

**Senedd Debate on Royal Welsh College of Music & Drama Junior Department,  
Wednesday 18 September**

**Briefing**

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## **PART 1 – KEY FACTS: Young RWCMD and a way forward**

### 1.1 Summary

**Like almost all higher education providers in the UK, the Royal Welsh College of Music and Drama is currently facing significant financial challenges.** Three years of high inflation have impacted the core costs of running Universities and Colleges in the UK. Undergraduate student fees have been capped at £9,000 for nearly 10 years (only rising to £9250 for new students from September 2025), and public funding for HE in Wales has reduced by 6% for 2024/25. More widely, the higher education sector in the UK is grappling with similar challenges: more than 50 universities have announced redundancies, with over 50% forecasting a deficit in 2023/24. Indeed just about all UK public services are under severe pressure, trying to find sustainable ways through a time of diminished government finances.

In this context **RWCMD is focusing on adapting and carefully prioritising and protecting the core of what we are funded to do: higher education training.** We are making 10% cost savings for 2024/25 and then moving forward to make proposals for further cost-savings over the next two years to ensure a sustainable model for RWCMD's future, albeit with an understanding at Board level that this level of savings presents a challenge to the nature of conservatoire provision.

**After much consideration and regret, RWCMD made the decision in July 2024, following a statutory HR and Employment consultation, to close its regular weekend music and drama provision for young people under 18.** We acknowledge both the powerful individual stories of some of our Young participants and public concern that have been expressed through our consultation period, which demonstrated how much people in Wales care about the role of music and drama in the lives of our young people. However, our decision was driven by the financial imperative we face, and **the closure is contributing a significant part (c.16%) of overall 10% cost-savings for the College (£1.5m) required in 2024/25.** In the Welsh policy context and the reality of limited resource across the arts and education, RWCMD is not funded or tasked to provide a weekly service to school-age children, and there is a stark contrast with conservatoires in England that receive annual funding from the Music and Dance scheme for their specialist under-18 provision.

At the same time, **we recognise the importance of nurturing young talent,** and particularly the importance of ensuring that young people with the greatest ability and potential, whatever their geographic and socio-economic backgrounds, are empowered to develop as part of the talent pipeline to the creative industries. That pipeline is vital in Wales both in terms of honouring and continuing to develop Wales' distinctive and well-known cultural strengths, and in feeding the future of the creative industries with its huge economic, social, cultural and political benefits for Wales.

**In 2024/25 we will continue to deliver sustainable project work in this field, which has reached almost 2000 young people throughout Wales, since October 2022.** This will include a series of weekend immersive music workshops seeking to inspire participation from beginners through to emerging professionals (supported by the Mosawi Foundation);

the National Open Youth Orchestra Ensemble Residency (in partnership with BBC NOW and Open up Music); and holiday courses in Production Arts (which continue to be sponsored by Bad Wolf).

This work sits alongside significant engagement with schools and communities that is embedded within our degree courses, including through partnerships with organisations addressing societal disadvantage/deprivation such as Making Music, Changing Lives in Ely, and the Oasis Centre in Splott. The College has a deep commitment to enriching the cultural landscape of Wales and beyond, and the wish to engage with young talent remains a central part of our ambition.

Furthermore, **given continuing financial challenge, we recognise the need to think and work differently.** We welcome, therefore, the recent announcement from Cardiff & Vale Music Service of its new Saturday Academi, run in partnership with teachers who have experience of RWCMD's Junior Conservatoire, as a local, sustainable initiative. Equally, **RWCMD is now working to scope a new partnership approach to supporting outstanding talent from right across Wales,** developing sustainable models in music and drama that will best serve young people from all backgrounds.

**We are planning to work closely in partnership with key national organisations: National Youth Arts Wales (NYAW), the National Music Service for Wales (NMSW), the Urdd and Seren, and constructive discussions have already begun.** We aim to map development pathways through to professional training (aligning with, for example, the NMSW's core objective in relation to pathways), and to understand where strengths and gaps lie and where RWCMD can play the most impactful, targeted role. We will also consult with diverse stakeholders including young people themselves, FE providers, youth organisations and youth theatres, music services and industry partners. **We expect that this work will result in proposals towards the end of this academic year, 2024/25, for a new national talent development programme, with partnership at its heart and co-ordinated by the College.** We are determined to create a positive future with opportunities for young people that they value. And we are hopeful that the position with public finances will now start to improve in the next few years and new investment will become possible.

We consider that within the wider ecology RWCMD has a vital role to play as a convener, partner, a reference point for quality, and a route for entry to professional music and drama training at undergraduate and postgraduate levels. The College adds unique value, particularly for those identified with exceptional ability and/or potential. It can work through special events and partnership workshops that inspire, through access to specialist tuition and instruments/equipment where appropriate, and through mentorship with our students as well as giving young people the opportunity to taste and get to know conservatoire study.

### 1.2 Outcomes of the decision on weekly provision in Young RWCMD

The decision to close our weekly Young RWCMD provision was not taken lightly by the Senior Management Team, and was supported by the RWCMD Board. We have recognised how difficult and unsettling the consultation period and subsequent decision were for staff and young students affected, especially given the challenges facing the wider arts sector.

We are continuing to work hard to ensure appropriate support and advice for staff, parents and learners.

**Young Music/Junior Conservatoire** (<https://www.rwcmd.ac.uk/young-rwcmd/music>). Saturday courses for learners aged from 4 to 18 years. The curriculum shares elements with the Curriculum for Wales and RWCMD's music degrees, providing a flow of learning from first musical steps through to conservatoire entry and beyond.

**Young RWCMD Drama/Richard Burton Youth Company and Young Acting** (<https://www.rwcmd.ac.uk/young-rwcmd/drama>). These courses run on a Sunday and are for learners from school years 3 to 12+.

The closure of these weekly courses impacted approximately 180 young musicians and 160 young actors. We recognise how much this provision meant to them and its cultural value.

To help mitigate the impact, carers and parents of learners seeking support for alternative provision have been linked to Directors of Drama and Music for advice and signposting to appropriate specialist providers.

In addition, learners currently borrowing an RWCMD instrument are entitled to apply for an extended loan of their instrument until the end of August 2025. RWCMD remains committed to retaining its instrument collection and making these available to young learners in any future provision.

We also recognise the contribution these Young RWCMD activities made to the talent pipeline, although this was not a strong pipeline into professional training at the College. Only a small number of the Young students stayed on to study for one of our undergraduate degrees. We had 19 "alumni" from previous years' Young programmes studying with us in 2023/24 - c. 2% of our total student base. These numbers have declined over the last 3 years, with 8 students joining us in 2021 (immediately after Covid) but only 3 in 2023.

### 1.3 Looking forward: a new national talent programme for young people in Wales

As we build on early constructive discussions towards a new national talent programme for young people in Wales based on partnership, we will continue to consider the proposals that we received as part of this consultation process, including those from both staff and students. We particularly appreciate the commitment shown by them and will aim to develop that engagement further as we continue to collaborate with other organisations.

The talent pipeline in both music and drama is critical, but there are some particular needs in each discipline as well as commonality between them. In music developing the craft skills of an instrument is particularly challenging and usually takes many years. People therefore need to start at a relatively young age and to have continuity in access to appropriate lessons and to an instrument. Equally they need regular ensemble experiences, both small and large, and support with musical literacy and musicianship skills, the latter particularly linking to GCSE and A-level courses where the downturn in Wales in schools offering these courses and young people choosing them paints a bleak picture.

In drama, young people need exposure to the many different roles both on and off stage in mounting productions and creating new work including film. This normally takes place through schools and youth theatres, with supplementary opportunities available from a number of private providers. Here too, however, funding pressures together with the downward trend in availability and take up of GCSE and A-level drama is hugely problematic. The most talented young actors and musical theatre performers will then need additional support with craft training and audition preparation in the few years leading up to auditions for drama school. Even more important, young people need support to understand the wide range of career pathways in production arts, from set and costume design, to lighting, projection, VR, AR and sound, to stage and arts management. As well as understanding, they need to develop relevant experience and portfolios to support transition into professional training.

A period of review, in 2024/25 will enable collective thinking to develop proposals for a national talent programme in music and drama for the whole of Wales. This will be underpinned by three key principles:

1. **Equity of access** across the regions of Wales, through both English and Welsh language, and in terms of economic background
2. **A partnership approach**, extending and deepening the reach and impact of existing provision, and ensuring pathways right through to professional training and professional practice
3. **A sustainable financial model**

We expect proposals to be developed by the end of this academic year.

Although music and drama are different in terms of young people's needs, there are likely to be three shared pillars in approach:

1. **Inspiring, immersive and inclusive experiences** that challenge the most talented young people to reach higher levels, experience the processes and values of professional contemporary live music and theatre/film making, and perform/showcase work in high quality venues and facilities.
2. **Mentorship** through a network of both industry professionals and top teachers across Wales, and peer mentorship through conservatoire and university students as emerging professionals.
3. **Attention to fundamental craft development at an appropriate level** (including relevant instruments and tools), and the challenge and support to reach excellence.

## **PART 2 – RWCMD in depth: what we do, future ambition and the financial challenge within the conservatoire sector**

### 2.1 RWCMD: a higher education provider and cultural institution

The Royal Welsh College of Music and Drama is Wales' National Conservatoire.

Funded as a higher education provider, we train over 850 undergraduate and postgraduate students each year following the specialist conservatoire model, with many graduates of the College becoming household names internationally acclaimed, and contributing to the outstanding success of Wales and the UK's creative industries.

Core to our purpose is to give our higher education students vital opportunities to develop their craft through diverse real-world experience.

Focusing on performance and exhibition, RWCMD offers a strong creative programme for the public, with up to 400 ticketed events a year (over 46,000 tickets sold in 2023/24) alongside a range of free and much-loved events including Friday evenings AmserJazz and regular Musical Theatre Cabaret nights. The architectural transformation of RWCMD's North Rd site in 2011 enabled step-change to create a rich cultural offer to the public through a diverse and world-class creative programme that combines College productions (students) with a roster of international visiting artists and directors. In addition, a significant London season encompasses our NEW theatre productions, showcase events, and our graduating Design students' exhibition, 'Balance'.

Equally the College champions collaborations between artists and communities, creating significant wider reach. Students across all courses are involved in performances and workshops in schools and community venues, not least in areas of deprivation and particular need. A network of residencies for small ensembles in small arts and community venues increasingly extends across Wales including to Theatr Clwyd in North Wales, Rhosygilwen in West Wales and Hay Castle. Our ambitions are to be a unifying force within Wales, bringing together diverse communities and interests, and to showcase Wales and Welsh talent internationally.

The value that RWCMD holds for the nation is therefore multi-layered: nurturing an international community and talent pipeline for the creative industries - championing future artistic excellence in Wales; *and* enriching the cultural life of the nation, supporting individual and community well-being and place-making; and contributing to Wales' position on the global stage.

#### 2.1.1 Professional training in music and drama

The conservatoire delivery model relies on:

- Industry-level facilities and immersion in industry and professional practice, including for high-quality performance, production and arts management opportunities.
- Intensive, immersive, practical and personalised learning
- Diverse teaching staff from industry and visiting artists from across the globe

RWCMD's degree courses are based on these elements, and are designed to prepare people for transition into highly skilled areas of the creative industries. The course portfolio covers classical music and jazz performance, composition, conducting, acting, musical

theatre, design, stage management and arts management. Recent additions include Foundation courses in scenic construction and scenic painting in response to industry demand and a need to diversify pathways and access into the industry.

We proactively attract an international community of students, recruiting over 100 new international students to commence study in 2024 from over 25 countries. We recognise that the arts are global industries where artistic voice, story-telling and creativity thrive on the stimulation of intercultural exchange and collaboration. As part of our community we also have a particular wish to nurture talent from right across Wales, to support the next generations of artists from this nation, and to protect and deepen Wales' renowned cultural traditions and to grow its international reputation for artistic excellence.

In recent years, responding to rapid change within the music, theatre and film industries, and acutely aware of the fragile state of the arts, we have been proactive in reshaping many of our courses to strengthen emphasis on students engaging with communities through performance and co-created projects. This both equips emerging artists with vital skills and experience for contemporary careers, and supports our civic mission and belief in the value of the arts in the centre of society. Examples include professional placements with the Forget-Me-Not-Chorus, collaboration with the Aloud Charity, and performances/workshops in schools.

RWCMD alumni celebrated across the world include Sir Anthony Hopkins, Ruth Jones, Eve Myles, Rakie Ayola, Callum Scott-Howells, Toks Dada (Head of Classical Music at the Southbank Centre), Tianyi Lu (conductor), Debbie Duru (designer - recent Black British Theatre Award) and Gabbie Slade (costume designer - Tony award and an Olivier nomination for 'Six' the musical).

The College has been no.1 in the Guardian league table for drama courses three times since 2013, and has a long tradition of royal harpists with links to the college. The current King's Harpist, Mared Pugh-Evans, joined the college in 2016, succeeding RWCMD graduates Alis Huws and Hannah Stone. Fellow, graduate and artistic director of World Harp Congress 2020, Catrin Finch was the first harpist to hold the post when the tradition was re-established in 2000.

Establishing Cronfa Syr Bryn Terfel in partnership with the world-renowned baritone, (a fund to support talented young artists training at the College, who might otherwise be unable to benefit from its advanced training because of financial barriers), has been another mark of confidence in the College. In 2024 Cronfa launches a new international biennial song prize in which participants will sing in Welsh as well as their chosen language.

### 2.1.2 Enriching the cultural landscape of Wales

The foundation of RWCMD's creative programme lies in College productions and performances. This is supplemented by a wide range of visiting artists, and taken together the programme provides a unique and significant cultural offer in Cardiff and for communities in the Cardiff region. In addition, we are able to host a range of events for arts and community partners, including the Cory Band, Forget-me-not Chorus, Blak RAT Productions.

It is perhaps a well-kept secret that in terms of numbers of productions, RWCMD is the most prolific producer of theatre in Wales. This includes our annual NEW season of commissioned new plays, which each year encompasses a co-commission with Sherman Theatre for a Welsh playwright. An annual Shakespeare production is filmed and offered free to all schools and colleges in Wales, together with a supporting resource pack. The College also offers the most extensive programme of classical chamber and jazz music, much of this taking place in the Dora Stoutzker concert hall, which is regularly used as well for high-profile events, for example by the BBC for Cardiff Singer of the World and Young Musician of the Year.

Access and inclusion are currently central strategic objectives, encompassing work with diverse groups, including young people under 18. Following completion of an access audit for our North Road campus in 2022 a programme of work over several years has been articulated. Milestones along the way include preparation of fully accessible facilities in order to be able to host the National Open Youth Orchestra at the College; and participation in the Craidd partnership of five theatre organisations in Wales dedicated to improving mainstream representation for and with Deaf, disabled and neurodivergent people across Wales.

Appointment of a Communities Engagement Partner in 2022 has further catalysed engagement with schools, participation in the Tempo Time Credits scheme that supports access to event tickets, and development of key community partnerships such as with the Windrush Elders, who meet weekly at the College.

All of this contributes to our determination to be a fully inclusive conservatoire with artistic excellence and community at its heart. Our direction is further exemplified in the College's partnership with Cardiff Council, and the commitment to a 99 year residency in the heritage building, Yr Hen Llyfrgell, the Old Library, in the city centre. In the first place, this partnership provides the College with the most cost-efficient approach to acquiring new space, which has been desperately needed for student rehearsal and teaching as we grow our student numbers. Over and above this, however, the residency enables us to lean further into our civic mission, exploring contemporary placemaking through the arts and ways of co-creating cultural activity and learning opportunities, including for example establishing a Sing Loud Choir for those living with Parkinsons and their families/carers from autumn 2024. The Old Library also acts as a hub for our emerging residencies network, a gathering point for the skills development, creativity and evolving practice this involves. The College has plans for capital development of this building, a restoration project to support and enable our vision that re-enlivens the Old Library's original mission for arts and education. It is important to note that the Board has decided that the capital costs of this project will be sourced from philanthropy and capital fundraising efforts rather than from core College revenue. To date, the capital campaign has unlocked the two biggest ever philanthropic gifts to RWCMD.

## 2.2 RWCMD within the conservatoire sector: the financial challenge

Conservatoires and drama schools in the UK form RWCMD's closest peer group. They are all operating in the context of current pressures in higher education together with the additional financial pressures on the performing arts industries. Within this group, RWCMD

has a particular challenge in that it receives the least public funding, with Trinity Laban, the nearest comparator in terms of public funding, receiving 47% more than the College (33% more for Teaching).

The table below provides the financial operating context for the College within the conservatoire and drama school sector, highlighting a representative sample taken from the Conservatoires UK group. This includes three multi-disciplinary institutions, two music only, and one drama school.

<b>Institution</b>	<b>Royal Welsh College of Music &amp; Drama</b>	<b>Royal Conserv. of Scotland</b>	<b>Royal College of Music</b>	<b>Royal Northern College of Music</b>	<b>Guildhall School of Music &amp; Drama</b>	<b>Trinity Laban</b>	<b>Royal Central School of Speech &amp; Drama</b>
Degree students	869	1244	938	890*	1040	1246	940
International student %	17	58	48	33	36.3	34	34
Annual overall surplus/deficit (000s)	608	-566	1,300	404	-2068	-2237	220
<b>Overall cash position (000s)</b>	<b>4,955</b>	<b>5,737</b>	<b>4,700</b>	<b>9,937</b>	<b>2,600</b>	<b>1,500</b>	<b>15,931</b>
<b>Income</b>	<b>£m</b>	<b>£m</b>	<b>£m</b>	<b>£m</b>	<b>£m</b>	<b>£m</b>	<b>£m</b>
Tuition fees	10.3	11.7	17.2	13.1	16.7	15.0	12.1
Grants (# see below)	4.3	13.9	7.1	6.7	7.5	6.3	9.6
Research grants	0.0	0.2	0.4	0.2	1.3	0.9	0.7
Other income	2.0	0.7	2.5	1.8	3.4	3.9	0.7
Investment income	0.3	0.4	2.3	1.9	0.0	0.4	0.3
Donations & endowments	4.0	0.8	4.6	2.6	0.0	1.2	0.6
City of London (direct support)	0.0	0.0	0.0	0.0	11.2	0.0	0.0
<b>Total Income</b>	<b>21.0</b>	<b>37.7</b>	<b>34.1</b>	<b>26.3</b>	<b>40.1</b>	<b>26.8</b>	<b>24.0</b>
<b># Breakdown of grant income from HE Funding Councils £m</b>							
Teaching	3.9	12.9	5.1	5.1	5.1	5.2	5.2
Research	0.1	0.4	1.2	1.4	1.5	0.9	3.9
Innovation	0.0	0.4	0.3	0.0	0.6	0.0	0.0
Other grants	0.0	0.05	0.1	0.0	0.1	0.1	0.04
Capital grants	0.3	0.3	0.2	0.1	0.1	0.2	0.4
<b>TOTAL</b>	<b>4.3</b>	<b>13.9</b>	<b>7.0</b>	<b>6.7</b>	<b>7.5</b>	<b>6.3</b>	<b>9.6</b>

## Notes

All figures are for 22-23 and are taken from annual accounts or Times Higher Education 2024 data unless otherwise stated.

**Tuition fees:** the College is set on a trajectory to build fees income to £14m over the next 4 years, an increase of 35% from 2022/23.

**Higher education grants:** the College receives the least. The nearest peer, Trinity Laban receives 47% more (33% more for Teaching). The median institution, the Royal College of Music receives 65% more (31% more for Teaching).

\* 2021 figure

The Murphy review in Wales, published in 2018, considered specialist performing arts training in higher education, and its recommendations resulted in the reinstatement of premium funding to the College for this teaching in 2019 on a Wales specific formula (£3m, plus a further £0.3m with the introduction of undergraduate Musical Theatre, and £0.5m strategic funding). Notwithstanding this, the CUK comparison indicates the extreme pressures on RWCMD and highlights the rationale for the very difficult decisions needing to be made. Furthermore, this funding has had no uplift for inflation since 2019, and the 6% cut in 2024/25 will erode a portion.

As mentioned above, we have developed detailed proposals to reduce our operating costs from the 2024/25 academic year by 10% - equivalent to £1.5m, and through 2024/25 will move to planning reductions to take us up to 20-30% over the next two years, a further £1.5m and £3m respectively.

Alongside proposals for cost savings, close attention has been paid in recent years to growing RWCMD's revenue base. The biggest opportunity lies in growing student numbers, and international students in particular. While the very nature of conservatoire training requires small cohorts and an intensive, face-to-face experience, much effort has gone into both domestic and international recruitment in the last few years (aligned with other UK conservatoires), and we have demonstrated 6% growth in student numbers since 2019/20. Nevertheless, the disruptions of COVID, diminishing arts provision in schools and confidence in the arts as a viable profession, and additional barriers for overseas students to studying in the UK have made student recruitment very challenging. The position for entry in 2024 is also looking relatively encouraging, suggesting that our concerted efforts of the last year in particular in this direction are enabling the College to mitigate some of the recruitment challenges being experienced across the HE sector.

Establishing a sustainable way forward for the College overall is challenging in the current climate, and, as the decision to stop weekly provision within Young RWCMD has intimated, there is now a potential threat to the nature of conservatoire provision and to being a world-class, specialist higher education provider and an institution making a significant and unique contribution to the cultural life of Wales.