S4C /

S4C Response to the BBC Charter Review Consultation

Securing the Future of Welsh-Language Public Service Media

Executive Summary

S4C welcomes the BBC Charter Review Green Paper and its recognition of our role as a distinct and independent Welsh-language public service broadcaster, serving audiences across Wales and the UK. It is essential that S4C's unique position within the UK media landscape is safeguarded beyond the current Charter period to secure the long-term future of Welsh-language public service media.

Public service broadcasting is a cornerstone of UK society, providing trusted content, reflecting our diversity, supporting democratic engagement, and driving creative innovation. S4C makes a unique contribution to this system, delivering high-quality content across genres and platforms. Our work sustains the Welsh creative sector, develops talent, and ensures the Welsh language remains a vibrant part of everyday life. Minority-language broadcasting is central to the legitimacy and reach of the UK's public service media system.

S4C's unique partnership with the BBC combines our editorial and operational independence with the BBC's scale and technological infrastructure, enabling Welsh-language content to reach wider audiences efficiently and effectively. Together, we can deliver public value while supporting a thriving and plural media ecosystem in Wales and across the UK.

Key asks to secure the future of Welsh-language public service media:

Sustainable Funding for S4C

- The UK Government must provide long-term funding certainty for S4C beyond March 2028, with public funding rising by CPI+ to ensure a Welsh-language service that not only survives but thrives.
- Expansion of BBC commercial activity must not undermine other public service broadcasters such as S4C.
- Any reforms to the licence fee determination process must safeguard S4C's funding, independence, and ability to contribute to plurality and the UK creative economy.
- S4C should be explicitly recognised within the scope of the licence fee as a core part of the UK's public media system, strengthening the social contract with its audiences.

A Futureproof S4C-BBC Partnership

- The BBC's statutory provision to S4C should be index-linked to CPI increases to maintain its real-terms value, production values, and to help sustain the partnership's impact.
- The BBC Charter should embed fair and transparent creative collaboration with others, including S4C on co-productions and rights acquisitions, strengthening Welsh-language provision for audiences and supporting the creative sector.
- Future partnership obligations on the BBC should ensure technology and broadcast services delivered to S4C under our partnership agreement are provided to the highest industry standards.
- The S4C-BBC iPlayer partnership should be extended into the next Charter period, with a Charter obligation on the BBC to guarantee prominence for Welsh-language content as core public service provision on its digital platforms under Ofcom oversight.
- The next Charter should formalise fair and structured innovation partnerships, so AI and new technologies strengthen Welsh-language services and the language's digital infrastructure.

Public Purposes for the Future

- Any evolution of the Public Purposes must be developed in consultation with S4C, anchored in the nations and regions, and recognise the contribution of minority-language broadcasting.
- A new Public Purpose based on growth should embed fair, mutually beneficial partnerships to support sustainable growth, plurality, and innovation across the UK.

By addressing these priorities, the UK Government can help ensure S4C can continue to deliver distinctive Welsh-language services to audiences across the UK, support the creative economy in Wales, and ensure the Welsh language thrives for current and future generations.

Introduction

S4C welcomes the opportunity to respond to the BBC Charter Review Green Paper. The Review represents a significant moment for the future of public service media across the United Kingdom, offering a chance to safeguard its role in reflecting audiences, supporting communities and enriching society for years to come.

Public service broadcasting has long been a cornerstone of UK society, delivering high-quality, trusted content, reflecting our diversity, supporting democratic engagement, and driving innovation across broadcast and digital platforms. The BBC has been central to this mission, reaching audiences of all ages, producing content that is both entertaining and informative, and supporting the wider UK creative economy – particularly through its *Across the UK* strategy in recent years.

S4C shares this commitment. As an independent Welsh-language public service broadcaster, we play a distinct role within the UK media landscape. We provide high-quality Welsh-language content across multiple platforms and genres – from news and children's programming to drama and sport – ensuring that Welsh audiences are fully served within the UK public service media system.

Minority language broadcasting is not peripheral to that system. It is central to its legitimacy, helping to ensure that public service media genuinely reflects the linguistic and cultural diversity of the UK and remains relevant to all its communities.

For more than forty years, S4C has connected audiences with the Welsh language, nurtured the creative sector, and championed original content across all genres. Creative and strategic autonomy are central to S4C's ability to commission distinctive, authentically Welsh content shaped by and for our audiences, and to determine our long-term direction in their interests. Crucially, S4C represents an additional commissioning point within the UK public service media system, creating plurality of opportunity for producers and strengthening the resilience of the Welsh creative sector.

Our unique partnership with the BBC complements this independence, combining editorial and operational autonomy with the BBC's scale and technological infrastructure to extend reach, share expertise and secure efficiencies. Together, this model delivers strong public value while supporting a vibrant and competitive media landscape in Wales.

In an era of rapid technological change and shifting audience habits, S4C and its content must remain sustainable, discoverable, and impactful to continue delivering value for our audiences, the creative economy, and the wider public service media system.

S4C has set out its ambitions in its *More than a TV Channel* strategy, which outlines a vision for a digital-first and audience-focused Welsh-language service. S4C was established to ensure that the Welsh language has its rightful place in contemporary media to protect it, celebrate it, help it grow and make it a natural part of everyday life. Building on that legacy, the strategy sets out how S4C will transform to meet changing audience expectations, redefining how content is commissioned, distributed and discovered so that Welsh stories and perspectives reach audiences wherever they are.

At the heart of this vision is S4C's role in sustaining and strengthening the Welsh language. Welsh-language broadcasting plays a vital role in grounding the language in everyday life, inspiring new speakers, and ensuring that Welsh remains visible and vibrant across generations. As recognised in the 2022 Licence Fee Settlement, S4C's work makes an important contribution to the Welsh Government's ambition of reaching a million Welsh speakers and doubling its daily use by 2050. By creating compelling, impactful content that audiences choose to watch, share and engage with, S4C helps ensure that the Welsh language thrives, not only as a heritage to be protected, but as a living language of modern culture, creativity and public life in the UK.

Our vision for S4C guides our contribution to the BBC Charter Review process, ensuring that our perspectives on funding, partnership, and public purposes help shape a framework that will secure the future of Welsh-language content and support a thriving creative ecosystem across Wales and the wider UK.

What's at stake?

Decisions arising from the BBC Charter Review will have real implications for public service media across the UK, and for S4C in particular. Key issues include:

- **Long-term funding certainty for S4C** – Without a sustainable funding settlement, there is a tangible risk to the future of original Welsh-language content, and to the sustainability of the independent production sector across Wales.
- **Online prominence for the Welsh language** – As audiences increasingly shift to streaming and online platforms, ensuring that Welsh content is discoverable and prominent across platforms is essential to maintaining engagement and relevance.
- **Wales' creative ecosystem** – S4C is a key driver of the creative industries, supporting jobs, skills development and opportunities across Wales. Any reduction in S4C's capacity would have knock-on effects for the wider creative economy in Wales.
- **Connecting audiences with the Welsh language** – S4C is an integral part of the cultural fabric of Wales, providing a bridge between audiences and the Welsh language, and offering a valuable service to TV licence fee payers.

These considerations underpin S4C's response to the BBC Charter Review. Accordingly, this submission focuses on three interrelated chapters:

1. Sustainable Funding for S4C
2. A Futureproof S4C-BBC Partnership
3. Public Purposes for the Future

1. Sustainable Funding for S4C

S4C welcomes the UK Government's recognition of the importance of sustainable funding for S4C and minority-language broadcasting, as reflected throughout the Green Paper. This commitment highlights the vital role that services such as S4C, BBC Radio Cymru, and MG Alba play in ensuring that the UK's public service media system remains responsive to audiences across all parts of the UK.

For S4C, sustainability rests on two complementary factors: having sufficient resources to deliver high-quality, distinctive Welsh-language services, and having the stability to plan, invest and innovate strategically. Without both, minority-language broadcasting cannot thrive, audiences cannot be fully served, and the wider benefits for Wales and the UK creative industries are diminished.

S4C's understanding of sustainable funding encompasses not only the level of resource but also the wider framework that supports long-term resilience. It includes the process by which funding levels are determined, the mechanisms and model through which those funds are delivered, and the social and economic impact that investment in S4C generates across Wales.

The Sufficient Funding Principle

The Secretary of State for Culture, Media and Sport has a statutory duty to ensure sufficient funding for S4C, set out in s.61 of the Broadcasting Act 1990 (as amended). This requires funding sufficient to cover the cost of providing S4C's public services and arranging their broadcast or distribution.

Since 1982, S4C has been funded through a number of different models, but statutory provisions have consistently outlined the financial requirement to enable S4C to provide a high-quality Welsh-language service.

For instance, in recognition of S4C's smaller scale and therefore its reduced scope to absorb funding fluctuations from year to year – as is the case with any household-led increases and decreases in licence fee income – S4C was awarded a total of £88.85m per annum at the 2022 Licence Fee Settlement, to rise with CPI inflation from April 2024. This is therefore set to be £100.67m by the 2026/27 financial year.

This financial certainty from 2022 has been crucial, allowing S4C to invest in digital services and to continue to deliver distinctive Welsh-language content across genres and platforms. It has also allowed us to manage inflationary pressures and plan strategically rather than react to short-term fluctuations. At the same time, we recognise the pressures on licence fee income and on the wider public service media environment.

What is 'Sufficient'?

S4C has a clear understanding of what sufficient funding means in practice. Being sufficiently funded is not just about meeting minimum statutory obligations, it is about having the resources and stability to:

1. Serve all audience groups,
2. Deliver high-quality, distinctive Welsh-language content,
3. Make that content available on the most-used platforms,
4. Compete for prominence in a crowded media environment, and
5. Make a meaningful contribution to the creative industries and wider economy in Wales.

The Licence Fee Model

Since April 2022, all of S4C's public funding has come from the licence fee. Prior to the 2022/23 financial year, S4C had experienced a prolonged period of flat core funding.

The 2022 Licence Fee Settlement marked a significant shift for S4C. It provided an additional £7.5m per annum to strengthen S4C's digital offer, rising with CPI from April 2024 until the end of the Charter period in line with the BBC's settlement. This approach by the UK Government implemented the recommendations of the 2018 Independent Review of S4C, which concluded that multi-year settlements, and avoiding the year-to-year fluctuations of a grant-in-aid, would help provide the stability necessary for S4C to thrive.

That stability is now demonstrably delivering. Five-year funding certainty enables S4C to commission ambitiously, invest in digital services, negotiate co-productions and secure multi-year sports rights, and provide confidence to the independent production sector across Wales. It supports returning series, long development cycles for film and drama, and sustained skills growth within the creative economy.

Funding via the licence fee has also offered broader advantages. It has provided a predictable, independent, and publicly accountable source of income, protecting editorial and strategic autonomy while ensuring that Welsh-speaking households who pay the licence fee see a direct return in the form of high-quality, culturally relevant programming.

The licence fee has traditionally underpinned the universal nature of public service media. However, as the BBC has highlighted in their response to the Green Paper, that universality is increasingly under pressure as fewer households contribute. S4C believes that the UK Government should consider ways to restore and sustain universality, ensuring that public service media can continue to serve all audiences and contribute to a healthy and resilient media ecosystem.

Greater visibility of funding beyond March 2028 would allow S4C to plan ahead with confidence, invest in digital innovation, deliver impactful content across genres, and continue making a meaningful contribution to the Welsh creative economy.

> ***The UK Government should provide long-term funding certainty for S4C beyond March 2028 and consider how the principle of universal funding for public service media can be sustained.***

Delivering Value for Money

S4C recognises the importance of balancing public investment with the need to keep the licence fee affordable. At the same time, our scale and role within the Welsh creative sector mean that stability and certainty are particularly important to sustain high-quality Welsh-language content and support employment within the wider sector. Any reduction in real-terms funding would directly impact content, services, and investment in the Welsh creative economy.

In the past fifteen years, S4C has already delivered significant savings while maintaining quality and diversity of core services. Measures have included reducing headcount by over 20%, cutting administrative costs to just 4% of total spend, relocating our headquarters to Carmarthen, co-locating broadcast and technical operations with BBC Cymru Wales, and working closely with producers to reduce production costs in response to inflation. Our commissioning remains highly cost-efficient, at least 25–33% lower than comparable genres on other public service broadcasters. Co-productions and contestable funding, such as the now-closed BFI Young Audiences Content Fund, have further extended value.

This approach allows S4C to sustain high-quality Welsh-language content and support skills development and employment in Wales, contributing over £150m annually to the Welsh economy and supporting more than 2,500 jobs across Wales. A significant proportion of S4C's expenditure is directed to relatively socio-economically disadvantaged areas in Wales, with 57% spent outside Cardiff, helping to stimulate local economies, support talent development, and sustain employment where it is needed most.

For example, S4C drama series *Bariau* was filmed at Aria Studios, Anglesey. With modern studio facilities, Aria supports both local and international productions while nurturing talent and skills in north Wales. S4C's investment helped provide employment for the local community, including former workers from the closed 2 Sisters plant, offering both short- and long-term roles on *Bariau* and *Rownd a Rownd*. This demonstrates how S4C commissions directly sustain local economies, develop skills, and support Welsh-speaking communities.

Supporting the BBC to Generate More Commercial Revenue

The Green Paper considers whether the BBC could increase commercial revenue to supplement public funding. S4C recognises the value of additional income streams, provided they do not compromise public service objectives or the broader media ecosystem.

Some options proposed, such as allowing the BBC to carry advertising across all its services, could adversely affect the wider market for other public service media, including S4C. The strength of the UK's mixed and balanced public service media ecology has helped create a thriving sector, offering audiences choice, plurality, and high-quality content across the nations and regions. Introducing more commercial activity across BBC services could shift the competitive landscape, potentially undermining this balance. Protecting a healthy, diverse public service media ecosystem should be a priority for ensuring that audiences across the UK continue to benefit.

For S4C, public funding remains the primary means of supporting distinctive Welsh-language content. S4C has a remit and strategy to generate commercial revenue, however, commercial income contributes only a small proportion of overall resources (0.6%) because of our scale, the limited size of Welsh-language audiences, and thereby the limited commercial potential of Welsh-language content. Any approach to growing BBC commercial revenue should take account of the implications for minority-language provision and the wider public service media ecosystem, ensuring that funding certainty and stability for S4C are preserved.

> ***Any expansion of BBC commercial activity should protect the wider public service media ecosystem and avoid undermining other broadcasters such as S4C.***

Changes to the Licence Fee Determination

The Green Paper notes that the UK Government is considering reforms to the process for determining the cost of the licence fee, aiming to increase transparency and support the BBC's independence. S4C recognises the value of a clear and robust process, and any changes should not compromise our funding, independence, or ability to serve audiences. The Secretary of State retains a statutory duty to ensure S4C is sufficiently funded, and this principle must remain central to any reforms.

> ***Any reforms to the licence fee determination process should safeguard S4C's funding and independence, ensuring S4C can continue to operate with strategic and editorial autonomy while contributing to plurality, minority-language provision, and the UK creative economy.***

Reforming the Licence Fee Model

S4C recognises that the UK Government is exploring potential reforms to the licence fee to ensure long-term sustainability, address the declining number of households who pay for the licence, and ease cost-of-living pressures. While we are sympathetic to the need for these considerations, any changes should be proportionate and carefully assessed to avoid unintended impacts on minority-language broadcasting.

For S4C, multi-year certainty and sufficient funding are essential for commissioning, strategic investment, and delivering high-quality Welsh-language content to audiences across platforms. In practice, this means funding that is set independently of year-to-year fluctuations in licence fee income, and that rises in line with CPI inflation, providing the stability S4C needs to plan with confidence. Maintaining this stability is essential to delivering high-quality Welsh-language content across platforms, supporting the creative economy in Wales, and providing value to Welsh-speaking audiences who pay their licence fee.

In the Green Paper, the UK Government has asked for views on whether additional activities or services could be included under the TV licence. The UK Government should consider including S4C as a service for which households are required to hold a TV licence. Such an approach could strengthen the social contract between audiences and S4C, reinforcing the link between public funding and the delivery of high-quality, culturally relevant content. This is particularly pertinent as S4C's content is already available via BBC iPlayer, which extends the reach of S4C programming while also linking UK licence fee funding directly to audience access.

> ***Explicit recognition of S4C within the scope of the licence fee would reflect its role as a core part of the UK's public media system.***

Supporting Sustainable Funding for Minority Language Broadcasting and S4C

S4C's ability to serve audiences, invest in digital innovation, and support the creative sector across Wales depends on sustainable, predictable funding. For S4C to maintain a minimum viable service, evidence currently being prepared for DCMS indicates that a CPI+ increase is likely needed.

In addition, S4C proposes that the BBC's statutory provision currently valued at £20.08m (2026/27) – one of the key components of the S4C-BBC partnership – should be tied to CPI increases. This would ensure that the provision retains its real value over time, strengthening the creative partnership between S4C and the BBC, and delivering high-quality, distinctive Welsh-language content for audiences across a range of platforms.

The current funding arrangement for S4C provides a robust foundation. It offers stability and multi-year visibility, enabling S4C to plan strategically, commission distinctive and impactful content, invest in digital services, and collaborate on co-productions, all while safeguarding editorial and strategic autonomy. Being funded through the licence fee also reinforces the social contract between S4C and Welsh households, connecting public funding directly with the audiences it exists to serve.

S4C operates within a distinct scale and context that shapes its funding and operational needs. While S4C has considered a range of alternative funding approaches, each carries considerations around predictability, sustainability, and the ability to maintain high-quality services. Any future model must ensure that the core principles of sufficient, predictable, and sustainable funding are preserved, both for S4C and for minority-language broadcasting more broadly.

By maintaining these principles, S4C can continue to deliver distinctive Welsh-language programming across platforms, support the creative economy in Wales, and contribute to a thriving public service media ecosystem across the UK.

> ***S4C's public funding should increase by CPI+ to ensure a sustainable Welsh-language public service media offer.***

2. A Futureproof S4C-BBC Partnership

The BBC Charter Review presents an important opportunity for us to reflect on the longstanding and unique partnership between S4C and the BBC, and to consider how it can be strengthened and modernised for 2028 and beyond. As audience habits evolve, and public service media operates in an increasingly global and digital environment, it is imperative that our partnership continues to deliver impact, value and prominence for Welsh-language content across all platforms.

Since the launch of S4C in 1982, our relationship with BBC Cymru Wales has been a central pillar of Welsh-language public service media. That relationship has enabled Welsh audiences to access trusted news, culturally significant programming and high-quality drama across multiple platforms. We have also sought efficiencies through co-locating our technical broadcast services with BBC Cymru Wales to Cardiff Central Square. Today, with all of S4C's public funding derived from the licence fee, our view is that the partnership must ensure that public investment delivers maximum value for audiences, while preserving clarity around our distinct role and editorial and operational independence.

In November 2017, S4C and the BBC published a Partnership, Funding and Accountability Agreement, setting out the framework for collaboration during the current Charter period to the end of 2027. As a new Charter approaches, there is a clear opportunity to renew and futureproof this framework, ensuring that it reflects the changes in technology, distribution models and audiences' expectations, while maintaining the strengths of the existing relationship.

The BBC Statutory Supply

The traditionally "10 hours per week" programme supply has been a central pillar of the S4C-BBC partnership. Since 1982, BBC Cymru Wales has supplied some of the cornerstones of S4C's schedule, including *Pobol y Cwm*, Welsh-language news programmes, some live sport, and comprehensive coverage of the National Eisteddfod. These programmes have formed an important part of S4C's services and have been consistently valued by our audiences.

While this statutory framework has traditionally been expressed as a minimum linear broadcast hours commitment, the media landscape in which that obligation operates has changed fundamentally. The Media Act 2024 provides for greater flexibility in how public service content can be delivered by allowing S4C and the BBC to agree suitable alternative arrangements. This modernisation has created scope to ensure that statutory supply arrangements reflect contemporary patterns of consumption, including digital distribution and on-demand viewing. The recent enhancement of the iPlayer partnership between S4C and the BBC is a practical example of how the statutory relationship can evolve to meet audiences' needs.

As we look beyond 2027, it will be important not only to modernise how the statutory supply operates, but also to protect its real-terms value. The financial value attributed to the statutory supply is £20.08m in 2026/27. Whilst this represents a 1.4% increase on the previous year, its value remained flat for many years, meaning that its real-terms contribution declined over time. Without a mechanism to reflect inflation in future settlements, the contribution would likely continue diminishing in real terms, weakening the overall strength of Welsh-language provision within the public service media system.

A renewed framework should therefore include a clear mechanism linking the value of statutory programme supply to CPI increases in the Licence Fee Settlement. Such an approach would protect sustainability, provide planning certainty for both S4C and BBC Cymru Wales, and ensure that the BBC's statutory contribution to Welsh-language provision retains its intended impact throughout the next Charter period.

> ***The BBC's statutory provision to S4C should be index-linked to CPI to protect its real-terms value, production values, and sustain the S4C-BBC partnership.***

Creative Collaboration to Make Wales Thrive

S4C's strategy recognises that we are more than a TV channel: we are a modern, multi-platform public service media organisation with a central role in supporting Welsh language, culture and the creative economy. One of our three strategic priorities – *Collaborating to Make Wales Thrive* – reflects our belief that partnership, when grounded in clarity and mutual respect, can amplify impact, help grow audiences and create wider economic opportunity across Wales.

Creative collaboration between S4C and BBC Cymru Wales has long contributed to that ambition. Co-productions such as *Y Gwyll / Hinterland*, *Un Bore Mercher / Keeping Faith*, *Craith / Hidden*, and *Pren ar y Bryn / Tree on a Hill* demonstrate how partnership can increase creative ambition, extend audience reach and enhance production value. These collaborations also ensure that compelling Welsh stories, reflecting life, culture and communities in Wales, are told authentically in both Welsh and English.

As production and distribution models evolve, it will be important that the future partnership framework continues to encourage collaboration and mutual benefit – particularly in high-end genres such as drama. S4C's recent drama series *Cleddau (The One that Got Away)*, co-produced by S4C and Banijay, became our most successful drama ever on BBC iPlayer. The English language version was subsequently acquired by the BBC. While secondary acquisitions are a legitimate, and often beneficial, feature of the market, a futureproof S4C-BBC partnership should seek, wherever appropriate, to support shared ambition and joint

development at source, ensuring that high-quality Welsh-language content delivers maximum impact for creative skills and economic benefit for Wales from the outset.

Supporting Wales to thrive also means ensuring that Welsh-speaking audiences – particularly children and young people – are not structurally disadvantaged in access to popular international acquisitions. There have been instances where the acquisition of UK rights to international animation titles by the BBC has made it difficult for S4C to secure Welsh-language adaptation rights. We welcome more recent positive collaboration, including arrangements around *Blŵi / Bluey*, which has proved to be immensely popular during its first two months on S4C, and which demonstrate that practical solutions can be found.

S4C does not necessarily operate in competition with the BBC; our remit and audiences are distinct and complementary. A modernised partnership should therefore include clear and transparent approaches to co-production and rights discussions, ensuring that minority-language provision is strengthened within the wider UK public service media system.

> ***The BBC Charter should embed fair and transparent creative collaboration with others, including S4C on co-productions and rights acquisitions, strengthening Welsh-language provision for audiences and supporting the creative sector***

Technology and Distribution

Technology now underpins the S4C-BBC partnership, ensuring Welsh-language content is accessible, prominent, and delivered to audiences where and how they want it.

For instance, the BBC was willing to reorganise its HD capacity in connection with the re-launch of BBC Three on television, agreeing to allocate HD capacity for S4C in Wales. This recognised the importance of HD-quality for viewers of S4C as a Welsh-language service and demonstrates the value of a futureproof technical partnership.

Co-location of broadcast and technical operations to BBC Cymru Wales' broadcasting centre in Cardiff in 2021 has delivered operational efficiencies, strengthened collaboration, and reduced duplication for both broadcasters. S4C pays for these shared services from licence fee derived income, and this investment underscores the importance of ensuring Welsh-language services receive the same attention and technical support as the BBC's services. Guaranteeing this, and maintaining and modernising the technical partnership, will be critical to sustaining high-quality delivery, supporting multi-platform distribution, enabling digital transformation, and ensuring that Welsh-language content continues to reach audiences effectively.

In addition to S4C's own streaming destination, Clic, S4C content has been available on BBC iPlayer since 2014, providing audiences with access to a wide range of Welsh-language programming across multiple platforms. The new S4C-BBC iPlayer partnership agreed from April 2026 represents a significant step forward, giving S4C content enhanced prominence, improved discoverability, and greater integration across the iPlayer. Extending this partnership beyond the next Charter period will help secure a strong digital presence for Welsh-language content.

The UK Government's Green Paper seeks views on how the BBC should ensure that a broad range of public service content is promoted across its digital platforms, including potential reporting requirements and new regulatory obligations to guarantee prominence on services like BBC iPlayer and BBC Sounds.

As audiences increasingly access content online and via connected devices, the Media Act 2024 introduces a new regulatory framework to ensure that public service content, including S4C's service, is guaranteed prominence across connected TV platforms. It is within this context that Welsh-language content should be recognised as a core public service offering, particularly for viewers in Wales.

Guaranteeing the prominence and discoverability of Welsh-language content in Wales, including S4C content, across BBC digital platforms, particularly the iPlayer, will protect its public service value and provide audiences with clear access to culturally relevant content. Ofcom oversight of these prominence arrangements would add transparency and accountability, reinforcing the objectives of the new regulatory landscape and safeguarding minority-language services like S4C.

> ***Future partnership obligations on the BBC should ensure technology and broadcast services delivered to S4C under our partnership agreement are provided to the highest industry standards.***
> ***The S4C and BBC iPlayer partnership should be extended beyond the next Charter period.***
> ***The next Charter should place an obligation on the BBC to guarantee prominence for Welsh-language content as a core public service on its digital platforms with Ofcom oversight.***

Innovation and AI

Technology and innovation are central to the future of public service media. As the Green Paper makes clear, the BBC's scale gives it a unique opportunity to develop tools and approaches that benefit the wider public service media system. For S4C, these opportunities are particularly relevant for Welsh-language broadcasting and distribution: AI could support subtitling, discoverability, speech-to-text search, and content recommendation in Welsh, helping audiences engage more easily with public service content.

Innovation and AI are not currently formally covered within the S4C-BBC partnership agreement. The next Charter provides an opportunity to explore how collaboration in these areas could be structured, ensuring that new technologies benefit minority-language services, including the BBC's Welsh-language services such as Radio Cymru.

The next Charter should help formalise a framework for fair and mutually beneficial innovation partnerships, so that AI or other technological developments are accessible to minority-language broadcasters like S4C. In practice, this could include co-developing or supporting AI-driven solutions for content discovery and accessibility, creating efficiencies while enhancing the audience experience. The BBC could also play a prominent role in developing AI tools in Welsh, strengthening the language's digital infrastructure.

By embedding innovation, AI, and partnership in the Charter, the BBC and S4C can ensure Welsh-language content remains discoverable, relevant, and resilient in an increasingly digital and competitive media environment.

> ***The next Charter should guarantee fair and structured innovation partnerships, so AI and new technologies strengthen Welsh-language services and the language's digital infrastructure.***

3. Public Purposes for the Future

The BBC's Public Purposes and those of S4C are closely aligned. Under the current Partnership, Funding and Accountability agreement between S4C and the BBC, S4C – as an independent public service broadcaster funded through the licence fee – recognises that its services contribute to the overall delivery of the BBC's Public Purposes to Welsh audiences. These five broadly defined purposes reflect the core principles of the public service media system, align with S4C's remit, and are capable of being delivered through S4C's distinctive services. This arrangement reinforces the constitutional link between licence fee funding and the delivery of public service outcomes for audiences across the UK, including Welsh-speaking audiences.

Within the scope of its remit, S4C delivers these Public Purposes directly and distinctively, contributing as a partner within the public service media system and as a national broadcaster rooted in Welsh language and culture.

Across its services, S4C contributes to all five existing Public Purposes:

Public Purpose 1 – to provide impartial news and information to help people understand and engage with the world around them.

S4C delivers a trusted Welsh-language news and current affairs offering across broadcast and digital platforms. This includes BBC-supplied news programme *Newyddion S4C*, long-running independent commissions like *Y Byd ar Bedwar* and *Pawb a'i Farn*, youth-focused social media content made by and for young people (*Hansh Dim Sbin)*, and *Newyddion Ni* for children. S4C's in-house *Newyddion S4C* digital news service, launched in 2020, provides timely updates, multimedia content, and accessible online coverage for audiences increasingly consuming news via connected devices. Together, this provision ensures Welsh-speaking audiences of all ages can engage fully with civic life in Wales, the UK, and beyond.

Public Purpose 2 – to support learning for people of all ages.

Through children's services such as *Cyw*, factual content like *Stori'r Iaith*, and digital provision for Welsh learners, S4C supports learning in its broadest sense. Its output promotes language acquisition, educational development, cultural knowledge, and understanding of history, science, current affairs and social issues in ways that are accessible and engaging. By combining early-years provision, educational storytelling and informative factual output, S4C strengthens cultural literacy and supports lifelong learning.

Public Purpose 3 – to show the most creative, highest quality and distinctive output and services.

S4C commissions ambitious drama, factual, entertainment, sport, and children's programming that reflects Welsh life authentically while meeting the highest production standards. In doing so, it helps sustain independent production companies, develop creative talent, and support employment across Wales.

S4C's commitment to quality is evidenced by the recognition our programmes receive, both nationally and internationally. Content such as *Y Golau: Dŵr, Teth,* and *Y Crwydryn* have recently been recognised at UK- and international-levels. Audience appreciation further underscores this impact. S4C consistently achieves strong audience appreciation scores and audience surveys show high levels of satisfaction, engagement, and loyalty. This combination of critical acclaim and audience support confirms that S4C delivers distinctive, high-quality output that resonates deeply with viewers in Wales and beyond.

Public Purpose 4 – to reflect, represent and serve the diverse communities of all the United Kingdom's nations and regions and, in doing so, to support the creative economy across the United Kingdom.

From continuous drama *Rownd a Rownd*, set and filmed in north Wales, to coverage of national events such as the Urdd Eisteddfod, and our nightly magazine programme *Heno*, broadcast from Llanelli and telling stories from local communities across Wales, S4C ensures that Welsh communities are visible and valued within the UK's public service media system. Our output reflects contemporary life across urban, rural and post-industrial Wales, promoting cultural representation and democratic inclusion.

While S4C's core purpose is to serve Welsh-speaking audiences, its services also reach many viewers who do not speak Welsh. Coverage of major sporting events, national events such as the Eisteddfod, and widely enjoyed factual and entertainment programmes like *Y Llais* attract audiences from across linguistic communities in Wales. Subtitles and online provision allow non-Welsh speakers to engage with our content, enabling S4C to reflect Welsh culture and national life to diverse audiences across Wales.

S4C's reach also extends beyond Wales. Approximately one third of viewing to S4C content on BBC iPlayer and S4C Clic takes place outside Wales, demonstrating that Welsh-language content forms part of the wider UK public service media offer and attracts audiences across the UK.

S4C delivers significant economic impact. Independent research shows it supports over 2,500 jobs across Wales and contributed £150.3m in GVA to the Welsh economy in 2024/25, with 57% spent outside Cardiff. By sustaining creative activity across multiple regions, S4C strengthens economic resilience, develops skills, and underpins long-term growth in the Welsh creative sector.

Public Purpose 5 – to reflect the United Kingdom, its culture and values to the world.

Welsh storytelling gives the UK a distinctive international voice. Dramas such as *Pren ar y Bryn* have been recognised internationally, international acquisition of Welsh IP such as *Bariau,* and co-productions like *Gronyn Gobaith - Cymry CERN*, demonstrates that stories rooted in Wales can resonate globally. By exporting high-quality Welsh drama and factual programming, S4C enhances the UK's creative reputation and soft power, showcasing our cultural plurality. It strengthens the global standing of UK public service media and demonstrates that we lead in distinctive, values-driven content.

Future Public Purposes

As the Charter Review considers whether the Public Purposes should evolve – including the proposal for a new Public Purpose focused on economic growth – S4C expects to play an active role in those discussions. Given S4C's ability to contribute to the Public Purposes through licence fee funding, as outlined above, and our partnership agreement with the BBC, changes should be developed in consultation with S4C to ensure Welsh audiences and services remain represented.

S4C supports the principle of a Public Purpose focused on growth, provided it is clearly anchored in the nations and regions, and based on fair partnerships. Growth must translate into strengthened creative clusters, commissioning power, skills development, and sustainable investment in Wales and across the UK's nations and regions. A growth-focused Public Purpose, grounded in collaboration and partnerships, should also recognise the specific contribution of minority-language broadcasting to economic resilience, cultural sustainability, and social cohesion across the UK.

The BBC Charter Review provides an opportunity to reinforce expectations around fair and mutually beneficial partnerships. Clearer recognition within the Public Purposes framework of collaboration – particularly with minority-language broadcasters in the nations – would ensure that the BBC's scale supports plurality, innovation, and sustainable growth across the whole UK.

> ***Any evolution of the Public Purposes must be developed in consultation with S4C, anchored in the nations and regions, and recognise the contribution of S4C and minority-language broadcasting.***
> ***A new Public Purpose based on growth should embed fair, mutually beneficial partnerships to support sustainable growth, plurality and innovation across the UK.***

10 March 2026