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# A Battle for the Nation's Rights'? Past, Present and Future Public Service Media in Wales

JAMIE MEDHURST AND SIÂN NICHOLAS

## Abstract

As in other UK nations, public service broadcasting (PSB) is facing an uncertain future in Wales as a result of threats to funding from government and competition from streaming services and other content providers. Partly because of this, calls for the devolution of broadcasting powers have intensified over the past couple of years to the point where it is now an aim of the Welsh government to see such powers being transferred to Cardiff from Westminster. In a nation of two languages and two cultures, PSB has played, and continues to play, a crucial role in Welsh life—but for how long?

**Keywords:** Wales, Cymru, BBC, public service broadcasting, devolution, regulation

## Introduction

ON 27 OCTOBER 2023 the House of Commons Welsh Affairs Committee (WAC) issued their report, *Broadcasting in Wales*.<sup>1</sup> This followed the publication in August 2023 by the Welsh Labour government in the Senedd of its own independent report, *A New Future for Broadcasting and Communications in Wales*.<sup>2</sup> The WAC report flagged up a series of concerns with regard to the future of public service broadcasting (PSB) in Wales, among them the precarity of the existing funding model for the Welsh language television service Sianel Pedwar Cymru, the decline of Welsh language radio stations and the lack of regulatory protection for Welsh language sports broadcasting. The Senedd report went further, positing the establishment of a new Shadow Broadcasting and Communications Authority for Wales that would strengthen regulation and accountability within the changing media landscape and 'bring that accountability closer to home' in anticipation of a future devolution to Cardiff of

broadcasting and communications powers, which are currently reserved to the Department for Culture, Media and Sport (DCMS) at Westminster. It is at the time of writing under consideration by the Deputy Minister for Arts and Sport, Dawn Bowden MS.

This call to devolve broadcasting and communications powers represents a major policy shift for the governing Welsh Labour Party. Unlike in Scotland, where calls to devolve broadcasting from London are located within wider discontent about the entire constitutional settlement between Scotland and the UK, in Wales there has historically been a broader and more positive consensus regarding both devolution itself and the ecology of PSB as it relates to Wales. However, both historic and more recent dissatisfactions with the status quo have raised new questions about the devolution of broadcasting from London to Wales (and in wider context, to the other constituent nations of the UK). This dissatisfaction, which is essentially located between the desire to regulate the Welsh aspects of UK-wide broadcasting and the desire to establish and own a dedicated Welsh broadcaster, threatens to challenge not just the settlement between the UK nations, but the survival of the BBC as a UK-wide institution and the future of public service media across the UK.

<sup>1</sup>Welsh Affairs Committee, *Broadcasting in Wales*, Cm. 5803, 2023; <https://publications.parliament.uk/pa/cm5803/cmselect/cmwelaf/620/report.html>

<sup>2</sup>Welsh government, *A New Future for Broadcasting and Communications in Wales*, 2 August 2023; <https://www.gov.wales/new-future-broadcasting-and-communications-wales>

## History of PSB in Wales

The call for some form of Welsh control over its broadcasting system, historically revolving around the preservation of Welsh cultural identity and (especially) the Welsh language, is almost as old as PSB in the UK itself. In 1927, a report commissioned by the Welsh Board of Education accused the BBC of ‘achieving the complete Anglicisation of the intellectual life of the nation’ and of representing ‘one of the most serious menaces to the life of the Welsh language’.<sup>3</sup> Welsh listeners to the BBC’s Regional Programme in the early 1930s felt shortchanged by the initial decision to assign regional broadcasting for Wales to BBC West region, broadcasting out of Bristol. The launch of BBC Welsh region, based in Cardiff, in 1937, following a long campaign, may have placated English speaking Welsh listeners, but the limited number of Welsh language broadcasts in the schedule failed to reassure Welsh speakers that the BBC was meeting their needs. The consolidated wartime BBC Home Service maintained a token element of Welsh language programming, including a daily News in Welsh, and *Awr Y Plant* (a Welsh-medium children’s hour) once a week.<sup>4</sup> However, it was not until 1949 that the BBC’s commitment to Welsh broadcasting was explicitly linked to a Welsh public service remit, with Controller of the BBC in Wales, Alun Oldfield-Davies, affirming that the role of the corporation in Wales was ‘to nourish and encourage national unity and to add wealth, depth, and value to all aspects of national life’.<sup>5</sup> Meanwhile, submissions to the Beveridge Committee on Broadcasting (1949–50) from the Welsh pressure group *Undeb Cymru Fydd* (the New Wales Union) and to the Pilkington Committee (1960–62) from *Plaid Cymru*, argued that an independent broadcasting corporation of Wales was needed to meet the linguistic and cultural differences between Wales and the rest

of the UK.<sup>6</sup> The launch of ITV company Television Wales and the West (TWW) in 1958, succeeded by the short-lived *Teledu Cymru* (1962–63) and *Harlech Television* (later HTV) in 1967, represented independent television’s acknowledgement of the specific needs of both anglophone and Welsh speaking Welsh listeners. So too did the launch of BBC Cymru Wales in 1964, a direct outcome of the Pilkington Committee’s deliberations, which provided twelve hours of programming across the week specifically for Wales: seven hours in Welsh—including *Pobol Y Cwm* (People of the Valley, 1974 to the present), the longest-running television soap opera produced by the BBC—and five in English, as opt-outs from the BBC’s regular network programme. However, the 1979 Welsh referendum campaign again featured debates around who should ‘control’ Welsh broadcasting. The launch in 1982 of *Sianel Pedwar Cymru* (S4C—Channel 4 Wales—originally broadcast in Wales in place of Channel 4) as the home for all Welsh-medium television broadcasting in the UK, and the establishment of the Welsh Assembly (now *Senedd Cymru/Welsh Parliament*) in 1999, for a time muted these debates. However, the changing global broadcasting landscape, the challenge to traditional national broadcasters of international streaming services and the presence of a UK government that questions the very nature of PSB, has raised the stakes again. With S4C, currently majority funded by the BBC, especially vulnerable to changes in the licence fee settlement, *Cymdeithas yr Iaith Gymraeg* (the Welsh Language Society) has renewed its calls for more Welsh language radio and television channels to safeguard future Welsh-medium broadcast content provision for Wales.

## Why now?

The current call to devolve Welsh broadcasting and communications powers to the *Senedd* derives from the December 2021

<sup>3</sup>Welsh in Education and Life, Owen Report, Education in the UK, 1927; <https://education-uk.org/documents/wales1927/index.html#03%E2%80%8B>

<sup>4</sup>S. Nicholas, *The Echo of War: Home Front Propaganda and the Wartime BBC, 1939–45*, Manchester, Manchester University Press, 1996, p. 231.

<sup>5</sup>J. Davies, *Broadcasting and the BBC in Wales*, Cardiff, University of Wales Press, 1994, p. 188.

<sup>6</sup>See J. Medhurst, “‘You say a minority, Sir; we say a nation’”, the Pilkington Committee on Broadcasting (1960–62) and Wales’, *Welsh History Review*, vol. 22, no. 2, 2004, pp. 109–136; J. Medhurst, ‘Minorities with a message: the Beveridge Report on Broadcasting (1949–51) and Wales’, *Twentieth Century British History*, vol. 19, no. 2, 2008, pp. 217–233.

Cooperation Agreement between the governing Welsh Labour Party and Plaid Cymru.<sup>7</sup> Of the forty-six policy areas where the two parties agreed to cooperate in the Senedd, one of the most significant was its plan to establish a new shadow broadcasting authority, tasked with ‘drawing up plans for, and steps towards, an alternative broadcasting and communications framework for Wales in readiness for the devolution of broadcasting and communications powers’.<sup>8</sup> This plan lies in large part with Plaid Cymru’s longstanding call for Welsh broadcasting policy to be formulated and controlled in Wales, as well as with wider concerns about the safeguarding of the Welsh language. But arguably more important from the Welsh government’s perspective was the UK media response to the Covid pandemic. Despite health being a devolved issue in Wales, during the early months of the pandemic much of the London-based media was presenting critical Covid announcements which pertained only to England as if they had a UK-wide application, at the same time that First Minister Mark Drakeford was presenting Wales-specific Covid updates on BBC and ITV Wales and S4C.<sup>9</sup> For many, this was an education in the extent of Wales’s devolved powers: as Owen Evans, then Chief Executive of S4C, noted, ‘In a nation that sometimes struggles to hear its voice against dominant media suppliers over the border and where 48 per cent of people didn’t realise that health was devolved, the focus on policies made in Cardiff rather than Westminster has been a significant and positive move for Welsh democracy.’<sup>10</sup> But the democratic disconnect was impossible to miss. As the Cooperation Agreement section on broadcasting concluded:

While the pandemic has raised the profile of Wales and Wales’s democracy in the UK

<sup>7</sup>See, Welsh government, ‘The Cooperation Agreement: full policy programme’, 1 December 2021; <https://gov.wales/co-operation-agreement-full-policy-programme-html>

<sup>8</sup>Ibid.

<sup>9</sup>Others include education, culture, and transport and the economy.

<sup>10</sup>The need for public service media has never been greater’, The Welsh Agenda, July 2020 (authors’ italics); <https://www.iwa.wales/agenda/2020/07/the-need-for-public-service-media-has-never-been-greater/>

media, there is a broad consensus that the current broadcasting and communications framework is inadequate, is hampering the democratic life of our country, and is not serving the needs of, or ambitions for, the Welsh language. The current system is therefore not capable of delivering the media Wales needs.<sup>11</sup>

In March 2023, in advance of the Senedd panel report the independent think tank, the Institute of Welsh Affairs (IWA) contributed to the debate with its own report, *Broadcasting Regulation in Wales*. The report, which drew on case studies from Germany, Spain, Belgium and the Netherlands, noted that, in the aftermath of the global financial crisis, ‘broadcasting at a sub-state level is under threat across Europe’. They identified positive developments: the Spanish example, in particular, was regarded as providing a model for ‘regional’ regulation within a single national regulatory framework; but also noted the risk of political partisanship eroding the independence of regional regulators.<sup>12</sup> The IWA concluded that the UK government should transfer key regulatory functions from the DCMS to either the Welsh government or to an independent commission, these being: all appointments to boards governing broadcasters; policy responsibility for commercial broadcasting; and decisions related to the BBC Charter, BBC Agreement and Broadcasting Licence Fee.<sup>13</sup> However, to avoid ‘a persistent “tug of war” between the UK Government and devolved governments’, and ‘to maintain the integrity of the media and the health of our democracy’, its preference was for a new independent broadcasting regulatory commission answerable to elected representatives in all four legislatures of the UK.<sup>14</sup> The report did not, however, clarify how making the BBC, for instance, answerable to the regulatory demands of four separate legislatures (themselves potentially of different political persuasions) might be resolved.

As expected, the Senedd panel’s own report, noted above, recommended the establishment of a Shadow Broadcasting and

<sup>11</sup>Welsh government, ‘The Cooperation Agreement’.

<sup>12</sup>*Broadcasting Regulation in Wales*, IWA/Media Cymru, /February 2023; [IWA\\_Broadcasting-Regulation-Part-2-3\\_FINAL-2.pdf](https://www.iwa.wales/agenda/2023/02/broadcasting-regulation-part-2-3-final-2.pdf)

<sup>13</sup>Ibid.

<sup>14</sup>Ibid.

Communications Authority for Wales. This new authority would work with public service broadcasters in Wales 'to coordinate joined-up and innovative responses to changes across the sector that would meet the needs and interests of the people of Wales'. It would also convene stakeholders to provide expert advice to the Welsh government on the future of public service broadcasters in Wales in the context of the forthcoming BBC Charter renewal, the future of S4C funding, and the relicensing of Channel 3 (ITV).<sup>15</sup>

Tellingly, however, the panel also concluded that the challenges of devolving oversight and regulation of all Welsh PSB currently outweigh the benefits. Devolution of broadcasting and communications might result in a more coherent PSB strategy for Wales and might improve the way Welsh news and stories were relayed to audiences, but the potential barriers were significant. First, any such move would require the approval and full cooperation of the UK government. Second, regulation would need to be decoupled from existing regulatory bodies such as Ofcom. Third, devolution of broadcasting and communications to Wales would risk the break-up of the BBC as a UK-wide institution. Such a move might risk losing pan-UK investment in the creative industries. As a current net beneficiary of the BBC licence fee, Wales would also need to find a way of ensuring that its audiences were not exposed by the inevitable financial hit to its public broadcasting ecology.

These concerns reflect both the continued importance of PSB within Wales and concerns about the survival of PSB going forward. Data on broadcasting trends commissioned by the panel suggest that satisfaction with current PSB provision is higher in Wales than any other nation in the UK, with 71 per cent of those in Wales who watched PSB channel services in a six-month period expressing satisfaction.<sup>16</sup> Unlike Scottish audiences, who consider BBC news too London-centric, Welsh audiences consistently express 'trust' in BBC news. BBC radio services are also significantly

more popular in Wales than the rest of the UK, with BBC Radio Cymru in particular having a broad demographic spread of listeners in terms of age and socioeconomic background.

However, the picture is not uniformly positive. With just ninety minutes of Welsh-interest broadcasting per week now mandated by Ofcom, ITV in Wales underperforms in comparison with STV in Scotland in terms of perceptions of delivering programming about their respective nations. Viewing of BBC and ITV's Welsh-interest programmes accounts for just 4 per cent of total TV viewing, with viewing heavily skewed towards the over 65s. Three-quarters of BBC Radio Wales's listening hours are, likewise, from the over 65s.<sup>17</sup> This suggests an entrenched dilemma for PSB in Wales going forward. Wales's population of approximately 3.1 million represents not quite 5 per cent of the UK as a whole. Furthermore, its population is ageing relative to the rest of the UK and it is growing more slowly. The Welsh language is a key marker of Welsh cultural and national identity, yet the number of fluent Welsh speakers is declining (an estimated 538,000/17.8 per cent in 2021 compared to 562,000/19.0 per cent in 2011); even while Welsh speaking as a whole appears to be widening (29.5 per cent according to the 2022 Annual Population Survey).<sup>18</sup> With PSB most heavily valued by older audiences, and essential to Welsh-medium broadcast provision, Welsh broadcasting will need to find new ways of capturing the interest of more and younger viewers and listeners if it is to survive.

## A 'Welsh model'?

While a devolved PSB system for Wales might make sense in terms of consolidating and

<sup>17</sup>For more details of Welsh and UK television consumption, see Ofcom, *Media Nations*, 2023; [https://www.ofcom.org.uk/\\_data/assets/pdf\\_file/0029/265376/media-nations-report-2023.pdf](https://www.ofcom.org.uk/_data/assets/pdf_file/0029/265376/media-nations-report-2023.pdf)

<sup>18</sup>Office for National Statistics (ONS), Welsh language: Census 2021; <https://www.ons.gov.uk/peoplepopulationandcommunity/culturalidentity/language/bulletins/welshlanguagewales/census2021>; Welsh government, 'Welsh language data from the *Annual Population Survey, 2022*'; [www.gov.wales/welsh-language-data-annual-population-survey-2022](http://www.gov.wales/welsh-language-data-annual-population-survey-2022)

<sup>15</sup>Welsh government, *A New Future for Broadcasting*.

<sup>16</sup>For more on broadcasting trends in Wales, see 'Broadcasting Trends: prepared for the Expert Panel on the Devolution of Broadcasting', Enders Analysis, February 2023, pp. 9–10.

protecting both Welsh language and anglophone Welsh culture, the practical challenges are considerable. Certainly, a devolved PSB system for Wales might more rigorously prioritise broadcasting that is 'closer' to its consumers, but would it also have the financial capacity to support the more outward looking and internationally competitive television output that Welsh audiences are likely also to want? Likewise, it might be able to offer more localised news provision, but would be likely priced out of the kind of international news service that only an organisation of the size and resources of the current (UK-wide) BBC can provide. Meanwhile, the respective needs of the Welsh language and anglophone communities would still exist in a devolved broadcasting environment, with the danger that anglophone Wales would simply opt out and seek its television elsewhere—something far easier in today's multi-channel digital environment than, as in the past, retuning Welsh televisions to pick up Granada TV rather than HTV, or Channel 4 in preference to S4C. A Wales-wide rather than UK-wide system would be an ever more fractured media ecology, and in order to survive financially might paradoxically need to dilute the very 'Welshness' that is currently its USP.

And while different regulatory and oversight mechanisms for Wales might give Welsh broadcasting greater autonomy and be more responsive to the needs of Welsh audiences, they would also need to protect both their commitment to impartiality and their independence from the political centre. Devolution of regulation to the constituent nations of the UK without clear formulas for keeping that regulation at arms' length from the devolved legislatures risks regulation itself becoming a political weapon.

Ironically, these discussions come at a time when the BBC has been leading the way in devolving core activities from London to Wales, and when the television industry and creative industries in Wales have arguably never been stronger. Writing in the Autumn/Winter 2023 edition of the IWA's *The Welsh Agenda*, interim Chair of the BBC, Dame Elan Closs Stephens, noted that BBC Director-General Tim Davie's *Across the UK* strategy represents a deliberate attempt by the corporation to remove some of the weight and power of London to the nations and regions of the

UK. As part of that initiative, and following on from BBC drama's move to Roath Lock, Cardiff, in 2021, BBC Wales in Cardiff is now home to the BBC's climate and science journalism team, serving the whole of the BBC across television, radio, and online. Key strands of BBC Radio output on Radios 1, 2, 3 and 4 now come from Cardiff, including Radio 4's flagship programmes *Any Questions, Any Answers* and *Saturday Live*, and BBC 6Music followed from January 2024.

Meanwhile, BBC drama's move to Cardiff not only placed Wales at the heart of the BBC's output, but has also helped boost the wider independent Welsh television production sector, with companies such as Bad Wolf, Telegop and Cwmni Da making programmes for Channel 4, Sky and the Discovery Channel, as well as BBC Cymru Wales and S4C. Programmes of Welsh (and Welsh language) origin have made both a national and international mark. The sitcom *Gavin and Stacey* (BBC, 2007–2019), set and filmed in South Wales, attracted some of the biggest UK TV audiences of 2019 and was remade for American television.<sup>19</sup> The bilingual Welsh detective drama *Y Gwyll/Hinterland* (S4C/BBC, 2013–2016), simultaneously filmed in both Welsh and English language versions, was a hit first on S4C, then BBC1 Wales, BBC4 and Netflix, where it was broadcast to over 100 countries. The crime thriller *Dal Y Mellt* (S4C, 2023) became the first subtitled Welsh language series broadcast on Netflix UK, compared by Gwenllian Gravelle, Head of Scripted Content at S4C, to such other subtitled international Netflix hits as *Squid Game*, *Lupin* and *Money Heist* ('if you have a good story, and if you have good drama, it will travel').<sup>20</sup> Welsh accented presenters such as Alex Jones, Jason Mohammad, Rhod Gilbert and Cerys Matthews are an ever more regular feature of mainstream television and radio. Creative Wales, an agency set up by the Welsh government in 2020 to develop and support creative industries including film, television, music, games and animation across

<sup>19</sup>R. McElroy and C. Noonan, 'Rooting the BBC: an interview with Rhodri Talfan Davies, Director of BBC Nations', *Critical Studies in Television*, vol. 17, no. 1, 2022, p. 33.

<sup>20</sup>Welsh government, 'Dal Y Mellt becomes the first Welsh language series on Netflix', 20 June 2023; <https://www.wales.com/news/united-kingdom/new-welsh-drama-series-now-available-netflix>

Wales, has reported a £1.7 billion annual turnover of and over 35,000 people employed in creative industries in Wales.

The key challenge to PSB in Wales is not, therefore, so much the dearth of Welsh-generated and Welsh-interest content as it is the superabundance of content elsewhere. This requires different digital strategies: not just to make and broadcast programmes, but to ensure and maintain their visibility on the digital platforms through which younger audiences in particular access broadcast content. One of the recent WAC report's most compelling recommendations was a call to all PSBs to 'urgently develop their digital platforms to improve their level of online personalisation and ensure that programmes local to Wales and Welsh language content are prominent and easy to access.'<sup>21</sup>

Finally, of course, PSB must not be seen as a proxy solution for the survival of the Welsh language. This is something which can only properly be addressed in a far wider political, social, cultural and economic context than the provision of Welsh language programmes and broadcasting services.

## Conclusion

In a BBC radio talk, *Darlledu a'r Genedl* ('Broadcasting and the nation') broadcast on 8 November 1972, Aneurin Talfan Davies, recently retired Head of Programmes at the BBC in Cardiff (and incidentally grandfather of the first BBC Director of Nations, Rhodri Talfan Davies, appointed in 2021) asserted that the history of broadcasting in Wales had always been a 'battle for the nation's rights'.<sup>22</sup> Fifty years later, those same rights are still being contested, though the broadcasting and wider media environment has changed beyond recognition. PSB—on television, radio and online—has made and continues to make a significant contribution to the cultural, economic and political life of Wales. Within

Wales, across the rest of the UK, and in its increasing international presence, it helps to define a sense of Welsh cultural identity. It also retains its crucial role in informing citizens about and promoting engagement with politics and government at local, national and UK level.

A new independent broadcasting system for Wales is not currently a realistic aspiration for reasons of scale, finance and public demand. Indeed, the Welsh example might arguably be viewed as demonstrating the success of an ongoing policy of internal devolution by a UK-wide BBC pursuing its commitment to be responsive to the needs of its constituent nations.

The Welsh debate is, therefore, fundamentally about new modes of devolved media regulation, though what these new modes might be and where they might reside, how they would address the needs of both Welsh and English speaking Welsh audiences, how any regulatory body might maintain its independence—and whether a new Labour government in Westminster in 2024 will be minded to devolve regulatory powers over Welsh broadcasting to the Senedd—are less clear.

However, the most serious challenge for Welsh PSBs, and for any new regulatory frameworks designed to represent the needs of Welsh audiences going forward, remains to recognise and engage with today's—and especially importantly, tomorrow's—Welsh audiences for television, radio and digital media as they navigate our increasingly crowded digital world.

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<sup>21</sup>WAC, *Broadcasting in Wales*.

<sup>22</sup>J. Medhurst, "'Nation shall speak peace unto nation"? The BBC and the nations', *Critical Studies in Television*, vol. 17, no. 2, 2022, p. 21.