

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) 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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