

# Darlledu yng Nghymru

## The case for devolving broadcasting to Wales

Discussion paper

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## Introduction

A review of S4C will be carried out this year and it is fair to say that this represents a very rare opportunity to look closely at the details of the broadcasting industry in Wales. In addition, a Welsh Office Minister has stated that this is an opportunity to consider the devolution of broadcasting, saying that such a discussion is 'inevitable' in conducting the review.

Cymdeithas' policy booklet 'Broadcasting in Wales', published in 1970, called for a Welsh language radio station and a Welsh language television channel to be established (Appendix 1), and it took over a decade to achieve these two aims. In addition, establishing an English language television channel and radio station for Wales was one of the developments we called for back in 1970.

However, that campaign began with the call for an 'Independent Broadcasting Authority for Wales' with 'complete authority over broadcasting in Wales'. Looking to the review of S4C, we believe that it is an appropriate time to revisit these concepts, whilst also considering what additional measures are needed in view of the major technological advances that have been made recently. It's worth noting that our broadcast provision in Wales on television and radio have not moved forward much in the past forty years, and that S4C's remit has not developed much despite significant developments on other platforms.

Now that we have a devolved Assembly in Wales, there is an opportunity to create laws which can be of direct benefit to the Welsh language, to the economy and to democracy.

The case for devolving broadcasting is a very strong one. Broadcasting has been devolved in other countries - the Basque Country and Catalonia amongst others - and these powers have been used to benefit their respective languages.

The Silk Commission cross-party committee, established by the UK Government itself, found that 60% of the people of Wales were in favour of devolving broadcasting in its entirety to Wales. So we have the support of the public. The Commission recommended devolving to Wales only the Government grant for S4C, despite a number of other organisations asking them to go further. However, the UK Government has refused to implement the Commission's recommendation to devolve to the Welsh Government control over even the few millions of pounds which go from taxpayers to S4C.

A number of other organisations and institutions in this field are also calling on the UK Government to go further, and see the virtue of the argument in favour of devolving broadcasting. BBC Trustee Professor Elan Closs Stephens said on Radio Cymru recently: *"I would be pleased to see more accountability ... I believe that Cymdeithas yr Iaith's job .... is to push, push for something ... and then the job of the civil service, the Government [and others] ... is to find the best way to do that ... I'm sure that it is possible to do more ... "*

We have an opportunity through this review to begin a new era for the media in Wales by devolving broadcasting to Wales.

## Summary

We summarise our principal proposals and observations as follows:

1. Responsibility for broadcasting should be devolved in its entirety to the Assembly, namely the power to regulate the whole spectrum of broadcasting, including responsibility for the licence fee, and a statutory financial formula should be established for one Welsh language channel, linked to inflation, as this would offer the broadcaster long-term financial security.

2. We recommend raising a levy on broadcasting and telecommunications companies, and also on corporations that sell advertisements, such as Google and Facebook, in order to finance Welsh language public broadcasting.

3. “Awdurdod Darlledu Cymru” should be established, an authority that would regulate the media in Wales instead of Ofcom. The members of the new Authority should be appointed through a democratic process in Wales rather than by the Department for Culture, Media and Sport in London. We believe that the new Authority should have functions and powers:

i. to normalise the Welsh language on every social platform, from commercial radio and local television to Netflix, YouTube, etc.;

ii. to strengthen community media and digital Welsh language content.

4. We believe that, under the devolved regime, Awdurdod Darlledu Cymru’s remit should include establishing “Sianel Cymru,” that would be responsible for 8 (initially) Welsh language multimedia platforms, including television, radio and online services. (See diagram on page 11.)

5. “Sianel Cymru” as a body should adopt a new model, by producing a substantial percentage of its programmes internally, including an internal multi-platform news service, and should own its broadcasting studios and infrastructure. Further, Sianel Cymru will be responsible for providing Radio Cymru 1, 2 and 3 alongside an online platform, with additional funds to achieve that. That new model will improve the terms and conditions of a number of workers in the broadcasting field.

## Broadcasting in Wales

If Wales needed to establish a broadcasting system from scratch tomorrow, what would we have to do? We would need to establish regulatory and technological bodies, including systems to regulate content and to allocate broadcasting frequencies. There would be a need for structures for the development, management, production and broadcast of both Welsh language and bilingual television. We would also require corresponding systems for Welsh and bilingual radio, all in accordance with the vision and the principles of public broadcasting. Structures and sources of funding would be of course be required. We would need to consider structures and the network of national and local broadcasting, including the role of commercial broadcasting. Amongst other concerns, there is not currently sufficient broadcasting in Wales which is independent of the BBC (there is no alternative Welsh language television news, for example).

Of course, since we are not talking about establishing a new broadcasting system, we need to devise an evolutionary process that will transform the current situation.

It is important to note that the north of Ireland already has a spectrum which is shared between two systems - one from the UK and one from the Republic.

## International context

The Basque Country and Catalonia, among other countries, demonstrate that it is absolutely possible to devolve broadcasting within a state. Below is an overview of channels and stations in those countries, including details of language, content and audiences of the different platforms, as well as observations on the structures and sources of funding of the bodies that are responsible for them.

### 1. Euskal Irrati Telebista (EiTB), the Basque Country

Euskal Irrati Telebista (EiTB) was established in the Basque Country in 1982, the same year S4C was launched in Wales. At the time, one television channel and one radio station were launched.

Nowadays EiTB is responsible for:

- 6 TV channels (ETB 1, 2 ETB, ETB 3, ETB 4, ETB Sat, Canal Vasco)
- 5 radio stations (Euskadi Irratia, Radio Euskadi, Euskadi Gazeta, EiTB Irratia Radio Vitoria)

In addition to channels and stations targeting general audiences (similar to S4C and Radio Cymru perhaps), we find that there are specific services for children and young people (Appendix 2). Through these, EiTB serves approximately 700,000 Basque speakers within the state and communities scattered across Europe and Latin America. EiTB platforms broadcast in Basque, Spanish and bilingually. Eighty-six percent of EiTB funding comes directly from the Basque government, with the remainder being raised through advertisements. It is also worth noting that there is a 50% quota for Basque language output on commercial radio.

## **2. Corporació Catalana de Mitjans audiovisuals (CCRTV), Catalonia**

Following legislation by the government of Catalonia, 'Corporació Catalana de Mitjans audiovisuals' (CCRTV) was established in 1983. It was launched with one TV channel and one radio station. Today, the corporation is responsible for:

- 6 TV channels (TV3, El33, TV3CAT, 3/24, Super3 could, Esport3)
- 4 radio stations (Catalunya Ràdio, Catalunya Música, Catalunya Informació, ICAT FM)

Catalan is the main language in all cases. Similar to EitB, there is a TV channel and a radio station specifically for children and young people (Appendix 3). Note iCAT FM in particular, a multi-platform service that makes extensive use of the Internet and new technology. Although CCRTV serves a comparatively larger audience than those in the Basque Country and Wales (there are approximately 4 million native speakers of Catalan), there are structural aspects of its devolved broadcasting system which are worthy of consideration.

Unlike in the Basque Country, responsibility for television and radio was divided between two CCRTV bodies, namely Televisió de Catalunya and Catalunya Ràdio, with other divisions of CCRTV responsible for supporting them through marketing, design, development and technology. There is also CCRTV Interactiva which creates and distributes interactive multimedia content for the above departments. More than half (52%) of the CCTV's funding comes from the Catalanian government general budget, the rest coming from advertising, sponsorship, merchandising and the sale of original productions.

In both of the cases above we find that broadcast systems launched in the same period as S4C have expanded significantly over the decades, while the Welsh language continues to be limited to only one channel and one station. We have recognised and welcomed the BBC's recent announcement of the launch of a second radio station for limited hours in the morning.

We believe that Wales deserves the kind of provision that exists in other states worldwide.

## Steps towards devolution

When considering the legislative process, the starting point will be removing the exception in the Wales Bill which reserves powers over broadcasting. Although this will not necessarily change things overnight, the Senedd of Wales would have the right to legislate in the area of broadcasting. The technical process is more complex in terms of allocating wavelengths, adjusting production structures and creating a system of financing (e.g. a Welsh licence fee) amongst other things. It is suggested that devolution is phased, beginning with regulation.

Therefore, short-term priorities in terms of devolution include:

1. Powers to legislate on the regulation of the whole broadcasting spectrum and the S4C Authority, in order to enable the establishment of a regulatory system for Wales;
2. Licence fee and tax-raising powers to fund public broadcasting;
3. Powers over commercial and community radio, and local television.

It should be noted that the devolution of legislative powers in these areas will mean that the National Assembly can decide, as is the case in all devolved matters, to maintain the status quo in broadcasting in the first instance. Devolution would therefore allow evolutionary changes to the system.

## Cymdeithas' view

Ofcom has failed - and continues to fail - to serve Wales and the Welsh language. We believe that there should be an independent regulatory body for Wales, free from commercial or political interference. 'Awdurdod Darlledu Cymru,' a broadcasting authority for Wales, should be established, with a statutory duty, which will be responsible for broadcasting in Wales in place of Ofcom or as an evolution of Ofcom.

The remit, duties and powers of the new body would include the promotion and normalisation of Welsh on all media platforms (including Netflix and Amazon Prime for example), with powers to set quotas for commercial radio and local television in terms of the percentage of their broadcasting in Welsh.

The new authority would have a duty to promote community media, and in particular Welsh language media. In order to ensure pluralism and a range of alternative voices, it would be possible for the Authority to have control over a 'community content fund' to promote local media and platforms in order to create a broadcasting system which starts from the grassroots. Community media have proved a very effective way of enriching the media landscape in the Basque Country and Catalonia and increasing speakers' opportunities to use the language.



## Sianel Cymru

### **Changing the S4C model by creating capacity to produce internally**

In addition to this, the model of the new S4C should be changed in order to ensure that a substantial percentage of the programmes be produced internally.

We believe that the news service is the most prominent output that the new S4C should produce itself because of the advantages vis-à-vis pluralism and the success of the broadcaster itself. It is indisputable that the BBC's influence over the provision of news and current affairs in Wales is far too strong, especially in Welsh where the BBC currently has a near monopoly.

We also believe that the EITB model of ownership of production studios and infrastructure should be adopted; facilities that could be made available to smaller production companies. That would be a stimulus to the creative industries and a boost both to the economy and to the Welsh language in Carmarthenshire, where the headquarters of the new S4C will be sited.

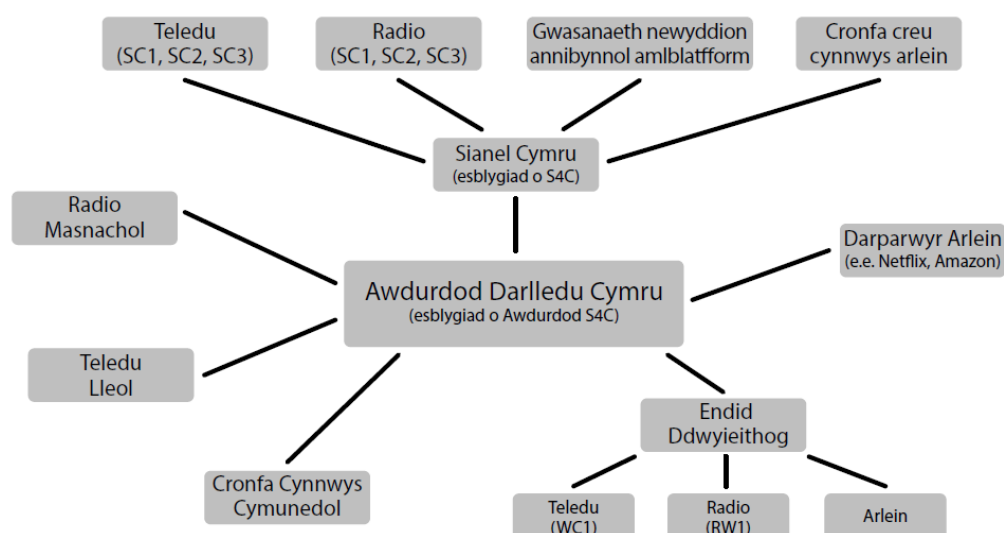
We believe that producing a substantial percentage of the output internally would also improve the terms and conditions of workers in the creative industries by generating more permanent jobs in a field where there is a high incidence of short-term agreements and freelance work partly because of S4C's external model. We realise that these developments will entail additional costs, as particularised in this document. However, we believe that, by devolving broadcasting, an additional sum of £20 million will be available to spend on Sianel Cymru 1 (namely, the former S4C).

## Illustration of a devolved system

### Benefits to Wales and the Welsh language of a devolved system

In order to create services corresponding to those in the Basque country and Catalonia (i.e. the broadcasting system Wales deserves), we believe that we should aim for an ambitious new system, and we offer below an illustration of one of several possible systems. Of course, we recognize the serious need to consider new and alternative options to fund such a system, and some of our recommendations as to how to do so are given in the subsequent section. Under a devolved system, Awdurdod Darlledu Cymru would establish a new S4C, which could be called 'Sianel Cymru', which would have a much wider remit that would include radio, television and online services. Sianel Cymru could be responsible for:

- 3 Welsh language television channels - SC1, SC2, SC3
- 3 Welsh radio stations - RC1, RC2, RC3
- An internally produced Welsh-language multiplatform Welsh language news service - Newyddion Cymru
- Offering support to local and community media initiatives producing Welsh language content



*Diagram - proposed new regulatory framework*

Note that more than just television or just Sianel Cymru (the proposed successor to S4C) will come under the auspices of Awdurdod Darlledu Cymru. As the diagram shows, as well as television channels, Sianel Cymru would be responsible for the new radio stations and news platforms, and also supervising an online content creation fund. Sianel Cymru will therefore be responsible for RC1 (currently BBC Radio Cymru), RC2 (a full radio station with much more resources than current BBC plans) and RC3, a new 24-hour platform for news and sports. Awdurdod Darlledu Cymru would regulate all of this.

Many of these services would be free of advertisements and would target different demographic and interest groups. Looking again at the examples of the Basque Country and Catalonia, in addition to

their main, general channels, there are also channels for young people / children, sports and news. A new broadcasting system could look something like this:

SC1 - general channel

SC2 - channel for children (morning/afternoon) and young people (late afternoon/evening)

SC3 - news and sports channel, based on a community network

RC1 - general station (24 hours a day)

RC2 - station for young people and contemporary music

RC3 - news and sports station (24 hours), based on a community network

Plurality and diversity of news providers is essential for a healthy democracy in Wales. At present, only the BBC has the opportunity to produce Welsh language television news programming.

SC3 and RC3 would be based on a community network, utilizing and supporting community media entities to broadcast on a national stage as well as a local one.

The terms of reference of the new broadcasting authority, Awdurdod Darlledu Cymru, would lead to a growth in the media community and digital content in Welsh. It would safeguard and expand Welsh-language community radio and television, favoring those provisions instead of the Ofcom system that has led to large companies reducing content relevant to Wales and in Welsh. Awdurdod Darlledu Cymru would also ensure that the current monopoly of a few Welsh production companies does not continue, through the allocation of work and wider agreements to include smaller, new, experimental and / or innovative companies.

The 'Awdurdod Darlledu i Gymru' would also establish a new bilingual broadcasting entity. The new entity would be responsible for:

- 1 Welsh bilingual television channel (WC = Wales Channel)
- 1 Welsh bilingual radio station (RW = Radio Wales)
- 1 Welsh bilingual online service
- Powers to regulate companies such as YouTube, Netflix, Google, Apple in order to ensure content of all kinds in Welsh gets priority, including video, programs and film, e.g. the creation of Youtube Cymru, distinct from "Youtube GB"

It is important to remember that the people of Wales would have continued access to English language media from the rest of the British Isles and the world in addition to the extra homegrown Welsh and bilingual broadcasting. There will be no impairment to Welsh audiences' enjoyment of the BBC's output, including popular programs such as Eastenders.

We recommend a system that not only expands existing services, but increases the number of media platforms available to the people of Wales. In the section below, it is explained how such a system will not only protect the working conditions and salaries of workers in the sector, but indeed improve them. By restoring S4C's budget (that is, the new Sianel Cymru), devolution of the license fee, and a levy on large companies, we show how it will be possible to fund such a system for the benefit of the people of Wales, workers in the industry and future generations.

# Financing the System

In 2015, Cymdeithas published a paper on the funding of Welsh language broadcasting, outlining alternatives for the financing of public broadcasting, a new multiplatform service, and S4C specifically. We have developed this work further for this paper, outlining how Wales could finance a devolved broadcasting system.

It appears to be possible to consider several of those recommendations in the wider context of the devolution of broadcasting as a whole.

- 1) Direct Funding from the Assembly
- 2) Devolving the licence fee
- 3) A levy on services, internet, telecommunications companies, advertising and/or the private sector

If a Welsh broadcasting corporation were to oversee commercial television and radio as well as public broadcasting stations and channels, a significant additional amount could be raised by selling advertising space on those platforms. As in the Basque Country and Catalonia, a combination of funding sources would probably be the best solution. Earlier this year, the BBC announced the intention to launch a new television channel for Scotland in October 2018, with funding of around £30 million, the same amount that was received annually by BBC4. We see therefore that the amounts for new, additional channels (i.e. those that complement a main general channel) are relatively less due to reduced broadcasting times, repeats, and reduced costs for joint productions and programs "bought in".

## Direct Funding from the Assembly

As in the Basque and Catalan systems, a statutory proportion of the funding of a devolved Welsh broadcasting corporation would come directly from the Welsh government. In 2014, the Silk Commission suggested transferring responsibility for funding S4C from the UK Government to the Welsh Government, as well as other structural changes. However, ideally - and in order to ensure that Wales has the expertise and capability to make the right decisions for the future of broadcasting - funding and legislative powers over the media would be transferred to the Welsh Assembly. Only full devolution would allow the people of Wales to devise a system suited to them. We believe that the Senedd of Wales should then establish "Awdurdod Darlledu Cymru" as a devolved national regulation organization.

## Devolution of the Licence Fee

Securing a Welsh licence fee in Wales could contribute towards the funding of the sort of broadcasting watchdog the country deserves; to determine who would own masts and how they would be used, and put in place the independent regulation of the sector in Wales in order to determine how much Welsh news, programming and music would be available (and how much in the Welsh language) - and also provide greater certainty to public broadcasting in Wales and for S4C in particular. We have come to realise that a period of time would be needed to establish a separate

system for Wales, but with the licence fee at risk at a British level it would be sensible for the Welsh Government to commission research on the costs and feasibility of establishing the Welsh system.

### **A Levy on Services, Internet, Telecommunications Companies, Advertising and / or the Private Sector**

There is ever increasing support for the idea of collecting a levy. In December 2016, in the context of Facebook and Google's business activities, the leading academic Leighton Andrews announced that he was "totally supportive of the idea that remediation is required at national level, such as a levy on digital media revenue". In our paper 'Financing Welsh Language Broadcasting ' it was shown that the turnover and profits of large companies, such as TalkTalk, EE, BSkyB and Google, have continued to rise significantly despite the recession and in the face of massive cuts to public broadcasting. It has also been shown that a levy of just 1% on the turnover of these companies alone (based on figures for 2013) would raise over £150 million annually on a UK level. By extending the levy to other large companies such as Facebook, Vodafone and Virgin Media, a significant amount could be raised to fund public broadcasting across the UK with a fair share of it is going directly to a Welsh broadcasting corporation and to new and existing services.

Among other issues, it will be necessary to remove the exception on broadcasting legislation which exists in the Wales Bill. As well as powers over the licence fee, it will be necessary to extend the Assembly's existing right to raise new taxes so they are able to consider creating a levy on private broadcasters and others.

# A budget for the media system

Cymdeithas yr Iaith has created a draft budget based on the public evidence available from the field, initial research, and feedback received on the first version of this document. As far as we know, this is the first time that definite figures have been set in attempt to create a budget for devolved broadcasting in Wales.

There are several possible ways of calculating the budget Wales has to spend on its devolved system.

It was not possible to find a reliable source for figures for Wales in all cases. Of course it will be possible to conduct research that responds to media needs in Wales under the devolved regime. In the meantime, the case must be presented based on the best available data and estimates.

Please note that the population of Wales is 4.85% of the UK's territorial population according to the 2011 Census.

## **Income: license fee**

In 2011, in the same year as the most recent Census, there were 25,103,079 households in the United Kingdom with a television set. According to the BBC's response to a freedom of information request in July 2017, this is the total number of television licenses: "Licenses in force in Wales on March 31, 2017: 1,285,107"

Disregarding exceptions such as free licenses for people over 75 years (which reduce the total) and other buildings such as the hundreds of hotels, pubs etc. (which increase the total), the income from the license fee (£147.00 per household) in Wales is around £188,910,729.

Item	Income
Household and Business Television License Fees in Wales	£188,910,000

## **Income: levy**

There are at least three categories of mega business that dominate media markets and have enjoyed the favours of the state in terms of taxation and public policy.

We will use the UK percentage of the UK population (4.85%) again as a basis for calculations, as the companies and corporations in question do not publish figures for Wales. So if there were a 1% levy were raised on the sales of the companies in order to fund public service media in the UK, the percentage of income owed to the people of Wales would be 0.0485%.

In order to recognize the actual size of the businesses and to ensure fairness to public service media, the levy would be related to sales (similar to value added tax), rather than the 'profits' declared by the companies.

**Telecommunications companies: broadband / internet, landline, mobile phone (sales levy)**

Ofcom's figures for sales in these diverse markets include several well-known companies.

There are sales of £3.75b in these markets across the territories of the UK. If the people of Wales took their 0.0485% of the total, this would lead to a sum of around £18,182,000 to Wales.

**Commercial television companies (advertisements and subscriptions)**

The main sources of income for commercial television such as Sky and ITV are advertisements (£5.27b of sales per annum) and subscriptions (£6.12b). Therefore, the totals owed to Wales (at a percentage of 0.0485%) will be £2,555,000 and £2,967,000.

**Online media companies**

Facebook and Google are the two main examples of online companies that make income through advertisements on the back of third party content. They compete with public media entities without producing content in Welsh or specific to Wales of their own substance. Concurrently, they distribute content with little regard to journalistic standards and professional broadcasting in terms of accuracy and reliability.

The total amount of digital advertising expenditure, £10.3b per year, would mean a levy share of £4,994,000 for Wales that is sure to increase in the future.

Item	Income
Telecommunications companies: broadband / internet, landline, mobile phone	£18,182,000
Commercial television companies (advertisements)	£2,555,000
Commercial television companies (subscriptions)	£2,967,000
Online media companies	£4,994,000
Total:	£28,699,000

**Income: Barnett transfers**

At present, a sum is being spent by the Westminster Government it would be reasonable to expect it to be transferred to authorities in Wales. The income on the basis of Barnett transfers would be as follows:

Item	Income
Transfer of the British Government's S4C grant to the Welsh Government	£ 6,700,000
Percentage of Wales of Ofcom's broadcasting and spectrum fees (estimate)	£ 18,000,000
Barnett transfer for British Government Department of Culture expenditure	£ 1,000,000
Barnett transfer for British Government spending on the World Service	£ 4,122,500
Barnett transfer of administration costs of the British Government Department of Culture	£ 2,716,000
Total:	£ 32,538,500

### Expenditure

Here is a summary of the annual expenditure under our exemplar devolved system:

Expenditure *	Total budget	Notes:
Platform		
SC1 (formerly S4C)	£100,000,000	Main Welsh language television channel. S4C Budget in 2009/10
SC2	£30,000,000	Second Welsh language television channel. Cost based on the costs of BBC 4 or BBC Scotland
SC3 (community network)	£17,000,000	Third Welsh language television channel. Similar cost to the new guise of BBC 3. Community media entities will contribute to the channel's output.
SC/W (bilingual entity)	£30,000,000	Bilingual TV channel. The real value of the budget would be around £43 million due to the value of buying programs in from the BBC in England.
RC1	£14,000,000	Radio and online
RC2	£3,000,000	Second Welsh language radio station, also online
RC3 (community network)	£3,000,000	Third Welsh language radio station. Community media entities will contribute to the station's output.



RC/W (bilingual entity)	£14,000,000	Bilingual radio station
Community Content Fund (online)	£1,000,000	Online content / initiatives
Online Content Fund	£1,000,000	Online content / initiatives. This budget is five times the current level of funding of Golwg360.
Other costs		
Awdurdod Darlledu Cymru (regulation)	£5,868,500	Ofcom's budget is £121 million in 2017/18.
Technical Infrastructure:	£15,000,000	fees and costs of technical providers, broadcasting and multi-platform distribution costs, etc.
The cost of purchasing program rights at the BBC	£ 13,230,000	The value of the programs accessing the bilingual entity. Based on the cost that Ireland has paid for BBC programs
Additional administration costs of the Welsh Government	£3,000,000	Costs for establishing and maintaining a Broadcasting Department within the Welsh Government
Total	£ 250,098,500	

\* Expenditure above includes administrative costs for the establishment and maintenance of two separate national broadcast entities, namely Sianel Cymru and the 'bilingual entity'.

## Balance

TOTAL EXPENDITURE	£ 250,098,500
TOTAL INCOME	£ 250,148,322
BALANCE	£ 49,822 (surplus)

We propose the above as a real attempt to show how a devolved broadcasting system could work. Unnecessarily, some of the figures are uncertain as the regime has not yet been devolved and figures are not available at a Welsh level. Therefore, we would welcome comments on the above analysis as part of an open discussion on broadcasting issues.

However, we believe that it is true to say that devolving broadcasting would be a huge boost to Welsh broadcasting and democracy, with more money being spent on broadcasting in Wales than today. In addition, all public broadcasting programs are to be produced from Wales' perspectives so they would reflect the aspirations of the people of Wales.

# Conclusions

We believe that the devolution of broadcasting offers an opportunity for a new era for the Welsh language as well as invigorating our democracy and all our communities. By devolving responsibility to Wales, the S4C Authority could be turned into a 'Awdurdod Darlledu i Gymru' (Welsh Broadcasting Authority) - a regulator for the entire broadcasting spectrum that would enable the expansion and normalisation of Welsh on all platforms.

We are confident that, after we devolved broadcasting, Wales could not only increase spending on S4C's successor, Sianel 1 Cymru, but also expand the provision to maintain 3 Welsh language TV channels, 3 Welsh language radio stations and several online platforms along with a bilingual entity. Indeed, the investment in broadcasting will be much higher than it is today - that is the benefit that comes with devolution. Instead of Wales having to try to persuade British broadcasters to spend our own own money in Wales, the people of Wales will have sovereignty to ensure that the media truly meets the needs of our country.

These developments will boost the Welsh language and Welsh cultures in every community, by ensuring that Welsh content is normalized across all platforms. By making Welsh the default language of our media, the use of the language will increase and people, from all walks of life, will be able to live their lives in Welsh. It will ensure better terms and conditions for workers as well as creating and spreading wealth much better throughout the country.

Additionally, it will give democracy a boost, ensuring that our democratic processes are the subject of stronger scrutiny and attention. Indeed, without the devolution of broadcasting, we believe that the lack of public understanding of our democracy is an increasing problem, so much so that it could jeopardize the existence and powers of our Senedd.

We have set out detailed proposals in this paper, but ultimately the role of the Welsh Government and other stakeholders will be to prepare the details in order to devolve the field. However, the main principle is undeniable: decisions about broadcasting in Wales should be made in Wales.

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August 2017

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Appendix 1:  
 Policy Booklet 'Broadcasting in Wales' (1970)  
 Cymdeithas yr Iaith Gymraeg

Appendix 2:  
 Basque Country - Euskal Irrati Telebista (EiTB) Channels and Stations

TV	Launched	Language	Content	Audience
ETB 1	1983	Basque	News, entertainment, documentaries, sports, youth programming, children's programmes, movies	General
ETB 2	1986	Spanish	news, entertainment, documentaries, sports, youth programming, children's programmes, movies	General
ETB 3	2008	Basque	Entertainment	Children / Youth
ETB 4	2014	Bilingual	Sports	General
ETB Sat		Bilingual	Basque culture	Spain and Europe
Canal Vasco		Bilingual	Basque culture	Latin America

Radio

Euskadi Irratia	1982	Basque	News / talk radio	General
Radio Euskadi		Spanish	News / talk radio	General
Euskadi Gazeta		Basque	music	Youth
EiTB Irratia		Bilingual	culture / music	General
Radio Vitoria <i>Local radio for the city of Vitoria</i>		Spanish	News / talk radio	General

Appendix 3:

Catalonia - Channels and Stations

Corporació Catalana de Mitjans audiovisuals (CCRTV)

Television (Televisió de Catalunya)	Launched	Language	Content	Audience
TV3 / TV3 HD	1983  <i>HD launched in 2007</i>	Catalan	News, Entertainment, Drama, Sports, Movies	General
El 33	1988	Catalan	Documentaries, Culture	General
TV3CAT	1995	Catalan	combination of TV3 and El 33 content	International
3/24	2003	Catalan	News <i>24 hours</i>	General
Super3	2009	Catalan	Entertainment	Children / Youth
esport 3	2010	Catalan	Sports	General

Radio  
(Catalunya Ràdio)

Television	Launched	Language	Content	Audience
Catalunya  Música	1987	Catalan	Contemporary and traditional music	General <i>24 hours</i>
Catalunya  Informació	1992	Catalan	News	General <i>24 hours</i>
iCaT FM	2006	Catalan	Contemporary and traditional culture	Youth <i>Multiplatform - on the web</i>