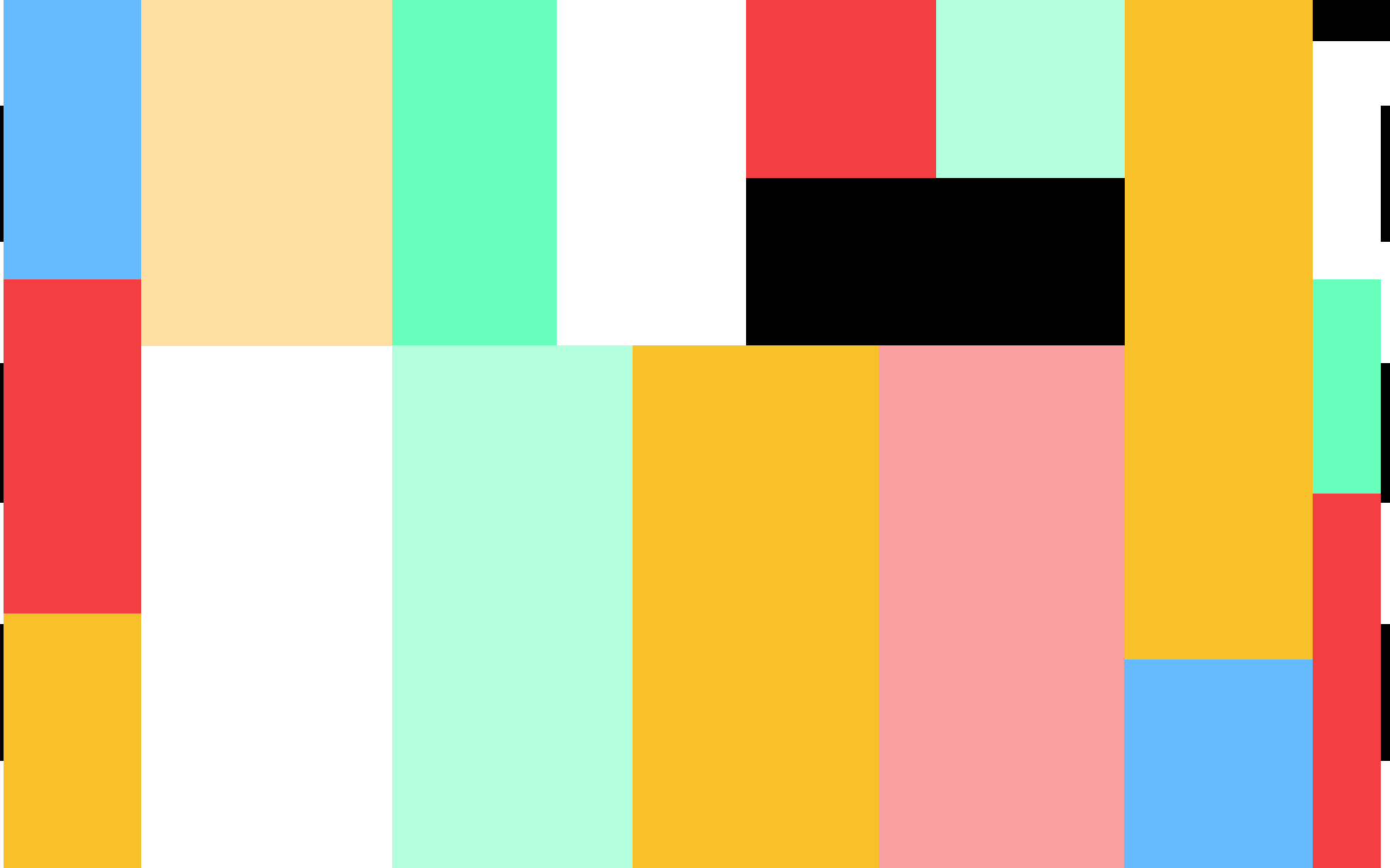




Ragdres Hwithrans Darlesor Gonis Poblek Kernewek Agwedh Onan – Studhyans Arhwilas Derivas

Cornish Public Service Broadcaster Research Project
Phase I – Scoping Study Report

Denzil Monk, Florence Browne, Rachel Moseley & Mandy Berry July 2019. D.M. designed and directed the project. F.B., R.M. and M.B. contributed to the design and implementation of the research, to the analysis of the results and to the writing of the manuscript. This work is licensed under a Creative Commons Attribution 4.0 International License.



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Dallethieth Oryon Nowydh arghesys gans Konsel Kernow delivrys gans DMCS, ow kesoberi gans an Bagas Hwithrans Termynow a Dheu Diwysyansow Awenek, Skol Fylm & Pellwolok, Pennskol Aberfala.

A New Frontiers initiative funded by Cornwall Council delivered by DMCS working with the Creative Industries Futures Research Group, School of Film & Television at Falmouth University and Department of Film & Television Studies at University of Warwick.

Raglavar Foreword

To Cornwall Council,

You commissioned us to conduct an initial scoping study to identify potential business and development models for a Cornish Public Service Broadcaster, to determine potential economic and cultural impacts, and to identify a framework for capacity development of such a service. We're pleased to submit our final report which sets out our findings and recommendations.

This study has investigated potential business and development models for Cornish Public Service Media, considering the current status and future developments of minority language public service broadcasting in the context of significant changes in viewing trends and technology in an expanding global VOD market.

We have reflected on the potential economic and cultural impacts of such a service, drawing on a wide range of recent industry reports and studies, implementing a high-level analysis of platform alternatives and potential audience, and assembling concise comparative case studies of Cornish, Irish, Manx, Breton, and te reo Maori minority language public service media (PSM), with a deeper analysis of S4C in Wales and MG ALBA in Scotland, evaluating these analogous services in the context of the rapidly changing digital landscape, dominated by data and the

discoverability algorithms of the streaming giants. The resultant case studies encompass a wealth of strategic and specific intelligences, which we have applied in modelling a Cornish Public Service Media.

Building on these analyses and ideas expounded in Freedman and Goblet's *A Future for Public Service Television* (2018) this study considers design principles for a new, non-metropolitan, non-linear Cornish Public Service Media that recognises, reflects and revitalizes the complex plurality of twenty-first-century British identity, modelling an essential redefinition of public service broadcasting for the digital age. It presents a framework for capacity development of Cornish Public Service Media in Cornwall identifying existing and proposed activities in Cornwall that could contribute to this development.

Using the EBU generic digital media enterprise value chain model as a foundation, we applied the public service resonant principles of a social foundation and climate emergency aware ecological ceiling described in Raworth's Doughnut Economics theory, defining the PSM Value Chain Doughnut, a twenty-first century model for regenerative public service media provision, a tool for planning and measuring value and impacts with process flows of people, finance and data from supply chain to user experience.

Considering the opportunities and implications arising from applications of emerging technologies like DLT in the global Media & Entertainment industries, we set out to describe a new blueprint for PSM, designed to harness the opportunities of the future.

**Denzil Monk, Principal Investigator,
Cornish PSB Research Project**

01. Berrskrif gweythresek Executive summary

Kenedhel yw Kernow.

Kernewek, an yeth, yw aswonys avel yeth minoritya yn-dann an Chartour Europek rag Yethow Ranndiryel ha Minoritya (CEYRM, 2003). Dasklassys veu gans UNESCO yn 2010 avel 'perylls yn troboyntel' ha dres an argerdh a dhasvywheans, gans an niver a dus owth ombrofyha dhe'n apposyansow y'n yeth kernewek gans Kesva an Taves Kernewek KESVA ow kresegi tevyans a 18% BWV dhyworth 2016-2018¹, konter an tuedh ollvysel a ddiverseth yethek ow lehe. Kernewek yw yeth usi ow pywa, tevi.

An ervirans dhe aswon honanieth unnik an Gernowyon a re dhedha an keth savla yn dann an Kevambos Framweyth rag Difresyans a Vinorytys Kenedhlek (KFDVK) ha tus keltek erel an RU, an Albanyon, an Gembrion ha'n Wodhyli (Governans RU, 2014).

An Gernowyon a's teves aga hwedhlow aga honan dh'aga derivas, a dalvia bos hwedhlys y'ga levow aga honan: istori gothus ha gonisogeth unnik, yeth arbennek, termyn present beghus ha devedhek dismygek. Gologva arbennek orth an bys hag yw kevrynnys gans teyluyow ha kemenethow yn diwottiw, klubow kowethasek, helyow trewow, gans gwariva hag ilow, orth golyow ha festow dres oll an vledhen, yn Kernow hys-ha-hys. Mes orth lagas a-ves, gonisogeth kernewek yw anweladow ogasti,

ha le mayth yw gweladow, lehes yw dhe 'goyntys leel' dhe vos gwelys avel rann a vewedh kernewek gwarahys po prevyans vusytyer.

Kernow yw kampollys yn tivers avel duketh, tiredh, is-tiredh, konteth, po avel pennhyns anhedhek. Homm yw gwel a-ves a 'aral' a denn vystyoryon yn bushow bras, myth-le selys war 'romansekheans teg' (Moseley 2018, f.110) pystryys gans kansvledhen anletty a argemynnow viaj romansek, desedhans drama istorek ha jornalyaseth tornyaseth sesonel.

Askorrans kernewek yw gwelys yn fenowgh dre brism a'y istori po y dirwedh avel kilva. Nebes askorroryon leel a venegas bos spas rag hwedhlans arnowydh ha rag keskelmans gans gonisogethow keltek erel, kepar ha Kembra po Breten Vyghan. Re rontyas dhe Gernow gre minoritya a-ji dhe'n RU mes hwath govyn ygor yw mars eus marghas rag hwedhlans kernewek fylmys a'n par ma a-ji hag adar CIOS (Saffery Champness 2018, f.55).

An hwedhlor allowys, lev a awtorita a-ves, a lever dhe'n Gernowyon piw yns i, ha styrya termys a'ga bosva, ha na wrons i eksistya yn hwir (Daily Mail, 2010), ha'ga bos feusik dhe vywa yn rann an bys mar deg. Dres an 'lagattans tornyas trevesigel perghenogel' (Moseley 2018, f.193), yn metyans gans gwel ledanna es karten bost, gwirder erbysek

dyffrans yw digudhys: bargennyow tir nerth konnyk, an goredhom anedhans, bonniow teknologiyeth vysel, menegvaow esow liesek, an diwysyans efanvos... usi ow tri yn fog imach komplettha dres eghen es Kernow 'pastiow ha dehen'.

Peswora Breus Kessedhek Kussulyek Konsel Europa war gowlwrians an KFDVK gans an Ruwvaneth Unys, recevys an 25ens a vis Me 2016, a wolowboynt an kuhudhans ma:

an BBC bys dhe'n termyn ma dhe worra Kernow yn bagas gans Pow Sows Soth West hag yn maner siansek dhe gemyska daldraow kernewek... An Kessedhek Kussul a edreg an profil ispyntyel a Gernowek war vedia pennfrosek. An 5 mynsen pub seythen a dowlennow kernewek darlesys gans an BBC war Radyo Kernow a veu arvreyssys gans kernewegoryon dhe vos anlowr – ow tochya gis, dalgh ha hirder (Konsel Europa 2017, f.31).

Y'n Deverow Ollgemyn Chartour Ryel an BBC (14) rann Diversita (5) 2016 y leverir: 'Res yw dhe'n BBC skoodhya yethow ranndiryel ha minoritya an Ruwaneth Unys der y eskorrans ha gonisyow ha dre gesparethow gans kowethyansow erel.' (DCMS, 2016).

01. Berrskrif gweythresek Executive summary

Ow provia nowodhow ha radyo 'leel' a-barth konteth a-ji framweyth Ranndir SW a Bow Sows, nyns yw provians an DGP (PSB) a-lemmyn dhyworth an BBC gwiw rag porpos. Y fyllir orth delivra lev rag an bobel gernewek. Ha'n BBC ow fyllel orth delivra kanasedhyans leun a styr a'n yeth ha'n bobel gernewek, ev a dorr yn syth y Dheverow Ollgemmyn (14) Diversita ow tochya an gorholedhow.

Kessedhek Kussulyek an Konsel Europa a bes breusi (heb bos merkys) fowt a brovians media a-barth an Gernowyon, ha dasleverel y gomendyansow rag 'gwrians desempis' yn Evrirans CM/ResCMN (2018) I an 7ves a vis Hwevrer 2018:

Rag gul gwrians hardh rag surhe daswel Chartour an BBC dhe wellhe hedhas dhe routh-vedia gans tus yw eseli minoritys kenedhlek hag ethnek; rag ynkressya arghasans ha surhe bos towlennow divers yn yethow minorityta, yn arbennek yn lwerdhonek, ha dalleth skoodhyans a'n par na rag Kernewek (Konsel Europa 2018).

Ow tochya aswonvos an yeth kernewek yn-dann CEYRM (ECRML) Konsel Europa yn 2003, ha gront gre minorityta kenedhlek difresys yn-dann an KFDVK (FCPNM) yn 2014;

Ow tochya an falladow ma gans Governans an Ruvaneth Unys ha'n BBC a-barth provians gonis

poblek rag an yeth kernewek ha'n bobel gernewek;

An studhyans ma a gows orth an fowt ma a brovians gonis poblek, ha kampolla agan kentrevogyon geltek, minoritys kenedhlek erel an RU yw aswonys gans gre difresys ha yethow teythek yn Kembra, Alban hag lwerdhon Gledh.

Ev a gows yn efanna a brovians a-lemmyn a'n DGP (PSB) y'n dirwedh vysyel usi ow chanjya, le may hwra kewri-frosa gwarthevya provians war-worholeth, hag yn pub le goslowysi ha data a dhetem an desedhegyans; ha porthow personelheans, yw lewys gans algorithmow diskudhadowder, a brof budhow ow lehe dhyworth an hager geynvor a 'Peak TV'.

An skrif ma a wra drehevel war dybyansow styrys yn 'Devedhek rag Pellwolok Gonis Poblek' (Freedman ha Goblot, 2018) ha hwithra pyth a yll bos semlant Media Gonis Poblek Kernewek anlinek pell a'n worcita: drehevys war deknologeth lyver-akontow lesrynnys (TLL) ha desinys a-barth an 'liesplekter keskomunyek gweriniethek' (Born 2018 f.134) a'gan devedhek bysyel. Yma barras eksistansel dhe'n BBC (ha Breten Veur); an bleuijowans a ddiverseth keffrysek a wordevis kesweythow usadow menystrans kresennys, orth aga chalenjya dhe esplegya yn uskis po bos yn godros kodha yn tewlder. An derivas ma a wovyn: a yll an BBC provia hembrenkyans dhe dhastesinya Kenedhlow

& Ranndiryow an BBC rag aswonvos, dastewynnya ha dasvywhe an liesplekter kompleth a honanieth Predennek an 21ens kansvledhen?

Dre reson an goredhom hin hag anparder golusogneth ow sevel - hwath yth yw Kernow yn mysk an boghosekka ranndiryow a'n RU ha'n ranndir nessa boghosekka yn Europa Kledh (Eurostat, 2014) – res porres yw bos pub gwrians gonis poblek nowydh desinys gans pennrewlys dastinythek y'ga holon. An skif ma a gemmer kevarwodhyans a 'Erbysieith Knowen Doos' Kate Raworth (2017) ha, gans menek an Arvreusyans Effeyth B yw talvosys yn ollvysel, an derivas ma a dhastewyn argergh tybyans desin radikal yn y brofyansow.

Aswonys yw Kernow dres an genedhel avel bonni awenek a vri. Yma dhodho bern a gerthow nosedhek, ertach gonisogethek a awen hag arnowedhyans, diwysyans ha kreft, spasow aswonys dres eghen ha tylleryow awenek troghyansek. Kespareth Aventur Leel Kernow ha Syllan a (KAL KS) a gampollas 10 chons ranngyllgh rag kevarghow dhe herdhya tevyans sostenadow ha gweres orth treusformya erbysieith an RU. Awenek a wra aga leda: 'an ranngyllgh awenek yw kerth wonisogethek hag erbysieithek - hag y tyv orth dewblek kevradh erbysieith an RU' (KAL KS, 2018).

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'New Frontiers' a gampol an diwysyansow awenek ha teknologethow bysyel avel ragwir stratejek rag Kernow, ow profya 'porth' rag an diwysyansow skrin – ow provia tommji rag an gwella roasow dhyworth Skol Fylm ha Pellwolok Pennskol Aberfala, ha gwruthyl sodhow, ha provia tre rag Media Gonis Poblek Kernewek.

An skrif ma a dhielven an chonsyow ma, eksamnya aga effeythow galladow, profya senario hewul nowedhyanse hag estenna an vaynorieth yw res dhe dhisplegya framweyth rag displegyans dalgh dhe gollenwel aga galladewder. Profyans ragresek yw hemma, enowys gans pennrewlys Darlesans Gonis Poblek, rag Kernow dhe wonis an kynsa Media Gonis Poblek drehevys war kadon-stock.

Dhe aralerya hunros Pellwolok Maori (2019) menegys yn teg:

An Yeth Kernewek yw tresor yn kolon an wonisogeth kernewek ha honanieth unnik dhe Gernow. Agan hunros yw bos Kernewek talveys, dynerghys ha kewsys gans pubonan. Selys yw agan strateji war dhalghuster – ow trehevel keskolm orth gonisogeth kernewek rag Onan hag Oll.

Y'n skrif ma, ni a brof kevres a gomendyansow rag dyghtya an ambosow hwithrans (Ystynnans A) settys gans gorholeth Konsel Kernow.

Cornwall is a Nation.

Kernewek, the Cornish language, is recognised as a minority language under the European Charter for Regional or Minority Languages (ECRML, 2003). It was reclassified by UNESCO in 2010 as 'critically endangered' and in the process of revitalisation, with the number of people taking a Cornish language exam with the Cornish Language Board KESVA averaging 18% YOY growth from 2016–2018¹, bucking the worldwide trend of diminishing linguistic diversity. Cornish is a living, growing language.

The decision to recognise the unique identity of the Cornish, now affords them the same status under the FCPNM² as the UK's other Celtic people, the Scots, the Welsh and the Irish (UK Government, 2014).

The Cornish have their own stories to tell, that should be told in their own voices: a proud history and unique culture, a distinctive language, a demanding present and an inventive future. A particular perspective on the world that is shared by families and communities in pubs, social clubs, village halls, with theatre and music, at feasts and festivals around the year, the length and breadth of Kernow. But to an outside eye, Cornish culture is practically invisible, and where it is visible, it is diminished to a 'local curiosity' to view as part of the commodified

Cornish lifestyle or visitor experience.

Cornwall is variously referred to as a duchy, region, sub-region, county³, as a perpetual destination. This is an outsider view of 'other' that attracts visitors in their droves, a place-myth based upon 'picturesque romanticization' (Moseley 2018, p.110) conjured by a hundred unhindered years of romantic travelogue, period drama location and seasonal tourism journalism.

Often Cornish production is seen through the prism of its history or its landscape as backdrop. Some local producers indicated that there was place for modern storytelling and for connecting with other Celtic cultures, such as Wales or Brittany. Cornwall has been granted minority status within the UK but it remains an open question as to whether there is a market for such filmed Cornish storytelling both within and without CIOS⁴ (Saffery Champness 2018, p.55).

The sanctioned narrator, the external voice of authority, tells the Cornish who they are, defines the terms of their existence, that they don't really exist (Daily Mail, 2010), that they're so lucky to live in such a beautiful part of the world. Beyond the 'colonial, appropriating tourist gaze' (Moseley 2018, p.193), in an encountering with a view wider than a postcard, a divergent economic reality is revealed:

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smart energy farms, the housing crisis, digital tech clusters, indices of multiple deprivation, the space industry... bringing into focus a far more complex picture than 'pasties and cream' Cornwall.

The Council of Europe Advisory Committee Fourth Opinion on the implementation of the FCPNM by the United Kingdom adopted on 25 May 2016 highlights this indictment, that:

so far the BBC has tended to group Cornwall as part of South West England and in an arbitrary manner blending out Cornish issues... The Advisory Committee regrets the minimal profile of Cornish on mainstream media. The 5 minutes a week of Cornish programmes broadcast by the BBC on Radio Cornwall was criticised by interlocutors as being totally insufficient – in terms of style, content and length (Council of Europe 2017, p.31)

In the BBC Royal Charter's General Duties (14) Diversity section (5) of 2016 it states 'The BBC must support the regional and minority languages⁵ of the United Kingdom through its output and services and through partnerships with other organisations' (DCMS, 2016).

Providing 'local' news and radio for a county within the framework of a SW Region of England,

the current PSB provision from BBC is not fit for purpose. It fails to deliver a voice for the Cornish people. In failing to deliver meaningful representation of Cornish language and people the BBC is in direct contravention of its General Duties (14) Diversity requirements.

The Council of Europe's (unheeded) Advisory Committee continues to criticise the ongoing lack of media provision for the Cornish, reiterating its recommendations for 'immediate action' in Resolution CM/ResCMN (2018)¹ on 7 February 2018 to:

Take resolute action to ensure that the revision of the BBC Charter improves access to mass media for persons belonging to national and ethnic minorities; increase funding and ensure a variety of programmes for minority languages, in particular for the Irish language, and introduce such support for the Cornish language (Council of Europe, 2018).

Having regard to the recognition of the Cornish language under the Council of Europe's ECRML in 2003, and granting of protected national minority status under the FCPNM in 2014;

Having regard to these failures by the Government of the United Kingdom and the BBC in provision of public service for the Cornish language and the people;

This study addresses this deficit of public service provision, referencing our Celtic neighbours, the other recognised UK national minorities with protected status and autochthonous languages in Wales, Scotland and Northern Ireland.

It also takes a broader look at the current provision of PSB in the changing digital landscape where streaming giants dominate on-demand provision, and everywhere audiences and data determine commissioning; where personalisation portals, navigated by discoverability algorithms, offer diminishing returns from the churning ocean of 'Peak TV'.

Building on ideas expounded in 'A Future for Public Service Television' (Freedman and Goblot, 2018) this report explores what a new non-metropolitan, non-linear, Cornish Public Service Media could look like: built on distributed ledger technology (DLT) and designed for the 'democratic communicative pluralism' (Born 2018, p.134) of our digital future.

The BBC (and Britain) face an existential crisis; the flowering of federal diversity has outgrown orthodox structures of centralized administration, challenging them to evolve rapidly or risk plummeting into obscurity. This report poses the question: can the BBC provide leadership in redesigning BBC Nations & Regions to recognise, reflect and revitalize the

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complex plurality of 21st century British identity?

In light of the climate emergency and rising wealth inequality - Cornwall remains one of the poorest areas of the UK and the second poorest region in Northern Europe (Eurostat, 2014) - it is essential that any new public service intervention be designed with regenerative principles at their heart. Taking direction from Kate Raworth's seminal 'Doughnut Economics' (2017) and with reference to the globally valued B Impact Assessment, this report reflects a radical design thinking process in its proposals.

Cornwall is recognised as a nationally significant creative cluster. It contains a wealth of notable assets, a cultural heritage of creativity and innovation, industry and art, celebrated exceptional spaces and immersive inspirational places. Cornwall and the Isles of Scilly Local Enterprise Partnership (CIOS LEP) has identified 10 sector opportunities for investment to drive sustainable growth and help transform the UK economy. Leading these is Creative: 'the creative sector is a cultural and economic asset – and it's growing at twice the rate of the UK economy' (CIOS LEP, 2018).

New Frontiers identifies the creative industries and digital technologies as a strategic priority for Cornwall, proposing a 'harbour' for the screen industries – hothousing top talent from Falmouth

University's School of Film and TV, creating jobs, & providing a home for Cornish Public Service Media.

This report analyses these opportunities, examines their potential impacts, proposes an innovative, practicable scenario and extrapolates the interventions required to develop a framework for capacity development to fully realise their potential. This is a pioneering proposition, ignited by the principles of Public Service Broadcasting, for Cornwall to cultivate the world's first Public Service Media built on blockchain.

To paraphrase the beautifully articulated vision of Maori Television (2019):

The Cornish language, Kernewek, is a treasure at the heart of Cornish culture and Cornwall's unique cultural identity. Our vision is for Cornish language to be valued, embraced and spoken by all. Our strategy is based on inclusivity – building a connection to Cornish culture for One and All.

In this report we make a series of recommendations to address the terms of reference (Appendix A) set by the Cornwall Council requirement.

1 M. Pierce on behalf of KESVA provided data in an email 2 Mar 2019.

2 The Framework Convention for the Protection of National Minorities (FCPNM) is a legally binding instrument that "sets out principles to be respected and goals to be achieved by member states in order to ensure the protection of national minorities" (Council of Europe, 2016).

3 The use of the words 'county' and 'England' when referring to Cornwall in

promotional literature have been discouraged by Visit Cornwall (BBC News, 2012).
4 Cornwall and Isles of Scilly (CIOS)

5 Despite representations, the drafting of the 2016 Royal Charter chose to disregard Cornish from this definition: "regional and minority languages" mean Welsh, Scottish-Gaelic, Irish and Ulster Scots' (DCMS, 2016).

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02. Mosen a gomendyansow Table of recommendations

Recommendation

1. Provision of transitional arrangements delivering for Cornish speaking audiences

That a Cornish Media Service: Gonis Media Kernewek (GMK) be established, initially incubated as a project in Screen Cornwall, until such time as it is provident, pending legislation, to form as an independent public body.

That funding arrangements for GMK transitional activities are promptly defined and committed.

That interim transitional partnerships be negotiated between the GMK and the BBC (and other partners) to support Cornish language content commissioning and distribution and help to cultivate the Cornish production supply chain.

2: Delivering high quality content and serving Cornish speaking audiences

That GMK develop co-commissioning partnerships with arts, cultural and heritage organisations and co-productions with other media organisations.

That a partnership arrangement be negotiated between the GMK and the BBC to establish a provision of public service media for Cornish speaking audiences; to distribute live and captured digital content to BBC iPlayer, with provision for equality of prominence for Kernow with S4C and ALBA; that this partnership delivers improved editorial provision of BBC services, including but not limited to local news, current affairs, and Radio Cornwall, that better reflects and represents the Cornish language and culture of the people of Cornwall.

3: Securing Cornish PSM for the future

That Cornish Public Service Media provision be delivered by GMK.

That in line with current public service media funding principles, an annual license fee funding agreement is negotiated and settled with DCMS for GMK of not less than £10m per annum.

That Cornwall Council propose and lobby for the changes required to secure a legislative basis for the provision of Cornish language public service media. This will need to be determined with legal counsel, and effected by the UK Government, indicatively: To introduce a Cornish media service: update Communications Act (2003) Chapter 1, new subsection: The Cornish Media Service (amendment should provide for functions for Cornish analogous to those provided for Gaelic in the Broadcasting Act (1990) Section 183.

That Cornwall Council request the Council of Europe to include Cornish in Part III (Article 11) of the European Charter of Regional or Minority Languages.

That Cornwall Council and GMK form a partnership to help effectively deliver language learning.

That the BBC seek to make an amendment to the Royal Charter for the continuance of the British Broadcasting Corporation in Interpretation Section 63. ...definitions... to insert the word 'Cornish' in the definition of 'regional and minority languages'.

That BBC Nations & Regions consider reconfiguring Cornwall from current dislocation as 'county' service within SW Region of England to Nation status in line with the UK's other national minority Celtic people, the Scots, the Welsh and the Irish.

That Ofcom changes to the Prominence Code include GMK content in line with 'Nation and area specific channels', not for EPG, but is required for: The prominence of PSB VoD content and considerations for a future regime.

That GMK ensure Cornish is included with parity in industry diversity monitoring processes e.g. Diamond diversity monitoring forms.

02. Mosen a gomendyansow Table of recommendations

Over the course of this study, but outside of its scope, the following areas have been identified that we consider warrant further research:

An action research project to analyse the cultural, linguistic, economic, diversity, equality and ecological impacts of a Cornish PSM, including platform data and audience reactions (Appreciation Indices) and immersive and interactive content innovation and implementation in PSM. Testing PSM Value Chain Doughnut / BIA impact reporting.

Study of the representation of Cornish language and culture in regional news and current affairs, including BBC news online with a primary focus on BBC South West from 2003 to the present.

Independent research on viewing habits of Cornish speaking audiences to inform editorial strategy.

Applications of DLT and other technologies in PSM that may have positive impacts on workflow and cost efficiencies throughout the value chain, thus improving the public value proposition, e.g. smart contract chain of title DRM, licence fee and rights and residuals waterfall crypto-payments, smart swarm commissioning.

“
**Everyone has
the right to
freedom of
expression.**”

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3.1. Media gonis poblek - gologva ollvysel Public service media – a global perspective

Neither commercial nor state-controlled, public broadcasting's only *raison d'être* is public service. It is the public's broadcasting organisation; it speaks to everyone as a citizen. Public broadcasters encourage access to and participation in public life. They develop knowledge, broaden horizons and enable people to better understand themselves by better understanding the world and others (World Radio and Television Council & UNESCO, 2012).

John Reith will forever be remembered for establishing the BBC mantra, borrowed from American broadcasting pioneer David Sarnoff, of 'entertaining, informing and educating (BBC, 2019), the pithy expression of core values that has served not only the BBC for nearly 100 years, but underpins a global understanding. The EBU defines Public Service Media (PSM) as 'broadcasting made, financed and controlled by the public, for the public. Their output is designed to inform, educate and entertain all audiences' (EBU, 2019).

There are varying definitions of the term 'Public Service Broadcasting' (PSB). Olexiy Khabyuk explores the nuances of ownership, legal status, degree of state intervention and public service remits amongst broadcasters, noting that the one combining factor in interpretations of the term is the concept of

independence from the state but concluding that this is difficult to ever truly achieve (2011, pp.67-73). Kalinga Seneviratne (2006, p.11) gives a summary of the different manifestations of PSB globally, noting that the British model has been widely accepted as a universal definition with the following key principles (summarised by the now defunct Broadcasting Research Unit):

- Universal accessibility (geographically)
- Universal appeal (general tastes and interests)
- Paying particular attention to minorities
- Contributing to a sense of national identity and community
- Keeping a distance from vested interests
- Direct funding and universality
- Competition in good programming rather than for numbers
- Guidelines that liberate rather than restrict programme makers

The second point, 'universal appeal', is presently under scrutiny, discussed later in the report, as the BBC faces governmental pressure to become less 'populist' and more 'distinctive'.

In some contexts, discourse is delimited to Public

Service Television (PST), a historical refinement of the broader term PSB which includes radio broadcasting and is increasingly used to describe provision of ever more complex internet-distributed media functions, delivered by organisations formed previously in more restricted linear broadcasting domains. In this study we move purposefully towards adopting the more apposite Public Service Media (PSM), a term which better describes the collection of services which provide, as Georgina Born suggests, 'the core of our future public knowledge ecology' (Born 2018, p185).

The Council of Europe recognises the important role of public service media (PSM) in upholding the fundamental right to freedom of expression and information, in accordance with Article 10 of the European Convention on Human Rights, enabling people to seek and receive information, and promoting the values of democracy, diversity and social cohesion.

By virtue of their remit, public service media are an important public source of unbiased information and diverse political opinions. They are particularly suited to foster pluralism and awareness of diverse opinions, notably by providing different groups in society with an opportunity to receive and impart information, to express themselves and to

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3.1. Media gonis poblek - gologva ollysel Public service media – a global perspective

exchange ideas. They can contribute greatly to the promotion of social cohesion, cultural diversity and pluralist communication accessible to everyone.

In exercising their role, public service media face a number of challenges, such as securing the right level of independence from those holding economic and political power, securing appropriate funding, adapting to the digital age and maintaining high editorial standards in a competitive market (Council of Europe, 2018).

‘Everyone has the right to freedom of expression’ (ECHR, 1950).

UK market context

Since its inception in 1936, television in the UK has grown to encompass over 480 channels with six main channel owners¹, and represents a unique model for PSB delivery which has extended beyond the BBC. The BBC and Channel 4 are what Patrick Barwise terms ‘pure’ PSBs, in that they have detailed public service remits and are publicly owned, along with S4C in Wales and BBC ALBA (in partnership with MG ALBA) in Scotland. Channel 4 is also grouped with ITV and Channel 5 as ‘commercial PSBs’, all mainly funded by advertising, and the latter two required to deliver some public service objectives.

In addition, the UK’s system includes non-PSBs, which consist of various platforms and online-only services such as Netflix. With the exception of these online services, all UK broadcasters operate under Ofcom’s Broadcasting Code, which is designed to protect the interests of children, avoid causing general harm and offence, ensure impartial and accurate news reporting, and so on. In terms of viewing figures of broadcast content in the UK, the BBC has the largest reach at 32%, with ITV second at 25% as of January 2019².

All major UK providers have significantly expanded their reach by offering extensive on-demand services online, via platforms such as BBC iPlayer, ITV Player, 4OD and Demand Five. BBC ALBA and S4C are both available via their own sections of iPlayer, while S4C also maintains its own catch-up service ‘Clic’. In February 2019, the BBC launched ‘BBC Scotland’, a new channel of mixed content aimed at better reflecting life in Scotland today, and this is also available on iPlayer.

In a new development, on the 27th February 2019 the BBC and ITV announced plans for a joint UK streaming service ‘BritBox’ which will operate in direct competition with global players Amazon and Netflix. The platform already operates in North America, providing British content to over half a million paying subscribers (Reilly, 2019). The launch

of this service in Britain later in 2019 is expected to draw in other partners to provide a combined platform for old classics, recent programmes and new commissions.

Global market context

In general, it can be said that countries with a healthy³ PSB presence enjoy a more robust television culture. A 2013 study by the BBC which examined PSBs globally revealed that countries with strong, well-funded public service broadcasting tend to have commercial channels which generate stronger revenues and levels of investment, with better choice and quality in the eyes of audiences, a ‘virtuous circle’ of competition between public and private broadcasters (BBC, 2013), findings corroborated by McKinsey & Company (2004, p.2). This applies in particular to the UK, Australia and the Nordic countries.

Jon Thoday suggests that PSB also provides a unique framework for talent development, something which goes unacknowledged by the commercial sector, which benefits hugely from this investment. In Britain, the BBC and Channel 4 have been a vital resource for nurturing talent beyond metropolitan centres⁴, starting the careers of countless artists who would have been deemed too inexperienced or risky for commercial organisations. Thoday also notes that the

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US tendency to ‘Americanise’ UK formats has gone, and instead the (heavily commercial) US market now regularly looks to Britain for new ideas and talent (2018, p.25).

The streaming giants

The reach and scale of online providers of content has grown rapidly over the last decade. Organisations such as Netflix and Amazon Prime Video have rapidly built up their subscribers from nothing to 125 million and 100 million⁵ respectively (Molla, 2018), with 40 million people reached by YouTube’s free content in the UK alone (Ofcom 2018, p.6). Other big players are Hulu, a joint venture between Fox, Disney/ABC and NBC Universal, which has around 25 million subscribers in the US, its territories and Japan (Spangler, 2019), and HBO, which operates ‘HBO Now’, ‘HBO On Demand’ and ‘HBO Go’ as variants of the online platform model with a total base (when combined with paying TV customers) of around 142 million subscribers (Molla, 2018).

Hailed as the biggest change in the Hollywood landscape since MGM’s demise in the 1980s, in March 2019 Disney closed a \$71 billion acquisition of 21st Century Fox, giving Disney an estimated control of 40% of the box office and securing its position as a rival to digital streaming service giants such as Netflix, Amazon and Apple (Bradshaw, 2019).

Disney is set to launch its own online platform later in 2019, ‘Disney+’, with a projected 160 million future subscribers (Franck, 2019), significantly strengthened now by the addition of Fox content.

The impact of these providers on the wider market goes unregulated in the UK, along with their broadcasting standards. These global media giants have created new definitions of market scale, with unprecedented levels of resources channelled into content production. An EBU Media Intelligence Service study charts the immense scale of differentiation between operating revenues of audio-visual players, exposing the top ten media conglomerates (AT&T, Comcast, Sony, Disney, etc) as having 11.2x the operating revenues of an aggregated sixty-five PSM members, and the top ten internet giants (Apple, Amazon, Alphabet, Microsoft, Facebook, Netflix, etc) having 18.4x. Compounding this disparity, the growth gap is increasing between non-European media conglomerates and internet giants, over traditionally nationally-focussed PSM (EBU 2018).

Viewing patterns

While traditional TV formats have been retained, Netflix has come to encourage an ‘epic’ style of viewing.

‘Many of its original series eschew the discrete episodic structure of television, with fewer standalone episodes and more collections of scenes moving slowly to a climax. Netflix also utilises A-list casts, lavish budgets, and endless marketing resources to brand its original productions as must-see events’ (Barker & Wiatrowski 2017, p.4).

This is an area that public service broadcasters struggle to keep up with, limited in terms of their budgets. The phenomenon of binge watching, now a common behaviour, is linked to this behaviour as platforms release their series in bulk and encourage viewers to move away from the traditional pace of weekly episode releases.

Move to online streaming

Undoubtedly the biggest change to television in recent years has been the shift of viewing content on TV sets to laptops, phones and other devices via the internet.

This change has been driven by a group of organisations, such as YouTube, the BBC, Hulu, iTunes, Netflix, Amazon, as well as others, rather than one individual in particular (Jenner 2018, p.2). The BBC led the trend for PSBs in Europe to build online presences after launching its iPlayer in 2007,

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and this gave viewers the ability to autonomously schedule their content around their own lives. This feature is now firmly entrenched in viewing culture, whether content is watched online or on a television set. It has been observed that catch-up services such as iPlayer also function as a 'front door' to the provider, where people begin their relationship with (in this case) public service broadcasting (Grainge & Johnson, 2018).

It is important to note that writers on this subject do not frame the internet as an end to television, or even as a rival. As Des Freedman puts it, the internet hasn't killed television but actually extended its appeal: 'Our routines and access points may not be the same but there is little evidence that we have lost our appetite for television-like content' (Freedman 2018, pp.5-6). This introduces a second important point, which is that despite the shift in the ways we view content, even the most 'disruptive' of providers are retaining traditional TV formats such as programmes, seasons, channels and so on.

The fact remains that even the young remain voracious consumers of television content. Television is...characterised by its durability as well as an underlying volatility and uncertainty (Freedman 2018, p.7).

Online viewing also allows for innovations such as

Amazon's 'X-ray' viewing option, where information on characters, actors, scenes and general trivia from IMDb can be accessed directly onscreen while viewing. In 2018 the Netflix series *Black Mirror* released its first interactive episode 'Bandersnatch', offering viewers the opportunity to choose their own path through the narrative by making decisions for the main character. While this was received by some as too gimmicky, interactive features such as these have the potential to develop and become more commonplace, and we can expect to see further experiments as technology advances and consumers demand more innovation from providers.

Algorithms

Another subtle change is the use of algorithms to determine what is suggested for us to view, based on past choices. The providers' goal is to retain, develop and monetise audiences, and decide what will get commissioned. These can be attractive to consumers in their obvious usefulness in a world filled with choice, but they also narrow our viewing horizons and limit discovery, reinforcing our views and rarely challenging them. 'No "surprises" or "unwanted" encounters, just uncannily familiar themes and variations' (Urrichio 2015, p.8). More than 80% of the programmes people watch on Netflix are chosen through its recommendation system, split into more than two thousand taste groups (Plummer, 2017).

This algorithmic lens is something James Bennett sees as having a potentially negative effect on democracy, counter to television's ability to be a 'window on the world' which enables exploration, and argues for PSBs to set different and less commercially-driven algorithms for their online content (Bennett 2018, pp.112-3). Now operating in a global market, British PSBs are competing for viewers with large commercial companies like Amazon and Netflix, whose algorithms have shifted viewing habits and ensure their content appears in 'top picks' viewing menus, above PSB content. In 2018 the heads of British PSBs wrote an open letter calling on the government to 'modernise the rules that help guarantee prominence for PSB linear services and associated on-demand services, such as the BBC iPlayer, ITV Hub, STV Player, All 4, My5, and S4C Clic, to ensure they are fit for purpose as viewing habits change' (The Guardian, 2018).

Funding

Making a useful comparison of the budgets of different broadcasters is not a straightforward task, as the sums of money spent are often radically different depending on the size, reach and nature of the organisations in question. In addition, companies such as Netflix are increasing their spend on production at an enormous rate, and each year sees a very different funding landscape globally.

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To give an idea of scale, RBC Capital Markets research ranks Disney as the biggest spender on content among media giants, with a projected \$23.8 billion for 2019, constituting 22% of the estimated \$107 billion in global content spending among the largest media companies (Littleton, 2019). Next on the list is Netflix, which spent \$12.04 billion on content in 2018, an increase of 35% from \$8.9 billion in 2017 according to its fourth-quarter 2018 earnings report. Analysts expect that trend to continue with a 25% increase on spending in 2019 at around \$15 billion; \$2.9 billion is expected to be spent on marketing these productions (Spangler 2019). The company can spend \$100 million or more on a single production. In contrast, the BBC's annual budget is around £4 billion, and smaller still, BBC ALBA works with an annual budget of around £13 million to cover its entire output. In 2017 in the UK, a total of £2.5 billion was spent on new, UK-originated content by PSBs (Ofcom 2018, p.16).

There is increased pressure on PSBs to produce high-budget, popular drama, which has led to an increased dependence on investment from the US and a growing number of co-productions⁶. Chapter 10 of the Puttnam Report (2016) details the ramifications of this, noting that while international collaborations have clear advantages, they tend not to be making 'British stories for British audiences' but instead aim for global appeal. An hour of

primetime drama costs between £500,000 - £1 million to produce, while between 2008 - 2015 there was a 31% fall in investment in original drama in PSBs (Freedman & Goblot 2018, p.286). US content currently dominates via Netflix and Amazon, which appeal to younger demographics, and provide huge competition for PSBs.

Repeated cuts to the BBC's budget have led director general Tony Hall to warn that 'cracks are beginning to show' in his speech in 2018 to the Royal Television Society. External competitive pressures are exacerbated by the funding deficit caused by the revoking of the 4.55 million free TV licences for over 75s previously covered by the government (since being introduced in 2000). This compensation is being phased out in three steps – it fell from £655m in 2017-18 to £468m in 2018-19 and a final £247m payment will be made in 2019-20. By then the value of the free licences could constitute £725m (RTS, 2018) equivalent to nearly 20% of the BBC's annual operating budget.

Political threat

The world's leading alliance of public service media, the European Broadcasting Union (EBU) asserts that:

'well-funded and strong public service media are the cornerstones of democratic societies and

have been shown to correlate with higher degrees of press freedom, lower levels of right wing extremism and better control of corruption' (EBU, 2019).

A 2017 article by Nils Muižnieks notes an emerging trend of threats to the independence of public broadcasters or of their regulatory bodies in Europe, and that 'a growing number of alerts concern political interference in the editorial line of public broadcasters, insufficient safeguards in the legislation against political bias, or the lack of appropriate funding to guarantee the independence of the public broadcasters' (Muižnieks, 2017).

In the UK, this has manifested itself as the perception that the BBC's success is preventing private companies from entering the market. David Hendy discusses this current trend and the false idea that 'light' programming is something new to the BBC, along with a pressure for it to provide more 'distinctive' (unpopular) content (Hendy 2018, pp.104-5) leading to the government seeking to make it less 'populist' and more 'distinctive' as set out in a 2016 report commissioned by the Department for Culture, Media and Sport. This has put the BBC in what David Mitchell called 'an almost impossible situation'. Outlining the unprecedented political pressure faced by the BBC and its low morale, he argues, 'those who work for it and run

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it are understandably asking the question: what do we have to do to assuage our critics, to be allowed to continue? This report's answer can be summed up in one word: fail' (Mitchell, 2016). The prior 2013 BBC report addressed the argument that PSBs crowd out commercial media investment and innovation, suggesting that this misunderstands the dynamics at play in the UK creative sector. 'In practice, the BBC's presence has had the opposite effect...the BBC helps create 'competition for quality' between different institutions that grows the overall market' (BBC 2013, p.1). Difficulty lies in framing broadcasting policy as a balancing act between citizen and consumer interests, diminishing public service television to plug gaps in commercial provision while at the same time minimising its cost and impact for consumer reasons. As Patrick Barwise points out, this 'assumes a clear-cut distinction between popular/commercial and minority/non-commercial programmes' which the immense success of seemingly minority interest programmes like 'The Great British Bake Off' shows is anything but (Barwise 2018, p.53).

Fragmentation

A challenge common to PSBs around the world is sustaining high levels of reach, impact and value to audiences as they fragment and become harder to reach in the face of increased choice. Content costs

must be thinly spread across a broad audience base whilst maintaining a diverse schedule which informs, educates and entertains, amidst fierce competition for viewers. The BBC's 2013 study warns that this could potentially lead to a 'race to the bottom' with channels 'focusing increasingly on low-risk, low-investment programmes, from reality TV to cheap US imports' (BBC 2013, p.2). For public service broadcasting in the UK, and the BBC in particular, other threats are posed by long-term changes in British behaviour and attitudes, such as a reluctance to allow 'only a narrow elite to pronounce on matters of news-worthiness or artistic value' (Hendy 2018, p.103), causing audiences to look elsewhere for content which resonates with them more closely.

1 In order of market share: the BBC, ITV plc, Channel 4 Television corp, Sky UK, Viacom (Channel 5) and UKTV Media.

2 Data from BARB, available at: <https://www.barb.co.uk/viewing-data/monthly-viewing-by-channel-group/>

3 Defined as broadcasters which 'invest high levels in originated programming, and whose TV channels offer a diverse schedule (i.e. have a high proportion of programming in key public service genres) and are regarded by audiences as being of high quality' (BBC 2013, p.12).

4 As of 2014, the majority of BBC staff are now working in the nations and regions (BBC Press Office, 2014).

5 8.2 million and 4.3 million households respectively in the UK (Ofcom 2018, p.6).

6 Examples include the BBC's 'The Night Manager', coproduced with US TV channel AMC, 'War and Peace' produced between BBC One and the Weinstein Company, as well as the UK losing productions such as 'The Trip' and 'Black Mirror' to American companies with bigger budgets.

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The campaigns to obtain these channels have usually been driven by the realisation that, in the modern world, television in your own language is a necessity for cultural and linguistic survival.

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3.2. Media gonis poblek - yethow minorityta Public service media – minority languages

‘The campaigns to obtain these channels have usually been driven by the realisation that, in the modern world, television in your own language is a necessity for cultural and linguistic survival’ (Thomas 1995, p.5).

Minority languages in Europe have become increasingly visible, connected and legally protected over the last few decades with the emergence of organisations such as the Mercator Network, established in 1988 to connect multilingual communities and promote knowledge sharing across Europe, and the European Language Equality Network (ELEN), an international NGO that works to protect and promote equality for European minoritised languages which was established in 2011 to replace the European Bureau for Lesser-Used Languages (1980-2010). The European Charter for Regional or Minority Languages (ECRML) is the European convention for the protection and promotion of languages used by traditional minorities, which together with the Framework Convention for the Protection of National Minorities (FCNM) entered into force in 1998, and constitutes the Council of Europe’s commitment to the protection of national minorities.

In this context, and an integral part of this advancement, has come the formation and evolution of minority language PSB. The Welsh channel S4C launched in Wales in 1982, and has not only been

a strong example within the UK, but a global inspiration for other minority languages. Then Chief Executive Huw Jones wrote in S4C’s 1994 annual report: ‘Our success has been the inspiration for the establishment of a Gaelic service in Scotland and now an Irish channel in Ireland. It is paralleled and admired in small countries and regions from Catalonia to Slovenia, and from Tanzania to New Zealand’ (S4C 1994, p.14).

The landscape has continued to evolve in the UK, with Ireland’s TnaG growing into TG4 in 1996 and Scotland’s Gaelic Media Service developing into today’s partnership between MG ALBA and the BBC, BBC ALBA, in 2008. Broadcasters operating as protectors and champions of a minority language tend to be found in countries which have granted devolution or political autonomy to regions, which in Europe constitutes Spain (Galicia)¹ and the UK.

As of 2019, the Isle of Man are making moves towards a greater provision of Manx programming, discussed later in this report. Elsewhere, examples of a growing indigenous television movement include APTN (the Aboriginal Peoples Television Network) in Canada, NITV (National Indigenous Television) in Australia, Oivi TV in Hawaii, TITV (Taiwan Indigenous Television) in Taiwan and Maori Television in New Zealand, giving a voice to the historically marginalised First Peoples of these countries.

Maori Television constitutes a particularly positive example, in that it has been warmly welcomed by a non-Maori majority culture and held up as one of the best PSBs in the country (Smith 2016, p.23).

While the common driver behind such campaigns is the preservation of language, Mike Cormack observes that their success is unpredictable and gives seven interconnected variables which come into play: number of speakers; breadth of support; campaign’s leadership and organisation; current political culture and the space for negotiation; a weakening of the state coinciding with a strength in the relevant region; symbolic status of the language; and sympathetic international trends (Cormack 1998, pp.39-42).

No one of these is a deciding factor, but Cormack points out that their emphasis is political rather than economic or cultural. ‘The case for S4C, and the case for an expanded Gaelic Television service, is one of political commitment to the autochthonous languages of Britain’ (Comunn na Gaidhlig 1989, p.2). This is supported by Mattelart’s observation that since the mid 1990s, alongside rapid developments in audio-visual technologies, a new appreciation of cultural diversity has slowly emerged as a reaction against state-centralised policies as well as against the de-territorialisation of traditional social and cultural spaces caused by the internationalisation

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3.2. Media gonis poblek - yethow minoryta Public service media – minority languages

of communication systems (Mattelart 1994, pp.100-103), contributing to a flourishing (albeit vulnerable) global eco-system of minority language PSM organisations.

McElroy and Noonan observe some of the strategies employed by minority language PSM to thrive in the increasingly commercialised global broadcast ecology, by directly connecting and building relationships with their audiences wherever they happen to be, beyond national boundaries, reaching out cross-platform to global diaspora communities:

‘In many nations that have a variety of language communities, both commercial and majority language PSB organisations have withdrawn from minority-language provision due to deregulation and market forces (such as overseas sales) that favour dominant languages. However, minority-language PSB organisations recognise the value of digitalisation and are responding in diverse ways, including multi-platforming, social media, and user generated content’ (McElroy & Noonan 2017, p.169).

The protected status given to minority languages presents many opportunities for broadcasters, although Tadhg Ó hlfearnáin notes that in the case of the Irish language it is increasingly treated by the

government as a minority and heritage issue, leading to ‘a marginalisation which provides great dangers’ (Tadhg Ó hlfearnáin 2001, p.6).

There is a fine line for broadcasters and governments to tread between presenting minority languages and cultures as historic and worthy of preservation, and at the same time current, mainstream and robust enough to have practical application in modern life.

PSM organisations have often trodden between a commons/minorities dichotomy, which Born challenges to ‘employ digital media to shape a three-way, multi-platform public sphere’ where alongside ‘universal’ appeal, ‘services [are] aimed at supporting both intercultural and intracultural modes of address’ (Born 2018, p.133).

‘Intercultural is when a minority speaks to both the majority and to other minorities, a core function of pluralist PSM. Intracultural is when a minority speaks to itself via services and programming’ (ibid).

This triskelion mode is particularly resonant in the context of minority language PSM. With guidance and encouragement from the network of now established Celtic minority language broadcasters, and in response to favourable aligning trends, this report proposes the timely formation of a Cornish PSM in Cornwall.



I Corporación de Radio Televisión de Galicia

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Hindi, Chinese and French are taught [in schools], so why not Welsh? And why not Cornish? They're part of our culture (Benjamin Zephaniah, 2015).

Representation

Rachel Moseley's *Picturing Cornwall: Landscape, Region and the Moving Image* (University of Exeter Press, 2018) explores the moving image construction of place onscreen since the advent of the moving image. The findings of this research show that Cornwall has been produced persistently in representation as England's exotic 'other', as an internal colony, in ways which have contributed to its longstanding reliance on a tourist economy. Cornwall has been constructed, from the outside, as an almost exclusively coastal destination, a place of towering cliffs, crashing waves, cream teas and ruined engine houses, as a place of leisure and relaxation for the visitor from outside. This view, this place-myth, effectively limits Cornwall to its coastal edge, making its post-industrial and agricultural interior invisible and reducing a multiplicity of identities to a tourist picture postcard image. This book also considers film work produced from within Cornwall, and its potential to offer an 'inside' view which is productive and critical. Among the Cornish screen work considered were the films of Mark Jenkin, whose film *Bait* premiered to enormous critical

acclaim at the 2019 Berlinale and will go on general release in September 2019. Moseley argues that in order to challenge the persisting, colonial 'outsider' view of Cornwall, a rebalancing is required, in terms of indigenous production. Access to meaningful, self-produced representation on a par with that of S4C and MG ALBA, for example, which proceeds from setting editorial policy, through commissioning, to supply chain, creative talent and production entities, requires investment on an appropriate scale to enable the development of PSM for Cornwall which will be able to respond to and redress over 100 years of picturing which has elided the Cornish voice, experience and culture.

The absence of 'proper job' Cornish media representation has become increasingly visible in recent years, framed by a growing corpus of economic development studies, human rights reports, government statements and the global network of minority and indigenous language cultural bodies, including PSM organisations. Whilst unfortunately clouded by an opaque 'outsider' view of Cornwall, e.g. omitting a single reference to the Cornish language in their Strategy for the Screen-based Sector in Cornwall and the Isles of Scilly, Saffery Champness (2018) do acknowledge a unique Cornish culture informing a rich placemaking narrative and note the:

Lack of a regional broadcaster or publisher of screen content. Cornwall is covered by BBC South West, which offers a half-hour current affairs programme but has no commissioning power. Though there is a BBC Radio Cornwall presence, there is a lack of a BBC Cornwall as a cultural content investor no mechanism for Cornish stories to get on to the screen (Saffery Champness, 2018).

The Council of Europe Advisory Committee is the independent expert committee with recognised expertise in the field of the protection of national minorities responsible for evaluating the implementation of the Framework Convention. From this perspective the inadequacy of provision is clearly recognised and has been repeatedly articulated:

The Advisory Committee regrets the minimal profile of Cornish on mainstream media. The 5 minutes a week of Cornish programmes broadcast by the BBC on Radio Cornwall was criticised by interlocutors as being totally insufficient – in terms of style, content and length. Independent Internet e-broadcasting and local community radio stations provide a platform for a further one hour a week of Cornish. The ongoing revision of the BBC Charter is perceived by the minority's representatives as the occasion to improve the

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situation, since so far the BBC has tended to group Cornwall as part of South West England and in an arbitrary manner blending out Cornish issues (ACFC, 2017).

Since 1961 BBC Spotlight, a half-hour regional news programme, has broadcast on weekdays from BBC Broadcasting House in Plymouth, with the BBCs regional current affairs half-hour, Inside Out South West, following in 2002. These programmes cover local (sic) news and stories from across the SW region. BBC Radio Cornwall is the only physical presence of public service broadcasting in Cornwall, based at Phoenix Wharf in Truro. According to Rajar listening figures for March 2019, BBC Radio Cornwall reaches 24% of 15+ listeners in Cornwall, achieving 11.7 average hours per listener per week (Rajar, 2019). A detailed historical analysis of the representation of Cornish language and culture on the BBC, focussing particularly on SW regional BBC Spotlight and BBC Radio Cornwall is unfortunately beyond the scope of this study. Regarding Cornish language provision and investment in Cornish infrastructure, however, the picture is pitifully simple. The broader lack of Cornish cultural representation is illustrated by the BBCs handling of the language. The only Cornish language provision is An Nowodhow, a five-minute review of the week's news in Cornish on Sunday afternoons. This is the only public service broadcast in Cornish.

Challenging this vacuum there has been a tenacious, if restricted, flowering of Cornish language content. Independent filmmakers have been inspired to tell Cornish stories, old and new, in the Cornish language, from the first Cornish language feature film in 2002, Hwerow Hweg (Bitter Sweet), a 'gleaners sheaf' anthology of award winning Cornish shorts, Tyskennow Kernow, to animated series Mazed Tales (12 x 1 minute) and Piski Films' Cornish Legends. These productions have predominantly been made on shoestring budgets, some with support from cultural and educational organisations including: Heritage Lottery, Arts Council England, Cornwall Council, FEAST, Cornwall Heritage Trust, Dasserghi Kernewek, Kowethas an Yeth Kernewek, Falmouth University and University of Exeter.

Radyo an Gernewegva started in 2008 and its video counterpart Pellwolok an Gernewegva, are run by a determined individual, supported by small pots of arts and community funding and volunteers from the Cornish language speaking community. Radyo an Gernewegva provides a weekly hour-long podcast in Kernewek, largely reporting from and about Cornish language and cultural events. Since 2014 the service reaches a wider audience being broadcast on several stations through Cornwall community radio network. In 2018 the service expanded to a YouTube channel, Pellwolok an Gernewegva, delivering a current affairs monthly round-up: An Mis, and from

January 2019 an occasional half-hour 'daytime' chat show: Jaqi ha Jerry. Despite limited production values characteristic of low or no-cost community production, and a lack of English subtitles limiting their accessibility, programmes typically generate several hundred views evidencing a small, but committed, audience for Cornish language content that is not currently being served by professional broadcasters.

Between 2003 and 2013 a partnership between the Cornish Language Partnership MAGA and various organisations sustained an annual Cornish language award (the Govyn Kernewek Award) with iterations ranging from a £5000 commission to £1000 prize for a winning short. After several years absence, in 2018 the award was revived and rebranded as FylmK (Kesstrif rag Fylm Berr y'n Yeth Kernewek | Competition for Short Film in the Cornish Language) a new Cornish language short film competition, delivered by the Cornish Language Office at Cornwall Council and the School of Film and Television, Falmouth University (Monk, 2018). In 2019 the management of FylmK has been taken on by the newly formed Screen Cornwall, as part of its talent development programme.

Addressing the lack of action from the UK Government in tackling this public service deficiency, as evidenced in the Fourth Opinion on the United

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Kingdom, in February 2018 the Committee of Ministers presented resolution CM/ResCMN (2018) I with recommendations for immediate action including to:

Take resolute action to ensure that the revision of the BBC Charter improves access to mass media for persons belonging to national and ethnic minorities; increase funding and ensure a variety of programmes for minority languages, in particular for the Irish language, and introduce such support for the Cornish language (Council of Europe, 2018).

Ken MacQuarrie, BBC Director of Nations and Regions, makes a 'big commitment to better serve the nations and regions and represent the diversity of the UK' (BBC, 2018). The BBC has since made substantial changes to the management of BBC Nations and Regions, consolidating BBC West & South West into a larger region, effectively positioning Cornwall in an even more peripheral space in terms of relative population size and geography, in polarity to an established urban film and TV sector in Bristol. Cornwall presents a unique position of cultural and linguistic diversity as a Celtic Nation, yet this is seemingly invisible in the eyes of the BBC, within a West & South West region of England, within the UK's Nations and Regions framework.

The BBC Charter, updated in 2016, commits the organisation to supporting 'the regional and minority languages of the United Kingdom through its output and services and through partnerships with other organisations'. Cornish however, is conspicuously absent from the minority languages listed: Welsh, Scottish Gaelic, Irish and Ulster Scots. Cornwall Council take this up in their response to the Fifth Cycle:

This is profoundly unjust, and aberrant to the principles and spirit of the BBC Charter and public service broadcasting. The Council understands that the only way the Charter can be changed is by amending legislation - therefore, once again, the issue rests with the UK Government to address (Cornwall Council, 2019).

The negligent stance taken by the BBC contrasts markedly with that of other major cultural investors. Arts Council England, The National Lottery Heritage Fund and Historic England, having all committed to work closely together with Cornish partners to promote Cornwall's distinct identity:

In March 2019, the three organisations agreed a unique Memorandum of Understanding with Cornwall Council and the Cornwall and Isles of Scilly Local Enterprise Partnership, with each

of the five partners committing to work together to continue to encourage and support Cornwall's arts and cultural economy and develop new, sustainable ways to support the growth of creative industries (Cornwall Council, 2019).

This partnership is evocative of Georgina Born's proposition to take the principles of PSM into the digital ecology, identifying the 'new principles of animation, participation, partnership and curation' as synergistic powers that can boost diversity by opening up public service content 'to all publicly-funded providers of cultural, artistic and intellectual content (Born 2018, p.183).

The spectrum of PSM-animated and PSM-curated production and services should therefore range from fully professional to amateur and emerging practices: all matter today, and PSM in the digital era is about brokering participation and partnerships across this full spectrum. Emulating the long tail model. By utilising the curatorial and distribution powers of public digital platforms will allow PSM to open out, and the productive effect will be to boost its key functions of animating the 21st Century creative economy (ibid).



Great place-making makes people feel a renewed love, passion and pride for their ‘place’. It draws on the combined assets of heritage, people, buildings and landscape to create places for people to fall in love with. Cultural identity is strongly tied in with a person’s sense of engagement, belonging, understanding and appreciation of their ‘place’.

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From Cornwall's culture, arts and heritage investment partnership to its fast-growing tech sector, from a nascent screen industry drawing global attention, to a flourishing community radio and citizen journalism news networks and the multi-arts cross-disciplinary Falmouth University and Launchpad incubation accelerator, as a nodal networked, digital, creative rural economy Cornwall is poised to exploit this opportunity.

During the course of this study, a call for evidence was issued by the House of Lords Select Committee on Communications regarding: 'Public service broadcasting in the age of video on demand' (launched 12th March 2019). The inquiry sought evidence regarding whether there is a future for PSBs in the context of the rising popularity of video on-demand services. This retrograde questioning of the inherent validity of PSB is addressed briefly elsewhere in this report, and substantively by the recent Puttnam Inquiry. One question in particular posed by the committee, 'Does public service broadcasting do enough to reflect and serve the demographics of the UK?', is however particularly pertinent to this study, so with reference to an early draft of this report Cornwall Council submitted a response, making the case for proper representation of Cornish culture and language, noting the BBCs contravention of their diversity requirements in defining the UK's regional and minority languages

where 'the Cornish language is the only officially recognised language excluded. Rather than supporting diversity, the Charter itself excludes a British minority – the Cornish.' Cornwall Council goes on to comment:

The two main public service broadcasters in the UK (BBC and Channel 4) have not evolved to reflect the increasing devolution and federal diversity of the UK. The main focus has been on moving some studio production out of London and to the North of England, but this has so far failed to translate into real devolution and diversification of programming (Cornwall Council, 2019).

An underlying recalcitrant attitude to decentralisation and urban-centric dogmatism have a negative impact on both diversity of representation and rural economic development, overlooking the considerable potential offered from a different view.

A wider national context: a rural creative economy

The [creative] rural sector is ideally placed to re-invent itself for the digital age, by opening up new world markets to locally based businesses and providing fresh opportunities for jobs growth and inward investment. The

New Creative Rural Economies report and seminar (CaDRE initiative) clearly point to all of these opportunities and many other creative challenges that are ahead - the future is rural. (Puttnam, 2017)

The importance of the rural economy to the nation as a whole, and the lack of support that has been paid to it in terms of strategy and policy, are issues that are currently gaining attention amongst national and regional government, policy makers and practitioners. The Select Committee on the Rural Economy was appointed by the House of Lords in May 2019 and its report 'Time for a strategy for the rural economy' was published in April 2019. It notes the 'urgent challenge is to encourage the new opportunities, release unfulfilled potential and enhance the contribution which rural England can make to the nation while retaining its distinct character' (House of Lords, 2019, p.5).

Rural arts and creative industries have also been identified as a significant contributor and important source of growth to rural economies. 'We believe that the time has come for greater focus on the role the arts and creative industries can play in rural regeneration' (ibid, p.17).

There is a growing demand in the creative and cultural sectors for policy makers, who have until

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now focussed on the contribution of urban areas and cities to the economy, to look to the rural areas and start to understand the significant contribution they could make if supported by policy and investment. In addition, an argument is developing that city-centric models around which most existing policy is designed do not fit well outside the urban areas, and a new discourse and script needs to be developed for the rural creative economy. Reports such as 'The New Creative Rural Economies' lay out some of the opportunities and make recommendations for action (Creative Rural industries Consortium, 2019).

Various seminars and conference events are being planned in 2019 to bring together organisations and companies in the rural creative sector with regional and national policy makers and government. The newly established Creative Industries Policy and Evidence Centre, led by Nesta, will be looking at creative industries in rural settings as part of its investigation into how location impacts the sector.

Cornwall Council and the CIOS LEP have recognised the huge potential of the creative industries and the LEP has made the sector number one in its list of '10 Opportunities' in the growth of the regional economy. It is taking a strategic and pro-active lead in investing in and supporting the growth of creative, cultural and digital businesses.

Cornwall has imagination and innovation embedded in its DNA, evident in its history of mining and invention and now in its creativity and also in the myriad enterprises and activities in its towns and villages, from festivals, volunteer community and campaign groups to music, theatre and film. However, these are not always connected or more widely visible.

A CIOS commissioned Saffery Champness screen strategy report states the 'lack of a regional broadcaster or publisher of screen content' in Cornwall, recognising the fact that currently there is 'no mechanism for Cornish stories to get on to the screen' (Saffery Champness 2018, p.55).

This PSM research project has a close fit with the developing wider creative rural context. A Public Service Media would be an integral part of a thriving creative and cultural sector in Cornwall, helping to nurture growth and sustainability. It would provide a platform for talent, support talent progression and the growth of the creative economy. It would amplify the creative and cultural voice of the region and its people.

Placemaking

The importance of place and cultural identity is gaining recognition nationally as essential

to developing strong, confident and resilient communities. This has become even more critical as Brexit has divided communities and as the gap in equality between London and the South East and the rest of the UK continues to grow ever wider.

The Bazalgette Review recommends a bottom-up process that allows localities to direct policy development for the creative industries including the screen sector, since they have a better understanding 'of their growth potential and needs than central government' (Bazalgette 2017, p.6).

Cultural expression and shared experiences are key elements in underpinning vibrant communities. Arts Council England's Creative People and Places supports this and a positive evaluation of its first three years showed that the programme was starting to achieve its long-term goals of improving wellbeing and a sense of belonging.

The importance of cultural identity is not just championed by the arts establishment. The Local Government Association recognise the importance of placemaking and the vital role played by culture:

'Great place-making makes people feel a renewed love, passion and pride for their 'place'. It draws on the combined assets of heritage, people, buildings and landscape to create places

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for people to fall in love with. Cultural identity is strongly tied in with a person's sense of engagement, belonging, understanding and appreciation of their 'place' (Local Government Association 2017, p.4).

The individual's place in a supportive community and strong local networks is vital to delivering on wider national agendas such as those around health and wellbeing. Attention to place is also key to developing sustainable economies and if the existing Cornish place-myth is to be rebalanced, then it requires a 'place-based' approach, as articulated directly in The House of Lords Select Committee report 'Time for a strategy for the rural economy':

'We recommend that the national rural strategy enables, and is realised through, a "place-based approach", meaning one that is connected to local needs and interests, and with the participation of as wide a range as possible of public and private bodies, community groups, businesses and individuals.' (House of Lords, Select Committee on the Rural Economy 2019, p.9).

A Cornish Public Service Media would give a voice to the communities of Cornwall, create a shared cultural expression and connections across a dispersed rural community. It would be an integral

component of place making and strengthening communities' ambitions for the region.

Economic impact

Investment in a PSM for Cornwall would have a significant positive economic impact both through direct activity and indirect and induced multipliers. The impact would grow over time as the service becomes established and as revenues grow. It would be generated through direct employment, through the commissioning of content and services, through the related supply chain of mostly SMEs, micro businesses and freelancers and would create spill-overs into the wider regional economy. Impact would not only be in the directly related sectors of media, film and TV, arts, culture and entertainment but also heritage, tourism and hospitality etc.

Through ownership of IP in some of the content there would be an opportunity to sell on ideas, programmes and formats both in the UK and internationally, particularly through the Celtic nations and the Cornish Diaspora.

At this stage it is only possible as indicators to cite the economic impacts of the wider UK creative, arts and cultural industries and those of the existing UK minority language public service media companies.

The creative industries are the fastest growing part of the UK economy. They contributed £101.5bn to the UK economy in 2017, accounting for 5.5% of UK GVA. The 'Film, TV, video, radio and photography' sub-sector accounted for 16.5% of Creative Industries GVA in 2017 at £16.7bn.

The Cultural Sector contributed £29.5bn to the UK economy in 2017 and accounted for 1.6% of UK GVA. Over three fifths (60.2%) of the Cultural Sector GVA was in the 'Film, TV and music' sub-sector contributing £17.8bn (DCMS, 2018).

The Centre for Economic and Business Research report 'Contribution of the arts and culture industry to the UK economy' April 2019 states that the sector contributed £10.8bn GVA to UK economy in 2016. When add indirect effects from the economic activity of supply of goods and services to the arts and culture industries as well as induced in the wider economy of employees in the arts and culture sector, GVA rises to £23bn. It estimates that the wider multiplier impacts of the arts and culture industry are:

- For every £1 in turnover directly generated by the arts and culture industry, **an additional £1.24 in output is supported in the wider economy** through indirect and induced multipliers.

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- For every £1 of GVA generated by the arts and culture industry, an additional £1.14 of GVA is supported in the wider economy through indirect and induced multipliers.
- For every 1 job directly created by the arts and culture industry, an additional 1.65 jobs are supported in the wider economy through indirect and induced multipliers.
- For every £1 in employee compensation paid to workers directly employed in the arts and culture industry, an additional £1.21 in employee compensation is supported in the wider economy through indirect and induced multipliers.

(Centre for Economic and Business Research 2019, p.8)

The existing UK minority language public service media companies' economic impact estimates vary with impact apparently rising with larger operating budgets.

- MG ALBA with an annual operating budget of £13.8m estimates economic impact of every £1 spent is £1.07
- TG4 with an annual operating budget of £32.4m estimates economic impact of every £1 spent is £2
- S4C with an annual operating budget of £83.8m

estimates economic impact of every £1 spent is £2.09

Although it is not possible at present to size the impact that a PSM for Cornwall would generate it is clear that it would be positive. Jobs created and supported in the sector by a PSM would be high value in the fastest growing part of the UK economy, a sector identified by the CIOs LEP as the number one priority for economic growth. In addition, there would be significant indirect and induced multipliers and a positive impact in the wider Cornwall economy.

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04. Dielvenansow Analyses

4.1. Daswel lien Literature review

From the 1962 Pilkington report on broadcasting to the 2016 Puttnam Inquiry into 'A Future for Public Service Television' numerous theorists, practitioners and commentators have expounded powerful, substantial arguments for why Public Service Broadcasting is an essential component, even a prerequisite for a healthy democracy and how models of Public Service Broadcasting should/could evolve.

Whilst the literature we have reviewed explores a wide variety of such theories derived from both academic and industry texts, this study focusses on contexts pertinent to a dedicated Public Service Media for Cornwall, drawing particular reference to three major themes which have repeatedly emerged.

These themes are: creative diversity and equality (especially screen representations of Cornwall and the Cornish), the mercurial digital and media landscape, and the recurrent questioning of the relevance, purpose and models of Public Service Media provision in the UK.

In reviewing the available literature, 'A Future for Public Service Television' (Freedman & Goblot, 2018) emerges as a central text to inform this study: a collection of forty-six essays from industry experts, summarising, analysing and expanding on the 2016 Puttnam Inquiry report, constructing a thorough, insightful picture of the current condition of Public Service Television, furthermore proposing areas of interest where

attention is most needed for PSM to stay relevant and embrace an uncertain future.

We have studied an extensive compilation of annual reports, vision documents, strategies and operational plans, legislation, technical and academic papers, government, regulator and industry studies, audits and reviews, including several that were published during the course of this study.

As our research progressed with smaller nations and minority language public service broadcasters, we decided to place particular emphasis on BBC ALBA's history and structure as it represents the more relatable model for Cornwall. As well as a more recent formation, just over a decade ago in 2008, the status of Scottish Gaelic is comparable, like Cornish it is recognised by the ECRML, but is not an official language of the UK, and the percentage of speakers to geographical population 1.1% provides both the most contemporary and most apposite comparable from which to ideate the development of a Cornish public service media provision. By contrast S4C has been operating for 37 years, Welsh (in Wales) is an official language of the UK, and is spoken by 19% of the population. Likewise, Irish is the official first language of the Republic of Ireland, understood by 39.8% of the population (plus a further 6% in Northern Ireland) and TG4 has been broadcasting for 23 years.

Maori Television has also provided an important model of minority language broadcasting which is inclusive of a whole population, warmly received by Maori speakers and non-Maori speakers alike. The framing of the Maori language in New Zealand as a 'gift' to be shared by the whole community is an example of the ability for PSM to cross historic societal divisions and engender a tangible positive outcome, in terms of boosting the number of Maori speakers but also promoting social cohesion. This is an important approach to bear in mind when considering the potential risk of marginalising a minority language and/or culture while attempting to preserve it.

'If a major part of the population never hears nor sees a minority culture on their television it ceases to be part of their reality. The perception by non-speakers of the status of a minority language has a consequent effect on the actual status of that language' (Ó hlfearnáin 2001, p.8).

The essential social and ecological contexts of the proposed intervention of creating a new public service have also been considered, interpreted by the application of a social foundation and ecological ceiling to the PSM value chain, following the principles proposed by Kate Raworth in her seminal work, *Doughnut Economics: Seven Ways to Think Like a 21st Century Economist*.

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Audience behaviour

The number of UK subscriptions to television streaming services like Netflix has overtaken those to traditional pay television for the first time, marking a major shift in the UK's viewing habits (Ofcom, 2018).

Audience behaviour is changing. 2018 saw TV streaming services overtake pay TV for the first time. Rethink Technology Research predicts that SVOD (streaming video-on-demand) viewing will shortly draw level with traditional broadcast TV globally by 2023 (Rethink, 2019).

TV advertising value is collapsing, tracking audience eyeball behavioural shifts towards a point of convergence with online advertising.

2018 was another bad year for traditional TV set viewing of broadcast channels (BBC, Channel 4, Discovery, Five, ITV, Sky, Sony, Turner, UKTV, Viacom, Walt Disney) with a 5% decline year-on-year—its steepest since 2011. The decline accelerated among most demographics, but particularly for 16-34s, down 13% YOY from their already relatively low levels of TV viewing (Enders Analysis, 2019).

This decline, particularly threatening for commercial

PSBs, prompted the House of Lords Select Committee on Communications to launch their inquiry (mentioned earlier in this report): Public service broadcasting in the age of video on demand.

The International Broadcasting Convention observes 'the 'edge' of TV viewing is 'eroding quickly' especially amongst digital natives, Millennials and Gen Z' (IBC, 2019). Enders Analysis predicts that 'broadcasters will account for two-thirds of all video viewing in 2028, down from c. 80% today, due to the relentless rise of online video services' (Enders Analysis, 2019). Audiences want effortless access to content on-demand, everywhere, across multiple devices and the key to playing successfully in this future is data.

In a world of data-driven, algorithmic curation, decisions about audience and platform are becoming intrinsically interwoven and are essential for survival. How data is used will benchmark success or failure: maintaining relationships with existing and attracting new audiences, increasing personalisation, harnessing influencers, ensuring visibility.

This is demonstrated by S4C's decision to invest in their Clic player, in order to collect accurate and informative data. Audiences for S4C are growing, not only in Wales itself but across the UK as a whole. The Welsh language broadcaster increased

viewing by 5% in Wales and 12% across the UK during 2017/18. Each week, 365,000 people in Wales watched S4C on TV, and 690,000 across the UK. The channel also had 8.2 million viewing sessions on its online channel, Clic, and the BBC iPlayer (Thomas, 2018). This shows a demand for Welsh-language content stretching beyond the immediate audience within Wales. By requiring sign-in to Clic, S4C are now able to gather essential audience data to better determine their continued growth.

Younger audiences

The retention and development of younger audiences is vital to the continued survival of minority languages, and the rapidly changing digital landscape presents various challenges as well as opportunities to broadcasters. McElroy and Noonan highlight one key advantage digital platforms offer, that they 'complement traditional television's consumption-only mode, and allow broadcasters to engage in two-way dialogue with vibrant but relatively small communities' (McElroy & Noonan 2018, p.170). The rise in popularity of platforms such as YouTube is one such example of an opportunity to both reach new viewers and uncover a fresh talent pool, with broadcasters such as S4C and BBC ALBA making use of this alternative space to build audiences in the 16-34 age bracket. S4C in particular has made significant progress in this area with its online-only

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service ‘Hansh’, discussed in this report’s case study, aimed at young people and delivered in the Welsh language. It has grown its output from comedy to a wide range of genres for the 16-34 age bracket, and is distributed via social media, YouTube and Clic. The internet and social networking sites can be seen as ‘a tool to strengthen linguistic communities and revive weakened languages by producing easily accessible content in minority languages, and providing networks of support for fluent speakers and learners alike’ (Cunliffe, D. Morris, D, & Prys, C. 2013, p.75).

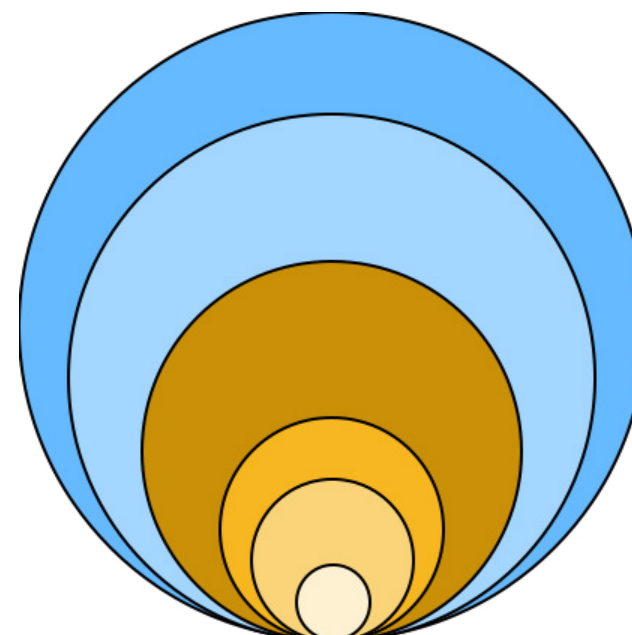
Continuing to diversify its output and test new approaches, June 2019 saw the launch of the world’s first online Welsh language comedy platform, ‘S4C Comedi’. While not exclusively aimed at young adults, the platform will host its own Facebook and YouTube pages, encouraging engagement from younger viewers and the progression of new talent. S4C’s Comedian Esyllt Sears commented:... ‘for comedy in any language to mature and flourish, it’s all-important for scriptwriters, performers, and directors to get the chance to experiment and develop ideas’ (S4C, 2019).

The BFI’s new Young Audiences Content Fund presents a further opportunity for minority-language

PSM. ‘One of the priorities of the Fund is to support content that reflects UK cultural identity and the nations and regions – both on screen and off screen – and content in UK indigenous languages’ (BFI, 2019). This ringfencing of funds for content, across all genres, is significant and positive, both in terms of its practical application and its demonstration of confidence and support for minority-languages.

Total addressable market

We have identified a total addressable market (TAM) of 25.5 million people who discernably have a direct interest in Cornwall and Cornish culture, and could reasonably be expected to view and engage with Cornish PSM content.



- 25.5m Addressable market
- 19m Annual visitors
- 6m Cornish global diaspora
- 549,400 Resident population
- 281,910 Cornish ethnicity
- 9,340 Cornish language community

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For visitors (and the tourism sector), a Cornish PSM provides an opportunity to make 'brand Cornwall' thrive throughout the year, and perhaps more interestingly to increase the Heritage and Cultural segment market share. The Cornish language and culture 'Brand Kernow' content that a Cornish PSM would provide enriching the digital tourism experience.

24% of TAM, the global Cornish diaspora, is geographically non-UK, and may be restricted from viewing where content is only available on a geo-blocked platform, which could mean a reduction in audience reach e.g. BBC iPlayer is not available outside of UK due to rights agreements.

UK Census 2011 allowed for the first time a write in option for respondents to self-identify as Cornish, resulting in 14% of the total population stating that they have Cornish national identity – a significant number considering no tick-box option was available. It is germane to note that in the 2001 Census 14.4% of residents in Wales wrote in their national identity as Welsh, rising significantly to 66% following the inclusion of the Welsh tick-box in 2011.

The most recent data (Cornwall Council Residents Survey 2017) shows that 1.7% respondents stated

Cornish as their main language. This is comparable to 1.1% Scottish Gaelic speakers in Scotland, 2.2% Isle of Man population with knowledge of Manx, and 6% who state they are able to speak Irish in NI (though only 0.2% use Irish as home language) from UK Census 2011 data. This contrasts with the

significantly higher proportion 19% Welsh speaking population in Wales, and from Irish Census 2016, 39.8% Republic of Ireland population record that they speak Irish.

Population	Total	Source
Cornish speakers – fluent	557	ONS 2011 Census (Information request released: 09.06.17)
Cornish speakers – main language	9,340	Cornwall Council Residents Survey 2017
Cornish nationality	73,220	ONS 2011 Census (write in)
Cornish ethnicity	281,910	Pupil Level Annual Schools Census (PLASC) 2017 as proportion of CIOS population 2015
Population of Cornwall	549,400	ONS population estimate 2015
Cornish Diaspora	6,000,000	Cornish Mining World Heritage Site: Mining Migration, Cornwall Council (2011)
Annual visitors to Cornwall (95% from UK)	19,000,000	4.3M staying visitors, 14.7M day visitors Cornwall Visitor Survey (2016) Visit Cornwall
TOTAL	25,500,000	

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Cornish speaking audiences

**An lavar koth yw lavar gwir.
Nevra dos mas a daves re hir.
Mes den heb taves a gollas y dir.'**

Bearing in mind of the scarcity of empirical data yet collected on Cornish language use, it is useful to consider the engagement with and impact of the language in recent artistic expressions and public events.

It is also important to recognise the significant adoption of Cornish language by Cornwall Council, e.g. the unanimous adoption of the Cornish language plan 2019-2022 outlining the authority's focus on developing the use of the language in both spoken and written form across Cornwall.

This is manifest in the increasing visibility of Cornish language signage and in Cornwall Council brand guidelines. In a statement, portfolio holder for planning and economy Councillor Egerton maintains, 'We have to take these exciting opportunities to ensure that Cornish is not just a language with a past, but that it has a future as well' (Cornwall Council, 2019). In terms of public service media this is reflected in support for Radyo and Gernewegva, and the annual FylmK award, though it is worth noting the extremely limited amount of resource that is

currently available to support these intentions. A 38 degrees 'Campaigns by You' petition was launched in 2016 calling for the establishment of BBC Kernow | Cornwall, to 'give Cornish language and culture the equal status, recognition, respect and prominence in public service broadcasting that it deserves' (38 Degrees, 2016). The petition has received 988 signatures to date and remains open. This selection from comments made by signatories demonstrate a common appeal for the provision of a Cornish language PSM:

Like biodiversity, cultural diversity makes the world more interesting. If we're to increase the availability of Cornish material in the multi-media 21st century the iPlayer sounds like an obvious place to start. There's plenty of Cornish material out there if the BBC would just remember its public service remit for a while and stop slavishly trying to follow Murdoch and co down into the gutter.

A language is fundamental to identity.

The UK's linguistic diversity should be celebrated and encouraged. A BBC Kernow service would surely do a lot to help the language and culture thrive. We should not allow the UK government to get away with ignoring Cornish history and culture. Also, language death is as bad a tragedy

as the death of a species, and the government's refusal to properly fund the Cornish language will aid the process of Cornish dying out. This must not happen!

Cornish culture and language are just as important as any other British culture yet we see very little to represent us that respects the real Cornwall past and present. The BBC needs to change this as all cultures need an inclusive approach when broadcasting.

As a Welsh speaker, and somebody who is studying other Celtic languages - including Cornish, I think a Cornish service will be a fantastic resource for those who are also studying this wonderful language, and for those who still use the language in Cornwall. A service like this will almost certainly help the language to thrive once again, retaining an important part of Cornwall's rich heritage.

Cornish/Kernewek is the richest aspect of Cornwall's heritage. It is alive and kicking as a legitimate and recognised language of the UK and allotted television time is the obvious route to take in encouraging its continued development and increased use.

This is an important step in ensuring the

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continuation and expansion of the Cornish culture, language and way of life.

A Petition Parliament campaign: 'Please continue to provide annual financial support for the Cornish language' was submitted on 21st Oct 2016 having received 10,342 signatures.

No one can say he is giving the public what it wants, unless the public knows the whole range of possibilities which television can offer and, from this range, chooses what it wants to see. For a choice is only free if the field of choice is not unnecessarily restricted. The subject matter of television is to be found in the whole scope and variety of human awareness and experience (Pilkington, cited in Freedman, 2018).

Cornish culture is expressing itself in the streets and venues of Cornwall and around the world – but is barely visible in the absence of an 'insider' PSM to communicate with wider spheres of audience.

As Moseley argued in *Picturing Cornwall*, for over 100 years dominant representations of Cornwall, which have circulated globally, have been constructed and produced from without. This has been an imagining of Cornwall's identity and history from an 'outsider' perspective, one which continues to

reinforce a hegemonic internal colonial view of Kernow focused on stasis, the past, and leisure. Without a compensatory and restorative 'insider' perspective, a construction of Cornwall from within, it is impossible to imagine the emergence of any alternative vision which could enable an imagining of a future wedded to change, modernity, labour, and innovation.

Such a vision – key to the determination of Cornwall's future - would be at the heart of content delivered through Kernow Public Service Media. The 'insider' view suggested here would radically challenge and invert existing and widely circulating representations and cement the construction of an alternative place-myth. A place-myth produced 'from within', will be key to the successful growth of Cornwall's future global reputation and economy, and KPSM would be at the heart of that project.

Cornish stories

There is a significant appetite in Cornwall for content and experiences that have a regional resonance. Cornish stories attract large audiences including audiences that don't often go to arts and cultural events.

Theatre thrives in Cornwall attracting large and loyal audiences, both locals and visitors. Cornish stories

such as o-region and Palores Productions, Hireth, telling the untold story of Cornwall's forgotten war heroes and the unique impact they had on the First World War brought large audiences from across St Just's different communities, packing out the huge Miners' Chapel used as the production venue; Kneehigh Theatre grows its internationally renowned productions from cliff-top barns, and entices audiences to their bespoke venue The Asylum wherever it pops-up in e.g. The Lost Gardens of Heligan or on Carlyon Beach; the Minack Theatre, carved from the granite cliffs of Porthcurno, is Cornwall's world-famous open-air theatre, drawing hundreds of thousands of annual visitors; WildWorks weaves wondertales of landscape theatre with the people of the places they work around the world. Cornish theatre has a long history, with its roots in the medieval plen-an-gwari, the playing places of a unique, vibrant theatre culture.

'Spectacular, outdoor performances lasting for several days were once staged, immersing the whole community in a celebration of the lives of Cornish saints or illuminating religious stories'. (Coleman, 2015).

Miracle Theatre's micro budget feature film 'Tin', told the true story of a mining scandal in West Cornwall in the 1890s. With 229 screenings, across 15 cinemas in Cornwall, 'Tin' reached over 6,500 people in its



No one can say he is giving the public what it wants, unless the public knows the whole range of possibilities which television can offer and, from this range, chooses what it wants to see. For a choice is only free if the field of choice is not unnecessarily restricted. The subject matter of television is to be found in the whole scope and variety of human awareness and experience.

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first two weeks. In its first week it outsold all films in Truro, including 'Fast & Furious 7' (in fact, more than doubling the blockbuster's audience). Mick Catmull's film 'Dying Breed', is a documentary chronicling a rural landscape in transition, bearing witness to the struggles of three cattle farms in West Cornwall to survive against the odds. It screened across Cornwall and beyond with Newlyn Filmhouse showing it 14 times to largely sell out audiences.

It is worth reflecting too on recent examples of Cornish culture which have met with significant national and international recognition and acclaim. When compared with the self-representation made possible through S4C and Alba, for example, it is clear that there is a significant imbalance in the potential for access to and visibility of Cornish cultural production.

Recent examples demonstrate the ways in which through increased visibility, Cornish media can reach and significant audiences. The Big Cornish Sing was co-funded by Cornwall Council in 2017, and encouraged the social singing and speaking of Cornish, reaching 1.8 million by live streaming and via regional TV, online, print and radio coverage (Cornwall Live, 2018); Mark Jenkin's feature Bait (2018) has achieved enormous success at the 2019 Berlinale international film festival, introducing a working class Cornish story to global audiences and

has subsequently acquired general release from the BFI; Golden Tree Production's Man Engine, drawing an attention to Cornwall's industrial history and post-industrial inheritance, achieved enthusiastic national reception, a global media reach of over 100 million people in 104 countries, and brought a live audience of 150,000 to the streets of Cornwall chanting in Cornish, and Gwenno's Cornish language music, which has been championed by, amongst others, BBC Radio 6 music and Jools Holland's BBC programme Later (The Economist, 2018), show the wider national and global potential of cultural production from within, challenging dominant, pre-existing colonial representations and illustrating what Georgina Born has described as 'intercultural speaking'.

For the purpose of defining a public service media provision that represents and delivers for the Cornish language and people, we define the Cornish speaking audience as:

People who are fluent in Cornish, who are learning Cornish or who understand and wish to speak some words of Cornish as an expression of their cultural identity.

Considering the potential offered by the audience segmentation identified in the TAM, the independent

production already happening, supported by sporadic arts, cultural and heritage funding, the numerous examples of mass use of Cornish language in cultural events, the evidential growth of Cornish learners, it would be reasonable, in terms of reckoning a core audience for Cornish language public service media, to place the Cornish speaking audience far higher than the base figure of 1.7% of Cornwall's population:

Ottomma ugens mil a dus Kernow a wodhvydh oll an kas. Here's twenty thousand Cornish folk will know the reason why.

Minority language PSB comparative analysis

Comparative data between PSBs is limited and partially incompatible due to differing organisational remits and regulatory frameworks. For example, data published by Ofcom on PSB audience figures largely excludes S4C and BBC ALBA, focussing instead on the main (larger) five PSB channels defined in PSB Annual Research Report 2017 as 'BBC One, BBC Two, the Channel 3 Services (ITV/STV/UTV), Channel 4 and Channel 5, including their HD variants but excluding their +1s.' (OFCOM, 2017). Where data does exist, it is not always annually reported, e.g. the BBC's most recent reported figure on their economic impact was sixteen years ago in 2003! The data we've compiled here originates from

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regulators, PSB annual reports, financial statements and from census data. The comparative data we were able to compile does however provide a clear enough picture of normative modes to apply certain assumptions in modelling a Cornish PSM.

Celtic PSBs key data table²	S4C	TG4	MG Alba	...
Population	Wales 3.1m	ROI 4.8m	Scotland 5.4m	Cornwall 549,400
Speakers	562,000 (18%)	1.76m (37%)	57,000 (1.1%)	9,340 (1.7%)
Weekly Viewing Figures	690,000	500,000	452,000	0
Total Individual Viewers (including online)	9.4m	1.98m	6.5m	...
Formed	1982	1996	2008 (1990) ³	...
Regulator	S4C Authority	BAI	Ofcom	...
Funded By	Licence Fee (90%) DCMS (8%) Advertising (2%)	Government of Ireland (90%) Commercial (10%)	Scottish Government	...
Annual Operating Budget	£83.8m	£32.4m	£13.6m	£0
Programming Budget (as % operating budget)	£65.6m (78%)	£21.7m (67%)	£11.8m (86%)	£0
Annual Original Content Hours	1,762	1,622	421	0
Number of Employees	131	80	39	0
Economic Impact per £1 Spent	£2.09	£2	£1.07	

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With reference to the foundational and current scale of operations of each of the Celtic broadcasters, consultation with their senior executives and discussion with local stakeholders, we have determined that whilst any intervention might be beneficial to the Cornish language, the minimum viable foundational scope for a Cornish public service media that could have significant economic, cultural and linguistic impact is:

- That a Cornish PSM should commission and deliver a minimum **200 annual original content hours**.
- That original content be produced at an **average cost/hour £40K**.
- That the content spend to operating budget be established at **80%**
- That the annual operating budget therefore be established at **£10 million**

Contextual data and a detailed analysis of these assumptions is provided in Annex 2.

The value of economic, cultural and linguistic impacts a Cornish PSM can deliver will be determined by three key factors:

- The promptness with which the recommendations presented in this report are acted upon

- The amount of the licence fee agreement with DCMS and value of partnership agreement with the BBC
- The resources which can be levered into place through the transition phase, to cultivate partnerships, grow the supply chain and engage the waiting audience for Cornish PSM.

1 The old saying is a true saying. Never did good come of a tongue too long. But a man without a tongue loses his land." Collected for Edward Lhuud from the Vicar of Lannyust/St Just in Penwith, Cornwall c. 1700. (Monk, 2016)

2 Data from MG Alba 2018-19 operating plan, Olsberg SPI Economic Impact of MG ALBA 2015, S4C Annual Report and Statement of Accounts to 31 March 2018, TG4 Annual Report 2017, ONS 2011 Census.

3 First formed under Broadcasting Act 1990 (as Gaelic Television Committee), Broadcasting Act 1996 (renamed Gaelic Broadcasting Committee following addition of radio to remit) and then reformed as Gaelic Media Service in Comms Act 2003 (following expansion of powers to include operating a channel and commissioning or making content). Rebranded to MG ALBA in 2008.

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Context

According to Ampere Analysis SVOD¹ services generated \$36bn globally in 2018 showing a significant rise from 13% to 20% of claimed viewing between Q1 2017 and Q1 2019 (Ampere Analysis, 2019). New entrant OTT² subscription SVOD services announced to hit UK screens in 2019 include: BritBox, Apple TV+, Disney Plus and Bird Box from Goldfinch Studios, joining an increasingly crowded ocean of video streaming services.

Three new SVoD market entrants (Apple TV+, BritBox and Disney+) are all likely to gain at least 2m subscriptions (more than 5% of UK households) by 2023 and – under more aggressive scenarios – could collectively create 10m new subscriptions in this time period (Ampere Analysis, 2019).

The digital streaming market is maturing rapidly, and although the shape of the future is hard to predict, whoever is serving the content, there will be a lot more of it. Amidst the challenge of increasing competition for eyeballs, an opportunity also arises for minority language PSM seeding original ideas from unique perspectives, to upsell (or co-produce) tentpole properties to/with the streaming giants, who operate in a multi-lingual and therefore language-agnostic content global paradigm.

Prominence

What does prominence look like beyond the EPG³? How are audiences to discover PSM content in a crowded marketplace, where personalisation of content offering is the future, and are recommendation algorithms designed to exploit consumers, or to inform, educate and entertain citizens?

Driven by consumer viewing convenience, as the global transition to VOD advances through smart TVs and mobile devices, so regulated EPG dominance diminishes. Ofcom's consultation on 'Proposed changes to the linear EPG Code and future of the prominence regime', recognised the challenges of maintaining prominence for PSB content in an online environment, but noted 'that it is possible to gain prominence for content in an online world' setting out proposals for 'the future of the prominence regime' (Ofcom, 2018). It is in this future digital ecology that prominence for PSM content will matter, and it is to this future that Cornish PSM distribution pipelines must be aligned.

Discoverability

In an algorithmic culture, the challenge for the BBC is to find the public service structuring

logics of recommendations in order to guide viewer choice (Bennett, 2018).

The increasing move to personalisation driven by algorithms powered by programme meta-data and learnt audience behaviours is the area which is maybe most significant for public service contents future relevance. In exploring the idea of 'public service algorithms', Bennett challenges the BBC move beyond just replicating the commercial logic offering users 'more of the same' or 'most popular' (or indeed 'promoted') suggesting for example the addition of a 'serendipity window' to iPlayer to challenge, confound and surprise its viewers out of their echo chambers (Bennett, 2018).

The iPlayer algorithms underserve Welsh & Gaelic language content; e.g. if a viewer watches Welsh drama 'Un Bore Mercher' ('Keeping Faith') they will be recommended the current offer of English language popular drama series, but not other Welsh language content, making it less likely for new viewers who haven't explicitly sought out programmes directly through the S4C or ALBA filter to discover minority language content.

This problem is exacerbated by the ever more complex, overcrowded iPlayer menu, with filter in 'Categories': Northern Ireland, Scotland, Wales

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and minority language in ‘Channels’: S4C, ALBA all positioned furthest right on the screen, which when accessed through smart TV apps or on mobile devices often pushes these options off-screen, making them effectively invisible to any viewer who doesn’t explicitly search for them by actively scrolling right beyond the landing page.

The user experience could be improved as the iPlayer evolves, if visibility of the Nations other than default England, and if minority language content discoverability is taken into consideration in development planning.

However, despite these concerns, the iPlayer remains a vital platform for minority language content, offering greater discoverability and brand awareness to and beyond core audiences. From the outset of an active Cornish PSM, distribution on the iPlayer is essential, with equality of prominence in the menu alongside the other national minority Nations and Channels, hence Nations would offer Northern Ireland, Scotland, Wales, Cornwall and Channels: ... ALBA S4C KERNOW.

Options

Existing platform options

- BBC iPlayer. Preferred option as part of partnership arrangement for delivery of live and recorded content in a filtered channel and Nation on comparable basis as Wales/S4C and Scotland/ALBA.
- Social platforms. E.g. YouTube, Facebook, Instagram, Twitter. All social platforms should be utilised, determined by commissioning audience targets.
- Facebook 360 and YouTube 360 allow for immersive content: 360-degree spherical video VR. Content can be viewed using a mobile with e.g. Daydream View or Google cardboard.

Bespoke player

- Develop a bespoke player like S4C’s Clic player or the TG4 Player. MG ALBA have not developed their own player, considering the cost of doing so to be too great, compared with the benefits of the iPlayer. At this early stage, we consider the cost and risk of developing a bespoke player prohibitive; Cornish PSM must focus primarily on content and utilise existing platforms at least until it is properly established. If a bespoke player were to be

considered in the future, this should be developed in partnership.

Collaborative platform development

In an article on TVBEurope.com, Ofcom CEO Sharon White is quoted, speaking of the necessity for collaboration between UK broadcasters:

“The sea-changes of recent years will not be the last,” she warned. “Nor can anyone be sure what competition and technology lie over the horizon. But while we cannot hold back the tide, our broadcasters can swim more strongly with it – by working together” (Priestley, 2018).

Subsequently, in early 2019 the BBC and ITV announced their proposal for launching BritBox in the UK. The joint streaming service, is commonly referred to as ‘a Netflix rival’; an earlier Britbox service launched in the US in 2017 and claims over ‘half a million subscribers’ (BBC, 2019), however entering the UK market in direct competition for yet another subscription against the giant splash Disney and Apple will undoubtedly make in the streaming quagmire, Britbox may struggle to cause much of a ripple.

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4.3. Bynk – dielvenans nivel ughel Platform – high level analysis

In the recent EBU report: Moving Fast or Moving Forward? The Shift from a Partnership Agenda to Collaboration as the True Fabric of Public Service Media, Raats categorises collaboration as the essential factor for PSM to harness the future, detailing methodologies for successful partnership working and noting several joint distribution platform developments:

Public broadcasters are exploring the potential of joint distribution platforms (Salto in France, NLZiet in the Netherlands, NowTV in the UK, LovesTV in Spain, as well as the proposed ‘Danflix’ in Denmark or the ‘Flemish Netflix’ in Belgium), or they have engaged in collaborations with start-ups and other mediatech companies (note The Sandbox Hub initiatives led by PSM across Europe). As a corollary, the idea of partnerships has been increasingly tied to PSM’s role as a market strengthener, i.e. a lever for independent production, creativity and technological innovation (Raats, 2019, p6).

Will the BBC develop the iPlayer collaboratively with its partners such as MG ALBA and S4C (and GMK) in a way which serves the UKs minority language PSM requirements? Or could the Celtic public service broadcasters pool resources in a collaborative development of a shared white label player infrastructure, skinned for each in their own

language, that offers the algorithmic, interactive and immersive features vital to thrive in a crowded future digital platform ecology. Such a development could reanimate the spirit of global alliance the latent World Indigenous Television Broadcaster Network (WITBN) previously initiated.

Data

The absolute necessity for PSM organisations to obtain and utilise user (audience) data is detailed earlier in this report. The iPlayer collects user data, but with notable absences and exclusions, e.g. whilst views and download statistics are available, no postcode data is collected. S4C and TG4 have each developed their own players, and are therefore able to develop data capture and personalisation with impunity, also allowing, where content licence restrictions permit, their content to reach global audiences (e.g. diaspora communities) The iPlayer however is geo-blocked, restricting it to UK audiences.

Where control and design of data capture and analysis is possible, larger data sets can be developed allowing data mining of community interactions to identify patterns and trends in user experience which feed into publication planning, then through to commissioning (including e.g. designing metadata standards, scheduling and marketing strategies) creating a virtuous circle

of data. Collaborative development would reveal opportunities for mining from even greater data sets.

DLT⁴ / Blockchain

An emergent DLT entertainment paradigm is being composed by pioneering companies such as LiveTree, Breaker, and Dot Blockchain Media.

The intrinsically decentralised, immutable nature of DLT is resonant with Born’s principle of PSM orchestrating a ‘democratic communicative pluralism’ (Born 2018, p. 134) presenting a prospective technological tool to facilitate the formation of a non-metropolitan, smaller nations PSM model. The potential is to create a robust, secure and future-proof distributed nodal network for supply chain data (and ultimately financial) processes that producers/ users can access and engage with directly online, wherever they are based.

Audio Network head of product Matthew Hawn, quoted in a Broadcast article, explains that in order to harness the benefits blockchain may bring, industry processes and practices need to change:

“You’ve got to capture this stuff at the point of creation in the edit suit or the recording studio,” he says. “At the moment, this task is usually added at the end of the production process by

04. Dielvenansow Analyses

4.3. Bynk – dielvenans nivel ughel Platform – high level analysis

the most inexperienced members of the team. We need to flip this around so that this data travels all the way through” (Corvin, 2018).

DLT is not a magic bullet. Its ability to process large volumes of data, particularly at speed is limited. But what it does well is provide a decentralised database of infinitely updatable immutable ledger data. Whilst there are certainly future applications worth keeping in view, the immediate, or very near future opportunity is to develop a M&E industry smart contract framework, the ‘missing link in copyright licensing’ (Bodó, Gervais & Quintais, 2018).

The Interoperable Master Format (IMF) is a form of component-based media based on the requirements common to many in the broadcast and online sector. The SMPTE TSP 2121-1 standard has been adopted globally from Netflix to BBC. It simplifies the use of IMF for TV and online programme production, mastering, delivery and exchange. Component based media, such as IMF, opens the potentiality for the application of DLT allowing multi-party orchestration of bundled datasets.

Authors can publish works on blockchain creating a quasi-immutable record of initial ownership, and encode ‘smart’ contracts to license the use of works. Remuneration may

happen on online distribution platforms where the smart contracts reside. In theory, such an automated setup allows for the private ordering of copyright (Bodó, et al. 2018).

A UK Jurisdiction Taskforce consultation is currently underway to clarify uncertainties regarding the status of cryptoassets, DLT and smart contracts:

The UKJT is coordinating the preparation of an authoritative legal statement on the status of cryptoassets and smart contracts under English private law. The intention is that the legal statement will either demonstrate that English private law already provides sufficiently certain foundations, or highlight particular areas of uncertainty that may need to be clarified (The Law Society, 2019).

Describing the potential opportunities presented by blockchain for the M&E industry: copyright violation more difficult, legitimate purchase more convenient, curatorial added value, less links in the recoupment waterfall means more value retained by producers and better value offered to consumers, and challenges the resistance of disruptive technology changes in the M&E industry, difficulty of implementation across highly complex value chain, Lederer makes the case for the micro option:

Microchains are well-defined blockchain projects applied to a core M&E workflow. The “microchain” is a more manageable approach for executives to invest successfully in blockchain. It is hardwired for quick wins and demonstrable value, but it’s also designed for growth so it can gain traction over time (Lederer, 2019).

A Cornish PSM presents a viable testing ground for just such a microchain project.

The risk of leaping forward into DLT technology is mitigated by a number of factors:

- By adopting DLT in the design thinking of Cornish PSM from the outset, the resulting content would have maximum access to the rapidly evolving new global M&E industry models whilst allowing integration with legacy processes.
- Content is platform agnostic, i.e. value generated from commissioned works can be exploited in established traditional platforms as well as innovative new ones.
- Smart contracts are presenting the easiest adopted aspect of the paradigm shift DLT offers to the M&E industry, converted from established value chain legal processes;

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4.3. Bynk – dielvenans nivel ughel Platform – high level analysis

We recommend that a Cornish PSM adopt the following principles regarding distribution platforms:

- Platform agnostic commissioning.
- Multi-platform distribution matrix. (e.g. iPlayer, YouTube, Instagram, Facebook, emerging platforms)
- Distribute and market content to range of platforms where the audience already is, with data feedback and analysis to monitor future trends.
- Develop technical specifications range to future-proof commercial exploitation and archival value of higher-end content (i.e. IMF), with simplified deliverables for social platform and/or transient content.

We also recommend that from the outset a Cornish PSM seek to:

- Establish or engage with industry and academic technology partners to develop and exploit emerging technological applications, e.g. a Cornish PSM Microchain project: M&E industry smart contract framework, value chain DRM through DLT.

1 Streaming Video-on-demand.

2 Over-the-top refers to content providers that distribute digital streaming media directly over the internet bypassing traditional controllers and legacy broadcast providers.

3 Electronic Programme Guide, an application with digital set-top boxes and

television sets listing current and scheduled programmes, accessed by remote control device.

4 Distributed Ledger Technology: a decentralised consensus of replicated, shared, and synchronised digital data. Blockchain is a type of DLT.

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with the primacy of the climate emergency, in a time of discordant social division and rising wealth inequality, it is imperative that public services utilise appropriate design principles to ensure they are, or that they become structures fit for purpose.

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4.3. Knowen doos gadon dalvosogeth MGP The PSM value chain doughnut

The aim of public service media is to inform, educate and entertain. It is a public duty to ensure activities which provide such services are for the public good, and as such, with the primacy of the climate emergency, in a time of discordant social division and rising wealth inequality, it is imperative that public services utilise appropriate design principles to ensure they are, or that they become structures fit for purpose.

Every business process creates social and ecological impacts. By modelling an end to end value chain within social and ecological boundaries, we aim to design a public service media model that is sustainable and regenerative, operating within ecological boundaries and bolstering social equality.

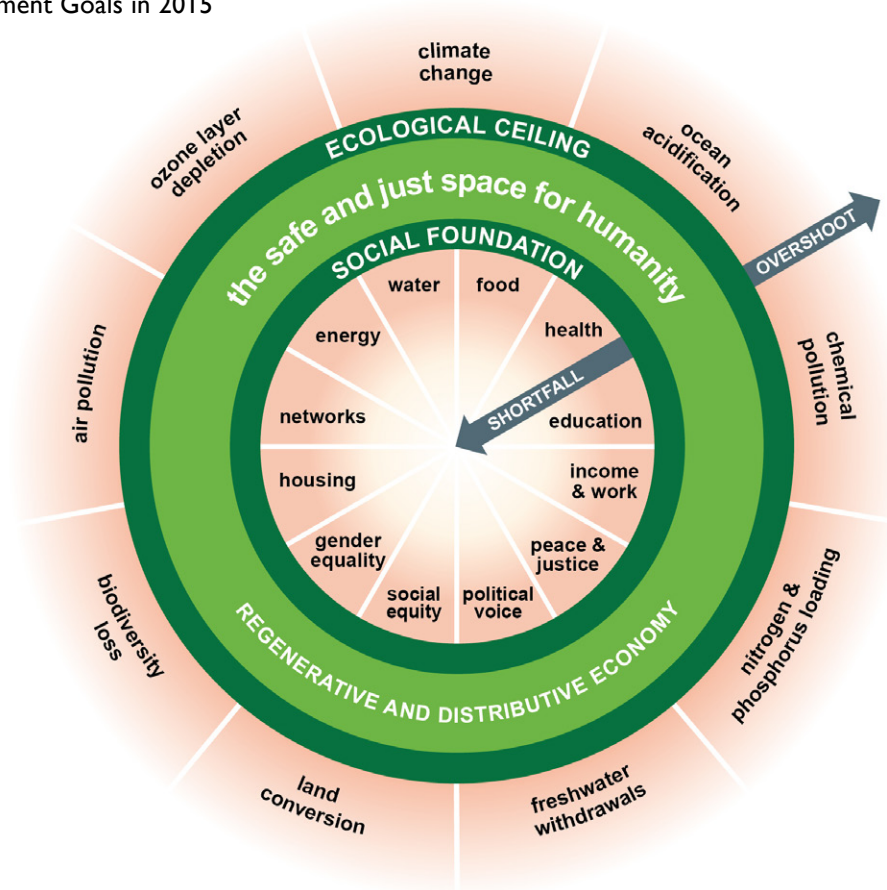
Doughnut Economics

Visualising a social foundation of human well-being and an ecological ceiling of planetary pressure, in Doughnut Economics Kate Raworth (2017a) proposes a radical and ambitious new economic model, one that doesn't assume infinite growth on a planet of finite resource, but rather imagines a 'safe and just space for humanity' to thrive.

The environmental ceiling consists of nine planetary boundaries, as set out by Rockstrom et al, beyond which lie unacceptable environmental degradation

and potential tipping points in Earth systems.

The twelve dimensions of the social foundation are derived from internationally agreed minimum social standards, as identified by the world's governments in the Sustainable Development Goals in 2015 (Raworth, 2017b).



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Calling into question the logic, indeed the sanity, of GDP growth as the measure of success, Raworth presents The Doughnut as a twenty-first century compass for thriving in balance. The Doughnut principle can be applied at any scale, to any form of organisation or economic process. In this study we have applied it to the end-to-end value chain of a public service media enterprise, specifying a high-level model where each process in the value chain can be viewed through a Doughnut lens of social and ecological impacts.

Digital media enterprises value chain model

We started with the EBU digital media enterprises value chain model (EBU, 2017) which describes the chain of processes that add value to business objects of digital media enterprises.

EBU digital media enterprises value chain model



The model is generic and designed “to be applicable to any type of media, any type of content, any method of production, any platform of distribution, any way of consumption, etc. The process model is an end to end model that spans over all activities by the provider as well as by the consumer to form a full cycle” (EBU 2017). As such, the model is consonant with the circular representation characteristic of Raworth’s doughnut economics theory.

Considering the application of this model to the use case of a Public Service Media organisation, it is pragmatic to align break points where responsibility for decision making is owned and therefore controllable by different entities (e.g.

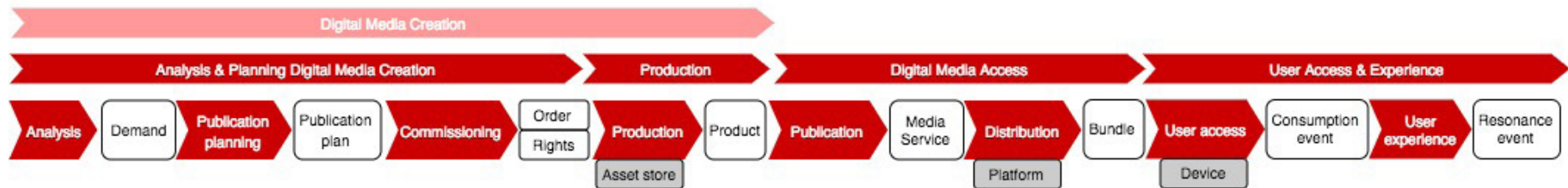
PSM organisation, independent producer, consumer). We have shifted the cycle representation one phase, placing Analysis at the head of the first process grouping, better representing its application in the value chain flow. Digital media creation comprises a commissioner (the PSM organisation) and a producer (assuming an independent producer), hence the division described.

The Media Service employs Distribution Platforms to provide the User access via their Device to a Bundle (defined by the EBU as a set of media services with common technical mode of access) from which the user can select and experience a Product in a Consumption event.

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PSM use case value chain model: process ownership defined



Simplifying the value chain elements with these groupings describes a PSM value chain model, framed below within the doughnut economics social foundation and ecological ceiling.

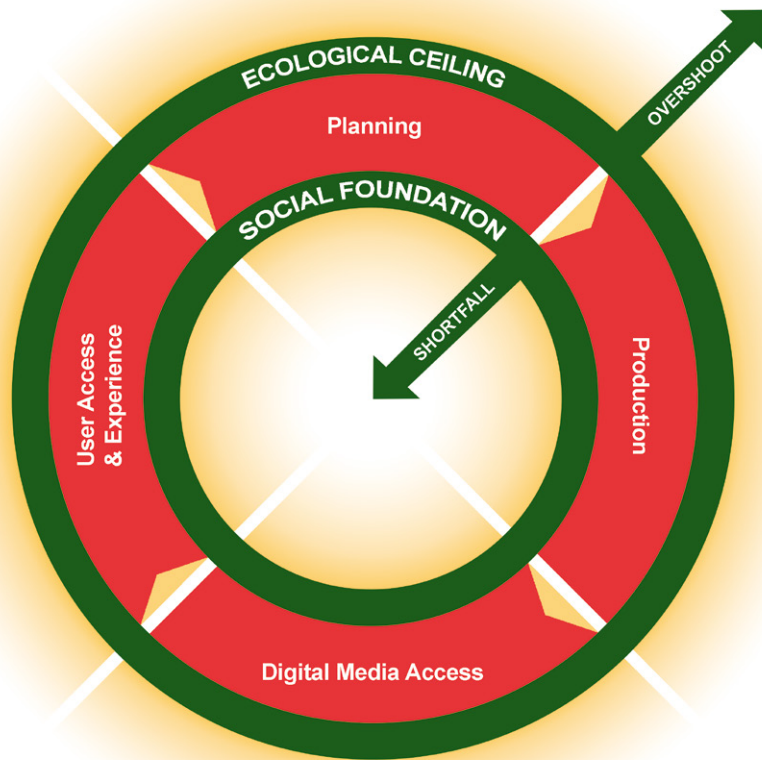
PSM value chain model framed within doughnut economics boundaries



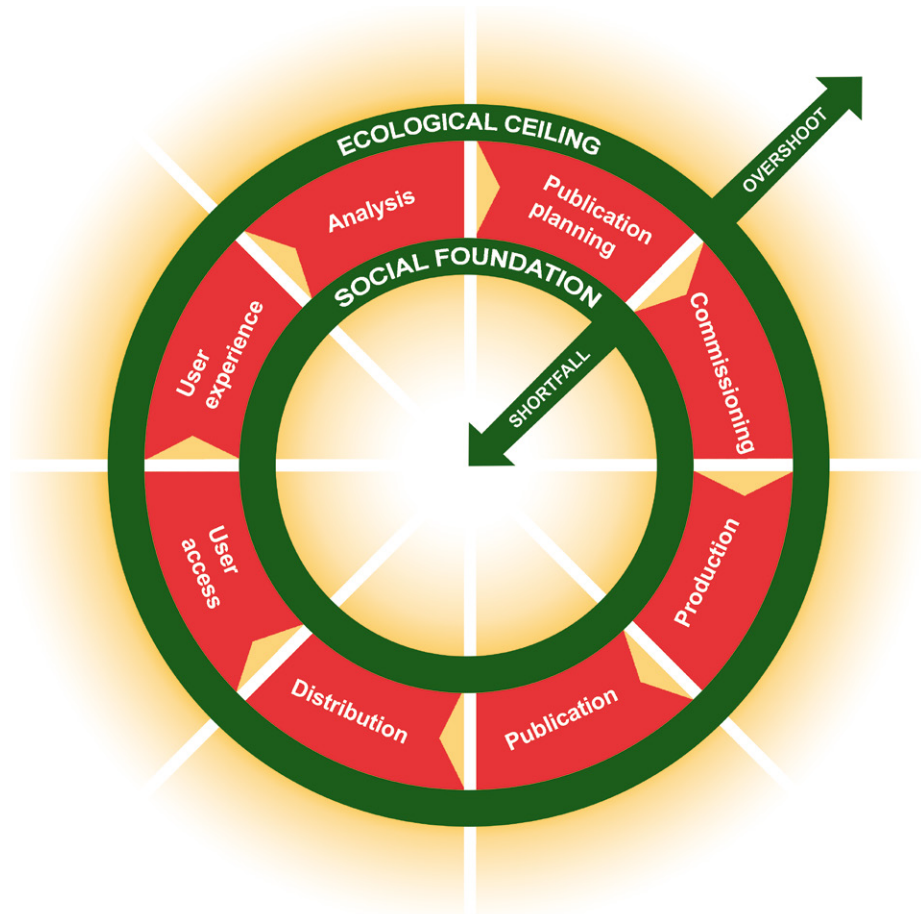
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Wrapping the end to end cycle we can form a PSM value chain doughnut, illustrated below in simple four-process model:



And more detailed eight-process form:



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4.3. Knowen doos gadon dalvosogeth MGP The PSM value chain doughnut

This high-level model illustrates how doughnut economic boundaries can be applied to each set of processes grouped by process owners. From this model we can make refinements to consider the social and ecological impacts of policy and procedures at each stage of the value chain, and identify the modes and extent of control and/or influence the PSM organisation can employ.

For example, within the PSM operations, decisions can be made to determine energy supplier and efficiencies, travel policy, carbon offsetting, standards like living wage minimum, tethered salary structure between highest and lowest earners, stakeholder engagement, etc. As a commissioner the PSM is limited in influence, but can enforce regulatory requirements e.g. Diamond Diversity reporting, and impose additional minimum standards for commissioned productions, e.g. Albert Certification for more environmentally sustainable production practices. Furthermore, the PSM could identify ways to incentivize its supply chain beyond commissioning contractual obligations (e.g. encouraging suppliers to engage with B Impact Assessment, the Tevi initiative, providing BS8909 and ISO 14001 training for sustainability management of film and TV production). Taking a generative approach to establishing normative practices for a new supply chain, a Cornish PSM could establish a set of standards that raises the bar of expectation to reflect the fairer, greener Cornwall to which all stakeholders aspire.

Supply Chain

A future-looking PSM supply chain looks a bit different to the traditional linear model. In a digital, data driven ecology the audience is much closer to (and sometimes is) the producer. At the extremes are paradigm shifting blockchain experiments like Breaker and Livetree Adept, 'the world's first blockchain film & TV rights funding and distribution platform' where DLT managed crowd commissioning drives a system of crypto-currency micropayments and algorithmic personalization... an alien scenario to the tightly controlled funnel of stamped, approved, hierarchical, centralised content commissioning of the old, linear world. The future is rapidly approaching. The rabbit is in the headlights.

This growing complexity means that the traditional E&M value chain is not linear any more, but fluid and multi-directional. Not a chain at all, in fact, but something much more complex (PWC, 2013).

Building on the Strategy for the Screen-based Sector in Cornwall and the Isles of Scilly report (Saffery Champness, 2018) this study has investigated the present infrastructure and capacity development required to deliver the envisioned Cornish PSM provision. To inform this analysis, we worked with the newly formed Screen Cornwall and Cultivator

Cornwall to organise and run a supply chain workshop, inviting professionals with a broad range of broadcasting experience, working in Cornwall across the value chain to consider the screen industry in Cornwall. 28 media professionals from across Cornwall participated in the workshop, bringing a broad range of experience and perspectives, from seasoned producers to recent graduates, with several Cornish language speakers and learners in the mix. In facilitated groups, we asked participants to:

- identify the strengths already present and opportunities to grow capacity, sustainability and resilience, and
- explore and understand the challenges and identify what interventions might help their growth.

SWOT analysis

An analysis of the SWOT exercise illustrates some of Cornwall's distinctiveness as a community and place of work, expressing a long history of innovation and entrepreneurialism, recognising a unique independent spirit of resolve in a can-do culture.

It also identifies areas of weakness where interventions to address them are required.

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Strengths

Cornwall's distinctive, rich and vibrant culture is a key strength as is the distinctiveness of the Cornish language itself. It draws on a long history of storytelling and a wide range of cultural activities inspired by its past and present, its landscape and its people.

The artistic ecosystem is diverse with high numbers of cross-disciplinary creative practitioners. Innovation thrives, underpinned by a culture of sharing, self-sufficiency, an entrepreneurial can-do attitude and a trusted local talent pool.

Falmouth University supplies a stream of young skilled talent and the offer of a good work/life balance, lower costs, high speed internet and a supportive environment attracts creative people and companies to relocate to Cornwall.

Weaknesses

The creative workforce is dispersed with many working in isolation or in small-scale operations that face challenges in scaling up. This is exacerbated by an expectation of 'cheap' labour and the lack of an industry database or networks.

The poor infrastructure results in lack of capacity in the sector. There is inadequate development or production

funding. Also there is a lack of access to finance, funding and external professional expertise at a high level. It is hard to retain graduates if they cannot see the opportunities.

There is currently virtually no support for minority language broadcasting and Cornwall's diverse socio-economic background is not much present in the production or curation of content.

Opportunities

Developments in technology and platforms offer many opportunities for digital content and can lower the cost of production. Audience appetite everywhere for non-traditional and authentic content is growing and regionally the importance of Cornish identity in its many facets is recognised.

The need for increased connectivity and infrastructure is starting to be addressed with initiatives such as the newly formed Screen Cornwall. A PSM for Cornwall could be a seedbed for new ideas, an industry showcase and an integral part of an effective creative network.

The support and leadership from Cornwall Council and the CIOS LEP can help raise the visibility of the sector and unlock future funding opportunities.

There are opportunities for co-productions with

Celtic broadcasters and with Europe and the Cornish diaspora can be both a source of content and a significant market.

Threats

As across all of the UK there is the uncertainty and lack of confidence caused by Brexit.

Cornwall is too often absorbed into the wider South West with resources concentrated on centres such as Bristol. There is a pervasive perception of Cornwall as a tourist destination with its creativity going unrecognised.

Historically Cornwall has been heavily dependent on grant funding, particularly European funding and it does not have a strong investor community with access to private finance. The small companies so prevalent in Cornwall are not geared up for institutional funding trends moving from grants to loans and investment.

There is intense competition nationally for both funding and work, with talent often being lost to London, depleting the skills base in Cornwall.

There are threats to the UK film and TV industries as a whole – a sector increasingly middle class in make-up, a world of polarised local versus global content and the use of algorithms that reduce the diversity of taste.

SWOT	Positive	Negative
<p>INTERNAL</p>	<p>STRENGTHS</p> <p>ATMOSPHERE:</p> <ul style="list-style-type: none"> • Time of momentum & coming together • Spirit of innovation in Cornwall • Culture of willingness to share • Culture of self-sufficiency, multi-tasking, different hats • Entrepreneurial spirit • Can do attitude <p>CULTURE</p> <ul style="list-style-type: none"> • Distinctiveness of the Cornish language • Rich sense of Cornish identity/brand to tap into, range of cultural events and history, distinctive and authentic storytelling • Strong community storytelling practices • Varied, inspiring landscape which draws interest and incentivises relocation, offers range of shooting locations • Diversity of artistic ecosystem & high numbers of cross-disciplinary people <p>RESOURCES</p> <ul style="list-style-type: none"> • Wealth of talent and graduate pool • Good links to London and fast internet speeds • Some organisational structure • Lower rates/overheads <p>WORK ENVIRONMENT</p> <ul style="list-style-type: none"> • Good work/life balance • Lower cost of living • Small networks with a trusted local talent pool • Positive Local Authority support • Musicians and studios 	<p>WEAKNESSES</p> <p>WORK ENVIRONMENT</p> <ul style="list-style-type: none"> • Lack of a database of talent/crew etc • Lack of joined-up thinking • Lots of people working remotely in isolation, lacking offices • Small scale operations • Mates' rates, expectation of 'cheap' labour • Microbusinesses – challenges of scaling up, risk of expansion • Confusion about where to go for funding <p>RESOURCES</p> <ul style="list-style-type: none"> • Lack of development and production funding • Lack of capacity • Lack of Post to delivery pipeline / capacity. • Failure to retain graduates • Small pool of fluent Cornish speakers and lack of skills & capacity within that group • Lack of infrastructure, connectivity & networking opportunities • Lack of a hub/centre • Lack of access to specialist external expertise at high levels, e.g. commissioners, legal & financial advice, global finance & sales markets for IP • Lack of Cornish broadcaster <p>DIVERSITY</p> <ul style="list-style-type: none"> • Lack of support for minority language broadcasting • Funding is project-led and not focused on strands • Difficulty seeking ethnically diverse talent • Lack of voices from diverse socio-economic backgrounds producing/curating content

SWOT	Positive	Negative
EXTERNAL	<p>OPPORTUNITIES</p> <p>TRENDS</p> <ul style="list-style-type: none"> • Possibility for non-traditional content & appetite for distinctive cultural content • Growth in the embracing of Cornish identity, Brand Cornwall and Cornish produce • Use of digital content on the rise • Thought leaders doing 'good' business (e.g. Goodfest) • Evolving technology – cheaper and easier productions <p>CORNISH DEVELOPMENT</p> <ul style="list-style-type: none"> • Industry showcase • Community radio partnership • Capacity building between media professionals and Cornish speakers • Increasing connectivity, Screen Cornwall • PSM can act as a seedbed for ideas • Environmental leader • Untapped pool of stories • Rural creative hub <p>FUNDING</p> <ul style="list-style-type: none"> • Post-Brexit funding opportunities • BFI Diversity Strategy – 50% crew to be sourced locally • Region of Culture • Audio content fund – possibilities for community radio • Creative Industries are the CIOs LEP's no.1 priority <p>CONTENT</p> <ul style="list-style-type: none"> • Diaspora, as both a market and source of content • Outreach – ethnic/socio-economic diversity • Co-productions between Celtic broadcasters and Europe • Archives and back catalogues 	<p>THREATS</p> <p>PERCEPTION</p> <ul style="list-style-type: none"> • Absorption of Cornwall into the 'South West', with resources concentrated in Bristol • Loss in confidence in British businesses from Brexit • Failure to secure Cornwall's place as a creative centre • How Cornishness is currently perceived / portrayed nationally <p>ECONOMIC</p> <ul style="list-style-type: none"> • Increased cost of production • Logistically not easy to shoot in Cornwall – costly and complicated • Speed tech change • Lack of production funding, leading to poor quality content • Domination of Falmouth University • Weak Cornish economy and lack of investors • Over-dependence on grant funding, especially EU funding, in Cornwall • BBC license fees being introduced for the over 75s • BFI/CE move to loans not grants • Loopholes in the ring-fencing of funds for Cornwall • Brexit <p>RESOURCES</p> <ul style="list-style-type: none"> • Intense competition for funding and audiences • Competition with London agencies and companies • Losing talent to London • Lack of skilled staff – difficulties with recruitment <p>INDUSTRY</p> <ul style="list-style-type: none"> • Classist nature of films & TV industries • Polarisation of local/global content • Huge diversity of platforms & algorithms reducing diversity of taste • Large geographic distance makes networking difficult

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The workshop also presented the proposition of a non-linear digital commissioning framework and participants explored ideas about the kind of content that could be commissioned by a new Cornish PSM, informing the examples given in Annex 2.

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**Cornwall's
distinctive, rich
and vibrant culture
is a key strength
as is the Cornish
language itself.**

Ystynnans I: Studhyansow kas media gonis poblek yethow minorityta

Annex I: Minority language public service media case studies –

Alban - MG Alba Scotland – MG Alba

Population	5.4m
Gaelic Speakers	57,000
Weekly Viewing Figures	452,000
Total Individual Viewers (including online)	6.5m
Formed	2008 (1990) ¹
Regulator	Ofcom
Funded By	Scottish Government
Annual Operating Budget	£13.6m
Programming Budget	£11.8m/86%
Annual Original Content Hours	421
Number of Employees	39
Economic Impact per £1 Spent	£1.07

'Since the eighteenth century the concept of Celticness has been used by scholars...to denote not only the historical continental and insular British 'barbarian' Others of Ancient Greece and Rome, but also the northern and western 'barbarian' Others of modern Europe...' (Stroh 2011, p.13).

Language Context

Scottish Gaelic is closely related to modern Irish and Manx, with around 57,000 speakers mainly located in the Outer Hebrides (UK Census, 2011). Its suppression has a long history, and Michael McIntyre points to the 1595 Privy Council Act of James VI of Scotland² as the legal embodiment of the miorun nòr nan Gall, 'the great malice' of the English speaker toward the Gaelic language, which had already transitioned from the language of the royal court to the 'language of a troublesome minority' (McIntyre 2009, p.2).

Gaelic is not currently an official language of the UK or the EU, but was made an official language of Scotland under the 2005 Gaelic Language Act. To develop the use of Gaelic further, the Gaelic Language Agency 'Bòrd na Gàidhlig' was established

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under the same act, and MG ALBA works with this body to deliver their objectives.

In 1996 MG ALBA's precursor, The Gaelic Language Fund (Comataidh Telebhisein Gàidhlig - CTG/CCG) was granted additional funding to accommodate a new statutory inclusion of radio. In 2009 the Scottish Cabinet Secretary for Education provided a one-off grant of £50,000 to MG ALBA for an additional Gaelic learning service provision (Scottish Government, 2009). MG ALBA delivered Learn Gaelic (www.learnghaelic.net) spending £110k of its main funds annually on the resource, which until recently was delivered by a third party. A BBC post has now been moved to MG ALBA, and a digital/social engagement media officer post created (funded by Bòrd na Gàidhlig) and with future plans for an additional Learning Manager situated within Sabhal Mòr Ostaig, the Gaelic College in Skye and an assistant BBC commissioner/editor for learning resources. The aim of this expansion is to better connect tutors and local authorities with course provision, mentoring and conversation classes, promoting improved coherency of provision for independent adult learners and making sure the resources and information on offer are fit for purpose. MG ALBA has identified a strong need to find a way of mapping existing learning provision against demand, and so has been working with Glasgow University to implement the Common

European Framework of Reference for Languages (CEFR) for Gaelic.

Learn Gaelic aims to emulate an approach taken with the Maori language, 'ZePA' (Zero – Passive – Active).

'The ZePA model highlights how right-shifting the position of an individual from Zero – passive – Active can strengthen the position of the language within society. The key difference is that the emphasis is not simply on moving directly from Zero to Active. Right-shifting an individual from Zero to Passive can generate increased awareness and support for language revitalisation more broadly, and the subsequent right-shift from Passive to Active is then easier to achieve' (Te Mangai Paho, 2015).

In an interview on 8 April 2019, MG ALBA Chief Executive Donald Campbell summarises this as 'Stimulate awareness, stimulate interest, stimulate a decision to learn, and then move them closer'. The Omnibus Survey, conducted with 1000 people in Scotland each month, has found that while around 20% of respondents will indicate that they don't feel Gaelic has value, a proportion of those are still viewing ALBA content. This demonstrates a willingness to engage with Gaelic programmes if the subject matter is right, and it is hoped that this will, in time, soften ambivalent feeling towards the language at the more antagonistic

end of the spectrum.

History & Legal Basis 1990-2003

The Gaelic Television Fund (CTG/CCG) was established in 1990 under the 1990 Broadcasting Act to finance the production of Gaelic programmes for the schedules of Scotland's three key terrestrial television services (Hourigan 2007, p.151), the BBC, Grampian and STV. As with BBC ALBA today, the CTG was aimed at the broader Scottish population as well as Gaelic speakers. Mike Cormack characterised its mission as:

'...an attempt by a relatively small and cohesive group of Gaelic-language activists to do two things: to alter the Gaelic community's self-perception and to alter the broader Scottish public's view of Gaelic...Indeed, the generally negative reactions to the whole enterprise evident in the Scottish tabloid press are best read as a refusal to accept this broader redefinition of Scottish identity.' (Cormack, 1994).

When interviewed on 8 April 2019, MG ALBA's Director of Finance, Neil Graham, explained that 'we were set up with £100,000 worth of development funding in 1991-2 to create offices and administrative staff, and a remit to deliver up

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to 200 hours of original programming in Gaelic.’ In its first year of operation, 1992-3, the CTG operated on a budget of £9.5m with £8m of that going to programming at an estimated cost of £40k per hour. It reported to the UK Government in the days prior to the Scottish Government’s formation in 1999.

Initial audience response was very positive with such high audience ratings that it was argued by some commentators that the CTG model provided a more efficient mechanism for minority-language broadcasting than S4C’s model of a separate channel. ‘S4C, the Welsh language channel, has very low viewing figures compared to us. Its highest-rated programme has 120,000 viewers. Our Gaelic programmes regularly attract up to half a million viewers in our transmission area alone’ (Macdonald 1993, p.13).

However, Hourigan notes that during a decline in audience figures in the late 1990s two problems with the structure of the CTG became evident – its vulnerability to government budget cuts and its lack of control over the scheduling of its programmes. Programming was reduced substantially in 1998 following cuts; Neil Fraser, a Gaelic speaker who had been a senior executive at BBC Scotland, estimated that by 1998 the value of the fund for CTG had fallen in real terms by 24% since 1992, and was only sufficient to fund about 160 hours of programming

(Fraser 1998). The CTG’s status as a financier rather than commissioner gave its committee no power to oppose both the BBC and ITV’s rescheduling of Gaelic content to late-night and weekend slots, adding to the ‘ghettoization’ of Gaelic programming it had tried to avoid along with problems in continuity (Hourigan 2007, p.154).

Robert Dunbar observes additional shortcomings in the broadcasting acts:

‘Neither the 1990 nor the 1996 act specified the size of the fund and, crucially, also did not provide a mechanism for increasing the amount of the fund to take account of the effects of price inflation. As a result, the size of the fund was left wholly to the UK government to decide, although it should be noted that under Scottish devolution—which resulted in the creation of the Scottish parliament and the Scottish executive (now, the Scottish government) in 1999—while the UK parliament and government in London continued to have sole authority for all matters relating to broadcasting, in 1999, funding of the Gaelic Broadcasting Fund was transferred from London to the devolved administration, with the result that funding is now determined by the Scottish government’ (Dunbar 2012).

In 1999 TeleG was established as the first daily digital Gaelic TV channel, available on Freeview, but

the accessible presence of Gaelic content did not solve CTG’s problems. Neil Fraser commented: ‘The concept of a Gaelic service remains elusive; the extended provision has become just a large collection of programmes randomly scheduled across several channels with no overall control of the range and quality of the programmes on offer’. (Fraser 1998, p.4).

In 2000 a report chaired by Alasdair Milne, a former director general of the BBC, recommended a Gaelic television channel on digital television and strengthened the case for a channel, but its suggested budget of around £44m was considered by some to be too high and stalled progress.

2003–2008

In 2003 the campaign for a Gaelic digital service took a step forward when the CTG was reconstituted as the Gaelic Media Service (Seirbheis nam Meadhanan Gàidhlig), which was established under the provisions of the Communications Act 2003 (Sections 208-210) with much broader functions than those of CTG: ‘to secure that a wide and diverse range of high quality programmes in Gaelic are broadcast or otherwise transmitted so as to be available to persons in Scotland’ (Section 208,3). Its abilities too were grown to enable it to now engage in programme making and securing, opening the door to the service

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becoming a broadcaster itself. It should be noted that, as Robert Dunbar points out, the process had also been facilitated by the fact that the most senior BBC Scotland executives, including the head of BBC operations in Scotland, Ken MacQuarrie, and his two deputies, Donalda MacKinnon and Maggie Cunningham, were all Gaelic-speakers who had begun their careers in the BBC's Gaelic language service (Dunbar 2012, pp.410-411).

During this period the positioning of Gaelic as an official language of Scotland came to fruition in 2005 with the Gaelic Language Act. Bòrd na Gàidhlig was established as the public body tasked with implementing the Act, 'securing the status of the Gaelic language as an official language of Scotland commanding equal respect to the English language', (Scottish Government, 2005) and as a key part of the Scottish Government's delivering their duties under the European Charter for Regional or Minority Languages. The Act contained two central strands of development: Gaelic-medium education and broadcasting, television broadcasting in particular.

The same year a report was conducted by Deloitte looking again at the possibility of setting up a TV station dedicated to Gaelic output. In an interview on the 8th April 2019, Donald Campbell noted that 'the report carried with it an authority, the stamp of Deloitte. There's not a lot of new material or

findings in the report, but it drew a lot of strands together and had the endorsement of government and all the various parties who'd contributed to it.' The report recommended a channel at around half the cost of the prior (Milne) report, and it's likely that this reframing of the budget and potential of the channel contributed to its success this time around.

2008–Present

In 2008 the Gaelic Media Service rebranded as MG ALBA, continuing to hold subsumed funding powers and responsibilities in relation to financing of Gaelic programmes, training, research and related activities³. Donald Campbell explained in an interview on the 8th April 2019, that the board considered different options regarding the framework of a potential channel, including whether the organisation should run the channel itself, whether the BBC or STV should run the channel, or whether it should be a partnership. The BBC's offer of a collaborative partnership was chosen, and in addition they offered MG ALBA a news service worth £2.5m annually. It was also thought that working closely with the BBC would lead to carriage on the BBC distribution infrastructure.

BBC ALBA, a partnership between the BBC and MG ALBA, officially launched on 19 September 2008 and was the first channel to be delivered under a BBC license by a partnership. A weekly reach target was

initially set at 250,000, broadcasting 50 hours a week with a schedule covering news and Highland-interest programmes appealing to Gaelic speakers, and music, sport and documentaries on Scottish and international issues appealing to Scottish audiences in general. MG ALBA's 2017-18 annual report shows an operating budget of £13.8m with £9.8m spent directly on content providing 432 hours of original programmes from 24 production companies. The partnership with the BBC adds a further £6m-£7m worth of provision for Gaelic language programming into the mix (MG ALBA 2018, p.13), including the news and current affairs service, as well as a presence on the iPlayer.

Talent development was a key driver of the early years of the channel. MG ALBA launched Gaelic short film competition FilmG in 2008 with the aim of uncovering new talent for development for BBC ALBA. Run as a partnership with Skye-based media company Cànan, the competition received 50 entries with winners supported to developing their ideas for broadcast. This competition firstly addressed the lack of a ladder opportunity, and aimed to provide an alternative route into television which advanced people more quickly through the industry than traditional career steps. It also targeted a dearth of spontaneous, home-grown content in Gaelic on platforms such as YouTube, limiting the creative ecology surrounding ALBA and confining

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Gaelic content to official channels and the associated editorial constraints. When interviewed on the 8th April 2019 Donald Campbell summarised the issue:

‘You’ve got a group of three or four people controlling what millions of people are watching every day, so how can you break that and just give the possibility to other people to create their stuff?’

In the early days of the competition financial prizes of £2k and £5k were offered to winners, with development contracts, encouraging local talent to take a risk with a project and enter. MG ALBA contracts out the project management of the competition and annual awards ceremony, which ALBA has broadcast for the past two years. In addition, the scheme offers tailored two-day workshop programmes to schools which link in with aspects of the curriculum and offer new skills, something particularly valued by the Scottish Government. In an interview on the 8th April 2019, Donald Campbell said: ‘It’s felt by ALBA that although some excellent and interesting content has been made over the years as a result, the most important outcome has been the widening of ownership of the creative space and the encouragement for locals to tell their own stories using audio-visual media’.

The annual budget for FilmG is £100k, with £70k

of that spend on the project and £30k on the awards event. The Scottish Government contributes £20k-£25k which covers the workshops. MG ALBA retain the broadcast rights of entries, but all ownership rights remain with the creators.

VAT Status

The VAT status of MG ALBA has undergone changes over the years in response to issues, particularly with the independent sector, surrounding the status of programmes for broadcast as a ‘supply’. When interviewed on the 8th April 2019, Neil Graham commented that resolving this problem had taken the organisation a long time and with a lot of money spent on consultants and accountants in the process. The only rights taken by MG ALBA on programmes were educational and research, out of the scope of VAT, and any VAT spent or had funding on was non-recoverable as the organisation was not VAT registered. When independent companies linked to MG ALBA had internal VAT inspections, despite the grant-aiding status of the transactions, the issue would again come into question, and independent producers would be sent VAT bills of hundreds of thousands of pounds.

To resolve the problem, MG ALBA went into discussions with the Treasury seeking Section 33

status, giving the organisation the ability to reclaim VAT on non-business supplies. The BBC also hold Section 33 status, exempting their licence fee income from VAT. Shortly after establishing the channel, MG ALBA agreed with the BBC that the broadcasting rights would be purchased from producers in the independent sector and sold onto the BBC. This transformed the status of MG ALBA from a grant-aiding body to an organisation entering into commercial agreements. It was then agreed with HMRC that the value of the broadcast rights passed on, bought via the Scottish Government’s funding of MG ALBA, was equivalent to MG ALBA’s total income. Each month MG ALBA would then invoice the BBC for 20% of that amount, who in turn claim it back, creating a continuous flow. This system has proved satisfactory and makes annual savings for MG ALBA.

Programming

Presenters and contributors appearing on BBC ALBA are encouraged to use their own Gaelic dialect or way of speaking, rather than a promotion of one form of the language, while its written output adopts approved educational standards. BBC ALBA’s programming is split into three targeted strands:

- Core Gaelic Audience Mainly consisting of the older generation, the aim is for these people to

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think of BBC ALBA news as their main, default source. They are fluent or proficient in Gaelic, and the news and live content is presented without subtitles. The quality and quantity of Gaelic delivered for this audience is very high.

- Gaelic + National Resonance Strongly thematic programmes (e.g. agriculture, fishing) which appeal to both a Gaelic-speaking audience and the wider UK. These are made accessible through on-screen subtitles.
- National Resonance Content aimed at the country as a whole with broad themes, such as sport, music and compelling documentaries, and will have a flexible balance between spoken Gaelic and English.

As of autumn 2018, BBC ALBA has been able to produce a seven-day news service for the first time. The current affairs programme *An Là* is now broadcast at weekends, which the BBC has said created six new jobs in the Inverness area (McCall 2018). Additional Scottish Government funding and income from facilities and programmes boosted MG ALBA's programming funds in 2017-18 by an extra £700k, allowing for 'an ambitious commitment to new, engaging and attractive TV and online comedy' and the creation of the satirical comedy *Func* (MG ALBA 2018, p.14). Gaelic language children's programming will also be quadrupled under the expansion (McCall 2018).

Volume Deals

Following the formation of the partnership in 2008, it became necessary for BBC ALBA to redesign its commissioning model and agree volume deals with independent production companies. This arrangement ensures enough hours are generated to fill ALBA's schedule at a lower cost, forming the backbone of its output. BBC ALBA currently works with between seven and nine companies at any one time, and these contracts are usually between three and four years long, and these deals make up 88-89% of its output. Examples of genres covered by volume deals are dubbing (or versioning) of existing animations into Gaelic for children, sport, factual entertainment and documentary⁴. In an interview 9 April 2019, Donnie MacDonald, Business Affairs Manager of MG ALBA, estimates that they have been able to make an increase of 248 hours per annum on pre-ALBA volumes without requiring a proportional increase of budget due to the efficiency of volume deals; pre-BBC ALBA the organisation was producing 180 per year on a budget of £9.5m, and while that budget has increased to £12.8m the annual output (averaged over the last three years) has grown to 428 hours. As well as providing MG ALBA with a lower cost of production, the independent companies benefit from the security a four-year contract brings, and they are viewed as a positive arrangement for both parties. However,

the development of the surrounding independent sector has been challenging and often companies are significantly or totally reliant on MG ALBA, who would like to see a greater diversification amongst the clients of their companies to provide a healthier allocation of dependence.

Potential for independent companies to generate revenue through rights exploitation of their content has so far been limited for two reasons: the first is that there is low demand for Gaelic-language programmes overseas; the second is that distributors are looking to buy sets of episodes in bulk, on a scale which BBC ALBA takes a significant amount of time to develop. Five episodes a year are created for its drama series *Bannan* (2014-present), leaving several years before it will have accumulated the 40-60 episodes desired by distributors. ALBA's limited budget means that the majority of its series which extend beyond a handful of episodes will be created through lower-cost volume deals, and this inevitably results in a lower quality which adds to the content's struggle in the market. To encourage producers to pursue further sales, MG ALBA forgoes a percentage on any sales up to £100k, and following that a percentage split of 85:15 in favour of the producer (matching typical BBC terms of trade), but as yet this has not resulted in income of any significance for BBC ALBA.



It is a source of major concern that BBC ALBA is seen as a poor relation available on television only in standard definition.

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Co-Commissioning

To off-set volume deals, BBC ALBA holds open commissioning rounds twice a year which result in several one-hour, high quality programmes. In recent years BBC ALBA has also been pushing for more co-funded projects which makes higher-quality output like this more achievable. A collaboration with TG4 on the music programme *Port* has been particularly successful, filmed with both Irish and Scottish presenters to produce a version in both languages.

Co-financed projects also have the potential to generate more hours, or lower production funding for a particular programme, but BBC ALBA have tended to utilise partnerships for a higher quality of output because this is something the channel cannot produce by itself. An estimated £5m of value has been brought in via third-party finance over the past three to four years (MG ALBA 2018, p.28). Independent production companies delivering these deals can, however, struggle to cope with the complex legal agreements needed with co-financed projects. MG ALBA has had to dedicate time to supporting the sector with these contracts while it develops.

Challenges

Funding

However, overall BBC ALBA's budget continues to be 'seriously constrained' and the Annual Report cites this as a 'serious barrier to the challenges facing the channel' (MG ALBA 2018, p.13) along with its continued broadcast in standard definition. The launch of a new BBC Scotland channel in February 2019, with carriage in high definition, adds context to BBC ALBA's content budget of £11m with funds of £32m⁵ (BBC News, 2019). ALBA Chair Allan MacDonald commented on the comparison: 'It is a source of major concern that BBC ALBA is seen as a poor relation available on television only in standard definition' (quoted in Grant 2019).

As a result of financial constraints, MG ALBA's commissioning rates are lower than other broadcasters, putting increased stress on its supply chain. MG ALBA's rates are lower than the new BBC Scotland channel, which is itself lower than the BBC Scotland opt-out, and all these continue to sit below BBC network rates. Whilst there are many positives to be found with the increase in provision in Scotland, such as generating more work and an important boost for the sector, creating more choices for independent companies and a greater choice in types of content creation, ultimately MG

ALBA are in last place for independent producers in Scotland seeking commissions unless the content is specifically aimed at BBC ALBA.

Visibility – iPlayer

The formation of BBC ALBA coincided with the early years of BBC iPlayer, the online BBC platform which began purely as a catch-up service and has now developed into a destination for audiences in itself. It is worth noting that changing role of the broadcast schedule in this context, which now acts as a primary marketing tool to build interest in programmes. Campbell (Interview, 2019) remarks: 'The role of the linear schedule is changing to becoming probably the strongest marketing tool that you've got to drive viewership of your content'.

Initially, BBC Scotland was allocated ten hours of content a week in total on iPlayer, making ALBA's bid to place 13 hours a week there ambitious. However, When interviewed on the 8th April 2019 Campbell noted that a new, self-contained BBC channel presented the iPlayer team with the opportunity to experiment relatively risk-free on the platform, an example of how minority language content can provide a useful testing ground for mainstream content, ALBA were offered ten hours per week, equivalent to the main BBC Scotland channel, with the scope to increase that in the future.

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BBC ALBA's voice in the ongoing conversation on iPlayer development is promoted via a joint management board, but the majority of its practical relationship with the platform is made indirectly through commissioning, scheduling and promotion of programming. The key technical development of the service is carried out separate to the partnership, and as such ALBA are limited in their influence on online visibility of content. Data on viewing figures is fed back to ALBA in the form of views and downloads, but there is currently no postcode-tracking function. A wider problem surrounding visibility currently faced by linear TV channels is the ability for providers to buy their way onto television home screens, remote controls and so on, enabling organisations with the largest resources (Netflix being one) to ensure their presence dominates the choices presented to viewers. Without increased regulation, local content and public service content can easily be squeezed out in this way, significantly limiting its reach. An interesting anomaly exists between BBC ALBA and S4C, wherein S4C's 'Clic Player' platform has the ability to distribute content worldwide, whereas iPlayer (on which S4C also has a presence) is geo-blocked. ALBA therefore has significantly limited distribution in comparison, despite both channels being public funded broadcasters.

- 1 First formed under Broadcasting Act 1990 (as Gaelic Television Committee), Broadcasting Act 1996 (renamed Gaelic Broadcasting Committee following addition of radio to remit) and then reformed as Gaelic Media Service in Comms Act 2003 (following expansion of powers to include operating a channel and commissioning or making content). Rebranded to MG ALBA in 2008.
- 2 Which provided for 'the erecting of English schools for rooting out the Irish language and...to wear it out, and learn the people the English tongue' (as cited in MacLean 2007, p.201).
- 3 Under Sections 183 and 184 of the Broadcasting Act. 1990, Sections 32 and 95 of the Broadcasting Act 1996 and related Schedules.
- 4 Mac TV is a key supplier of factual content for BBC ALBA, and was interviewed as part of the research for this report. They provide around 20 hours' programming annually on their current contract.
- 5 There also is opposition to the size of this budget. Kevin McKenna remarks, 'the annual budget set aside for the new channel is woefully inadequate' and cites Caledonia TV as saying: 'We are not convinced the £30m per annum content budget is sufficient to produce the required number of hours of original, high-quality primetime content the BBC proposal suggests and the audience will expect from Scotland's new national broadcaster' (McKenna, 2018).

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Kembra - S4C Wales – S4C

Population	3.1m
Welsh Speakers	562,000 (18%)
Weekly Viewing Figures	452,000
Total Individual Viewers (including online)	9.4m
Formed	1982
Regulator	S4C Authority
Funded By	Licence Fee (90%) DCMS (8%) Advertising (2%)
Annual Operating Budget	£83.8m
Programming Budget	£65.6m (78%)
Annual Original Content Hours	1,762
Number of Employees	131
Economic Impact per £1 Spent	£2.09

'It is one thing for a gardening channel to disappear from the multi-channel spectrum, its group of viewers dispersing once again to form other viewing groups, watching other channels. The consequences of a minority language channel disappearing are somewhat more profound' (Kelly-Holmes 2001, p.3).

Language Context

The Welsh language has survived centuries of suppression in various forms¹, with a steep decline during the industrial revolution's period of mass immigration, to emerge as today's most widely-spoken of the Celtic languages. The 2011 census recorded 562,000 Welsh speakers within Wales, accounting for around 18% of the population of Wales, with a third of those aged 15 and under. This is a testament to the drive in the resurgence of the language which gained momentum in the 1930s, alongside the rise of the nationalist political party Plaid Cymru which began in 1925.

Since 2000, the teaching of Welsh as either a first or second language has been compulsory in all schools. The first state system Welsh-medium school opened in Llanelli in 1947, and was followed by the establishment of many other such schools around

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it is very interesting that there's an awful lot of support among non-Welsh speakers for S4C because they feel that S4C has programmes that discuss Wales and its communities. That is why it is important.

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Wales, but they were preceded by a private initiative to create a Welsh-medium primary school in Aberystwyth in 1939. Christina Paulston contrasts the resurgence of Welsh education with Irish, noting that:

‘Instruction in and through Irish has been imposed from on high, in Ireland, and there are various indications that the success of the instruction has been hampered by that fact. In Wales, on the other hand, the first efforts at education in and through Welsh were made without official sanction by individuals who cared passionately enough about Welsh to sacrifice financial reward and good instructional facilities in order to create Welsh-language schools’ (Paulston 1988, p.129).

In 1962 the Welsh Language Society (Cymdeithas yr Iaith Gymraeg) was established, and has since been instrumental in various campaigns for Welsh, including the formation of S4C. In the late 1960s it conducted a campaign against road signs written in English, painting them over or removing them on a large scale. Following this action, the Bowen Report of 1972 recommended that bilingual road signs should be systematically erected in all parts of Wales, ensuring that Welsh would be visible throughout the country.

Improvements to the status of Welsh continued to develop following the establishment of S4C in 1982. The Welsh Language Act of 1993 marked a change in attitudes towards the language that had grown over the previous decades, and promoted Welsh to having equal status with English in the public sector of Wales. This also saw the establishment of the Welsh Language Board and gave speakers the right to use Welsh in court proceedings. Following a referendum in 1997, the Government of Wales Act 1998 created the National Assembly for Wales and the Welsh Government, which formally separated in 2007 following the Government of Wales Act 2006. The latest important development is the Welsh Language Measure of 2011², which made Welsh an officially recognised language within Wales (the only language which is de jure official in the United Kingdom), and along with it the creation of the role of Welsh Language Commissioner to promote and facilitate the use of Welsh and improve the rights of Welsh speakers. See Morris (2012) for a discussion of this new role and examples of the hope it brought to Welsh speakers at the time of its implementation.

In findings which have remained steady over the years, a 2016 study found that 96% of viewers said that they felt S4C was an important channel for the Welsh culture, and 92% said that the channel actively contributed to Welsh culture; 85% of respondents

felt that S4C also provides good support for Welsh learners (Rolewska 2017, p.6-7). ‘The wide range of quality Welsh medium content provided by S4C is essential in order to create new Welsh speakers and support the use of Welsh’ (ibid).

In recent years S4C has worked more closely with Welsh teachers to provide more effective content for learners of the language and address problems in the classroom, for example a lack of awareness from teachers about what S4C has to offer and a lack of confidence in teachers who are not competent Welsh speakers themselves. One local authority is being used to trial a collaborative approach with NQTs, giving them the opportunity to commission clips of content useful for their classes. If successful, this is something which has the potential to be rolled out across Wales.

The Wales Centre for Teaching Welsh to Adults has also provided guidance to S4C on what would be most useful to their learners, and in addition this presents the opportunity for S4C to tap into the 30,000 subscribers to their database by providing them with a dedicated area on Clic, S4C’s online platform. S4C has also established a new language partnership with the National Eisteddfod, Urdd Gobaith Cymru, the National Centre for Learning Welsh, the Mentrau Iaith and the Welsh Government

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to maximize their impact in developing the language (S4C 2018, p.5).

History & Legal Basis

The grassroots passion for the promotion of the Welsh language identified by Paulston extended beyond school-based education, and was key to the establishment of a Welsh television channel. The Welsh identified the potential threat of English-language broadcast media on the Welsh language very early on. In 1927, the Welsh Board of Education stated that ‘we regard the present policy of the British Broadcasting Corporation as the most serious menace to the life of the Welsh language’ (Davies 1994, p.72). Concern over time, running parallel to developments in Welsh-medium schooling, led to the Welsh Language Society forming the first Celtic television campaign in 1966.

A range of data was assembled to support the case concerning the lack of Welsh language programmes, particularly for children, and the argument made that the invisibility of Welsh speakers on television was eroding their community and damaging the visibility and status of the language (Thomas 1971, pp.90-93). Various confrontational tactics were used by activists during the campaign, such as the occupation of television studios, the destruction of broadcasting

masts, and systematic refusal to pay television licences in the early 1970s which led to several imprisonments (Hourigan 2007, pp.144-145). Prior to the 1979 general election, both the Conservative and Labour parties had promised that legislation for a Welsh-language television channel would be put before Parliament the following year. This promise, however, went undelivered by Margaret Thatcher following the Conservative Party victory, prompting the Plaid Cymru leader Gwynfor Evans to begin a hunger strike in protest. A catalyst for renewing protest throughout Wales, the pressure mounted, and in September 1980 it was announced that the government would establish a single channel for the Welsh language as originally proposed in their manifesto. S4C (from the Welsh ‘Sinael Pedwar Cymru’ or ‘Channel 4 Wales’) was established and began broadcasting in November 1982, one day before Channel 4 in the rest of the UK. Kevin Williams raises an alternative issue, but one worth noting here, of a disparity in provision for Welsh speakers and English speakers in Wales – ‘S4C’s achievement is attributable to the active constituency that has supported Welsh language television. Calls for a dedicated English-language channel have never matched those for S4C. Nobody has offered to fast to death or go to gaol for an English language Welsh TV channel – yet’ (Williams 2009, pp.33-34).

Today S4C’s headquarters are based in Camarthen, at the University of Wales Trinity St David’s creative and digital centre, Yr Egin, with additional regional offices in Caernarfon and Cardiff. S4C is independent of but works in partnership with BBC Cymru Wales, which is based in Cardiff and operates radio stations and two TV channels, BBC One Wales and BBC Two Wales. BBC Cymru Wales supplies Welsh-language programmes to S4C free of charge under the BBC Cymru brand. S4C is regulated by the S4C Authority, an independent public body responsible for Welsh-language television content provision which works in conjunction with Ofcom. Following a 2018 review discussed later in this study, there are now plans for S4C to be reconstituted in the form of a Unitary Board similar to the BBC’s own new governance model (S4C 2018, p.13).

Programming & Supply

S4C is a publisher–broadcaster that commissions around 1,700 hours of original content each year from the independent production sector, which is broadcast together with at least 520 hours made for the service by BBC Cymru. It averages 121.3 hours weekly transmitted output.

In recent years S4C has found success with its bilingual presentation of the drama programmes *Un Bore Mercher* (‘Keeping Faith’) and *Craith*

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(‘Hidden’), co-commissioned with BBC Wales and filmed concurrently in Welsh and English, which have gone on to secure substantial audiences and critical acclaim on English-language channels and networks (S4C 2018, p.9).

S4C are also increasingly looking to collaboration to expand their impact, e.g. exploring co-productions with Celtic broadcasters TG4 and BBC ALBA. This fits the trend in UK broadcasting to remain competitive in an increasingly saturated global content production market, dominated by SVoD platforms. A report commissioned by Ofcom suggests that ‘co-production from UK broadcasters will increase in the coming years, as they seek to support the costs associated with high-end TV production, but Ampere expects the focus to gradually shift towards deals with other public and commercial broadcasters’ (Ampere Analysis 2019, p.14). The annual Celtic Media Festival provides an essential environment for discussion and partnership brokering between the Celtic broadcasters and with the wider market.

Hansh is a new online-only service aimed at 16-34 year olds, much like a Welsh-language version of BBC3, aiming to provide ‘attractive material for young Welsh speakers, at the age when they are instinctively making decisions regarding their personal language

use...’ (S4C 2018, p.10). Beginning with short-form comedy, the content has developed rapidly to include cookery programmes, environmental features, music and drama. Between its inception in June 2017 and March 2018 it drew in 4.9 million viewing sessions (ibid, p.44), demonstrating the trend of younger viewers moving away from linear or scheduled broadcasting in favour of shorter, peer-led content. Programmes are distributed through social media, YouTube and Clic, and this has enabled S4C to reach both a new audience and a new pool of talent to draw into its supply chain, both on and off-screen, that wouldn’t otherwise have considered work in the sector. During the course of 2018, S4C has been working to diversify its supply chain, increasing the percentage of small companies it commissions from around 5% to 10%. It is unlikely, however, that this number will increase much beyond 15% due to the capacity needed to manage contracts through small companies. Financially some of these companies are robust, but a proportion are mostly or wholly reliant on S4C for contracts. In its early stages S4C worked to build up several core companies to ensure security of supply.

Partnership & Status

BBC Cymru Wales makes a significant contribution to S4C’s schedule, providing 520 hours of content

annually. This includes the long-running Welsh language soap ‘Pobol y Cwm’, news provision, some elements of sports provision and coverage of the National Eisteddfod of Wales.

In 2018 S4C and the BBC entered into an agreement for the co-location and sharing of S4C and BBC Cymru’s technical broadcasting functions at the news BBC Broadcasting Centre in Cardiff from 2019 (S4C 2018, p.89), deepening the ties between the two organisations. S4C’s play-out and technical services will be outsourced to the BBC, a move designed to improve practical and financial efficiency.

Hugh McKay argues that funding S4C so substantially with the license fee and increasing its links with the BBC ‘reduces media plurality, the number of voices that can be heard’ (McKay 2016). However, S4C works hard to present an authentic portrait of contemporary Wales, something that is occasionally called into question with other broadcasters including BBC One Wales. A recent example includes their drama Pitching In, set in Anglesey and produced by Liverpool-based production company LA Productions, where complaints from viewers ranged from the fact that English characters took center-stage to the criticism of actors’ artificial North-Wales accents (Leaver 2019).

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This is part of a broader trend in English-language programming for Wales, with cuts in funds for both the BBC and ITV leading to a reduction in content produced specifically for Welsh audiences. Drama which fails to reflect life in Wales, using the

country instead solely as a location for filming, has been 'a major disappointment to both audiences and local industry' who would like to see increased representation both within Wales and to the wider UK audience (Noonan & Powell 2018, p.273). Menna Machreth suggests that 'it is very interesting that there's an awful lot of support among non-Welsh speakers for S4C because they feel that S4C has programmes that discuss Wales and its communities. That is why it is important' (House of Commons Welsh Affairs Committee 2011, p.26).

Visibility & Clic

While the general brand awareness of the BBC iPlayer is an asset to S4C's output, as with MG ALBA it is not without its difficulties for indigenous language content. S4C have had a presence on the platform (the first third-party broadcaster to do so) since 2014, but they do not receive detailed analytics, hindering any targeted marketing of content, and in their present state the platform's algorithms don't serve Welsh language content well enough. S4C's strategy has been to continue to develop their own online player, Clic, into a destination for audiences in itself, by strategically placing content such as box sets and Pro14 rugby on Clic only. The Welsh version of the popular series such as 'Un Bore Mercher' will be placed on Clic months before the BBC screen

the English-language version, helping to drive fans of the programme to the platform. In addition, as of May 2019 viewers must sign-in to use the platform, ensuring that S4C retain the audience data they need.

Funding

S4C receives the majority of its funding from the licence fee, an amount decided by the Secretary of State and delivered via the BBC, with a small additional grant-in-aid from DCMS, and revenues from advertising. While the licence fee funding is currently fixed until 2021/22 at £74.5 million, this has been cut significantly in recent years; in 2011-12, S4C received £101 million from the UK government, a figure which would now need to be significantly higher³ if it had kept pace with inflation, and in 2016-17 this figure was cut to £81.3 million (Culture, Welsh Language and Communications Committee 2017, p.5). The grant-in-aid funding, however, is subject to continuous change, a lack of certainty which 'has created a disproportionate level of anxiety and uncertainty among S4C and stakeholders that goes well beyond the impact of the actual sums involved' (Williams 2018, p.8). This was a conclusion drawn from an independent review led by Euryng Ogwen Williams for DCMS, published in 2018, looking into S4C's remit, governance and funding. The report recommended that to avoid this

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ongoing uncertainty, S4C's public funding should be provided entirely through the licence fee and that 'S4C's funding decisions should be aligned with the BBC's licence fee funding settlement from 2022/23 onwards' (ibid).

The government accepted all the report's recommendations, and S4C responded in their annual report: 'We were very glad that the UK Government...agreed to maintain our DCMS funding at existing levels for the next two years and to accept the review's conclusion that there is a need to ensure S4C funding is on a stable and transparent footing... Identifying as a benchmark the kind of five-year funding visibility which the Charter provides for the BBC, seems a sensible way forward' (S4C 2018, p.12).

S4C also generates commercial revenue for its public service fund via advertising, sales and programme sponsorship, averaging £2 million (gross) of income annually (S4C 2018, p.92). When interviewed 28 March 2019, Owen Evans notes that this comparatively small but significant amount is important not only for its financial impact, but in order to demonstrate credibility to funders that S4C are exploring every possible opportunity to generate commercial revenue.

1 Examples include the Laws in Wales Acts of 1535 and 1542, not repealed fully until 1993, which forbade the use of Welsh in legal situations and Welsh speakers from holding 'any manner Office or Fees', which led to the Anglicisation of the ruling class of landed gentry in Wales. Unofficially, the use of the 'Welsh Not', an item used in the 19th century to discourage and stigmatise children speaking Welsh by punishment, furthered the decline of Welsh in schools (Harley 2017 p.7).

2 The measure: confirms the official status of the Welsh language; creates a new system of placing duties on bodies to provide services through the medium of Welsh; creates a Welsh Language Commissioner with strong enforcement powers to protect the rights of Welsh-speaking people to access services through the medium of Welsh; establishes a Welsh Language Tribunal; gives individuals and bodies the right to appeal decisions made in relation to the provision of services through the medium of Welsh; creates a Welsh Language Partnership Council to advise Government on its strategy in relation to the Welsh language; allows for an official investigation by the Welsh Language Commissioner of instances where there is an attempt to interfere with the freedom of Welsh-speaking people to use the language with one another.

3 £111 million according to 'Outside the Box: The Future of S4C' by the Culture, Welsh Language and Communications Committee (2017), p.5, but as high as £121 million when calculated using the Bank of England's online calculator of inflation rates as of May 2019, from <https://www.bankofengland.co.uk/monetary-policy/inflation/inflation-calculator>.

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Ystynnans I: Studhyansow kas media gonis poblek yethow minorityta

Annex I: Minority language public service media case studies –

Republek Iwerdhon - TG4 Republic of Ireland – TG4

Population	4.8m
Irish Speakers	1.76m (37%)
Weekly Viewing Figures	500,000
Total Individual Viewers (including online)	1.98m
Formed	1996
Regulator	BAI
Funded By	Government of Ireland (90%) Commercial (10%)
Annual Operating Budget	£32.4m
Programming Budget	£21.7m
Annual Original Content Hours	1,622
Number of Employees	80
Economic Impact per £1 Spent	£2

'Irish-language media give a public – and legitimating – voice to a language historically denigrated by the English-speaking power-holders, and consequently the language is seen as capable of coping with the discourse needs of the modern world. In short, the status of the Irish language is 'reinvented' through the media' (Cotter 1999, p.372).

Language Context

The Irish language (Gaeilge) is recognised as the national and first official language of the Republic of Ireland, and in Northern Ireland it is an officially recognised minority language. It is still spoken as a first language by a group of communities (predominantly along the west coast) referred to as the 'Gaeltacht'. While the numbers of speakers in these areas are in decline, it has been observed that outside of the Gaeltacht, speaker numbers are growing. Interestingly (especially from a Cornish perspective) there are now more 'new' speakers of Irish than native speakers, with learners around the country looking to the traditional areas for inspiration and building a more stable base for the language (O'Rourke & Walsh, 2017).

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History

TG4 followed channels RTÉ (Raidió Teilifís Éireann) One & Two as the third national station to be launched in Ireland. It began in 1996 as Teilifís na Gaeilge or TnaG, before a rebranding campaign in 1998. TG4 initially operated under the statutory and corporate aegis of RTÉ, but was set up as a separate Broadcasting Authority. It is now independently managed by the corporation Teilifís na Gaeilge, who took over from RTÉ in 2007. It is regulated by the Broadcast Authority of Ireland (BAI), which regulates both public and commercial broadcasting sections in Ireland. TG4 emerged out of grass-roots campaigning by a wide range of Irish-speaking communities and organisations who pushed for a dedicated Irish-language broadcaster to fill the gap left by RTÉ's sporadic Irish content.

The appeal for a separate channel, rather than a boost RTÉ's output, was in itself divisive amongst campaigners (White 2009, p.217) but constituted an important ideological shift in the framing of Irish as a protected minority language, and the rights of its speakers. Attempts to persuade the authorities to create an Irish language service had been made by pressure groups from as early as 1926, culminating in 'pirate' television broadcasts between 1986-7 which as well as challenging the authorities demonstrated

that their protestations surrounding supposedly unfeasible costs were unfounded. In 1989, the various campaign groups combined to form 'An Feachtas Náisiúnta Teilifíse' (The National Television Campaign) and in 1996 the channel was launched.

Programming

TG4 receives significant non-monetary support from RTÉ in the form of programming, as RTÉ is required to provide over 360 hours of programming annually. As a contribution to TG4 this takes the form of all its news and current affairs programming. In addition to this, TG4 broadcasts approximately 2.5 hours a day of new Irish-language content and around 2.5 hours a day of repeated Irish-language programmes, supplemented with acquisitions from other broadcasters (the US in particular).

Over the years, TG4 has tried various scheduling formats. While still TnaG, and confronting low audience figures, the organisation moved some Irish-language programming from prime time hours to late night slots following popular English-language programming. This switch, referred to as 'hammocking' where less popular content is placed between programmes, successfully boosted audiences for Irish content.

TG4 has produced successful Nordic Noir-type programmes, a genre nicknamed 'Celtic Noir', such as *Corp agus Anam* and *An Bronntanas*. While tapping into a popular international style, TG4 has set these series in the Gaeltacht heartlands which places Irish language at the forefront and enables them to resonate strongly with Irish audiences. TG4 has also developed competition-style programming (drawing from mainstream English-language content like *Strictly Come Dancing*, *The X Factor* and so on) while at the same time drawing on aspects of Irish culture such as dancing (*An Jig Gig*) and singing (*Abair Amhrain*). This approach opens up TG4's appeal to audiences who value aspects of Irish culture, as well as language, as part of their identity.

Impact on Language

TG4 has no official language policy except for children's programming, where standard Irish is adhered to in order to provide a coherent extension of resources for children learning in schools. This gives the organisation the freedom to mix local dialects, slang and English loanwords with standard Irish, and this has inevitably angered some purists. Moriarty (2015) points out that while there are problems associated with this lack of policy, it also means that the channel has no drive to impose a form of Irish on viewers in a form which for many

Ystyynnans I: Studhyansow kas media gonis poblek yethow minorityta Annex I: Minority language public service media case studies – Repoblek Iwerdhon - TG4 Republic of Ireland – TG4

will be irrelevant; instead it constitutes ‘an important reflection on the sociolinguistic reality of the Irish context.’ This also enables the channel to be at the forefront of new linguistic practices, and present a variety of voices with a mix of Irish speakers from different backgrounds. TG4 can capture a range of Irish-language practices and experiences which moves the channel away from a binary opposition between speaker and non-speaker, and opens up the space to learners at different stages of fluency.

TG4 continues its successful programming in Irish, but it remains fundamentally bilingual between Irish and English, in contrast to channels such as S4C. A key objective for TG4 is to invest at least 70% of public funding in Irish language programming/content. In 2017, they exceeded this (74.5%).

The 2016 Public Funding Review of Public Service Broadcasters (pp.43-44) found that all of TG4’s language targets were either achieved or marked as ‘substantially achieved!’ , some of which included exceeding the target of a 90% weekly reach with Irish language audiences by 2%, successfully supporting initiatives to promote speaking skills in the post-primary curriculum and deepening partnerships with Irish language, culture and sporting bodies.

Funding

In October 2018, the Broadcasting Authority of Ireland (BAI) advocated strongly for increased government support for public service broadcasting, calling for RTÉ to receive €30 million and TG4 €6 million in addition to their annual funding. This need for extra funds was described as ‘immediate’ and ‘urgent’, implying that financial intervention is vital in order for the broadcasters to continue in their present forms. Detailing the situation, the Irish Times commented that ‘it’s an odd predicament. With each passing year, it seems less within RTÉ’s power to commercially grow its way out of the doldrums – the media market has simply changed too much. And yet it can’t shut down some of the services it provides without the consent of the Department of Communications. To date, whenever it has tried to do so, there has been a backlash’ (Irish Times, 2018).

This is consistent with the current financial situation of other European PSBs, including the BBC. The BAI also made clear that it does not believe that there are cuts left for RTÉ or TG4 to make themselves without undermining their very essence, as both organisations have already made ‘significant changes’ to reduce costs and increase efficiencies in recent years (BAI, 2018).

I Substantially Achieved relates to quantitative performance within 10% of target.

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Irish-language media give a public – and legitimating – voice to a language historically denigrated by the English-speaking power-holders, and consequently the language is seen as capable of coping with the discourse needs of the modern world. In short, the status of the Irish language is ‘reinvented’ through the media.

Ystynnans I: Studhyansow kas media gonis poblek yethow minorityta

Annex I: Minority language public service media case studies –

Mordir Nowydh - Maori TV New Zealand – Maori TV

Population	4.8m
Maori Speakers	148,000 (3%)
Weekly Viewing Figures	1.75m
Formed	2004
Regulator	BSA
Funded By	New Zealand Government
Annual Operating Budget	£20.1m
Programming Budget	£11.6m

'Everyday linguistic dominance places in peril the possibility of thinking from a perspective other than English' (Smith, 2016).

Language Context

Maori, also known as 'te reo' ('the language') is spoken primarily by the indigenous population of New Zealand, and gained recognition as one of New Zealand's official languages in 1987. Estimates of the number of speakers vary; a national census undertaken in 2013 suggests there were approximately 125,000 speakers of Maori (around 21% of all Maori and around 3 % of all people living in NZ), while the survey Te Kupenga undertaken by Statistics NZ in 2013 suggests there were approximately 50,000 (11 %) Maori adults who could speak Maori well or very well (Keegan 2019). Maori Television is aiming to enable all of its staff to become bilingual in English and Maori by 2020 (Maori Television Service 2017, p.13).

History

Maori Television was launched in 2004, and its partner channel Te Reo in 2008. Maori Television broadcasts in both Maori and English, catering to

Ystynnans I: Studhyansow kas media gonis poblek yethow minorityta Annex I: Minority language public service media case studies – Mordir Nowydh - Maori TV New Zealand – Maori TV

all levels of fluency, while Te Reo produces purely Maori-language content without subtitles.

Jo Smith (2016) gives a detailed account of the fight for the Maori language to have its own broadcast channel, within the larger context of a people fighting for decades for general visibility and recognition in a non-Maori majority country. 'There were no television programmes made especially for the Maori population. The Maori language was almost never heard on the airwaves, and the whole spectrum of social and political issues important to Maori people were largely ignored both by radio and TV' (Fox 2002, p.261). The demand for a Maori-language broadcaster followed efforts to establish teaching of the language in schools, and a petition made to the government in 1972 with over 30,000 signatories demanded that:

'courses in Maori language and aspects of Maori culture be offered in ALL those schools with large Maori rolls and that these same courses be offered, as a gift to the Pakeha [ethnically European New Zealanders] from the Maori, in ALL other New Zealand schools as a positive effort to promote a more meaningful concept of Integration' (Metge 1976, p.99).

This led to Maori Language Day, Maori Language Week, and increased cultural and political action which led to petitions in the 70s and 80s positioning a broadcaster as second only to the education system in revitalising a language. The Waitangi Tribunal of 1986 established that the Maori language should be considered a taonga (treasure) to be protected, resulting in the Maori Language Act of 1987 which made Maori an official language of New Zealand.

In 1994 Te Mangai Paho¹ (the Maori Broadcast Funding Agency) was established by the Broadcasting Amendment Act, a New Zealand Crown entity responsible for promoting and funding Maori-language radio and television, with the following aims:

- Ensure an increase in Maori programming and Maori audience shares
- Extend and develop the strands of programmes produced
- Promote the use, learning and profile of Maori language in primetime and mixed programming formats
- Encourage the growth of Maori music and oral and performing arts, contemporary and traditional arts and music.
- Provide a range of programming to specific

Maori interests...to general Maori audiences and to audiences with an interest in Maori programming. (Matamua, 2015)

Between 1993 and 2000, twenty-one Maori radio stations were established, and finally in March 2004 the long-awaited Maori Television Service began broadcasting, followed by a second Maori channel 'Te Reo' in 2008. Te Reo's purpose is to broadcast purely in Maori, without advertising or subtitles.

Programming & Vision

'Maori language is a taonga (treasure) at the heart of Maori culture and New Zealand's unique cultural identity. Our vision is for Maori Television to be Te Kuaha ki te Ao Maori [a 'door to the Maori world']' (Maori Television, 2019).

Its content plan puts this into action by:

- showcasing people from all walks of life including well know celebrities using te reo
- providing te reo Maori versions of popular shows
- ensuring content is available on multi-platforms

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Everyday linguistic dominance places in peril the possibility of thinking from a perspective other than English

- focusing content for specific audiences that engage them in te reo
- including English subtitles to cater to a wider range of viewers
- participating in and reporting on Maori language revitalisation initiatives directly
- ensuring high quality te reo Maori in all content
- supporting exemplars of te reo and iwi dialects
- creating Maori language plans that include quality assurance and independent reviews for all content.

(Maori Television Service 2017, pp.3-13).

Maori Television aims to broadcast a minimum of 7,900 hours of programming per year (around 22 hours per day) in a wide range of genres, with the majority of these in te reo Maori but a proportion also in English or bilingual. It caters to Maori speakers at different levels of fluency.

Its content and diversity have been positively received in New Zealand, with many politicians now regarding Maori Television as ‘the best public broadcaster’ and ‘the best of the free-to-air channels’ in a county with a sector otherwise dominated by

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commercial incentives (Smith, 2016).

Impact on Language

In 2016 Maori Television undertook a Maori Language Effectiveness Research project to assess the effectiveness of Maori Television's role in the revitalisation of the language, which indicated a strong supporting role in its promotion, normalisation and growth, and in providing a sense of connection with the language and culture. The research also showed an 11% increase in language ability amongst all Maori people aged over 15 attributable to Maori television, along with a 30% increase in understanding of and receptiveness to Maori culture among non-Maori. (Te Heuheu 2017, p.4).

Less quantifiable but nevertheless important were the findings that Maori Television acts as a trusted source to go to for anything and everything related to the Maori world, and that it encourages engagement, supporting inter-generational transmission of the language in the home (Maori Television Service 2017, p.14).

Funding

Maori Television is funded by Te Mangai Paho, a government body which in addition funds Te Reo,

the flagship daily news programme Te Karere and the operation of a network of bilingual English and Maori language radio stations.

Its projected costs until 2020 are an estimated \$22.154m per year (£11.37m) on operational costs and \$18.538m (£9.61m) per year on direct programming, provided by Te Mangai Paho. Maori Television also anticipates \$16m (£8.27m) per year in that period of indirect programme funding, made available by Te Mangai Paho, NZonAir and others to pay independent television production companies to produce programmes for broadcast by Maori Television (Maori Television Service 2017, p.22).

¹ It was launched under the name Te Reo Whakapuaki Irirangi but uses the name Te Māngai Pāho (TMP) in official publications.

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Ystynnans I: Studhyansow kas media gonis poblek yethow minorityta

Annex I: Minority language public service media case studies –

Breton Vyghan - TV Breizh Brittany – Breton TV

'This resurgence of cultural groups is an important part of socially anchoring individuals within the vague impersonality of the global flow of information' (Winterstein, 2001).

Language Context

The Breton language's closest linguistic relative is Cornish, and was brought to the shores of France by migrating Britons during the Early Middle Ages. Breton is classified as 'severely endangered' by the UNESCO 'Atlas of the World's Languages in Danger'. A survey in 2013 found that around 206,000 Breton speakers remain, which while a significant figure, constitutes a drop of around 80,000 since the previous survey conducted ten years earlier (Broudic 2009, p.71). Most of these speakers are unable to read or write in Breton. As with other Celtic languages, the repression of the language by the state has played a large part in its decline, in addition to the young speakers lost during the World Wars (Kennard 2018, pp.231-2). France remains resolutely monolingual, and Breton is afforded minimal regional status (Kelly-Holmes 2001, p.1);

it is only in recent years that France has been forced by international pressure to recognise the rights of

Breton speakers. Taesohlavá (2018) gives an up to date and comprehensive portrait of the current use of the Breton language.

TV Breizh

TV Breizh was founded by Patrick Le Lay and launched in September 2000, broadcast throughout France in simultaneous Breton and French-language versions, and constitutes the main effort to date to establish a significant Breton-language broadcaster to date. It followed a resurgence in interest in Breton language and culture, alongside the efforts of separatist groups such as the Breton Revolutionary Army working against the French government's contentious relationship with Breton. These efforts have been at times violent; a bombing was attributed to a wing of the Breton Liberation Front (FLB) in April 2000 which caused the death of a woman, and did considerable damage to the group's popularity and support (BBC, 2000). Enthusiasts of the language also had to counter its association with the German occupation, and the collaboration of some anti-French, right wing Breton nationalists with France's Nazi occupiers'.

At its inception it promised up to six hours of

original programming in Breton each day, alongside films with a Celtic-interest dubbed into the language and a weekly magazine. Le Lay, the then CEO of TFI (France's most popular channel), had substantial financial support from Rupert Murdoch, Silvio Berlusconi and Breton-born tycoon Francois Pinault (Lichfield, 2000). In 2012 the headquarters of TV Breizh were moved from its homeland of Brittany to Paris, although the channel had moved away from its bilingual roots as early on as 2003 (Schwartzenberg 2012), and in 2008 had abandoned Breton programming altogether citing low ratings (de La Casinière, 2008). However Jacques Guyot suggests that it had never been Le Lay's intention to defend Breton language and culture, but rather TV Breizh was designed as 'a technological and commercial tool to test the Breton consumers and to provide a presence at the regional level when the invitation to tender for digital terrestrial television channels was launched' (Guyot 2007, p.39). The scope of its news programmes was limited to local events, and while an estimated 20,000 people watched each lunchtime, as Stefan Moal puts it, 'a language that is not given the opportunity to describe with its own words whatever takes place throughout the world cannot be seen by its own speakers to have reached full maturity. As for non-speakers, the image given by such a

Ystynnans I: Studhyansow kas media gonis poblek yethow minorityta Annex I: Minority language public service media case studies – Breten Vyghan - TV Breizh Brittany – Breton TV

situation is also one of inferiority and incapacity to express the universal' (Moal 2001, p.46). Today TV Breizh features mainly reruns of French and international series.

Other TV

Current Breton-language broadcast TV programming is limited, with the regional service France 3 Ouest providing a Breton opt-out; however, this is only for 90 hours a year of news, current affairs and magazine shows. A further 90 hours of content is produced for digital platforms where there is a little more flexibility in programming, resulting in the first Breton drama miniseries 'Fin Ar Bed'. The regional general-interest channel TV Rennes 35 also broadcasts some Breton-language content, as does Ty TV and Armor TV.

Brezhoweb is an online-only channel which broadcasts entirely in Breton. It was founded by Lionel Buannic in 2006, and has since acted as a model for other web-based regional French Tv, such as ÒC tele which caters for Occitan speakers. Like the initial plans for TV Breizh, Brezhoweb's two main outputs are original Breton-language content and pre-existing content dubbed into Breton. It has established its own long-running series, such as 'Ken Tuch' (one of the first programs created entirely in Breton) the talk show 'Bec'h De'i', now in its 13th year, and the game

show 'Foeterien'.

BreizVOD is an online on-demand service, where viewers pay a monthly subscription to watch a variety of content produced in or dubbed in Breton. It is marketed primarily as a language-learning tool rather than a cultural resource, and caters for different levels of proficiency with some content also subtitled in French.

Radio

Breton has a regular presence in regional radio stations such as France Bleu Breizh Izel, and local stations like Radio Kreiz Breizh and Radio Bro-Gwened. There are then local radios, including voluntary stations like Arvorig FM in Brest, the Catholic station Radio Rivages and Radio Kerne in the south west of Brittany, broadcasting entirely in Breton. While these are limited in terms of broadcast distribution, they are also available online for global listeners. Most of these independent stations are staffed by volunteers, with a small proportion of paid staff.²

¹ See Reece (1977) for a full account.

² See Ball & Müller (2010) for an overview of the history of Breton radio.

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Ystynnans I: Studhyansow kas media gonis poblek yethow minorityta

Annex I: Minority language public service media case studies –

Manow - Radyo Isle of Man – Manx Radio

Population	84,000
Maori Speakers	1,662 (1.9%)
Weekly Viewing Figures	33,000
Formed	1964
Regulator	Communications Commission
Funded By	Manx Treasury & Advertising
Annual Operating Budget	£2m
Annual Content Hours	260

'Television within a culture that previously lacked access to the medium does not simply transmit the existing culture, it transforms it' (Thomas 1995).

Language Context

Manx is a Goidelic language closely related with Irish and Scottish Gaelic, which arrived on the Isle of Man with Irish monks in the fourth and fifth centuries AD. The last native speaker of the language, which is also known as Manx Gaelic or Manks ('Gaelg'), died in 1974, and it has been the subject of interest and revival efforts as a second language since the end of the 19th century. Thanks to this interest in Manx over the last century, modern learners are aided by recordings of the last native speakers. Boosting the numbers of young speakers, there are now five pre-schools on the island which use Manx as the sole medium, and the primary school Bunscoill Ghaelgagh (established in 2001) teaches solely in Manx, allowing pupils to become fluent. All other island primary and secondary schools provide it as a second language. After a slow but steady resurgence, current speakers number around 1,650, of a population of 84,000 (Isle of Man Government Treasury, 2011).

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This resurgence of cultural groups is an important part of socially anchoring individuals within the vague impersonality of the global flow of information

Ystynnans I: Studhyansow kas media gonis poblek yethow minorityta

Annex I: Minority language public service media case studies –

Manow - Radyo Isle of Man – Manx Radio



Television within a culture that previously lacked access to the medium does not simply transmit the existing culture, it transforms it

History

Manx Radio operates alongside two other indigenous radio stations on the Isle of Man, both of which are fully commercial: Energy FM and 3FM. It is regulated by the Isle of Man Communications Commission, which is responsible for regulating all telecommunications and broadcasting on the island. The station first went on air in June 1964, following a four-year negotiation with the UK's General Post Office for a frequency and permission to broadcast. Commercial radio wasn't licensed in the UK until the mid 1970s, but the Isle of Man's status as a Crown Dependency with its internal self-government made this exception possible, and it was established as a semi-commercial station with additional government support. In 2002 the island's government, Tynwald, agreed to elevate Manx Radio's status to become the National Public Service Broadcaster of the Isle of Man but it was not until 2014 that this was enshrined in primary legislation, ensuring a more secure future for the station. (Manx Radio, 2019).

Programming

Manx Radio broadcasts on both AM and FM 24 hours a day, seven days a week, and announces itself in Manx ('Shoh Radio Vannin' – 'this is Manx Radio').

Ystynnans I: Studhyansow kas media gonis poblek yethow minorityta Annex I: Minority language public service media case studies – Manow - Radyo Isle of Man – Manx Radio

As a small island, the Isle of Man doesn't have a daily newspaper, and so Manx Radio constitutes the primary source of news for citizens. Approximately five and half hours a week of its output is broadcast in Manx or presented bilingually with English, spread over the week with three of those hours scheduled on Sundays (Culture Vannin, 2019). Julia Sallabank notes that these programmes are often about the language, rather than in it, but also highlights its use of innovative formats in this area, for example combining language lessons with music, or the magazine programme 'Shiaght Laa' ('Seven Days'), presented bilingually in English and Manx, which previews forthcoming events as well as covering highly varied events (Sallabank 2013, p.165).

Funding

Currently Manx Radio is jointly funded by the Manx Treasury and advertising. A report in November 2018 by a Tynwald committee examining the future provision of public service media on the island recommended that Manx Radio should instead be largely paid for by the BBC and UK government. Its authors suggested the Manx government entered into negotiations with the BBC to either (in order of preference) increase funding and eliminate the need for commercial income; themselves supply Manx content; or for the BBC to establish a radio station for the Isle of Man, similar to those in Jersey and

Guernsey, allowing Manx Radio to abandon its public service obligations (BBC 2018).

A 'fall back option' of a refusal to pay the TV license by Isle of Man residents was suggested should the BBC not agree to any of the proposed concessions, reminiscent of one of the strategies employed to achieve a Welsh PSB (IOM News Desk 2018). Such an action would in effect release the BBC from any obligation to provide for the island, freeing up an estimated £4.8m per year for islanders to 'exercise for the first time true self-determination in relation to public service broadcasting', and underline the popular feeling that currently island residents are paying twice for public service broadcasting – firstly through their BBC TV license, and then through a Manx government grant of £875k per year to support Manx Radio.

In January 2019, however, the proposed shake-up was rejected after Manx politicians failed to agree on the report's 11 recommendations, and instead have decided to accept a suggestion for the Council of Ministers to negotiate with the BBC for 'improved outcomes' for the Isle of Man (BBC 2019). Highlighting the challenges the station is facing, despite cutting its running costs by 5% Manx Radio has now made a loss for three years running¹.

¹ Its annual report revealed a loss of £37,975 in 2018, although an improvement on the previous year's loss of £82,406 (BBC 2018).

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Ystynnans I: Studhyansow kas media gonis poblek yethow minorityta

Annex I: Minority language public service media case studies –

Enesow an Chanel - Jersenyys/Gwernenys Channel Islands – Jersey/Guernsey

Jèrriais, the form of the Norman language spoken in Jersey, and the similar language Guernésiais spoken in Guernsey, receive little in the way of support or promotion via broadcasting. Although they are both recognised as regional languages by the British and Irish governments, their decline has been increased by some speakers' dismissive view of the languages and their tendency to view them as patois versions of French. Julia Sallabank writes: 'Many people in the Channel Islands still call French 'the good French' – even people involved in teaching and promoting the island languages – which may reveal deep-seated deficit ideologies about language status'. (Sallabank 2013, p.44).

Encouraged by the progress made on the Isle of Man to teach Manx in schools, in 1994 Jersey residents successfully secured provision for the teaching of Jèrriais in schools, adapting Manx teaching materials (Jones & Singh 2005, p.120). This step has been important to the retention of the language, but the surrounding media has been slow to develop. Regular columns and articles are published in Jèrriais in the Jersey Evening Post, and BBC Radio Jersey provides a Sunday programme 'Voices' which 'celebrates Jersey's diversity' in Jèrriais, French, Portuguese and Polish. Television broadcasting in Jèrriais is almost

non-existent – Channel Television's license requires that an hour of air time per year is allocated to the dialects of the Channel Islands, which when shared with Guernésiais means an hour each, every two years (ibid).

In Guernsey, the language is not currently taught as a subject in schools. The only appearance of Guernésiais in broadcast media is a five-minute slot of news once a week on BBC Radio Guernsey, which also occasionally broadcasts lessons in the language.

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**GMK economic impact:
magnifying Cornwall's
creative industries and
cultural multipliers,
attracting Celtic co-
productions, playing in
a growing global market**

Ystynnans 2: Gonis Media Kernewek

Annex 2: Cornish Media Service

This study presents a framework for capacity development of Cornish Public Service Media in Cornwall identifying existing and proposed activities that could contribute to this development. Considering the findings of this study, we propose the formation of a Cornish Media Service: Gonis Media Kernewek (GMK) to drive this development and deliver Cornish PSM.

Access to meaningful, self-produced representation on a par with that of S4C and ALBA requires investment on an appropriate scale to enable the development of PSM for Cornwall which will be able to respond to and redress over 100 years of picturing which has elided the Cornish voice, experience and culture, to transform perceptions in and out of Cornwall, to invoke a self-determined, vibrant new place-myth that reflects the language, culture, innovation and diversity of Cornish life.

From setting editorial policy, through commissioning, to supporting supply chain creative talent and production entities, GMK will repair the misrepresentation of the Cornish, providing the necessary rebalancing of indigenous production expounded throughout this study, generating high value jobs in the fastest growing part of the UK economy, a sector identified by the CIOs LEP as the number one priority for economic growth, with

significant indirect and induced multipliers and a positive impact in the wider Cornwall economy.

Profyans proposal

1. Transitional phase – immediate

That GMK be established as a project incubated in Screen Cornwall, to act on immediate opportunities and drive the development towards a full service, until such time as it is provident to be formed as an independent public body.

- We recommend Cornwall Council provide £150K infrastructure development funding over 3 years for GMK to implement the transitional plan below.

2. Full service – pending legislative changes

That GMK be formed as a public body, with a subsidiary commercial arm.

- GMK will commission and deliver a minimum 200¹ annual original content hours. 200 hours would provide 3-5 hours / week of original content for Cornish audiences. This would allow for regular releases of different types of content to build audience across the different viewing demographics targeted.

- Original content to be produced at an average cost/hour £40K. £40K cost per hour is set slightly higher than MG ALBA (£27,268 in 2018) and S4C (£34,992 in 2017/18) averages, as both of these figures reflect efficiencies established for linear services, e.g. volume supply commissioning. For context, this rate is less than the lower end of most BBC Nations & Regions tariffs, which are themselves significantly lower than BBC Network tariffs.

- The content spend to operating budget should be established at 80%. The average original 'content spend to operating budget' of the Celtic PSBs (S4C, TG4, MG Alba) is 77%, the BBC is just 63%. Establishing a higher proportion of direct content spend challenges the PSM to develop a culture of productivity, providing maximum value to the licence fee paying Cornish public.

- The annual operating budget should be established at £10 million. To achieve the above minimum viable service requires an annual budget of £10 million per annum.

Ystynnans 2: Gonis Media Kernewek

Annex 2: Cornish Media Service

Developing Cornwall's screen infrastructure

Screen Cornwall has been set up to drive the development of the screen industries in Cornwall and the Isles of Scilly, working with incoming film & TV productions, businesses and individual freelancers to build a strong and thriving production sector.

GMK will be set up to commission and distribute, create and curate a diverse range of high-quality Cornish language and cultural content. This will promote greater stability and growth in the Cornish independent production sector.

GMK will have a significant commitment to the promotion and development of Cornish language and culture. It should engage actively with Cornwall Council's Cornish Language Strategy, working in partnership with the Cornish Language Office to help deliver and develop its objectives.

The dynamics of the two Cornish screen entities will feed economic activity, delivering a generative growth infrastructure: Screen Cornwall providing a global interface for Cornish talent, and a strong indigenous production sector cultivating a community wealth building, sustainable supply chain, scaling up a skills-base which can support incoming productions,

providing more services locally, thus retaining more of the value of high-end incoming film & TV productions within Cornwall.

The competition for talent is driving a well-established reciprocal co-production model, where a UK broadcaster commissions a title, retaining UK rights, and e.g. Netflix or Amazon puts in the majority of financing for international rights. There is increasing demand for high-end UK content domestically and abroad, resulting in near saturation point in high-end production in UK due to lack of additional facilities and skillsets (Ampere Analysis p. 13). This presents a significant opportunity for an established Cornish production base to grow in this market. Indigenous language original dramas e.g. S4C's 'Y Gwyll' ('Hinterland'), 'Un Bore Mercher' ('Keeping Faith'), and BBC ALBA's 'Bannan' have sold into the global streaming market, Celtic noir following the Nordic torchbearers - the thriller genre travels best.

GMK will be a flagship example of Cornwall leading from the edge, demonstrating a progressive, world-leading technological, environmental and socially responsible future PSM model.

- GMK economic impact: magnifying Cornwall's

creative industries and cultural multipliers, attracting Celtic co-productions², playing in a growing global market.

- GMK language impact: transforming the Cornish learning ecosystem providing rapid significant enhancement of high-quality audio-visual resources.
- GMK cultural impact: burning brighter than the Tansys Golowan midsummer bonfires, igniting a Cornish cultural renaissance, giving voice to a quieted nation.

Transitional plan

The following table sets out the key tasks that make up the transitional plan.

¹ This proved a successful scale of initial output for the Gaelic Television Fund in 1991.

² International and UK co-productions with 27 different partners valued at over £5m with BBC ALBA providing average 15% funding (ALBA, 2018 p. 20)

TASK	OUTPUTS
Governance	
Establish GMK as a project within Screen Cornwall to action GMK development plan. Enlist an Advisory Board from stakeholders to provide oversight, advice & guidance for the development of the service, transition to independent public body, set up of commercial arm.	GMK advisory board established. Transitional plan delivered.
Legislative changes	
Work with Cornwall Council and legal counsel to lobby for legislative changes to achieve full service.	New legislation for the provision of Cornish language public service media
Funding	
UKRI Strength in Places:Wave 2 Eol 21st century place-based, rural PSM ecology as driver for regenerative growth of creative and tech industries across CIOS	UKRI Strength in Places:Wave 2 Eol submitted. If successful, full bid completed.
Make request to Secretary of State for Digital, Culture, Media and Sport for £300,000 one-off grant to seed Cornish language content commissioning.	Commission minimum 10 hours of original Cornish language content. Target to double value of grant through commissioning partnership and co-productions, resulting in £600,000 value Cornish content.
That in line with current public service media funding principles, an annual license fee funding agreement is negotiated and settled with DCMS for GMK of not less than £10m per annum.	£10m p.a. licence fee funding agreement for GMK.
Investigate other potential sources of Cornish content funding.	Enhanced commissioning pot resulting in more Cornish content produced.
Business management processes	
Define operational structure and design workflows.	<ul style="list-style-type: none"> • Corporate & Finance • Content & Development • Communications • Administration & Facilities • Technology & Operations
Draft policies and processes with reference to: <ul style="list-style-type: none"> • Disability Cornwall and Ofcom On-demand programme services accessibility report • Learning principles, e.g. Cornish subtitled in English. Bilingual content cross-subtitled. • Creative content guidelines (notes below) 	<ul style="list-style-type: none"> • Accessibility, usability and inclusivity policy • Diversity policy • Subtitling policy • Editorial policy • Platform/distribution strategy • Licensing/rights framework • Digital Tartan commissioning matrix

TASK	OUTPUTS
Business management processes	
The PSM Value Chain Doughnut, an output of this study, provides a 21st century model for regenerative public service media provision, a tool for planning and measuring value and impacts with process flows of people, finance and data from supply chain to user experience.	PSM Value Chain Doughnut impact assessment completed for GMK operational processes and commissioning matrix
Digital Asset Management <ul style="list-style-type: none"> • Technical specifications (IMF, DPP compliant) • Metadata requirements • Storage & maintenance • Archiving 	Technical specifications designed to future-proof commercial exploitation and archival value of higher-end content (i.e. IMF), with simplified deliverables for social platform and/or transient content.
Acquire extant Cornish content with potential for distribution by the service and licensing to other Celtic broadcasters/ international distribution.	Establish GMK content catalogue.
Partnership development	
Develop co-production and licensing partnerships with Celtic broadcasters, e.g. S4C, France 3 Bretagne, BBC Alba, TG4.	GMK participate in Celtic Media Festival and the Celtic International Fund. Target development of Welsh, Breton, Cornish online drama co-production.
Work with commissioners at S4C to review and identify existing S4C owned properties with potential for licensing for Cornish versioning, e.g. Cyw, Stwnsh, HANSH.	<ul style="list-style-type: none"> • Heads of Agreement with S4C for Cornish versioning co-production of S4C IP. • Cornish version Byd Cyw App published. • Coordinate promotion of Cyw with CC/Golden Tree.
Negotiate partnership with the BBC: <ul style="list-style-type: none"> • To distribute live and captured digital content to BBC iPlayer. • For equal prominence on iPlayer with other national minorities/ indigenous languages. • For editorial changes to BBC services in Cornwall, that better reflect and represent the Cornish language and culture of the people of Cornwall. 	BBC iPlayer distribution of Cornish content. Filters on BBC iPlayer for Cornish content: <ul style="list-style-type: none"> • Nations: Cornwall • Channels: Kernow
Identify, develop content ideas for and create a culture of co-productions with other arts, cultural and heritage partners e.g. ACE, HLF, CMWHS, CMP, Cornwall Sports Partnership, Rosweyth, Falmouth University, HfC, Minack Theatre, Eden Project, Cornwall Community Radio Network...	Commissioning partnerships established. Content commissioned, produced and distributed.
Initiate partnership with Kressen Kernow to develop a Cornish Digital Archive. Identify historical Cornish content.	Consolidation of Cornwall's audio-visual collections, e.g. Kressen Kernow, SWFTA, Azook, CAVA, Govyn Kernewek, Tyskennow Kernow, FylmK, clarifying rights, assets, availability. Establish archiving protocols for GMK content.

TASK	OUTPUTS
Consultation with commissioners to identify collaborative advantages, indicatively: <ul style="list-style-type: none"> • BFI Young Audiences Content Fund • Audio Content Fund • Channel 4 • Commercial streaming platforms, e.g. Netflix, Prime, Apple 	Co-commissions ³ , e.g. BFI YACF 50% co-commission of original Cornish language children's series distributed on BBC iPlayer.
Liaise with key industry organisations, e.g. Ofcom, PACT, UK Screen Alliance, Creative England, ScreenSkills.	Establish relationships with key industry organisations.
Supply chain development	
In partnership with Screen Cornwall, GMK should provide a training programme for media skills for Cornish speakers and training for media professionals to work with and in the Cornish language.	Professional development scheme focussing on Cornish language content writing and presenting. Working with Cornish on set training programme.
Identify gaps in post-production delivery pipeline to BBC: e.g. AS-11 file delivery in accordance with DPP technical delivery standards.	Post-production infrastructure development plan.
Commercial development	
Identify investment relevant models for commercial partnerships and exploitation of IP owned/ co-owned by GMK to generate revenues for the service.	Establish commercial arm.
Complete B Impact Assessment for GMK and register commercial arm for Pending B Corp status.	B Impact Report Network of 2,000 peers in the global community of Certified B Corporations.
Research	
Advance an academic partnership (Falmouth University, University of Warwick, PEC) to design and source funding for an action research project to analyse the cultural, linguistic, economic, diversity, equality and ecological impacts of a Cornish PSM, including platform data and audience reactions (Appreciation Indices).	Evidence of how a 21st century place-based, rural PSM ecology can drive regenerative growth of creative and tech industries across CIOS. New knowledge about immersive and interactive content innovation and implementation in PSM. Independent research on viewing habits of Cornish speaking audiences to inform editorial strategy. Testing PSM Value Chain Doughnut / BIA impact reporting
Engage with NESTA Creative Industries Policy and Evidence Centre (PEC)	Blog post contributing to (PEC) Arts, Culture and Public Service Broadcasting strand. Association with PEC.
Engaging in industry technical working groups, e.g. EBU Technology & Innovation and the DPP working group on IMF for Broadcast & Online.	Membership of Digital Production Partnership Membership of European Broadcasting Union. Sign EBU declaration: Empowering Society: A declaration on the core values of public service media.

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**GMK language impact:
transforming the
Cornish learning ecosystem
providing rapid
significant enhancement
of high-quality
audio-visual resources.**

TASK	OUTPUTS
Research	
Develop a challenge to explore applications of DLT and other technologies in PSM that may have positive impacts on workflow and cost efficiencies throughout the value chain, thus improving the public value proposition, e.g. smart contract chain of title DRM, licence fee and rights & residuals waterfall crypto-payments, smart swarm commissioning.	Falmouth Launchpad challenge with industry partner Dot Blockchain Media. M&E industry smart contract framework integrated with DLT consensus platform and IMF standards
Dissemination at international conferences.	University of Edinburgh international conference 'Crowded out or limitless horizons? Minority language-media in the digital age' PI presenting paper: 'Answering the Cornish question: designing a non-linear, data driven, pluralist public service media, built on blockchain for our digital future.'
Engage with NESTA Creative Industries Policy and Evidence Centre (PEC)	Blog post contributing to (PEC) Arts, Culture and Public Service Broadcasting strand. Association with PEC.

Contextual notes

BBC licence fee

The BBC does not publish a breakdown by postcode (or any other geographical segmentation) of licence fee collected, nevertheless one can make a reasonable approximation of BBC revenue generated from Cornish households, thus:

- In 2018 the rate (r) of all households in the UK which owned a TV set (Audickas, 2019) and therefore liable to pay the licence fee was 95%
- Census data records the number (n) of households in Cornwall as 230,400 (ONS, 2011)
- 6% TV licence fee evasion rate (e) (Audickas, 2019)
- Annual TV Licence fee £150.50 (assuming none black & white)

The calculation follows:

$$\begin{aligned}
 &(r \times n) (100\% - e) \times £150.50 \\
 &(95\% \times 230,400) \times 94\% \times £150.50 \\
 &218,880 \times 94\% \times £150.50 \\
 &= £31 \text{ million}
 \end{aligned}$$

£31 million BBC licence fee is collected annually from Cornish households. Public Service Media need not be an extractive industry.

Tariffs

BBC Nations & English Regions are significantly lower than BBC Network tariffs (BBC, 2019). Minority language PSB represented below by S4C indicative tariffs (S4C, 2019) are lower still.

Ystynnans 2: Gonis Media Kernewek

Annex 2: Cornish Media Service

Per hour £	BBC Network	BBC N&R	S4C
Drama	50k – 1000k	30k – 450k	75k – 250k
Comedy	160k – 700k	50k – 500k	75k – 130k
Children's	50k – 550k	...	
Entertainment	20k – 750k	20k – 220k	15k – 85k
Factual	10k – 500k	5k – 200k	30k – 50k

S4C's 16-34 targeted brand HANSH (Welsh equivalent to BBC Three) commissions short-and mid-form content, distributed digitally through Facebook, YouTube, and Clic with a tariff of roughly £500 per minute, e.g. 5 x 1 – 4 minutes, between £5,000-10,000. ALBA short form digital (e.g. new writing comedy sketch show Func) is commissioned for similar rate of £300-500 per minute. In both examples, commissioning of short form digital content to reach new and particularly younger audiences, have provided a 'ladder of opportunity' and delivered greater diversity on-screen and in production roles.

Drama and comedy tend to be higher cost, with sports and events towards the lower end of tariffs, subject to rights. Similarly, entertainment formats range from low end single day production, e.g. quiz programmes to higher end performances. Factual has the broadest array, and children's sits in the low-mid range across programming genre tariffs.

Ystynnans 2: Gonis Media Kernewek

Annex 2: Cornish Media Service

Creative content

'In order for PSM to deliver an enduring communications infrastructure equivalent to PSB's analogue public space, it therefore needs to envisage, build and sustain the architecture of a PSM-based digital public commons.' (Born, 2018, p187)

Editorial policy

Content will not be confined by a traditional TV schedule. Non-linear and platform agnostic, commissioning will look for a broad diversity of voices expressed through a range of formats. All ideas proposed will be expected to have a good understanding of who their target audience is and on which platform/s they discover, share and interact with content on.

GMK will commission recorded or live, in studio or on location, immersive and interactive. Content will be long, medium and short form: single items, series or seasonal specials. A wide range of genres will be included - drama, factual, documentary, news and current affairs, entertainment, comedy, sport, music, lifestyle, children's, Cornish language learning, archive and more.

Quality is a determinant factor for success in the crowded and competitive market for engagement, and whilst it may not be a linear graph, budget does have implications for the quality of media product. As a non-linear service, the necessity to produce a quantity of content to fill a linear schedule vanishes. The cost/hour equation is a crude measure of value in a multi-platform ecology, however it serves as a benchmark for comparison.

Whilst the service intends to present a positive representation of Cornwall, it should also challenge audiences, and reveal the breadth of views and opinions of the people it serves. Equality and diversity, both visible and invisible, will be inherent in setting editorial strategy.

As an ethical commissioner, with an intrinsic commitment to equality and sustainability, budgets will require minimum standards of e.g. a living wage and fully costed environmental impact measurement for proposed production activity.

Digital Tartan commissioning matrix

Principles

GMK will provide opportunities to explore and trial

new content ideas, pioneering new ways of engaging and retaining audiences. The overarching principles will be:

- Authentic Cornish voices and stories.
- Platform agnostic commissioning.
- Multi-platform distribution.

Original Content Hours

Annual original content hours is a metric used by the broadcast industry to plan and report on delivered programming output. In the digital ecology, where less standardised durations and types of content are delivered across fragmented platforms the approximation becomes crude, though remains useful. Most (though not all) audio visual material will still be linear in essence, and a budgetary aggregation of 60 x 1 minutes of short form content can be comparable to a single hour.

GMK intends to commission and distribute 200 hours of high quality, distinctive content per year, publishing 3-5 hours of original content per week, across a wide range of genres and platforms, significantly in Cornish but with a proportion also in English or bilingual. It will cater to Cornish speakers at different levels of fluency.

Ystynnans 2: Gonis Media Kernewek

Annex 2: Cornish Media Service

Original content commissioning targets (200 hours p.a.):

- Minimum 25% entirely Cornish language
- 15% commissions potential for selling into international market.
- A Cornish noir series (pilot) targeted at international market
- 15 hours of early years
- 15 hours of children's
- 10 hours of drama
- 10 hours of comedy

Publishing will follow a dynamic calendar paralleling the succession of Cornish Feasts and Festivals, marking traditional solstices, equinoxes, cross-quarter days, processional and cultural festivals, e.g. Padstow May Day, Mazey Day, Camborne Trevithick Day, Gool Peran, LostFest, Tansys Golowan.

Indicative content

Cornwall is a land of storytellers. Indicative content ideas that have emerged from this study include:

- Reality series about the community activists who

bring Cornwall's processional festivals to life every year, with curated user generated content from and of associated community events

- Wandering droll teller, live streaming legends of each place they rest for the night
- Animated series telling tall tales of the infamous Cornish Saints
- Children's sci-fi adventure set at Goonhilly Space Science Park
- Factual series orbiting the fortunes of Spaceport Cornwall
- Live foraging cookery show
- Wellbeing features such as yoga on the beach
- Factual features on 'Extinction Rebellion' and Cornwall's actions on the climate emergency
- Factual exploration of 'Plastic Free Towns'
- Cornish sports: wrasslin, hurling, surfing and rugby. 'Gwari hweg yw gwari teg' ('fair play is good play')
- Live from the Isles of Scilly World Pilot Gig Championships
- Cornish diaspora stories and histories: miners known as 'Cousin Jack', the International Pasty Festival, and Kernewek Lowender, the Copper Coast Cornish Festival in Australia

- Musical features on Cornish singing past and present, the 'Trelawney Shout' and the Cornwall International Male Voice Choral Festival
- Cornish wildlife features such as sea quests, river life, the Seal Sanctuary, the Cornish Beaver Project, and Cornish choughs
- Creative collaboration between Cornwall's cultural and arts community with captured theatre, recorded and live music, storytelling and other events.

¹ This proved a successful scale of initial output for the Gaelic Television Fund in 1991.

² International and UK co-productions with 27 different partners valued at over £5m with BBC ALBA providing average 15% funding (ALBA, 2018 p. 20)

³ MG ALBA e.g. recently published an open call for partnership development projects for Children's comedy and drama leveraging additional funding from (i) Screen Scotland's Broadcast Content Fund (BCF) (ii) the BFI Young Audiences Content Fund (YACF).

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- MG ALBA, 2018, Annual Report 2017-18, viewed on 7 May 2019, from <http://www.mgalba.com/downloads/reports/annual-report-17-18.pdf>.
- S4C Indicative Tariffs, viewed 31 March 2019, from <http://www.s4c.cymru/en/production/page/1154/guidelines/>.

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**GMK cultural impact:
burning brighter than
the Tansys Golowan
midsummer bonfires,
igniting a Cornish cultural
renaissance, giving voice
to a quieted nation.**

Ystynnans A: Ambosow kevarwodha

Appendix A: Terms of reference

Requirement overview

Cornwall and the Isles of Scilly have agreed New Frontiers¹, a package of projects for the post-Brexit period to develop the area's social, economic and cultural potential. A key project within New Frontiers is a public service broadcaster – a new online TV platform to provide Cornish cultural content, from Cornish language to the arts, sports and contemporary issues. The platform will create a space for content relevant to Cornish national minority status, including Cornish language content, as well as exploring other aspects of life in today's Cornwall. The online platform has the potential to offer a new non-metropolitan model for media and TV.

Objectives

- a. To conduct an initial scoping study to:
 1. identify potential business and development models for a Public Service Broadcaster with a regional identity/language remit;
 2. identify the potential economic and cultural impacts of such a service; and
 3. identify a framework for capacity development in Cornwall.

- b. To make recommendations to Cornwall Council within 6 months

Methodology

- a. **Literature review:** Survey of smaller nation/region public service broadcasters, legislation and licensing arrangements, recent sector reports and analyses.
- b. **Qualitative Research 1 – Institutional Interviews:** a series of interviews with Government, British Irish Council, minority language PSB organisations (to include MG ALBA, S4C, and TG4) and regulators – to report on the political, legislative, economic, technical, cultural and social context for each PSB and the requirements for that PSB to develop and succeed.
- c. **Supply Chain workshops Qualitative Research 2 – Supply Chain Workshops:** Workshops with supply chain/content producers in Scotland, Wales and Cornwall to investigate commissioning models and capacity development models.
- d. **Data analysis:** Analysis of literature review, interviews and workshops including:

1. high level audience demand data analysis
2. high level technical platform options analysis

e. **Ethical considerations:** To ensure the quality and integrity of our research, we will:

1. ensure that participants participate in research voluntarily;
2. seek informed consent – where appropriate providing participants with the project Research Information Sheet & Privacy Notice, and requesting a Consent Form to be completed;
3. respect the confidentiality and anonymity of our research respondents, only attributing quotes where consent has been explicitly given;
4. always process data in a fair and lawful manner;
5. avoid harm to participants, and;
6. ensure that the research is independent and impartial, and complies with all relevant standards for good research practice.

Ystynnans B: Para ragdres

Appendix B: Project team

PRINCIPAL INVESTIGATOR

Denzil Monk,
Lecturer in Film, The School of Film & Television,
Falmouth University.

A prolific creative producer with two decades of professional experience across the film value chain. Denzil is a Lecturer in Film at Falmouth University and a Bard of the Cornish Gorsedh. Previous work includes associate producer on Mark Jenkin's Bait (BFI 2019), developing a UK-wide digital cinema distribution network at Cinegi and producing The Man Engine (voted UK's Best Arts project 2017). Previous roles include CEO at Western Light Pictures, Executive Producer at Dogbite Film Studio, MD at awen productions, Senior Producer at Chew TV, Executive Committee Member at Celtic Media Festival and Chair of Cornwall Film Festival.

CO-INVESTIGATOR

Professor Rachel Moseley,
Director, Centre for Television History,
Heritage and Memory Research
University of Warwick.

Professor Rachel Moseley is Reader in Film and Television and current Head of Department of Film and Television Studies at the University of Warwick. Her most recent book Picturing Cornwall (UEP, 2018) examines the long screen history of Cornwall, and the ways in which it has been 'made' and contained as a place through that history. The critical analysis of moving image representations of region has become an important part of her teaching, engagement and impact activity. With Gemma Goodman, she has recently published on the male regionalised body in the television serials Poldark and Outlander.

RESEARCH ASSISTANT

**Florence Browne,
Filmmaker & researcher,
Freelance.**

Florence graduated in 2017 with an MA in Documentary and Ethnographic Film from UCL, and is now working as a freelance researcher and filmmaker in west Cornwall. Her 30 minute film 'Just As I Am', a project exploring the homophobia faced by gay clergy, has shown at various UK festivals and is soon to be distributed by Journeyman Films. Her current film projects include a commission from North Devon Moving Image on Exmoor farming, directing a web series for Engine House VFX, and working with local artists to showcase their work, alongside editing for clients in Cornwall and London. She is also a trustee of the Hypatia Trust, a women's educational charity, and oversees their publicity. Having successfully secured development funding for both the Trust and her film work, she is now receiving mentoring in researching and writing project bids, and NFTS training in narrative-led sound design. Previous roles include Project Assistant with awen productions and Film & Music editor with Data Surgery in London.

SPECIALIST CONSULTANT

**Mandy Berry,
Founder and CEO Cinegi Media Ltd,
Chair Miracle Theatre.**

Mandy is a senior executive and entrepreneur with a wide experience of the creative and cultural industries, working across the digital media, entertainment and arts sectors. She has set up and led innovative companies and projects such as 0|zero-one in London's Soho, exploring new thinking and innovation, products and services in both the public and private sectors. She has worked with media executives, public bodies and government. She has also advised numerous companies, organisations and individuals on strategy, innovation, governance, finance and funding and was Co-Founder and Director of innovation agency Golant Media Ventures. Mandy was a founder of the London Games Fringe Festival, member of the UK National Commission for UNESCO's Information Society Working Group, co-leading on digital media literacy and has been trustee and chair of various arts and cultural organisations. Mandy lives and works in Cornwall and London.

Ystynnans C: Kowethasow kussulys

Appendix C: Parties consulted

Name	Role	Organisation
Cornwall Council reference group		
Mark Trevethan	Cornish Language Lead	Cornwall Council
Mark Holmes	Future Devolution Policy Lead	Cornwall Council
Nathan Cudmore	Creative Industries	CIOS LEP
Emmie Kell	Creative Industries Lead	CIOS LEP
Laura Giles	Digital and Design Creative Business Advisor / Project Lead	Cultivator Cornwall / Screen Cornwall
British Irish Council round table		
Chrissy Callaghan	Education Improvement Service	Isle of Man Government
Tony Scott-Warren	Offici du Jèrriais (retired)	Government of Jersey
Llio Angharad	Senior Marketing Manager	Welsh Government
Bethan Webb	Deputy Director Welsh Language Division	Welsh Government
Stuart Prescodd	Senior Gaelic Development Officer	Scottish Government
Helena O'Brien	Assistant Principal, Department of Culture, Heritage and the Gaeltacht	Irish Government
Martina Campbell	Languages Branch, Department for Communities	NI Executive
Danny Williams / Jerry O'Donovan	BIC Secretariat	British Irish Council
Cultural and creative industries consultees		
Donald Campbell	Chief Executive	MG ALBA
Neil Graham	Director of Finance	MG ALBA
Donnie MacDonald	Business Affairs Manager	MG ALBA
Owen Evans	Chief Executive	S4C
Lois Davies	Communications Officer (Events & Partnerships)	S4C
Rhodri ap Dyfrig	Online Content Commissioner	S4C
Llino Wynne	Factual Commissioner	S4C
Lowri Sion Evans	Customer Care Assistant (Workshop Support)	Yr Egin

Name	Role	Organisation
Jason Lye Phillips	Multimedia & AV Technician	Yr Egin
Moel Le Guennec	Responsible programmes bretons	France 3 Bretagne
Alan Esslemont	Director General	TG4
Leo Devine	Head of South West Region	BBC
Jackie Edwards	Head of Young Audiences Content Fund	BFI
Sam Bailey	Managing Director	Audio Content Fund
Catriona Logan	Director	Celtic Media Festival
Vaughan Temby	Community Engagement Manager	disAbility Cornwall & Isles of Scilly
Matthew Rogers	Project Lead, Citizen Journalism News Network	University of Exeter
Chris Archer-Brown	Professor of Digital Entrepreneurship	Falmouth University
Nick Dixon	Head of Programme, Launchpad	Falmouth University
Manda Brookman	Director	Permanently Brilliant
Deborah Bowden	Coordinator	Cornish Mining World Heritage Site (WHS)
Phillippa Giles	Managing Director Chair	Bandit Television Screen Cornwall
Seumas Mactaggart	Head of Development	Mac TV
Sue Hill	Associate Director	WildWorks
Keith Sparrow	Illustrator	Freelance
Merv Davey	Bardh Meur (Grand Bard)	Gorsedh Kernow
Tehmina Goskar	Director & Curator	Curatorial Research Centre
Jim Barritt	Principal Software Engineer (Blockchain and DLT)	ThoughtWorks
Chloe Johnson	Client & QA Associate	Dot Blockchain Media
Greg Karachuk	Data Strategy Associate	Dot Blockchain Media
Catriona Noonan	Lecturer in Media and Communications	Cardiff University / Creative Industries Policy & Evidence Centre (PEC)
Anne Carlisle OBE	Vice-Chancellor & Chief Executive	Falmouth University
David Prior	Director of Research	Falmouth University
Jonathan Eddy	Director of Innovation and Research Funding	Falmouth University
Kamran Harandy	External Funding Manager	Falmouth University
Nolwenn Baot	External Funding Support Officer	Falmouth University
Gregg Whelan	Research & Innovation Programme Lead: Creative Industries Futures	Falmouth University

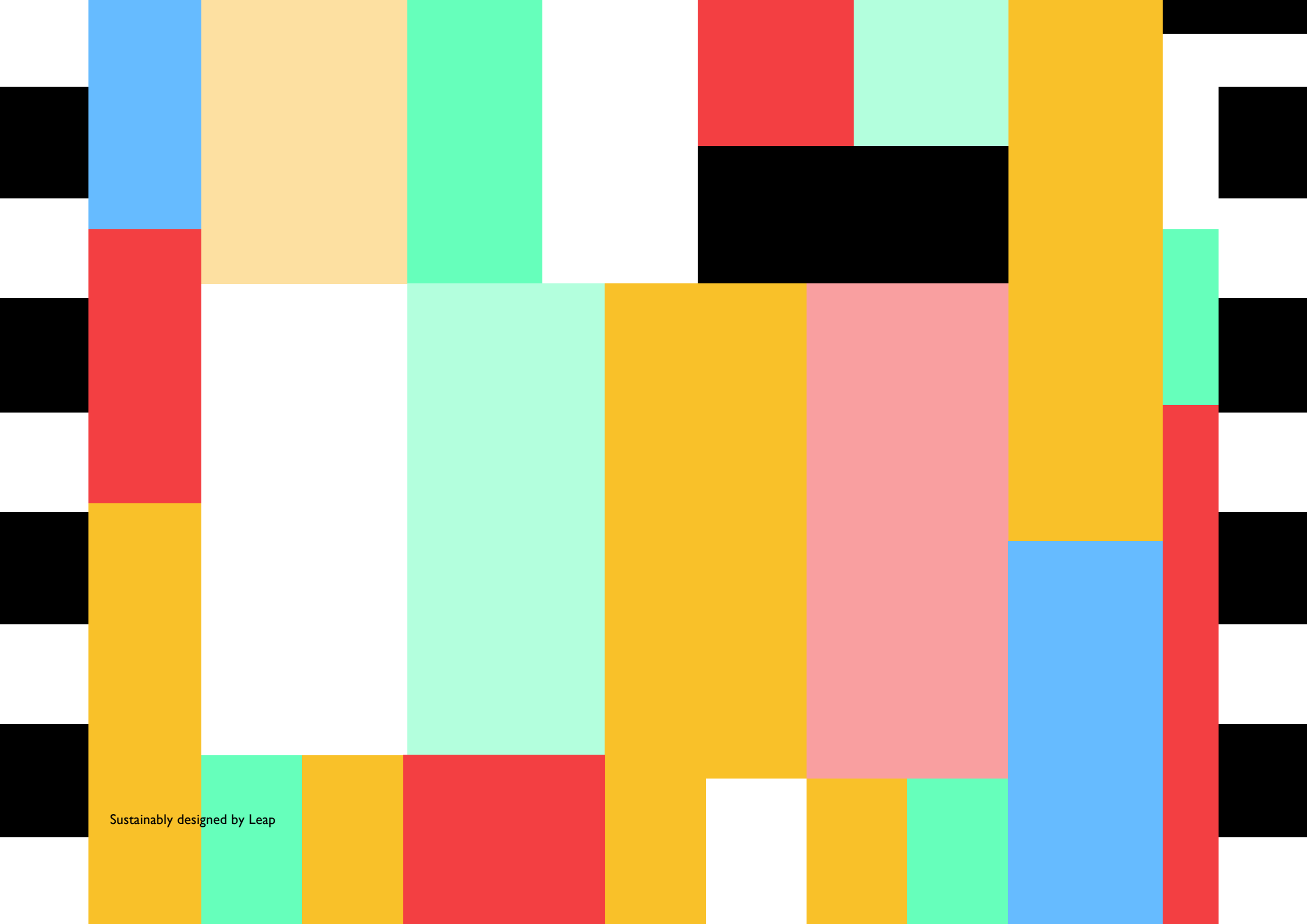
Ystynnans C: Kowethasow kussulys

Appendix C: Parties consulted

Name	Role	Organisation
Chris Morris	Director SoFT	Falmouth University
Kingsley Marshall	Head of Film	Falmouth University
Cornwall Supply Chain Workshop		
Charlie Fripp	Producer	Fieldgrazer Productions
Joan Berveridge	Writer/Director	Labrys Film
Milo Perin	Editor	Cornish Stuff
Mel Mercer	Film & Television editor	Freelance
Jack Morrison	Manager	Feast
Harry Ancombe	CEO	Beagle
Mathi Clarke	Journalist, Founder	Radyo an Gernewegva, Pellwolok an Gernewegva
Lorraine Molloy	Edit Producer	Freelance
James Stuart	Director	Lightbox Film Co.
Joe Turnbull	Founder	Bull & Wolf Film Co.
Natasha Price	Producer	Engine House
Mike Richter	Director	Engine House
Lou Brett	Director	awen productions
Barbara Santi	Director/Producer	awen productions
Sue Hill	Associate Director	Wildworks
Gani Naylor	Director	Blue Raincloud Films
Tom Kerevan	Company Director	Cannibal Films
Hannah Wakely	Producer	Cornish Stuff

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If a major part of the population never hears nor sees a minority culture on their television it ceases to be part of their reality. The perception by non-speakers of the status of a minority language has a consequent effect on the actual status of that language.



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