

Agenda – Pwyllgor Diwylliant, y Gymraeg a Chyfathrebu

Lleoliad: I gael rhagor o wybodaeth cysylltwch a:
Ystafell Bwyllgora 2 – Y Senedd Steve George
Dyddiad: Dydd Iau, 10 Mai 2018 Clerc y Pwyllgor
Amser: 09.00 0300 200 6565
SeneddDGCh@cynulliad.cymru

1 Cyflwyniad, ymddiheuriadau, dirprwyon a datgan buddiannau

2 Cynrychiadau ffilm a theledu mawr yng Nghymru: sesiwn dystiolaeth 2

(09:00 – 10:15) (Tudalennau 1 – 27)

Ed Talfan, Cynhyrchydd–Cyfarwyddwr, Severn Screen

Dewi Gregory, Cynhyrchydd, Truth Department

Catryn Ramasut, Cynhyrchydd, Rheolwr Gyfarwyddwr, Ie Ie Productions

Roger Williams, Cyfarwyddwr, Joio

3 Cynrychiadau ffilm a theledu mawr yng Nghymru: sesiwn dystiolaeth 3

(10:15 – 11:30) (Tudalennau 28 – 45)

Ruth McElroy, Athro yn y Diwydiannau Creadigol, Prifysgol De Cymru

Faye Hannah, Cyfarwyddwr, OurCOLAB

Tom Ware, Pennaeth Ysgol Ffilm a Theledu Cymru, Prifysgol De Cymru

Caitriona Noonan, Darlithydd yn y Cyfryngau a Chyfathrebu, Prifysgol

Caerdydd

4 Cynnig o dan Reol Sefydlog 17.42 i benderfynu gwahardd y cyhoedd o'r cyfarfod ar gyfer y busnes a ganlyn:



5 Trafod y dystiolaeth

(11:30 – 11:45)

6 Radio yng Nghymru: Papur ar y materion allweddol

(11:45 – 12:00)

(Tudalennau 46 – 66)

Egwyl (12:00 – 12:30)

7 Cynyrchiadau ffilm a theledu mawr yng Nghymru: sesiwn dystiolaeth 4

(12:30 – 13:30)

(Tudalennau 67 – 77)

Angharad Mair, Cadeirydd, BAFTA Cymru

Sally Griffith, Cyfarwyddwr Ffilm a Sinema, Canolfan y Chapter

Hana Lewis, Rheolwr Strategol, Canolfan Ffilm Cymru

8 Cynyrchiadau ffilm a theledu mawr yng Nghymru: sesiwn dystiolaeth 5

(13:30 – 14:30)

Euros Lyn, Cyfarwyddwr

Julian Lewis Jones, Actor

9 Cynnig o dan Reol Sefydlog 17.42 i benderfynu gwahardd y cyhoedd o'r cyfarfod ar gyfer y busnes a ganlyn:

10 Trafod y dystiolaeth

(14:30 – 15:00)

Eitem 2

Mae cyfyngiadau ar y ddogfen hon

Cynulliad Cenedlaethol Cymru / National Assembly for Wales
Pwyllgor Diwylliant, y Gymraeg a Chyfathrebu / The Culture, Welsh Language and Communications Committee
Cynyrchiadau Ffilm a Theledu Mawr yng Nghymru / Film and Major TV Production in Wales
CWLC(5) FILMTV28
Ymateb gan Severn Screen / Evidence from Severn Screen

Severn Screen Ltd - Introduction

Severn Screen is an independent film and television production company based in Wales. The company produces English and Welsh language content and has a diverse slate of projects in development with UK and international partners including BBC Films, XYZ Films, All3Media International, Revolution Films, S4C and Ffilm Cymru Wales.

Prior to setting up Severn Screen, Creative Director Ed Talfan was co-creator and producer of drama series HINTERLAND. The series ran for three seasons between 2013 and 2016 and was sold to over 100 countries by distributors All3Media International.

2017 was an exciting year for Severn Screen. The company took on an exceptional slate of productions, and worked with many talented individuals and companies. In all, we produced £16m worth of film and television content, generating over £11m of Welsh spend.

During 2017:

- We produced Netflix original feature APOSTLE in partnership with US based XYZ Films. The film was directed by Gareth Evans (THE RAID) and shot entirely in Wales. The production was awarded £385k of Welsh Government finance and generated a Welsh spend in excess of £6.3m. The film stars Michael Sheen and Dan Stevens and will premiere on Netflix later in 2018.
- We produced 8x60min drama series CRAITH / HIDDEN for partners S4C, BBC Wales and All3Media International. The series has been sold to North America and will premiere on BBC Wales and BBC Four in June.

- We produced feature film DENMARK for BBC Films and FfCW (in partnership with Daybreak Pictures). The bitter-sweet comedy, set in South Wales and Denmark and written by Welsh screenwriter Jeff Murphy and is being sold by sales agents WestEnd Films. The film was awarded £85k of Welsh Government funding and generated a Welsh spend of approx £1.3m.
- Our Welsh language film YR YMADAWIAD (THE PASSING) was premiered on S4C. The film won Best Drama at the Celtic Media Festival 2016 and four awards at BAFTA Cymru including Best Actor for Mark Lewis Jones, Best Writer for Ed Talfan and Best Cinematography for Richard Stoddard. Writer/Producer Ed Talfan was also nominated for Best Debut Screenwriter at the British Independent Film Awards 2016.
- We supported the production of BFI-backed feature RAY & LIZ, directed by Turner Prize nominated photographer Richard Billingham.
- We worked closely with Ffilm Cymru Wales, Charter Housing and Our Colab to devise and deliver the Foot in the Door training program, offering people not in employment, education or training the opportunity to work on a 'live set' and learn valuable new skills. The scheme is nominated at this year's Arts & Business Awards.

Severn Screen is committed to the sector in Wales. As part of this, we work closely with other Welsh companies including 4-Wood Construction, Cinematic, Soundworks, Bang and Bait.

The company works with cast and crew from across Wales and seeks to develop project that will shoot in all parts of the country. In the past twelve months we have filmed in North Wales, Pembrokeshire, Port Talbot, Cardiff and RCT.

Cynulliad Cenedlaethol Cymru / National Assembly for Wales
Pwyllgor Diwylliant, y Gymraeg a Chyfathrebu / The Culture, Welsh Language and Communications Committee
Cynyrchiadau Ffilm a Theledu Mawr yng Nghymru / Film and Major TV Production in Wales
CWLC(5) FILMTV05
Ymateb gan Truth Department / Evidence from Truth Department

Mae byd ffilm yn amgenach na Hollywood, diolch byth. Mewn gwyrionedd, mae cynhyrchu ffilmiau yn dalcen calen. Unigolion ymroddedig mewn swydfeydd bach ydyn ni. Rhwydd anghofio hynny a chael eich dallu gan yr enwau mawr fel Pinewood. Mae'n hollbwysig sicrhau lleoedd i gynhyrchwyr wrth y bwrdd wrth drafod a llunio polisi yn y dyfodol. Gobeithio bydd y llywodraeth yn dilyn esiampyl y pwyllgor hwn.

Cwmni bach yn llwyddo

Mae Truth Department yn cynhyrchu ffilmiau i'r farchnad ryngwladol. Mae'n ffilmiau yn cael eu dangos mewn gwyliau o'r radd flaenaf, yn ennill gwobrau mawr ac yn cael eu gwerthu i ddosbarthwyr ledled y byd. Mae cynhyrchiadau ffilm yn gallu dod â budd mawr i'r economi trwy gyflogau, a rhoi gwlad fach ar y map. Fel bron pob cwmni cynhyrchu ffilmiau annibynnol, mae'r cynhyrchydd yn gweithio mewn swyddfa fach, fel arfer gydag un neu ddau gyflogai parhaol yn unig, a rhwydwaith o bobol yn gweithio'n llawrydd iddo.

Model busnes diffygiol

Mae gwneud busnes parhaol o gynhyrchu ffilmiau'n anodd iawn. Mae'n risg i'r cynhyrchydd yn uchel bob tro. Mae'r farchnad yn gystadleuol iawn ac yn newid yn glou. Yn yr oes ddigidol sydd ohoni, mae'n amhosibl amddiffyn ffilmiau rhag cael eu gwyllo am ddim. Y cwmni cynhyrchu yw'r ola o bawb i gael elwa, os oes elw o gwbl. Mae ond yn bosibl parhau trwy gymorth gwlad a phen galed.

Cymorth gwlad

Yn y DU, mae'r credyd treth i gynhyrchwyr ffilmiau (UK Film Tax Relief) wedi gwneud gwahaniaeth mawr. Mae'r cynhyrchydd yn gallu hawlio'n ôl un bunt am bob pedair mae'n gwario ar gynhyrchu yn y DU. Mewn gwyrionedd, mae'r rhan fwyaf o'r arian yn cael ei buddsoddi yn y ffilm ei hun, ond o leiaf mae gwneud ffilmiau yn y DU yn rhatach nag y byddai fel arall. Mae hyn yn gwneud y DU yn ddeniadol i gynhyrchwyr o dramor ac yn cryfhau sefyllfa cynhyrchwyr yma. Fyddai Truth Department ddim wedi goroesi cyhyd hebdo. Does neb sicrwydd am ba hyd bydd y polisi'n goroesi.

Cropian cyn cerdded

Mae cynhyrchwyr fffilmiau annibynnol yn dechrau trwy gynhyrchu fffilmiau gyda chyllidebau cymharol fach, e.e. fffilmiau dogfen, neu fffilmiau gyda chast bychan heb effeithiau drudfawr. Trwy brofi ei hun gyda chyllideb fach, mae'r cynhyrchydd yn gallu denu buddsoddiad mewn fffilmiau drutach. Gallai Llywodraeth Cymru wneud gwahaniaeth mawr i'r sector yn y tymor hir trwy roi cymorth i'r cynhyrchwyr cynhenid sydd ar hyn o bryd yn cynhyrchu fffilmiau ar gyllidebau bach.

MIB a Pinewood

Mae Llywodraeth Cymru wedi buddsoddi yn y sector trwy'r gronfa MIB. Mae'n debyg taw denu cynhyrchiadau mawr o dramor yw'r nôd. Mae lle i hyn mewn unrhyw strategaeth wladol – mae pob cynhyrchiad yn talu cyflogau ac yn gwario ar wasanaethau lleol wedi'r cyfan.

Mae nifer o anfanteision i'r polisi. Yn gynta, dyw'r effaith ddim yn debyg o bara'n hirach na'r gefnogaeth ei hun. Os bydd y gronfa'n dod i ben, neu os bydd cronfa fwy deniadaol yn rhywle arall, daw'r cynhyrchiadau a'r swyddi i ben, a'r gweithwyr yn gorfod gadael Cymru i ddilyn y swyddi.

Dim ond fffilmiau gyda chyllidebau yn uwch na £1.5M sydd yn gynnwys i geisio am gronfa MIB. Ac mae'n debyg bod y costau cyfreithiol bob tro yn affwysol o uchel. Mae ond yn gwneud synwyr busnes i'r cynhyrchiadau mwya drudfawr ddefnyddio'r gronfa. Mae hyn yn cau allan cynhyrchwyr lleol.

Mae'r gronfa MIB hefyd yn gaeëdig i gynhyrchwyr dogfen sydd â diddordeb yn y byd tu hwnt i Glawdd Offa. Mae'n amhosibl cysoni'r angen i fffilmio tramor gyda'r gofyniad gan y gronfa i wario'n helaeth yn lleol. Mae goblygiadau i iechyd diwylliant Cymreig os cyfyngir ein canfas i Gymru'n unig.

Yn ola, mae perchnogaeth y fffilmiau hyn (underlying Intellectual Property) yn rhywle arall. Yn ymarferol felly, mae arian trethdalwyr yn cael ei wario er budd perchnogion tu hwnt i Gymru. Hen stori yw hyn: Cymru fel estyniad o economi rhywle arall. Y gangen yw'r rhan gynta i gael ei thorri, er mwyn amddiffyn y canol.

Hybu cynhyrchwyr cynhenid

Os am ddatblygu'r diwydiant i'r hir dymor, rhaid cefnogi cynhyrchwyr yn lleol. Gellid ystyried sawl ffordd i gyflawni hyn:

Yn gyntaf, byddai'n bosibl addasu cronfa MIB trwy ei gwneud yn ofynnol i gynhyrchiadau o dramor gyd-gynhyrchu gyda chynhyrchwyr addas yng Nghymru, os am gael dwylo ar yr arian. Gofyniad digon cyffredin yw hyn. Byddai cynhyrchwyr Cymru yn derbyn ffi, ond mae'n bosibl byddai'r budd mwyaf yn dod o gael enw ar ffilm fawr a pherthynas weithiol gyda chwmni mawr. (Os am gymhwyso cynhyrchwyr, Ffilm Cymru fyddai'r corff mwyaf gwybodus yn y maes.)

Mae seilwaith yn bodoli'n barod ar gyfer hybu talent cynhyrchu o Gymru, sef Ffilm Cymru. Mae Ffilm Cymru yn gwneud gwaith glew iawn gydag arian bach (o'r Loteri – ddim o goffrau Llywodraeth Cymru). Mae ganddyn nhw lai na £1M y flwyddyn i'w gwario bob blwyddyn ar bob dim – cynhyrchiadau, datblygu, arddangos, staff, cefnogi cwmnïau. Byddai arian ychwanegol yn eu coffrau'n mynd ymhell – heb yr angen i wario ar greu corff arall.

Mae'n werth ystyried mwy nag un ffordd i fuddsoddi. Er enghraifft, byddai MIB ar ei newydd wedd yn gallu parhau i ddenu cynhyrchiadau tramor (yn cadw'r rheol o luosi'r buddsoddiad mewn gwariant lleol). Ar yr yn pryd, gellid agor cronfa arall ar gyfer tyfu busnesau cynhenid i'r hir dymor – ar gyfer ffilmiau llai drud, a heb yr un anghenion gwariant lleol fel bod modd i'r cynhyrchydd gau cyllideb trwy gyd-gynhyrchu gyda gwlad arall ac fel bod dogfenwyr yn gallu gwneud ffilmiau am y byd amgenach.

Mae lle i ddarlledwyr Cymreig chwarae rhan trwy sefydlu slotiau pwrpasol ar gyfer ffilmiau o Gymru – boed yn ddogfen, neu wedi'u sgriptio. Yn ddiweddar, pitw iawn fu eu cyfraniad. Dyw ITV Cymru ddim yn mentro dim. Mae'n debyg bod BBC Cymru wedi buddsoddi ffi drwydded awr mewn un ffilm ddogfen yn ddiweddar – ond dim byd arall. Mae S4C yn comisiynnu ffilm deledu o dro i dro – efallai unwaith bob blwyddyn neu ddwy, ac hynny heb adael argraff ar y farchnad ffilm na chynulleidfaeodd rhyngwladol.

BBC Storyville yw'r unig slot rheolaidd ar gyfer ffilmiau dogfen hir yn y DU – a hynny ar gyfer ffilmiau o ar draws y byd i gyd. Felly mae cynhyrchydd ffilm ddogfen o Gymru'n aml yn gorfod mynd yn waglaw i'r cyfandir a thu hwnt i godi arian ar gyfer ffilmiau o Gymru. Byddai slot pwrpasol ar gyfer ffilmiau dogfen hir – efallai trwy gyd-weithrediad BBC ac S4C – yn gwneud byd o wahaniaeth. A'r un peth gyda ffuglen wrth gwrs.

Mae'n werth edrych ar wledydd eraill i gael penderfynnu ar y ffordd ymlaen. Cyhoeddodd Creative Scotland strategaeth £9m newydd ar gyfer hybu'r sector ym

mis Rhagfyr 2017, sy'n cynnwys £4m ar gyfer datblygu ffilmiau gan wneuthurwyr yr Alban (cymharer â £1M Ffilm Cymru ar gyfer popeth). Boed trwy grantiau, llochesi treth, neu ddyfeisiadau eraill, mae gwledydd bach fel Iwerddon a Lwcsembwrg i gyd wedi ffeindio eu ffyrdd eu hunain i hybu'r sector. Byddai arolwg o'r rhein yn ddefnyddiol iawn. Beth am gael Ffilm Cymru neu'r ystadegydd Stephen Follows i baratoi adroddiad cymhariaethol cyn gwneud penderfyniadau hir-dymor?

Mae tyfu sector cynhyrchu cynhenid, hynny yw, cynhyrchwyr ffilm yng Nghymru, yn broses sydd angen buddsoddiad gofalus a hir-dymor cyn bydd hi'n dwyn ffrwyth. Ond o wneud hynny, gallwn dyfu diwydiant llewyrchus a rhoi llwyfan byd i dalent Cymreig.

Mae cyfyngiadau ar y ddogfen hon

Cynulliad Cenedlaethol Cymru / National Assembly for Wales
Pwyllgor Diwylliant, y Gymraeg a Chyfathrebu / The Culture, Welsh Language and Communications Committee
Cynyrchiadau Ffilm a Theledu Mawr yng Nghymru / Film and Major TV Production in Wales
CWLC(5) FILMTV18
Ymateb gan Joio / Evidence from Joio

Context

Our response to the above consultation should be read in the context that our company – Joio – is one of the few indigenous Welsh companies to have successfully secured funding from the Welsh Government’s Media Investment Budget in a TV project. To the best of our knowledge BANG is also the only Welsh language project to have received funding from the MIB fund.

This was our first attempt to secure funding from WG and the funding was essential in realising the project. We wish to reinforce the importance of this investment in bringing BANG to the screen and the legacy that has followed. However, while we are incredibly thankful to WG for investing in the project, we believe all parties involved would agree it was a very drawn out process and incredibly frustrating.

Having made an initial approach to Pinewood (who were managing the fund on at that time on behalf of WG in June 2016) to discuss investment in BANG we eventually received the funds in December 2017. The series had finished shooting and had been broadcast on S4C by this date.

The application and decision-making process was lengthy and complicated. There was a great deal of confusion and frustration caused by a lack of communication and information on Pinewood’s part and I think it was particularly problematic that Pinewood did not have a representative based in Wales who was easily accessible to us.

We were not always confident we knew how the process of awarding the investment would play out and what the timescale would be. This made planning our production and the cash flow incredibly difficult.

Members of WAG’s Creative Industries team were incredibly proactive and helpful throughout the process and we don’t think we would have successfully accessed the investment without the dedication of members of this team.

BANG was successfully produced in 2017 to popular and critical acclaim and is the first Welsh language drama series to be exported to foreign territories including Sweden, Denmark, Finland, Iceland and the USA.

BANG recently won an award at the New York Film and Television Festivals and has been nominated in the Celtic Media Festival. The series was also shortlisted for a Writers' Guild of Great Britain award alongside Line of Duty and Taboo.

Economic Impact

£2,561,928 of BANG's £2,829,996 total budget was spent in Wales.

Over 90% of the budget was spent in Wales. This is significantly higher than the minimum Welsh spend we were required to spend in Wales under WG's requirements for investment. Much of the spend that wasn't spent in Wales was paid to Welsh actors represented by London agencies and represents our legal costs and WG's legal costs which were managed by London based firms.

The production company Joio is based in Neath and holds a bank account at a branch in the town centre. BANG was filmed entirely in Port Talbot with a mostly Welsh cast and crew. The production therefore has clearly had an impact on the economy of the area especially as the intellectual property is Welsh-owned.

This is an important point to emphasise. BANG is owned by a Welsh company and all benefits will flow back to Wales. It allows the company to build on its success, generate further business and continue to employ Welsh talents.

Cultural Impact

BANG's impact has been – and continues to be – transformative. BANG wouldn't have been possible without additional investment. Banijay Rights's investment and WG's investment through the MIB allowed us to realise a drama series that has been S4C's most successful drama series since Y Gwyll/Hinterland. However, unlike Y Gwyll/Hinterland, there is only one version of BANG which is filmed 80% in Welsh language. The reach of the series was very high for an S4C drama series and discovered a new audience for the channel in the South Wales valleys and outside of Wales.

Unlike many other shows, BANG is conceived in Welsh and written in Welsh.

Viewing figures for the series on-demand via S4C's catch-up system and the iPlayer have been record-breaking for an S4C drama and we know the series has

been watched by a significantly large younger audience and by families in bilingual homes. Anecdotally we have received many reports that BANG is the first time partners (where one doesn't speak Welsh) have sat down to watch a Welsh language drama together.

Locally the series has successfully promoted the Welsh language at a time when the local authority is constructing a new Welsh medium secondary school in the centre of the town and Swansea University have plans to open a BANG store in the shopping centre in Port Talbot to promote adult Welsh lessons.

The project's legacy therefore is still being felt in very real ways that will dovetail into WG's ambition to create one million Welsh speakers by 2050.

Since BANG also only exists as one programme (unlike Hinterland, Keeping Faith and Hidden) the Welsh language is being positively exported to other countries which has a positive impact on people's perceptions and attitudes towards the language.

We established a successful partnership with Neath Port Talbot county council and had contact with many local schools, charities and other organisations based in the town.

It is important to reiterate that the WG's funding of the project was key to its realisation and all that has followed.

Value for Money

BANG was made for £350,000 an episode which is a very modest budget for television drama. WG invested £350,000 in the project but on such a modest budget a relatively small investment like this was key.

It should be noted that the legal fees and costs payable to Pinewood for their role in the production are comparable to the costs other companies going through the process of seeking investment from the MIB would have occurred despite our lower global budget.

Skills

We believe there isn't a skills shortage in Wales in terms of crew. Large scale investment by the BBC, S4C and Welsh Government over many years has led to an army of highly-skilled technical teams, make-up artists, costume assistants etc. who are amongst the best in the world.

We believe there needs to be a campaign to invest in the work of Welsh producers, directors and writers. We need to ensure that these key talent groups are enabled to live and work in Wales to create their best work and do not believe currently that the system is enabling them to do so.

Many of the projects WG has funded have relied on importing these key talents and it would be interesting to look at a system that backs the Welsh talent that is currently here.

Other

During the many years WG has been investing in the film and television sector it has always been the big budget American shows that have secured the headlines. We have always felt the government should be actively supporting the indigenous productions and particularly the Welsh language productions which realistically have fewer investment opportunities open to them.

By supporting the Welsh talent and the intellectual property generated in Wales that Wales can help build and maintain a sustainable sector that is able to export its programmes worldwide. While we understand (and appreciate) the arguments for attracting productions to Wales with investment it will always be true that the key roles in the production will be taken by individuals who are being parachuted into Wales and that any profit will flow back to companies in London, Los Angeles and New York.

In our opinion, WG should be endeavouring to fund the ambitious Welsh project that can promote Welsh talent and increase the diversity and scope the television drama projects coming out of Wales.

The projects realised by S4C in 2017 – BANG, Un Bore Mercher/Keeping Faith and Craith/Hidden have made an impact beyond Wales, with an easily accessible investment model supported by WG we could achieve so much more over a longer timescale.

We would be happy to appear before the committee to provide further evidence should they wish us to.

Eitem 3

Cynllun Cenedlaethol Cymru / National Assembly for Wales

Pwyllgor Diwylliant, y Gymraeg a Chyfathrebu / The Culture, Welsh Language and Communications Committee

Cynyrchiadau Ffilm a Theledu Mawr yng Nghymru / Film and Major TV Production in Wales

CWLC(5) FILMTV22

Ymateb gan Prifysgol Caerdydd / Evidence from Cardiff University

Introduction

This a crucial moment to reflect on the film and television industries we have and those we want in the future. Changes to audience behaviour, media infrastructure and the political landscape have altered the screen industries. In submitting evidence to this inquiry my ambition is to help create a culturally rich and diverse screen sector here in Wales that is economically sustainable and continues to compete internationally.

This submission draws on the research that I have conducted on the Welsh television industry, much of which was done in collaboration with Professor Ruth McElroy (University of South Wales). Over the past seven years I have also collaborated and worked with colleagues in other small nations such as Ireland and Denmark to understand some of the distinct challenges facing screen sectors in a more competitive digital environment.

Our research tells us there is certainly evidence of gains made in further nurturing and building the sector locally (McElroy and Noonan 2016). The international journey of the Welsh-language drama *Y Gwyll/Hinterland* (S4C 2013-) coupled with investments in Roath Lock studios by the BBC, in Pinewood Studios and by the production company Bad Wolf are testament to the vital infrastructure that now underpins the Welsh production sector today. However, mixed with a renewed confidence in the sector is an awareness that further interventions, resources and accountability are needed if these successes are to be fully leveraged by local audiences and industry.

A sustainable production sector needs three overlapping elements: infrastructure, decision-making power and financial support. As detailed above, much work has taken place to build the physical infrastructure of the Welsh sector and this is to be welcomed, not least in the context of recent debates in Scotland and Ireland (McCarthy 2018) around securing this as a vital, competitive resource. Now the emphasis within the sector needs to be on building long-term sustainability.

The committee takes at its starting point ‘major television’ and there is merit in that approach. Large-scale productions like *Doctor Who* (BBC) and *Game of Thrones* (HBO) can transform the local production ecology of nations like Wales and Northern Ireland, and their impact can extend well beyond the production itself. I would, however, advocate that this focus on ‘major’ productions should not be at the expense of smaller productions as it may exclude other forms of television and film that might have important structural and cultural value. In our research we highlight the value not only of *Doctor Who* to the Welsh sector, but also of returning dramas like *Casualty* (BBC) and *Pobol y Cwm* (S4C) which offer an important route to building the professionalism of the sector and also offers stable employment in a sector known for its precarious working culture. These mid-scale productions are a space in which workers can develop their talents and becomes especially important to access and equality. The recent success of the Northern Irish comedy *Derry Girls* (Channel 4) highlights the possibilities (creative and commercial) of television which might not fit under the frame of ‘major television’ but which should not be forgotten in policymaking and sectoral planning.

Regarding the labour market it is clear that there is a knowledge gap around the creative labour market in Wales. The IWA Media Audit (2015) was an important resource in building an evidence-base on which changes to the sector were realised. However, gathering intelligence of that scale and then analysing the resulting data requires substantial resources and long-term planning. I would welcome further discussion and planning regarding building the knowledge infrastructure around the labour market especially given the localised impact of a number of changes including Brexit, BBC Studios and the UK’s Industrial Strategy.

Television drama production has been a beacon of success in Wales, yet in recent years this drama has rarely reflected life here. Wales is often relegated to merely a location for filming rather than part of the narrative setting, a concern recently echoed by Dr Nina Jones of Cardiff Metropolitan University (Jones 2018). The recent success of *Keeping Faith/Un Bore Mercher* (2017–) demonstrates that dramas set in Wales dealing with universal themes around relationships can be successful on nonnetwork and digital platforms like iPlayer. A commitment to making content like this more routinely visible and available on *network* services must be the next step in achieving sustainability. Continuing engagement with BBC senior executives and commissioning editors to ensure network content from and for Wales should remain a priority for the committee.

Keeping Faith/Un Bore Mercher also demonstrates the productive relationship between local independent production company Vox Pictures, BBC Wales and S4C, and this is to be supported. Like others (Marshall 2018), I broadly welcome the recommendations of the recent DCMS report on S4C especially where it allows for stable and secure funding and more effective commercial remit in which to promote the Welsh language. Any actions by the committee to support these recommendations would also be welcomed. A recent chapter by Professor McElroy and I (2018) in a volume on public service broadcasting in a networked society pointed to some of the challenges of the current digital landscape including the power exercised by large-multinational gatekeepers and its impact on pluralistic media provision. Creative solutions and policy collaboration are needed to deal with this issue and will become even more important for Wales in a post-Brexit context. In this context it will be crucial that Welsh policy-makers continue to dialogue with their European counterparts specifically around digital issues which transcend geographical borders such as funding, language access and the use of data.

The success of *Hinterland/Y Gwyll* (2013-) and *Keeping Faith/Un Bore Mercher* (2017) also demonstrates the value of co-productions to the Welsh production sector. It is important that support is made available for Welsh indies to secure co-productions and for these companies to continue to have access to opportunities for international partnerships - I hope through this consultation their specific concerns and needs in this regard are voiced. A recent article in *Screen Daily* reported a growing need for business and negotiation skills in order to support international distribution strategies (Baughan 2018). Establishing how this need might be addressed within the specific context of the Welsh production sector would be a useful outcome from this committee's inquiry.

One route for upskilling the sector has been through the work of Film Cymru. Their *Foot in the Door* initiative, which has partnered with local housing associations to help those who are not currently in employment, education or training to improve their chances of getting work, merits special mention as it addresses the twin aims of upskilling the labour market and improving access to the sector. Faye Hannah, researcher at the University of South Wales, is currently researching interventions in the labour market and will be able to speak to the merits of this scheme and the wider issues relating to talent development in Wales. In June this year I will lead a two-year, AHRC-funded project (in conjunction with Professor McElroy) which examines the aims and strategies of screen agencies in a

number of small European nations. We will ensure the committee is kept abreast of the research and we will report our findings directly to the committee along with relevant recommendations.

About the Author

Dr Caitriona Noonan is lecturer in Media and Communications at the School of Journalism, Media and Culture (JOMEC) at Cardiff University. Her research relates to television production, cultural labour and public service broadcasting. This research appears in journals such as the *International Journal of Cultural Policy*, *Cultural Trends*, and the *European Journal of Cultural Studies*. Caitriona is currently principal investigator on an AHRC ECR funded project 'Screen Agencies as Cultural Intermediaries: Negotiating and Shaping Cultural Policy for the Film and TV Industries within Small Nations'. In 2015/16 she was part of a research network on 'Television from Small Nations' with Prof McElroy, Dr Anne Marit Waade (Aarhus University), the European Broadcasting Union, Royal Television Society (Wales), S4C (Wales) and TG4 (Ireland). Caitriona serves on the steering group of the Centre for the Study of Media and Culture in Small Nations.

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Cynulliad Cenedlaethol Cymru / National Assembly for Wales
Pwyllgor Diwylliant, y Gymraeg a Chyfathrebu / The Culture, Welsh Language and Communications Committee
Cynyrchiadau Ffilm a Theledu Mawr yng Nghymru / Film and Major TV Production in Wales
CWLC(5) FILMTV29
Ymateb gan Our Colab / Evidence from Our Colab

Faye Hannah is Director of leading Wales' based creative company 'Our Colab' working collaboratively with the creative and cultural industries, primarily for the screen industry in Wales and across the UK. Our Colab design, deliver and collaborate to manage a wide range of skills, training and education projects. Faye brings expert knowledge of Creative Industries skills development and experience of conducting research as well as business support to develop and enhance client aims and objectives around skills and training. Our Colab clients include Creative Skillset, Ffilm Cymru Wales, Arts Council of Wales, NextGen Skills Academy, Fiction Factory, Severn Screen, Rondo, Westminster Kingsway College and BFI – delivering BFI Film Academies in Cardiff and Swansea since 2015.

Faye Hannah is a funded PhD Candidate researching at [University of South Wales in Cardiff](#). Her PhD research examines screen industries talent and skills development, creative labour and related policy in the context of Wales as a small nation within the UK and in comparison, to other small nations in Europe.

Faye has worked with a wide cross section of the UK Creative Industries, including between 2010–2014 Creative Skillset as UK Partnership Manager for Apprenticeships and Interim Director, Wales. Here she worked with an experienced team to develop and pilot the first Creative and Digital Media Apprenticeships in Wales with BBC Cymru Wales and the independent TV and film production sector. She managed and delivered SPFP and ESF projects during this time. Faye has also

worked delivering learning and events for BAFTA Cymru. In 2014 she founded [‘Our Colab’](#).

Overview

1. I fully welcome the committee’s enquiry into major TV and Film production in Wales and am supportive of any discussion that provides greater transparency for all. I am pleased to be offered the opportunity to contribute. I acknowledge the need to provide greater clarity around Welsh Governments policy aims relating to film and major TV production in Wales – a priority sector for Wales’ economic growth.
2. **OVERVIEW:** I would be encouraged to see the following areas considered as part of this inquiry:
 - i. **That the committee consider the entire eco-system of Wales’ screen industries, particularly around labour market intelligence relating to skills development and related support.** In terms of labour market, there is a knowledge gap in terms of understanding clearly the demographic and needs of the screen sector in Wales. Mapping of the size, shape and needs of this industry in Wales on a longitudinal basis would be a step to ensure greater evidence-based policy making and offer a view as to how the entire ecology of film and TV can be supported and how funding can be accessed to ensure economic and cultural growth. Defining ‘Who we are and What we are’ in Wales TV and Film industries is a first step in terms of establishing a baseline.

From a policy and funding perspective, acknowledgment of the importance of the role that all indigenous and non-indigenous TV and Film production companies play in Wales, in relation to developing the talent pipeline, as well as for high end and major TV and Film production. This should extend to the inclusion of independent production companies of all sizes and Welsh language

production companies as an important part of the talent development pipeline in Wales.

- ii. **Wales screen industries should not operate in a vacuum and it is essential that Welsh Government are aware and engaged in Creative Industries policy and skills developments UK wide and associated activity.** A focus on this, will ensure link-up and monitoring of best practice and knowledge sharing as well as 'opening-up' of opportunities UK wide.
- iii. **That any focus on skills, training and employability for the screen industries acknowledges and supports the needs of an increasingly flexible, highly mobile, self-employed workforce.** It is important to future growth that current creative labour market and its accompanying challenges are taken into consideration.
- iv. **That tackling barriers to industry access and broadening the diversity of industry is embedded in film and TV development initiatives and funding.**
- v. **That consideration is given to include vital sub-sectors in Wales that are integral to the eco-system and who contribute to major TV and Film production in these screen industries including Animation, Games, VFX and SFX.**

3. How support for the sector may be affected by the Welsh Government's new Economic Action Plan;

- 3. As a priority sector of economic importance, the Welsh Government has placed Creative Industries more broadly as strategically important to the economic and cultural value of Wales. Overall it is encouraging to see skills and employability as a priority area in the Economic action plan (2017), however it is not fully clear as to how creative industries and screen industries specifically are focused or considered within this.

4. **Indigenous Welsh production companies play a key role in developing skills for the overall talent pipeline in Wales, that includes major TV and Film production and as such they are both economically and culturally important.** One practical example of this would be Rondo, who since 2008 (based pan-Wales deliver award winning factual, drama and documentary in both Welsh and English) have been a vital base for developing and nurturing talent in North and South Wales at all grades, including producers, editors, script writers, actors. Many remain and return to the organisation, some develop freelance careers and others move to work elsewhere in Wales and UK wide within TV and film.
5. Any individualised sectoral approach would be encouraged– as outlined in the Welsh Government’s accompanying Employability Plan (Mar 18). **It is vital that a focus on skills and employability for the screen industries acknowledges and supports the needs of an increasingly flexible, highly mobile, self-employed workforce.** Consideration should be given to the current creative labour market and its accompanying challenges. **The ‘labour market challenges of tomorrow’ (as outlined in the Employability Plan Mar 18) exist in Wales’ creative industries today.**
6. Underlining the responsibility of employers to up-skill their workers is vital in a high volume of industries. Almost 40% (Priority Sector Statistics, 2017) of the creative industries workforce in Wales are self-employed and freelance, often working on short term contracts. **Identifying who is responsible for training a largely freelance labour force is a matter of urgent concern.**
7. Consistent Wales-derivative research focused on encouraging development of higher and specific industry relevant skills for existing freelance industry practitioners in Wales has been markedly absent since the close of the Skills for the Digital Economy project (2015) funded through ESF, S4C and TAC. The project saw a £4.2m ESF investment with a £9.3m return (Arad, 2015).

8. There are now significant differences between development of Apprenticeships in England (occupational standards) and Wales (frameworks) as well as the changes for employers brought in by the apprenticeship levy. This can be problematic, not least in ensuring parity between nations in provision and ensuring that industry focused higher-level qualifications are readily available for employers in Wales.

An example of this is the Level 4 industry developed standards by NextGen Skills Academy/AIM Awards in VFX in England, that are not currently available for industry in Wales. It would be key to understand the industry needs in Wales (mapping / measuring) to ensure that future solutions around apprenticeships are tailored to the needs of the TV and film industry. I understand as part of their BFI Future Skills funding- Creative Skillset in England are poised to undertake further work around development of apprenticeships for industry.

4. To investigate how Ffilm Cymru Wales, the BFI and others support the sector, and how this work complements the work of the Welsh Government in this area;

9. Ffilm Cymru Wales contribute significantly to the economic and cultural development for film and the wider screen industries in Wales. As an organisation alongside their extensive development and audience priorities, they fund and deliver several programmes that offer clear cultural access and opportunity at several entry points to industry.

Ffilm Cymru Wales highly successful Foot in the Door programme in the last 12 months, has seen them work with housing associations across Wales, including a pilot with Charter Housing Association to secure access and practical opportunities in Film and TV for 30 participants. These individuals were not in education, training or employment and faced socio socio-economic challenges that would act as a barrier to career in film and TV in Wales becoming a consideration, let alone a possibility. Many of these participants have much needed craft and technical skills more broadly that

are transferable to a range of skills gaps in Wales' TV, Film and creative industries in areas such as art department, production, sound, hair and make-up and costume.

Foot in the Door achieves success through Ffilm Cymru Wales and partners developing a more holistic, long term view to skills and talent development. It also delivers outcomes through building of long term partnerships with industry production companies such as Severn Screen, the housing sector and a deep understanding of industry access. The programme is funded through multiple channels, including Creative Skillset.

5. The support given to develop skills and address skills shortages in the industry, whether there is sufficient data to map existing skills.

10. Further connection and link up between Welsh Government Creative industries departments with Skills and Employability departments would undoubtedly support future activity to ensure that the screen industries are some way towards future-proofed in terms of workforce skills and talent development. It would also acknowledge the important link between growing skills, talent development and economic growth for the Film and TV industry in Wales.
11. In 2010, Professor Ian Hargreaves 'Heart of Digital Wales' report outlined (with reference to skills development and priorities) that; "There is no doubt that without a comprehensive and co-ordinated approach in this area, neither the Digital Wales agenda nor a refreshed Creative Industries strategy will enjoy sustainable success". The report also recommended that mapping the scale and needs of the sector was a first step, particularly in terms of measuring the progress of the creative economy. To date, neither of these key recommendations have continuously been carried forward in Wales.

At the time of this report, Creative Skillset Cymru (the sector skills council for the screen industries UK wide) had a base in Wales and the TV and Film industry expressed broad satisfaction with the arrangements in place to support skills development. Importantly, Creative Skillset Cymru linked in all elements of sectoral training and education, drawing and connecting training and creative industries provision through their work with research, Higher Education (The Tick, Wales Screen Academy) and Further Education (Digital media apprenticeships, mentoring support for FE and industry links) CPD (Skills for the Digital Economy programme) in Wales that was delivered based on regular research around industry needs.

In 2015, Creative Skillset Cymru (after 13 years of presence) ceased to exist in Wales as a base or as a support broker and funder of screen industries skills and talent. This was largely due to a reduction in central UK funding for Creative Skillset and Welsh Government funded projects ending: (ESF– Skills for the Digital Economy, Sector Priority Fund Pilot /2 Apprenticeships) and no wider commitment to fund the organisation in Wales going forward. **Since 2015, screen industries in Wales have experienced a gap in terms of the challenge of joining up, funding and supporting skills development and their talent pipeline across the board. This has specifically impacted independent production companies and freelance individuals in terms of targeting support where industry say it is most needed.**

12. In terms of mapping skills needs, gaps and industry demographic, there is existing data which is referenced and utilised in the absence of specific current data around the TV and Film industry within Wales.

- DCMS Economic estimates / Economic Estimates: Employment & Trade
- ONS Labour Force Survey
- Welsh Government Priority Sector statistics
- Creative Skillset (Census 2012) and Employment Surveys

There are challenges and limitations to some elements of this data. Individual methodologies need to be considered when evaluating the effectiveness of these metrics to be truly representative of Wales film and TV industry opposed to the broader creative industries.

- Ensuring that data is reflective of the current and changing landscape in Wales
- Standard Industrial and occupational codes (SIC & SOC) prove to be a challenging metric by which to measure an industry where there is a high volume of micro-enterprises (<4 employees) and fluid/multiple occupational titles and roles that may not always be reflective of specific job roles and descriptors within the industry. I understand that ONS are updating / have updated recently their data to reflect some of this.
- Data collection sources (i.e. APS– Annual population survey samples)
- The methodology of self-selection ensures industry employers and self-employed individuals are positioned to ‘stand up and be counted’ and that any UK wide data collection is fully representative of the workforce in Wales.
- Ensuring data and metrics are current.

Accurate representative data as to who works within the screen industries in Wales has been lacking. **Prior measurement of the wider creative industries (an often-problematic grouping to measure due to there being 11 broad sectors grouped to make up the creative industries) that includes Wales and its screen sector workforce are undertaken through a UK wide lens and UK focused organisations.** Developing an accurate picture of where the industry is now would be a starting point.

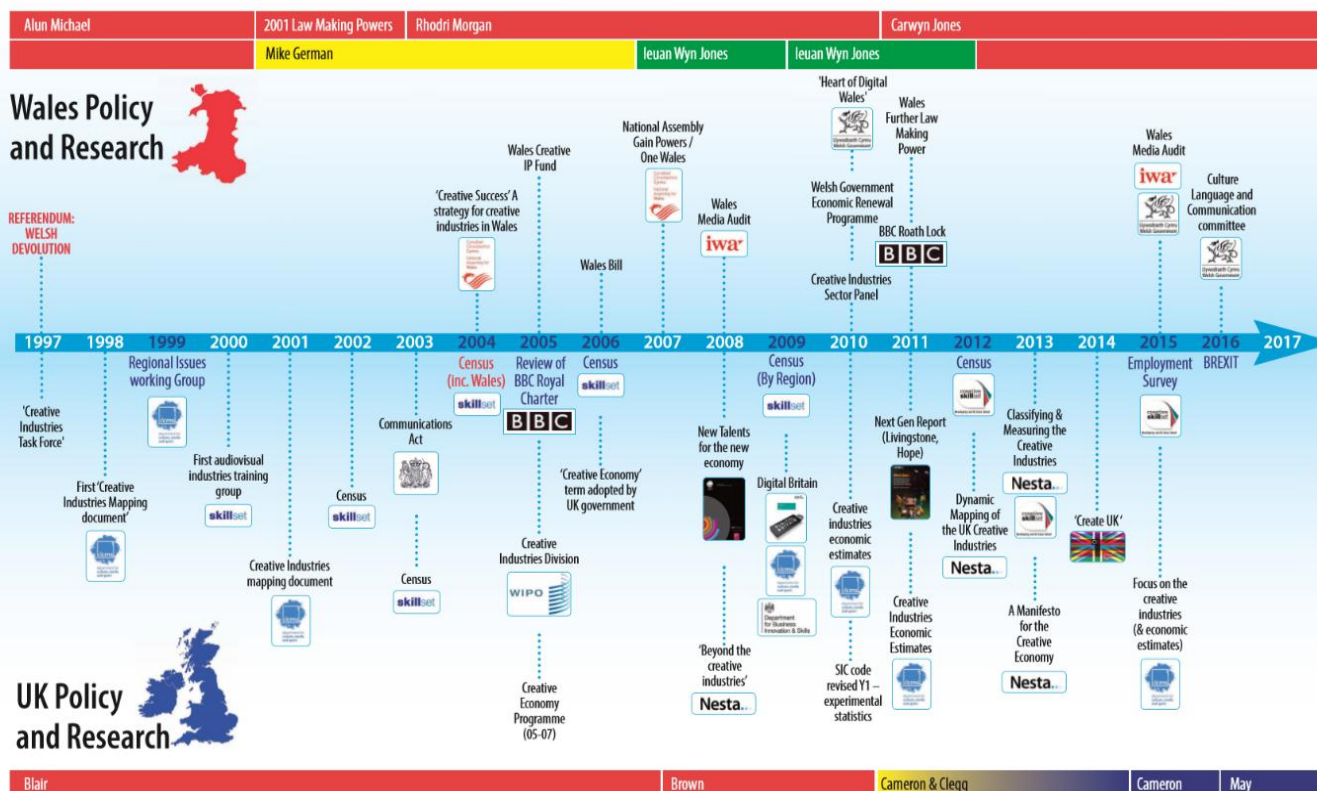
Initial research I have conducted as a PhD funded research candidate at the University of South Wales, highlights **the extent that existing creative industries and screen industries policies specifically centred around workforce and skills development, is derived from a UK (England) based standpoint across the last twenty years;**

Mapping Creative Industries Policy: Screen Industries Workforce in Wales

Faye Hannah, PhD Research Candidate



University of
South Wales
Prifysgol
De Cymru



There is no up to date Wales' derivative baseline data that exists as to the size and shape of Wales' screen industries, or in terms of defining what the skills gaps/needs are for the breadth of career starters, freelance practitioners and importantly all production companies and broadcasters in Wales. Undertaking this task is challenging as outlined. On a UK wide level, many organisations are working to deliver on parts of this agenda, including wider mapping work relating to the creative economy by NESTA and British Council.

- As part of the BFI's future skills action plan, Creative Skillset have committed to deliver 'skills forecasting' to understand how best to develop and support UK's screen industries. This is welcome, and it would be

encouraging if the Welsh Government could engage to ensure that this is truly representative of Wales and its labour market across the board. Methodology as well as industry engagement in Wales 'on the ground' will be key to how successfully this is truly representative of the industry here in Wales. A more accurate picture will be developed if it is assured that the entire ecology and nuances of Wales are considered – **very specifically it is vital that TV and film production more broadly as well as Welsh Language programming are a key consideration within this and not solely the economic driver of high end TV and film.**

14. Clear data and measurement of the workforce in Wales would support a further greater accuracy and specificity when targeting support for skills development, ensuring that support is placed where needs are greatest, dually linking to sectoral and government priorities. **Due to the fast moving, agile pace of the screen industry, any consideration of measurement needs to be longitudinal and iterative to ensure that any data on the size and shape of workforce in Wales is current and accurate.** It will also require specialist skills and knowledge to deliver this effectively.

Existing Wales based education, training and development initiatives in film and TV

15. An eco-system exists within the film and TV industry in Wales. There comparatively exists education, training, support, and a development eco-system in Wales for the screen industries. Organisations and programmes offer a range of careers advice, CPD, embedded vocational opportunity, qualifications, mentoring and training. These often act as progression steps and opportunities to and from each other. This is broad and ranges from primary school through to high-level industry CPD. These include (but are not limited to) Into Film, BFI Film Academies, It's my Shout, Foot in the Door, Creative & Digital Media Apprenticeships with Sgil Cymru, Cult Cymru, TAC, RTS, TAPE, Wales, BFI Network Wales, BAFTA Cymru, HE, FE as well as independent companies who undertake a range of

training activity for staff including any training delivered by companies and broadcasters for their own employees such as BBC Cymru Wales and Bad Wolf.

16. Any independent overview and joined-up approach to investing and supporting skills and workforce development that considers the whole of Wales TV and Film industry and its existing training and education offer would be welcome. Any funding support for training related to skills gaps should benefit a wide cross section of the industry and be informed by clear independent research and evidence of need. **An experienced and representative function focused on creative screen industries skills needs and labour/workforce development in Wales that is representative of and collaborates with all organisations already working to deliver industry training activity would be worthwhile considering.**

A clear 'one stop shop' that outlines purpose and scope of all education, training and development initiatives for Wales' screen industries would be beneficial for increased industry join-up and for those wishing to enter and progress within the industry.

Industry Access and Skills

17. There is significant UK wide focus currently on issues of diversity and class that highlight some of the socio-economic challenges (amongst others) that act as a barrier to entering the Film and TV industry. Recently this has stemmed from academia and industry including (but not limited to, as the body of research is extensive) the much-publicised Panic! 2018 research, that highlights the extent of the issue of class inequalities as a barrier to entry and progression within industry. It is worth noting the important use of longitudinal data in this study and how this synergises with goals encompassed in Wales' 'Wellbeing of future generations Act' (2015).

18. Developing a more diverse workforce in the screen industries in Wales, should be included at the heart of any strategy that focuses on training, skills and talent development. The 2017 ‘Rewriting the Script’ report (Welsh Government / Diverse Cymru) is a positive step – however practical delivery and embedding of the recommendations within industry is complex with no quick fix and needs considerable ‘buy-in’. Greater clarity as to how the whole industry in Wales can embed and deliver on a more diverse workforce and be practically supported to overcome barriers and exemplifying best practice would be welcome.
19. A plethora of brilliant, dynamic activities and initiatives exist across the UK where demonstrative collaboration and partnership between education, training and industry, supported by government, work to overcome the barriers facing those from diverse and under-represented backgrounds entering the industry. Understanding this would allow us not to ‘reinvent the wheel’. There are far too many to highlight, however a number I have worked with or engaged with in terms of best practice and pioneering activity are: ‘Access VFX’, ‘London Mayors Digital Talent fund’ initiatives and ‘Raising Films’.

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Eitem 6

Mae cyfyngiadau ar y ddogfen hon

Mae cyfyngiadau ar y ddogfen hon

Cynulliad Cenedlaethol Cymru / National Assembly for Wales
Pwyllgor Diwylliant, y Gymraeg a Chyfathrebu / The Culture, Welsh Language and Communications Committee
Cynyrchiadau Ffilm a Theledu Mawr yng Nghymru / Film and Major TV Production in Wales
CWLC(5) FILMTV06
Ymateb gan Canolfan Ffilm Cymru / Evidence from Film Hub Wales

To investigate how Ffilm Cymru Wales, the BFI and others support the sector, and how this work complements the work of the Welsh Government in this area.

1. BFI Film Hub Wales (FHW) have been tasked by the British Film Institute (BFI) to operate as a lead delivery organisation for exhibition in Wales.

Our specialism at FHW (<http://filmhubwales.org/about-us>) is audiences. Led by Chapter as the Film Hub Lead Organisation (FHLO), we believe that audiences and the cultural exhibitors who work tirelessly to reach them, require principal consideration across the film value chain, and within priorities for funding. If we do not reflect carefully on who Welsh productions will reach, and invest in ways of maximising this, how can we expect films to succeed.

FHW therefore exists to champion the innovative work of over 250 vibrant film exhibitors, in Wales, offering inspiration, support and inclusion, to bring British and international film and supporting activity to diverse audiences across Wales and the UK.

We operate audience development, research and skills support programmes, thanks to the support of the British Film Institute (BFI), awarding funds from the National Lottery to the programme since 2013, via their Film Forever and BFI2022 UK wide strategies. The BFI are our principal funders but we also work to lever in further funds for film exhibition, connecting film as an art form to wider inclusion, health and wellbeing, and cross art form agendas.

Our work enables innovative and adventurous cultural film programming in Wales and UK wide. We help exhibitors to invest regularly in bold choices, facilitating greater in-depth audience participation and overcoming potential barriers to access.

FHW is part of a UK wide network of eight hubs funded by BFI to form the BFI Film Audience Network (FAN), with Chapter, Cardiff, appointed as the FHLO in Wales. Since Film Hub Wales set up in late 2013, we have supported over 150 cinema projects (<http://filmhubwales.org/about-us/highlights>), reaching over 275,000

audience members and over 500 training beneficiaries. We have been proud to develop nationally significant projects such as:

- Roald Dahl on Film (<http://filmhubwales.org/roalddahlonfilm>),
- The Queer Film Network UK (<http://queerfilmnetwork.org/>),
- Off Y Grid (<http://filmhubwales.org/projects/y-grid>)
- The Gentle/Radical Film Club (<http://filmhubwales.org/gentleradical-film-club>).
- Anim18 (<http://filmhubwales.org/projects/anim18>). Launching on Friday 20th April 2018 and running until November, we are leading on the UK wide Anim18: A Celebration of British Animation. Working with industry partners across the sector, we will celebrate the past, present and future of British animation talent. Here at Chapter, we will champion the story of animation in Wales. With c£140,000 invested by the BFI, we levered a further £110,000 from Arts Council England and £7k from The British Council. Alongside in-kind support from creatives and participating venues, we will offer a diverse audience facing programme designed to grow the sector.

FHW will continue to offer a significant audience development programme from 2018–22 as part of the BFI 2022 strategy, bringing more films, to more people, in more places across Wales.

Made in Wales

A core element of our work, which specifically compliments that of the Welsh Government, is our FHW Made in Wales strategy (<http://filmhubwales.org/support/made-wales-2018>). The strategy works to boost the exhibition of Welsh film from heritage to new releases. We regularly liaise with filmmakers on releases and celebrate our cultural heritage through film. While we are not a distributor, we recognise the need for a formal film distribution strategy in Wales.

To this end, we called our first cross-sector meeting in January 2018 between the wider film organisations in Wales (such as Bafta Cymru, Wales Screen, NSSAW, IntoFilm, Pinewood, BBC Cymru and the Welsh Broadcasting Trust) covering areas such as training, broadcast and production, with the aim of developing central approaches to Welsh film marketing. We are currently discussing new approaches, such as:

- A potential partnership with Screen Alliance Wales, who are developing an online portal. Wales.com may also offer similar opportunities to collaborate,
- Development of a collective brand for film in Wales, such as shared hashtag #CymruarFfilm / WalesonFilm and national film reviews,
- Collaborative approaches to audience research and profile building for new talent.

We believe that clarity around partner services would address any confusion amongst wider industry around services on offer, with information on talent and new releases readily available in one location.

In terms of specific support offered to members by FHW to date, we have offered marketing and programming support to over 70 Welsh films, 24 of which would have otherwise had no theatrical release. We offer the following activities as part of the strategy:

- 10 Welsh film Preview Days in 8 different locations across Wales to date, enabling exhibitors to see films in advance, network and support programming (<http://filmhubwales.org/projects/welsh-film-preview-days>),
- Financial support for exhibitors seeking to programme Welsh film (circa £10,000 available annually),
- Collaborating both financially and creatively to Sinemaes at the National Eisteddfod, celebrating Welsh language film and talent,
- A preview room for Hub members where they can view Welsh film screeners online (<http://filmhubwales.org/previews>),
- Regular newsletters containing updates on releases,
- We talk regularly with distributors, filmmakers and agencies such as Ffilm Cymru Wales and Wales Screen on upcoming releases, passing information through to the network,
- Young FAN – a young programmers UK network with 4 venues in Wales and many more across the country. This offers opportunities for young audiences to train and feedback on Welsh films,
- A Made in Wales section on our website, where a catalogue of Welsh films are listed, included centrally curated packages for celebrations such as Santes Dwynwen (<http://filmhubwales.org/films/made-wales>),
- Curated film packages where there is thematic demand,
- National and regional promotion of Welsh film, where this activity will potentially generate additional audiences.

As specialists in audience development, we reiterate the need for a robust approach to Welsh made Film, in Wales and beyond, that values cultural presentation alongside production and development, as a driver of economic impact. We are fortunate that a wealth of experienced organisations exist in Wales to support new talent, although many work with limited funds. In order to maximise investment, avoid duplication and grow the sector, we need to collectively present a clear, central message. This need not sit within one organisation, but a range of specialist organisations.

2. The Welsh Government's policy aims for funding film and major television production in Wales, and transparency as to why and how decisions are made in this area;

- A. Additional clarity around the policy aims would be beneficial, with discussion of how the distribution and exhibition sectors can respond to and ideally benefit from Government investment, expertise and advocacy.
- B. It would be beneficial to have an exhibition representative on the Media Investment Panel, to reflect the interests and changing dynamics of the sector in Wales and beyond, considering how production and development decisions affect the audience facing elements of the film value chain.
- C. With inequality addressed in the Economic Action Plan, an absence of diverse voices means we are also lacking a sense of inclusivity and how minority audiences are considered within funding discussions.

FHW acts as the Lead Hub for Diversity and Inclusion on behalf of the UK BFI FAN network – managing the BFI FAN Access Officer and working on the delivery of the Inclusive Cinema Strategy (<http://filmhubwales.org/projects/access>). This will soon see the launch of inclusivecinema.org, which will work in collaboration with the UKCA's accessiblescreeningsuk.co.uk.

It is essential that projects are inclusive, promoting the diversity of our audience and eclectic industry. We recognise the significance of film to isolated rural communities and young audiences in Wales, in how it can generate positive partnerships, life-changing skills and celebrate the fundamental value of film as both heritage and art form, promoting Wales as a cornerstone for film culture.

We would welcome participation in the discussion around how diverse voices are nurtured in Wales and where we can find them. Representation on screen, in the crew and in the audience should form a core part of the process going forward and this is a key driver within the FHW, Chapter and BFI2022 strategy.

3. The support given by the Welsh Government to develop the film and television industries in Wales including: Economic impact, and how this is spread across Wales, Cultural impact, including the Welsh language and value for money

Investment

Support from local authority budgets for cultural presentation is dwindling with reference to the exhibition sector. Many organisations attempt to operate without this support. We are fortunate to have a rich cultural history in Wales, represented via our mixed arts centres, cinemas, film festivals, miners' halls and community spaces. Venues like the Monmouth Savoy and Theatr Colwyn have operated as cultural hubs for over 100 years. This heritage needs to be recognised and protected.

Many of these organisations operate via diverse funding streams and Welsh Government support could help to unlock other funds. With investment, we could work collectively to tell the story of Welsh film and organisations such as Chapter could develop its existing function as a national film space, growing to meet the demands of both industry and audiences.

Capital investment in screen capacity is essential to increase the economic impact of film. Many venues face challenges such as changes to digital technology, rendering screening facilities obsolete, or in need of expensive repair with extremely limited access to capital funds. Very few venues in Wales operate with more than one screen, reducing the potential economic impact of film. For instance, although we have a wealth of experience and activity in North Wales, only one two screen independent venue exists at the Scala Prestatyn. This is set to rise to two screens with the capital development at Galeri Caernarfon in 2018. With just one screen, the barriers to screening Welsh film increase. Mainstream distribution agreements can require venues to screen new releases for extended periods. With over 17 films a week released in the UK, the competition for screen space is already high. Even without this, venues are balancing programmes of theatre and community activities alongside film, all within one screen.

There is a wide demand for Welsh film and a particular demand for films made in the Welsh language and we have seen this increase over the four years that we have operated our Made in Wales strategy. According to our internal Welsh film review (Bigger Picture Research, 2017), approximately 8 Welsh films are released annually but only one (or fewer) in Welsh language. There are complexities to this of course, from the number of individuals making Welsh language content, to the limited financial support available. Welsh language film would ideally be watched regularly in Wales and recognised amongst the very best foreign language titles worldwide, including vast potential for animation and silent productions.

In terms of production, one of the valid points raised in the Film Futures workshop, was that projects are not eligible for support, unless they have a budget of over one million. This guideline will prohibit many Welsh producers and directors from engaging with the fund and it would be valuable to understand whether those individuals are accessing support elsewhere in Wales or the UK. Productions with a budget under one million could arguably have demonstrable economic and reputational impact, particularly when nurturing new talent.

Data

Robust data on the performance of Welsh film is crucial, and this is not often readily available. Data can be sourced from the BFI, Arts Council and distributors. Commercial supplier comScore does not track all theatrical releases, across all cinema sites, for their full theatrical run. Data for smaller Welsh releases, and second or third run dates of independent films, may not be captured, leaving us without full understanding of film performance and audience interest.

To our knowledge, Wales-only cinema audience figures are not routinely produced. Figures for 'Wales and West' are accounted for cumulatively by the Cinema Advertisers Association (CAA) and comScore. This data is also limited in terms of the breadth of audience information it captures, with a focus on ticket sales only.

Recognising the cultural and financial significance of a collective approach to audience development, we are liaising with Arts Council Wales, Ffilm Cymru Wales and other relevant organisations across the UK to develop a cross-sector approach to benchmarking and strategising audience development initiatives.

How we collectively measure and celebrate the impact of our screen industry needs to be explored with core metrics, agreed sector-wide. The exhibition sector is

greater than the sum of its parts, offering communities of all ages and circumstances, a cultural and social space to gather, learn, share stories and invest in the arts. Ticket sales and associated spend such as refreshments and hires are essential to the economy of our cultural sector.

4. How support for the sector may be affected by the Welsh Government's new Economic Action Plan.

Film and the wider arts do not seem to be expressly discussed in the Economic Action Plan and it is not one of the four foundation sectors, which leaves uncertainty around its perceived role. Film can address several of the calls for action: exports, skills and digitalisation are three areas where the film industry can make a real impact. In addition, film can have multiple benefits in terms of health and well-being, as we have demonstrated through our work with Inclusive Cinema.

5. The support given to develop skills and address skills shortages in the industry, whether there is sufficient data to map existing skills.

There are multiple offers available in Wales to new talent from the BFI Welsh Talent Network to TAC, It's My Shout and Cult Cymru. IntoFilm and Universities such as South Wales are also working to address the lack of film education provision in schools and higher education environments.

At FHW, we offer a training and skills programme for exhibitors, which includes bursaries to visit festivals, attend training, or participate in meetings outside of their local authority. We also develop skills directly through courses such as:

- Opening Our Doors – Inclusive Cinema training (<http://filmhubwales.org/Opening-Our-Doors-Workshops>),
- Rural Community Cinema (<https://www.eventbrite.co.uk/e/new-date-rural-community-cinema-2018-tickets-42499938460>),
- Festival Development (<http://filmhubwales.org/whatson/film-festival-development-session>)
- Young Programming (16–30 age group) (<http://filmhubwales.org/blog/sheffield-docfest-radha>).
- Accredited placements in partnership with the University of South Wales (USW) film courses, in addition to USW Lighting Design & Live Event Technology and Cadw on off-site screenings at Caerphilly Castle and Castell Coch,

- FEDS BAME intern at Chapter as part of Anim18:
<https://www.independentcinemaoffice.org.uk/courses/feds-2018-film-exhibition-distribution-sales-trainee-scheme/>

These courses are developed in response to sector need and reviewed annually. We also develop national training schemes in participation with FAN and the Independent Cinema Office, such as cultural programming, business development and technical cinema skills. We hold data on exhibition training undertaken in the sector between 2014 and 2018.