young People	Jukebox Collective	Kids Beginners	

2021/22	Children & Young People	Jukebox Collective	Kids Intermediate
2021/22	Children & Young People	Jukebox Collective	Kids Performance
2021/22	Children & Young People	Jukebox Collective	Kids mixed ability
2021/22	Children & Young People	Jukebox Collective	SHEP
2021/22	Children & Young People	Jukebox Collective	Cardiff West career day
2021/22	Children & Young People	Jukebox Collective	Summer of smiles
2021/22	Children & Young People	The Riverfront - Newport Liv	Art Club/Avenues
2021/22	Children & Young People	Head4Arts	Glyn Mill Project
2021/22	Children & Young People	Oriel Davies Gallery	Criw Celf Andrew Logan Museum Visit
2021/22	Children & Young People	Head4Arts	Cwm Crachen Crafts (winter of wellbeing)
2021/22	Children & Young People	Head4Arts	Cwm Crachen Arts Award
2021/22	Children & Young People	Jukebox Collective	Community class (Ely)
2021/22	Children & Young People	Jukebox Collective	Community class (Butetown)
2021/22	Children & Young People	Jukebox Collective	Community class (grange town)
2021/22	Children & Young People	Jukebox Collective	Academy
2021/22	Children & Young People	Jukebox Collective	Academy
2021/22	Children & Young People	Jukebox Collective	Academy
2021/22	Children & Young People	Jukebox Collective	Academy training session
2021/22	Children & Young People	Jukebox Collective	Acting with camera
2021/22	Children & Young People	The Riverfront - Newport Liv	Well being packs
2021/22	General Participation	Jukebox Collective	Open Class
2021/22	General Participation	Jukebox Collective	Academy
2021/22	General Participation	Jukebox Collective	Connect & Flourish
2021/22	General Participation	The Riverfront - Newport Liv	Summer of Fun Outreach
2021/22	General Participation	The Riverfront - Newport Liv	Roma Family- Welcome event
2021/22	General Participation	The Riverfront - Newport Liv	The (Future) Wales Coastal Foot Path
2021/22	General Participation	The Riverfront - Newport Liv	Random acts of kindness
2021/22	General Participation	Community Music Wales	Adult Learners
2021/22	Film	Chapter Cardiff Ltd.	Nomadland
2021/22	Film	Chapter Cardiff Ltd.	Wolfwalkers

Dawn Bowden AS/MS
Dirprwy Weinidog y Celfyddydau a Chwaraeon, a'r Prif Chwip
Deputy Minister for Arts and Sport, and Chief Whip

Agenda Item 3.3


Llywodraeth Cymru
Welsh Government

Delyth Jewell MS
Chair
Culture, Communication, Welsh Language, Sport and International Relations Committee
SeneddCulture@senedd.wales

11 January 2024

Dear Delyth,

Scrutiny of Public Service Broadcasting

Thank you for your letter of 15 December seeking information following the Culture, Communications, Welsh Language, Sport, and International Relations Committee's scrutiny of Public Service Broadcasting in Wales. We welcome the work of the Committee in this important area.

Our response is due with the Committee on 19 January 2024. However, the matters identified in your letter are still under active consideration and as such a detailed response will be provided to the Committee in February.

This revised deadline will enable us to provide a much more comprehensive response.

Yours sincerely



Dawn Bowden AS/MS
Dirprwy Weinidog y Celfyddydau a Chwaraeon, a'r Prif Chwip
Deputy Minister for Arts and Sport, and Chief Whip

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Rydym yn croesawu derbyn gohebiaeth yn Gymraeg. Byddwn yn ateb gohebiaeth a dderbynnir yn Gymraeg yn Gymraeg ac ni fydd gohebu yn Gymraeg yn arwain at oedi.

We welcome receiving correspondence in Welsh. Any correspondence received in Welsh will be answered in Welsh and corresponding in Welsh will not lead to a delay in responding.

Agenda Item 6

By virtue of paragraph(s) vii of Standing Order 17.42

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Timetable for consideration: Supplementary Legislative Consent Memorandum (Memorandum No.3) on the Data Protection & Digital Information Bill

agreed, in accordance with Standing Order 29.4(i), to invite the Culture, Communication, Welsh Language, Sport and International Relations Committee and the Legislation, Justice and Constitution Committee to consider and report on the Supplementary Legislative Consent Memorandum (Memorandum No.3) on the Data Protection & Digital Information Bill.

In accordance with Standing Order 29.4(ii), the Business Committee agreed that the committees should report to the Senedd by 2 February 2024.



Agenda Item 7

By virtue of paragraph(s) vii of Standing Order 17.42

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