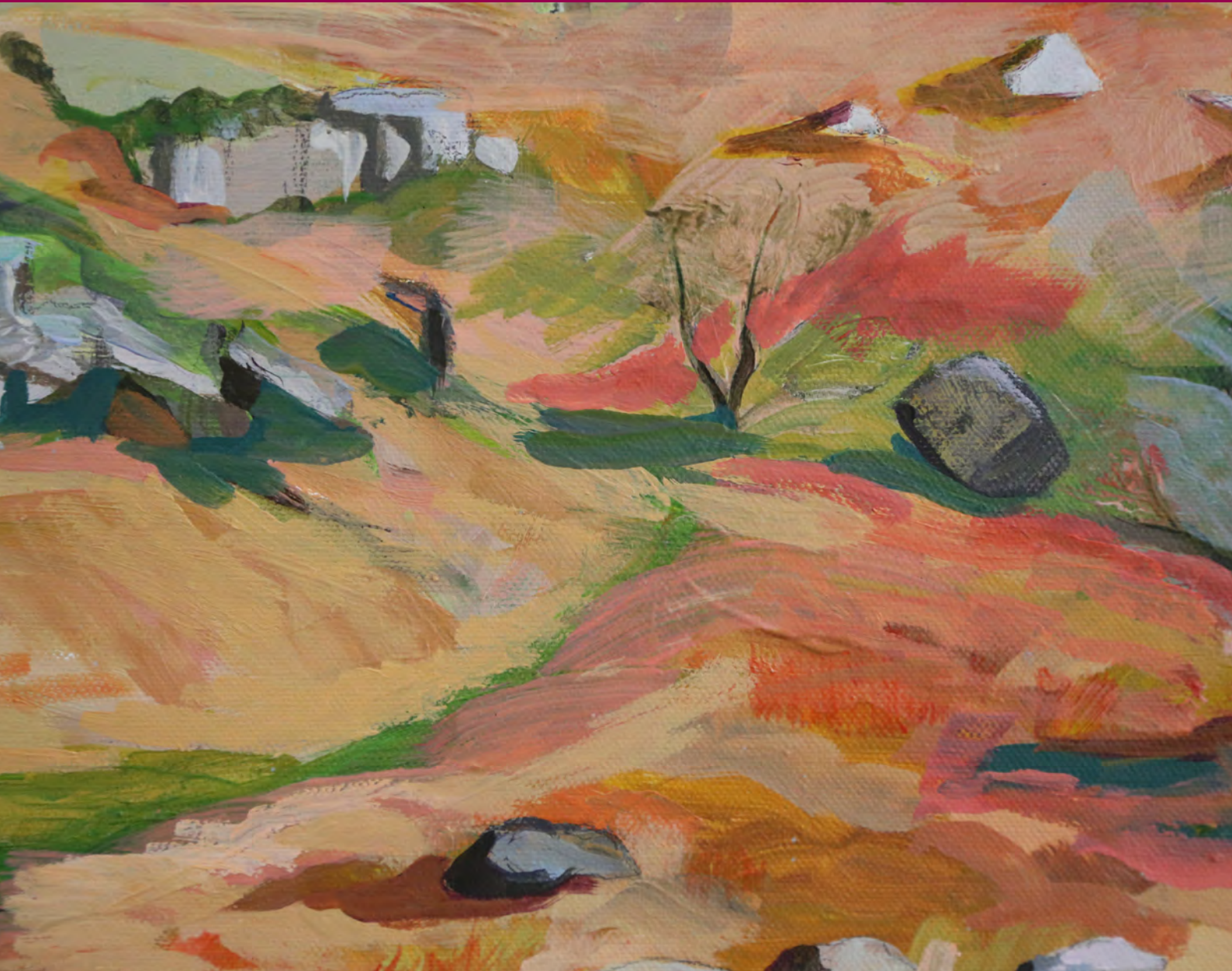


# Building Resilience

## Inquiry into non-public funding of the arts

March 2018



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# **Building Resilience**

## Inquiry into non-public funding of the arts

March 2018



# About the Committee

The Committee was established on 28 June 2016. Its remit can be found at: [www.assembly.wales/SeneddCWLC](http://www.assembly.wales/SeneddCWLC)

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## Committee Chair:



**Bethan Sayed AM**  
Plaid Cymru  
South Wales West

## Current Committee membership:



**Mick Antoniw AM**  
Welsh Labour  
Pontypridd



**Suzy Davies AM**  
Welsh Conservatives  
South Wales West



**Siân Gwenllïan AM**  
Plaid Cymru  
Arfon



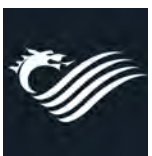
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UKIP Wales  
Mid and West Wales



**Rhianon Passmore AM**  
Welsh Labour  
Islwyn



**Jenny Rathbone AM**  
Welsh Labour  
Cardiff Central



**Jack Sargeant AM**  
Welsh Labour  
Alyn and Deeside

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The following Members were also members of the committee during this inquiry:



**Hannah Blythyn AM**  
Welsh Labour  
Delyn



**Dawn Bowden AM**  
Welsh Labour  
Merthyr Tydfil and Rhymney



**Dai Lloyd AM**  
Plaid Cymru  
South Wales West



**Jeremy Miles AM**  
Welsh Labour  
Neath



**Lee Waters AM**  
Welsh Labour  
Llanelli

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## Chair's Foreword

The Arts illuminate and enrich our lives. They are an indispensable part of our society, and they bring wide-ranging benefits to us all.

The arts bring practical and economic benefits, and can help us address a range of public policy matters, whether that be in the education system or in helping to address otherwise intractable health issues. Participation in the arts helps community cohesion and can reduce social isolation and exclusion.

Despite this, public funding for the Arts in Wales is falling. Welsh Government and National Lottery funding for the Arts Council of Wales has fallen in real terms over the last decade by 10% with the Welsh Government calling on the sector to reduce its dependence on public spending.

It would be tempting to simply call for public funding to be increased, and it would certainly be desirable for Government departments to work on a more cross cutting basis when allocating funding to the arts.

However, the Committee felt that it would be productive to look at how feasible increasing non-public funding is, and whether there were any practical steps the sector could take to diversify and increase this funding. The Committee agreed that now was the right time to look into this area to see:


- how successful the arts sector in Wales has been in increasing non-public funding;
- how non-public arts funding in Wales is shared out across Wales; and
- whether there were international models of best practice that Wales could emulate.

It became evident that the Arts in Wales faces very real challenges if they are to generate more commercial revenue and increase income from trusts and foundations. The often-small size of arts organisations in Wales and their distance from large centres of population contributes to their difficulties in raising funding. Wales is also not blessed with large numbers of high net worth individuals and few major companies have their headquarters here.

This presents something of a catch 22 situation where, in order to increase non-public sector funding, Arts organisations may need additional public sector support in the first instance. In particular, they may need more help to develop the fund raising skills they need and to seek out new sources of funding.

The Welsh Government needs to do more to raise the profile of the arts as a charitable cause and to raise awareness among UK based trusts and foundations of the excellence on offer from the arts in Wales. The Welsh Government also needs to look strategically at how it can help to promote Welsh arts to an international audience. This is another area where increased and better co-ordinated Welsh Government support could pay dividends.

What is clear is that it is not enough for the Welsh Government to simply call for the arts sector to reduce its dependence on public funding – they also need to back this up with an appropriate level of tailored and informed support. But, there should also be an onus on those organisation in the arts World to be as pro-active as possible in seeking alternative funding streams and support where appropriate, understanding that the reality we live in means they cannot rely solely on public funding to support them.

A handwritten signature in black ink that reads "Bethan Sayed." The signature is written in a cursive, flowing style.

Bethan Sayed AM  
Chair



## Recommendations

**Recommendation 1.** The Welsh Government should continue to provide financial support, whether through Arts and Business Cymru or otherwise, to promote and develop partnership working between business and the arts to help maximise financial support for the arts from business. The Welsh Government should also consider how the specific difficulties faced by the arts sector in Wales in attracting funding from businesses can be addressed, and whether additional public investment in this area is needed to drive this work forward..... Page 13

**Recommendation 2.** We recommend that the Welsh Government introduce further initiatives to raise the profile of the arts as a charitable cause, including a St David’s Day award to recognise those who have made significant contributions in support of the arts. .... Page 16

**Recommendation 3.** We recommend that the Welsh Government takes action to increase awareness of, and investment in, the excellent arts organisations and projects based in Wales, by UK-based trusts and foundations..... Page 21

**Recommendation 4.** UK based trusts and foundations should address as a matter of urgency the balance of funding within the UK, where a disproportionate and inequitable amount of funding is awarded to organisations based in London and the south east of England. .... Page 21

**Recommendation 5.** The Welsh Government should commission research in order to identify and exploit international markets that have growth potential for Welsh arts organisations. .... Page 27

**Recommendation 6.** The Welsh Government should ensure that each trade mission has a cultural component unless there are clear reasons otherwise. .... Page 27

**Recommendation 7.** The Welsh Government should consider implementing a clear strategy to assist Wales’ arts sector to grow international markets. .... Page 27

**Recommendation 8.** The Welsh Government should provide a source of fundraising expertise to help small arts organisations increase their non-public fundraising in an analogous fashion to the support it currently provides for small businesses through Business Wales. .... Page 35

**Recommendation 9.** We recommend that, given the difficult financial climate facing arts organisations in Wales – and subject to an impact assessment of the work carried out so far – the Arts Council considers whether the Resilience Programme can be expanded to help improve the financial resilience of non-revenue funded organisations. .... Page 35

**Recommendation 10.** The Welsh Government sets out clearly its aims for Creative Wales along with a timeframe for its establishment and how the new body will help arts organisations increase their non-public income. .... Page 35

## 1. Background

- 1.** The vast majority of the Welsh Government's budget allocations for the arts are for the Arts Council of Wales (Arts Council): £31.2 million revenue out of £31.7 million allocated in this area in the 2017-18 draft budget. Revenue funding in this area increased by 3.5% in cash terms compared to the 2016-17 budget, following a number of years of cuts.
- 2.** Real-terms public funding of the Arts Council (grant-in-aid funding from the Welsh Government and funding from the National Lottery) has reduced over the past decade from an original cash figure of £29.5 million in 1995-1996 to an RPI-adjusted figure of £26.7 million in 2016-17.
- 3.** Local authority funding of Arts Portfolio Wales (arts organisations that receive annual revenue funding from the Arts Council) has reduced from £11 million in 2011-12 to £4.5 million in 2015-16.
- 4.** The Minister's written evidence<sup>1</sup> acknowledged the decline in public funding of the arts, and said that "there is a clear need for the culture sector to up its game on fundraising, marketing and income generation". It also states that, "the sector is losing experience and specialist staff, which is putting its professionalism at risk". Furthermore, it calls for Welsh Government sponsored bodies to "encourage the culture sector to up its game" raising non-public funding.
- 5.** However, in an article written for the Institute for Welsh Affairs' "The Welsh Agenda" magazine in November 2014,<sup>2</sup> Geraint Talfan Davies explained:

"Fund-raising in provincial cities in the UK is a different proposition from fund-raising within London and the south east of England, as is evidenced by the survey, Private investment in arts and culture, 2011-12, conducted by Arts & Business and published in May last year. The report dealt solely with England. Arts and Business Cymru is a separate organisation and has no comparable data, although Wales is not expected to be out of line with other peripheral regions.

The A&B survey concluded that the combined contribution of individuals and business to the arts in London amounted to £412.43m. (85%) with the rest of England receiving £74.19m (15%) - almost precisely in inverse proportion to the distribution of the population. In

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<sup>1</sup> <http://senedd.assembly.wales/documents/s69376/Evidence%20Paper.pdf>

<sup>2</sup> <http://www.iwa.wales/wp-content/uploads/2016/04/agenda-53-winter2014-2.pdf>

terms of contributed income per head of the population, this amounts to £49.64 per head in London as against £1.64 per head for the remainder of England.”

## Our view

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Having investigated opportunities for growing non-public income for arts organisations in Wales, we have found that they face very real difficulties in doing so. Given the Welsh Government’s request for the sector to reduce its dependence on public funding, it is important to understand that such a change is likely to require additional public sector support in the short term, especially when considered against the backdrop of austerity and the dominance of London and the South East in UK fundraising.

The figures noted by Geraint Talfan Davies above present a startling picture. The extent to which London and the south east of England dominate private sector funding of the arts is inequitable and damaging. We address the causes of this later in this report. However, it is worth stating at this point that the situation, where one relatively small area dominates funding to such an extent, needs to be addressed urgently in order for the Welsh arts sector to react effectively to the Welsh Government’s call.

## 2. Business support

### Wales' performance in attracting business support

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- 6.** The Committee heard that arts organisations in Wales face difficulty in attracting business support, due to the small number of large businesses headquartered in Wales.
- 7.** The Arts Council's evidence<sup>3</sup> said that sponsorship "tends to be more prevalent in the metropolitan centres and in support of larger, higher profile arts organisations". Consequently, "a small community-based organisation in a rural area would generally struggle to achieve significant corporate sponsorship". The Arts Council also noted (in additional evidence to the Committee)<sup>4</sup> that in 2011 (the last year for which data is available) "Wales appeared to be holding its own when compared to the rest of the UK". However, the striking figure is for London, which has "13% of the UK population, but over half of the total business investment".
- 8.** Taliesin Arts Centre/Swansea University noted that, in terms of corporate funding of the arts, "the major players will always reap the biggest rewards".<sup>5</sup>
- 9.** Arts and Business Cymru (A&BC) is a broker of relationships between arts and business organisations. It explained to the Committee that businesses support arts organisations where they can support the businesses' corporate objectives, "not because of a philanthropic belief that it has a duty to support".<sup>6</sup> It also noted that decisions about businesses' involvement with arts organisations tend to be made in London, out of the control of Wales-based staff.

### Services to support fundraising

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- 10.** A&BC has operated as an independent charity in Wales since 2011. Arts Council funding has enabled A&BC to develop a range of services and projects, many of which are now supported with non-public funding. The Arts Council had intended to stop its core funding of A&BC. However, following the meetings looking at this issue that this Committee held last year, the Arts Council has

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<sup>3</sup> <http://senedd.assembly.wales/documents/s68064/ART06%20Arts%20Council%20Wales.pdf>

<sup>4</sup> <http://senedd.assembly.wales/documents/s68702/Arts%20Council%20of%20Wales%20-%20Additional%20Information.pdf>

<sup>5</sup> <http://senedd.assembly.wales/documents/s68076/ART18%20Swansea%20University.pdf>

<sup>6</sup> <http://senedd.assembly.wales/documents/s68083/ART25%20Arts%20Business%20Cymru.pdf>

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extended this funding for 2 years, on the strict understanding that this will be the end of the Arts Council's core revenue funding of the organisation.

**11.** The Minister told the Committee:<sup>7</sup>

“I was part of the discussion when Arts & Business Cymru was formed and there was then direct Government support. I'm not suggesting that we are making an offer through this committee that we would do that again, but there's more than one way of supporting a service organisation that straddles the private sector and the public sector, and we have to think of creative ways of doing this because they're not an ordinary client of the arts council is the point I'm trying to make.”

**12.** Contemporary arts gallery G39 has suggested that the Welsh Government could “provide incentives for businesses to support arts”.<sup>8</sup>

#### Balance of funding between the public and private sectors

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**13.** The Minister told the Committee<sup>9</sup> that he did not think that the current balance of funding between public and non-public sources of the arts was right, and that he thought:

“We need to inspire much more preparedness to invest by the corporate sector, by the public sector, in all forms of artistic activity.”

**14.** He elaborated that he wanted:

“to see the shortfall that has come about in public funding, through local government, into artistic and cultural activity, made up by a greater corporate investment ...

[He did not] accept for one moment that the level of economic activity or the productivity or the performance of Welsh business is at such a level that it is not able to take up its corporate social responsibility.”

**15.** When asked what the Welsh Government could do to induce further private investment in the arts, the Minister said:

“when I was doing not dissimilar work in the promotion of bilingualism or languages policy, Welsh language policy in Wales, and working with

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<sup>7</sup> <http://record.assembly.wales/Committee/4382#A40311>

<sup>8</sup> <http://senedd.assembly.wales/documents/s68074/ART16%20G39.pdf>

<sup>9</sup> <http://record.assembly.wales/Committee/4382#A40311>

the private sector, I made a decision fairly early on that the best relationship established with the private sector was through agencies that were themselves agencies that worked within the business sector, and I think that must be the way forward. That's why, as I say, I've been involved with Arts & Business and I think there is a case for further development of that kind.

[...]

And this is where I'm now in the process of looking at what has been described as 'creative Wales' and how that could relate to 'artistic Wales' in a federation of support so that the elements of the creative side of business, if you like, and the creative side of the artistic endeavour work together as teams that will be able to—not to be interventionist, but to be supportive of creating the atmosphere where businesses will see the opportunity of investing.”

## Our view

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Given the difficulties faced by arts organisations in Wales when attracting business support, it is essential that the services currently provided by Arts and Business Cymru continue to be available. That is not to say that Arts and Business Cymru is the only organisation that can or should provide these services or that they should continue to be provided in exactly the same way as now. It does mean that there needs to be a range of publicly funded services available to help arts organisations attract non-public funding for their work. More than that, work is needed to identify how to address the specific difficulties arts organisations in Wales face in attracting business funding. This may require additional public investment in the short term to drive this work forward.

**Recommendation 1.** The Welsh Government should continue to provide financial support, whether through Arts and Business Cymru or otherwise, to promote and develop partnership working between business and the arts to help maximise financial support for the arts from business. The Welsh Government should also consider how the specific difficulties faced by the arts sector in Wales in attracting funding from businesses can be addressed, and whether additional public investment in this area is needed to drive this work forward.



### 3. Individual giving

#### The environment for individual giving in Wales

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**16.** Again, evidence received by the Committee highlights the specific difficulties of generating funding from individual giving in Wales, with witnesses citing Wales's comparatively low number of high net-worth individuals, individual prosperity, and low proportion of households giving to charity. The Committee also heard that fewer people donate to arts organisations than they do to other good causes, including overseas aid and religious organisations.

**17.** Chapter arts centre noted the “constant challenge of demonstrating the arts as a charitable cause”.<sup>10</sup> Contemporary art gallery G39 noted<sup>11</sup> that, because of free access to galleries and museums, the idea that art can be viewed for free has become culturally embedded.

#### Incentives for giving

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**18.** The National Companies told the Committee<sup>12</sup> that the Welsh Government should help raise the profile of arts organisations in Wales, suggesting that:

“Support from Welsh Government to enable a national/international messaging campaign to advocate for its extraordinary Welsh arts organisations and artists will provide invaluable endorsement and national pride. Highlighting how the arts are intrinsic to the success of the Wellbeing of Future Generations Act, the Creative Learning Through the Arts and the Government's new 2018 curriculum (which includes the Expressive Arts), and more within the Programme for Government, will contribute to creating a positive picture for potential funders to support audiences to engage.”

**19.** The Arts Council endorsed this idea when discussing it with the committee. Blue Canary made a similar suggestion,<sup>13</sup> stating:

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<sup>10</sup> <http://senedd.assembly.wales/documents/s68065/ART07%20Chapter%20Cardiff%20Ltd.pdf>

<sup>11</sup> <http://record.assembly.wales/Committee/4381#A40056>

<sup>12</sup>

<http://senedd.assembly.wales/documents/s68079/ART21%20National%20Companies%20of%20Wales.pdf>

<sup>13</sup> <http://senedd.assembly.wales/documents/s67395/Paper%204%20-%20Blue%20Canary.pdf>

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“The ACW and Welsh Government could use their status to help to offer incentives to giving – awards for recognition being the most obvious.”

**20.** When questioned about the specific difficulties facing arts organisations in terms of raising income from donations from private individuals in Wales, the Minister told the Committee:<sup>14</sup>

“I’m not sure what these difficulties are. I’d be interested to see the committee’s evidence as to what you’ve identified as the difficulties. [...] I think that facilitating people to identify their opportunities and to feel that they are honoured for their contributions—and that’s important. Contrary to what the scripture suggests, which is that we should give without seeking praise, I think in this case we should celebrate publicly when people give significant donations, particularly in terms of capital investment.”

**21.** He also said:

“I think the way that the Government can do that is by being an exemplar and by investing appropriately in the arts in its new buildings. But, we must also be more open to ensuring that the art that we have is displayed.”

**22.** On the issue of whether a specific campaign was needed, the Minister said:

“I don’t think we need a specific campaign, but we need to ensure that the discussion on the role of the arts and culture within society is one that is prominent in Welsh life. That’s what I would say; not a specific campaign. If there are new plans and programmes that could be drawn up that would bring together the possibility of facilitating giving as well as advertising the opportunity to donate, then I would be interested in seeing those, but I haven’t seen anything attractive as of yet that I would be able to promote as a new campaign, but I am open to be persuaded on that, of course.”

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<sup>14</sup> <http://record.assembly.wales/Committee/4382#A40311>

## Our view

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There are significant hurdles to overcome to raise money from individual giving, not least the comparatively low number of high net-worth individuals in Wales. This position is compounded by the general view of the arts as a less worthy charitable cause than other areas, such as overseas aid and health.. We believe there is a significant role for the Welsh Government to play in helping to encourage individual giving to the arts by advocating for them as a worthy charitable cause.

We strongly urge the government to consider ways in which it can help arts organisations to overcome these significant hurdles and set out in the recommendation below specific suggestions, raised by witnesses during this inquiry, which we believe deserve particular consideration.

**Recommendation 2.** We recommend that the Welsh Government introduce further initiatives to raise the profile of the arts as a charitable cause, including a St David's Day award to recognise those who have made significant contributions in support of the arts.

## 4. Foundations and trusts

### The current market

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**23.** The Arts Council has told the Committee that the market for those seeking funding from foundations and trusts is currently very competitive. It stated that private foundations in Europe have limited their grant giving during a period of low interest rates, and that demand is high among arts organisations following a number of years of public sector cuts.<sup>15</sup>

**24.** However, Arts and Business Cymru stated that, whilst competition for grants is fierce, “many London-based trusts still express a desire to invest more in Wales, stating that the number and quality of applications remain low”.<sup>16</sup>

### Issues to overcome

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**25.** Blue Canary noted that “Wales does not have the wealth of trusts that many regions in England celebrate”. It also provides a number of possible reasons for “lack of applications and subsequent grants to Wales”:

- “Lack of capacity in arts organisations to research and submit applications to the right trust;
- Lack of knowledge in the sector about grant giving trusts;
- Lack of experience as to how to write funding applications for grant giving trusts;
- UK based trusts and foundations not doing enough in Wales to promote themselves (they all admitted more could be done).<sup>17</sup>

**26.** Taliesin Arts Centre at Swansea University notes the impact of scale on successful grant applications, with “the bigger organisations such as Welsh National Opera having most success as they are able to employ expertise to research and access such funds - competition being extremely keen and most trusts and foundations operating across the UK”.<sup>18</sup>

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<sup>15</sup> <http://senedd.assembly.wales/documents/s68064/ART06%20Arts%20Council%20Wales.pdf>

<sup>16</sup> <http://senedd.assembly.wales/documents/s68083/ART25%20Arts%20Business%20Cymru.pdf>

<sup>17</sup> <http://senedd.assembly.wales/documents/s67395/Paper%204%20-%20Blue%20Canary.pdf>

<sup>18</sup> <http://senedd.assembly.wales/documents/s68076/ART18%20Swansea%20University.pdf>

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**27.** Arts fundraising consultancy Blue Canary told the Committee that “Arts organisations are trailing behind the enterprise and initiatives that are being seen in income generation across the wider charitable sector”.<sup>19</sup> Arts organisations, therefore, need to “get better with messaging about the value of the arts”.

**28.** Arts and Business Cymru noted the specific skillset required to encourage individual giving, stating:<sup>20</sup>

“Securing donations is also a very different fundraising skill to negotiating a sponsorship deal or applying for a grant from a trust. This is just one of the reasons that underline the importance of ensuring Wales has enough skilled fundraisers working in the arts.”

**29.** Chapter describes<sup>21</sup> its annual revenue support from the Arts Council as “invaluable” in terms of accessing funding, as:

“Trusts like the reassurance of seeing public support there, and for funders who are not local, this public support is often the first sign that a project has a local need and should be funded.”

**30.** G39’s evidence questions why “the vast majority of philanthropic funding in the UK is centred on London”.<sup>22</sup>

**31.** Ffilm Cymru notes the lack of philanthropic funding for film, “with opportunities tending to lie more with investment, which favours more established companies and commercial propositions”.<sup>23</sup>

### Examples of success

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**32.** Though the majority of the evidence focused on the difficulties faced by Welsh arts organisations the Committee was also presented with some examples of successful revenue raising within the sector. In its written evidence<sup>24</sup> National Theatre Wales explained:

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<sup>19</sup> <http://senedd.assembly.wales/documents/s67395/Paper%204%20-%20Blue%20Canary.pdf>

<sup>20</sup> <http://senedd.assembly.wales/documents/s68083/ART25%20Arts%20Business%20Cymru.pdf>

<sup>21</sup> <http://senedd.assembly.wales/documents/s68065/ART07%20Chapter%20Cardiff%20Ltd.pdf>

<sup>22</sup> <http://senedd.assembly.wales/documents/s68074/ART16%20G39.pdf>

<sup>23</sup> <http://senedd.assembly.wales/documents/s68077/ART19%20Ffilm%20Cymru%20Wales.pdf>

<sup>24</sup>

<http://senedd.assembly.wales/documents/s68081/ART23%20National%20Theatre%20Wales%20NTW.pdf>

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“Since its inception, NTW has leveraged over £1.7 million from trusts and foundations based outside of Wales. All of which has been spent within Wales and has also paid for a number of jobs for individuals throughout Wales, not just in Cardiff where the office is based. A recent independent consultation has confirmed that NTW is punching above its weight with regards to this rate of return, particularly in relation to the company’s lean overhead business model and level of core ACW grant compared to other similar arts organisations throughout the UK.”

### The Community Foundation

The Community Foundation, established in 1999, is a charity that manages high impact grant programmes designed to achieve sustainable outcomes. They award grants on behalf of clients, fund holders and donors, aimed at enabling local people to achieve inspiring change in their communities.

The Community Foundation in Wales awards grants on behalf of donors from £500 to £150,000 to support community projects and organisations. Working with investment managers they have established an endowment fund in Wales, using the income to support community groups.

Though the foundation is not specifically arts orientated the projects they fund include artistic projects; they have also told the Committee that they would be interested in working with stakeholders across the arts sector to look at opportunities to create and jointly promote a sustainable fund.

### Increasing funding

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**33.** In the Minister’s paper<sup>25</sup> he states that “increasing funding from charitable trusts and foundations is also an important element of our strategy”. Pressed on what action this strategy involved, the Minister told the Committee:<sup>26</sup> “I never stop engaging with these people [Welsh trusts and foundations] because they’re all personal friends of mine”. In terms of seeking to increase funding from trusts and foundations not currently active in Wales, the Minister said:<sup>27</sup>

“...if you make a recommendation that you think the Minister for culture should be touting themselves around central London looking for arts funding for Wales, I will look at it.”

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<sup>25</sup> <http://senedd.assembly.wales/documents/s69376/Evidence%20Paper.pdf>

<sup>26</sup> <http://record.assembly.wales/Committee/4382#A40311>

<sup>27</sup> <http://record.assembly.wales/Committee/4382#A40311>

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**34.** While one of the Minister’s officials told the Committee:<sup>28</sup>

“I think it’s fair to say that the Arts Council of Wales has got extremely good relationships with all the major UK trusts and foundations and is actually working very closely with them: Paul Hamlyn, Esmée Fairbairn, Clore Duffield—all the major trusts. I think, as you’ve probably heard from other people who’ve given evidence, the process of improving the quality and number of applications from Welsh arts organisations—it’s a bit of an oil tanker thing.

[...]

I think it’s probably our role to ensure that the Arts Council reports to us and gives accurate information on the progress that’s been made, the number of applications that are being made. Clearly, there’s a training issue as well, and I know that the Arts Council are working with the foundations directly, and also with organisations like the WCVA and the county voluntary councils, to increase the training that’s available”

### Our view

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Given the small number of foundations and trusts in Wales and the current competitive climate, it is essential that Welsh arts organisations have access to the necessary skills to compete effectively for funding both within and outside Wales. However, a recurring theme in the evidence we heard is that Wales’ arts sector does not currently have the right skills to compete successfully for potential funding. A lack of applications, identified by Blue Canary in particular is also worrying and perhaps symptomatic of the lack of skills available to individual organisations.

While the Welsh Government has called for the sector to become less reliant on public subsidy, we are not convinced that it has targeted this skills deficit as urgently as it should to achieve this aim.

Despite the barriers to revenue raising within the sector some organisations have been very successful at it. Some of the inconsistency can be explained by the different size of the organisations. Larger organisations are more likely to be attractive to potential investors and are more likely to have access to the skills and resources required to secure funding. However, the success of relatively

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<sup>28</sup> <http://record.assembly.wales/Committee/4382#A40311>



smaller organisations, such as National Theatre Wales, suggests that there is scope for improvement within the sector.

We welcome the work of organisations such as the Community Foundation in Wales and believe the Welsh Government should consider how it can work with such groups to address the shortcomings identified within this report. In particular, working with them, and other stakeholders across the arts sector, to look at opportunities to create and jointly promote a sustainable fund.

We also welcome the Minister's commitment to engage with trusts and foundations on behalf of Wales' arts sector. This is a positive step and we look forward to seeing the results of this exercise.

**Recommendation 3.** We recommend that the Welsh Government takes action to increase awareness of, and investment in, the excellent arts organisations and projects based in Wales, by UK-based trusts and foundations.

**Recommendation 4.** UK based trusts and foundations should address as a matter of urgency the balance of funding within the UK, where a disproportionate and inequitable amount of funding is awarded to organisations based in London and the south east of England.

## 5. Revenue raising

### Sources of income

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**35.** The Arts Council explained<sup>29</sup> that:

“There is also the individual as private citizen, purchasing ticket sales for attendance and ancillary products (such as refreshments and merchandise), and cultural objects (such as books, recordings, films, works of art).”

**36.** It also noted that:

“A number of charitably constituted arts organisations have a wholly-owned trading subsidiary through which non-charitable trading activities are managed. Profits from these activities are then covenanted back to the parent charity.”

**37.** A&BC has explained that there has been a “sharp increase in the number of companies seeking arts based training to address staff development needs”.<sup>30</sup> Hijinx explained<sup>31</sup> that it is shifting its focus from seeking funding from trusts and foundations to:

“...earning income from promoting our learning disabled actors as role-play trainers helping public and private sector organisations improve their understanding and communication with vulnerable people- particularly those with a learning disability.”

**38.** Similarly, Ffilm Cymru explained that it “sees opportunities in developing new products and services particularly in the area of education and training, opening up earned income potential”.<sup>32</sup>

**39.** The National Dance Company Wales explained that “Welsh venues pay NDC Wales around 40% less for their performance than in other parts of the UK”.<sup>33</sup>

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<sup>29</sup> <http://senedd.assembly.wales/documents/s68064/ART06%20Arts%20Council%20Wales.pdf>

<sup>30</sup> <http://senedd.assembly.wales/documents/s68083/ART25%20Arts%20Business%20Cymru.pdf>

<sup>31</sup> <http://senedd.assembly.wales/documents/s69015/Paper%203.pdf>

<sup>32</sup> <http://senedd.assembly.wales/documents/s68077/ART19%20Ffilm%20Cymru%20Wales.pdf>

<sup>33</sup>

<http://senedd.assembly.wales/documents/s68078/ART20%20National%20Dance%20Company%20Wales.pdf>

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Hijinx explained that it tours internationally to recoup the losses it makes from touring in the UK.<sup>34</sup>

**40.** Ffilm Cymru described its “Magnifier” approach to developing the sector. This involves “the early and systematic identification of intellectual property potential, backed up with funding and multi-disciplined networks that can enable exploitation”.<sup>35</sup> At a previous meeting,<sup>36</sup> the Arts Council’s Nick Capaldi stated that there was a significant under-exploitation of intellectual property in the arts in Wales.

**41.** G39 cautions<sup>37</sup> that:

“It is not feasible to develop a one-size-fits-all approach for business development across all arts organisations, for example:

- a) the capacity to generate significant earned income increases exponentially with scale of organisation; and
- b) there are threshold levels of annual turnover below which it is acknowledged that certain business models (eg gallery with cafe) are more of a burden than an asset.”

**42.** However, a number of witnesses (such as Neath-based theatre company Theatr na nÓg) have noted the implicit constraint in many arts organisations seeking to raise revenue, stating:<sup>38</sup>

“Our remit as a charity is to provide a service, which like many other public services is not of a nature that would gain a return on investment by a commercial company. Much of our work happens with local communities and schools where a financial return would not be realistic.”

**43.** Similarly, Taliesin Arts Centre/Swansea University notes<sup>39</sup> that revenue-raising tends not to go hand-in-hand with creative experimentation, stating:

“A Pink Floyd tribute band will earn more income from tickets and bar sales than a piece of new writing or contemporary dance.”

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<sup>34</sup> <http://senedd.assembly.wales/documents/s70759/ART27%20Hijinx.pdf>

<sup>35</sup> <http://senedd.assembly.wales/documents/s68077/ART19%20Ffilm%20Cymru%20Wales.pdf>

<sup>36</sup> <http://www.senedd.assembly.wales/documents/s67044/4%20October%202017.pdf>

<sup>37</sup> <http://senedd.assembly.wales/documents/s68074/ART16%20G39.pdf>

<sup>38</sup> <http://senedd.assembly.wales/documents/s68075/ART17%20Theatr%20Nanog%20e.pdf>

<sup>39</sup> <http://senedd.assembly.wales/documents/s68076/ART18%20Swansea%20University.pdf>

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## International growth

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**44.** The Arts Council's evidence<sup>40</sup> stated that "there are a number of ways that more co-ordinated support could be given to companies and micro companies (often creative professionals) to grow new international markets", without suggesting who should do this work.

**45.** Wales Arts International's evidence<sup>41</sup> focused on increasing the export value of Wales's art. Points it raised include:

- WAI organised the cultural element of the Welsh Government's Trade and Culture Mission to China in February 2017.
- It is "paramount" that coordination between the work of the Arts Council/WAI and Creative Wales (the Welsh Government's proposed body to develop the creative industries)/Business Wales (the Welsh Government's business development service) is guaranteed".
- "Improved research and economic impact assessment is needed to match Wales's cultural and creative companies with relevant markets". A Welsh Government official told the Committee<sup>42</sup> that this idea was "not necessarily unnecessary". Another elaborated:<sup>43</sup>

"I think to understand the particular niche markets that offer the most potential. I think we recognise that, as a small nation, we have to focus our efforts in this area. We can't possibly cover every country and we have priority markets. In the cultural context, what are the activities and the fields where, potentially, we can not only share Wales's culture but actually generate income? I think we have to be very targeted about that. That's one of the lessons of the China visit."

- Its management of the Arts Council's International Opportunities Fund.
- In terms of international relationship building, they stated that "a more integrated approach across the arts and creative industries would ensure that the benefits are more widely felt".
- "The Committee could support such a proactive international approach by hosting a forum to bring together the depth and breadth of

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<sup>40</sup> <http://senedd.assembly.wales/documents/s68064/ART06%20Arts%20Council%20Wales.pdf>

<sup>41</sup> <http://senedd.assembly.wales/documents/s70761/ART29%20Wales%20Arts%20International.pdf>

<sup>42</sup> <http://record.assembly.wales/Committee/4382#A40311>

<sup>43</sup> Ibid

experience in working internationally that Wales has as well as the UK agencies that can help deliver such a strategy. The Arts Council of Wales and our international arm Wales Arts International would be more than willing to cooperate or to lead this work through our International Forum, as mentioned above, due in 2018.”

- A case study of the Quebec Society for the Development of Cultural Enterprise (SODEC). It states this organisation “deals with the promotion and support of Québec cultural enterprises, including the media, on behalf of the Ministry of Culture and Communications”. WAI explains that “SODEC has a variety of tools at its disposal but focuses largely upon applicants’ business plans in an effort to support the production, distribution and export of Québec cultural products”.
- “skills of working in more than one language are much needed internationally”.

**46.** The British Council added that more could be learnt from “higher education and vocational education and training sectors who are deeply connected internationally”<sup>44</sup>. They also told the Committee that it would be beneficial to establish a “high profile international culture platform in Wales – an industry focused annual biennial arts festival or education expo, like those developed in Scotland, for example”.<sup>45</sup>

**47.** Hijinx explained that touring in the UK is no longer financially sustainable. Consequently, the company aims to “counteract the losses ...[they] accrue touring in the UK with surpluses ...[they] make when touring internationally”.<sup>46</sup>

**48.** The Minister’s paper<sup>47</sup> states that the Welsh Government is “encouraging cultural organisations and creative businesses to participate in the wider programme of Welsh and UK government trade missions”. An official told the Committee:<sup>48</sup>

“it depends on the mission, but one thing that’s for sure is that there’s a discussion on the correct nature of what should go on a mission before the mission is put in place, and if it’s cultural, then that happens.”

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<sup>44</sup> <http://senedd.assembly.wales/documents/s70762/ART30%20British%20Council%20Wales.pdf>

<sup>45</sup> *ibid*

<sup>46</sup> <http://senedd.assembly.wales/documents/s70759/ART27%20Hijinx.pdf>

<sup>47</sup> <http://senedd.assembly.wales/documents/s69376/Evidence%20Paper.pdf>

<sup>48</sup> <http://record.assembly.wales/Committee/4382#A40311>

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**49.** Responding to a request during his oral evidence session the Minister shared the evaluation report of the Welsh Government’s visit to China.<sup>49</sup> The report states that:

“A large number of meetings took place between the delegates and arts venues, organisations, and individual artists in various locations across China, including Shanghai and Beijing.

Many conversations took place, and from these several new partnerships and associations have been formed. A number of projects have now begun. Generally these are at fairly early stages of development and discussion, and most organisations expect a further period of conversation, planning, research and development.

[...]

A number of delegates commented on the value of having both arts and other business sectors represented on the mission, as well as politicians. This is the first time that arts and cultural organisations have been included on a Welsh Government trade mission, possibly because Ken Skates’ brief (from May 2016 to present) includes Culture.

This combination was fruitful, and delegates felt that they had learned a lot from working closely with, or observing, those from the other sectors.”

## Our view

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We recognise that there are some constraints to arts organisations raising commercial revenue. We want to see a creative and inclusive arts scene in Wales, and creative risk-taking and inclusivity do not always go hand-in-hand with profit-seeking. However, we heard some excellent examples, such as Hijinx’s work providing training to businesses, of innovative ways that arts organisations can make money without simply booking “Pink Floyd tribute bands”.

We were impressed by the evidence we received about the impact of the 2017 cultural delegation to China. This pointed to great potential, both for future cultural engagement between Wales and China, and future cultural involvement in Welsh trade missions.

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<sup>49</sup> <http://senedd.assembly.wales/documents/s71411/Paper%202.pdf>

**Recommendation 5.** The Welsh Government should commission research in order to identify and exploit international markets that have growth potential for Welsh arts organisations.

**Recommendation 6.** The Welsh Government should ensure that each trade mission has a cultural component unless there are clear reasons otherwise.

**Recommendation 7.** The Welsh Government should consider implementing a clear strategy to assist Wales' arts sector to grow international markets.



## 6. Volunteering

**50.** The Arts Council describes the unpaid time committed by artists and creative professionals as “one of the most significant sources of non-public funding in the arts”.<sup>50</sup> Arts Alive Wales (Powys-based arts educational charity) expanded on this point, stating:<sup>51</sup>

“The huge role and value of unpaid volunteers, is one ‘in kind’ contribution which is scarcely recognised within the ecology of Welsh arts organisations.”

**51.** In oral evidence,<sup>52</sup> the British Council highlighted a tension in using volunteers within arts organisations, in that by replacing entry-level positions with voluntary posts, people from poorer backgrounds find it harder to get experience within the sector. In evidence to the Committee the Minister said:<sup>53</sup>

“I don’t think you can have too many volunteers in the arts world, because the big events and indeed small, local events that one thinks of in the arts world, rely continually on being able to ensure that audiences are comfortable and enjoy their time when they visit art events and venues.”

### Our view

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The invaluable role played by volunteers in Wales’ arts sector was a recurring theme, clearly articulated throughout the course of this inquiry. Though there are difficulties in quantifying their input there is no doubt that it is significant and should be recognised as such.

We note the concerns raised by the British Council over the opportunities available to those from poorer backgrounds, and believe that the Welsh Government should bear these in mind when making future policy and funding decisions.

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<sup>50</sup> <http://senedd.assembly.wales/documents/s71411/Paper%202.pdf>

<sup>51</sup> <http://senedd.assembly.wales/documents/s68073/ART15%20Arts%20Alive%20Wales.pdf>

<sup>52</sup> <http://record.assembly.wales/Committee/4381#A40055>

<sup>53</sup> <http://record.assembly.wales/Committee/4382#A40311>

## 7. Public Funding of the Arts

**52.** In evidence to the Committee,<sup>54</sup> the Minister said:

“I have started a discussion with the Welsh Local Government Association to see how we can have a more robust partnership in terms of public expenditure and the follow-on private expenditure ... so that we can have a better pattern of expenditure between local government, the Arts Council of Wales and the individual clients, those creative businesses and those arts businesses. I do emphasise ‘arts businesses’, because we are making a connection between arts and business and that’s at the heart of what I’m discussing. So, I do hope that we will be able to ensure that we will have a clear register of the specialists that can advise and of the effective administrators in the area, so that they are able to assist in providing advice on generating additional funds.”

### Arts and public policy issues

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**53.** At the same time, the Welsh Government has called on “organisations in the culture and heritage sectors to play a more active role in helping to tackle other public policy issues, such as health, education, regeneration and tackling poverty”.<sup>55</sup>

**54.** Giving evidence before the Committee,<sup>56</sup> Omidaze theatre company raised a concern that arts organisations were being asked to tackle problems in additional policy areas without receiving additional funding, stating:

“What’s happening at the moment is the arts and culture is being used as a cheap fix-all for no increase in investment, and that cannot be allowed to continue. We are being seen as a sector that can sort out poverty, education, health—‘Oh and can you make some great art and can we take you overseas on a visit as well, to promote Wales?’ Great. Yes, let’s do all of those things, but we can’t do it on reduced public investment.”

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<sup>54</sup> <http://record.assembly.wales/Committee/4382#A40311>

<sup>55</sup> <http://senedd.assembly.wales/documents/s69376/Evidence%20Paper.pdf>

<sup>56</sup> <http://senedd.assembly.wales/documents/s67806/18%20October%202017.pdf>

## Our view

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Public funding remains essential to a flourishing arts sector. It provides direct support for a wide range of arts organisations that would in many cases be unable to exist without it. It is also the bedrock that affords them the time and space to seek funding from the private sector and from trusts and foundations.

The difficulties faced by those within the arts sector when attempting to raise revenue are wide ranging. Scale and location are key factors in enabling the generation of non-public funding. The potential to raise commercial revenue, to secure funding from businesses and to successfully bid for grants is harder the smaller the organisation, and the further it is away from a metropolitan centre of population. Such difficulties serve to underline the value of the public funding provided to arts organisations, funding which has reduced greatly over the last decade.

Art forms a vital part of society. Self-expression and creativity are worthy reasons for public investment in their own right. However, art can make a positive impact across a variety of fields – mental health, tourism, tackling poverty among others. This potential for art to enable positive outcomes should be recognised by those making public policy and funding decisions.

Increasingly, this potential for wider public policy issues to be addressed through the arts is being recognised. However, it is also important to recognise that arts projects that address these issues may incur additional costs beyond those which organisations are funded to undertake. The appropriate level of support, financial or otherwise, should be available for both artistic input and any wider public benefit. The expectation that arts organisations can deliver such benefits without the necessary support is unreasonable and unrealistic, especially when considered against the backdrop of reduced public funding.

However, as challenging as the revenue raising difficulties are within the sector, they do not mean that arts organisations should not explore every opportunity to generate non-public income, and be supported in these efforts by the Arts Council, the Welsh Government and local authorities.

## 8. Other forms of financial support

**55.** Ideas raised in the consultation for other forms of financial support include:

- Social impact bonds, which use repayable finance to achieve a social as well as financial return. The Arts Council states that:<sup>57</sup>

“These potentially offer a new source of investment for organisations whose arts mission also delivers beneficial social outcomes. Consideration should be given to identifying new pump-priming investment that could be used to replicate the Arts Impact Fund that’s available to creative businesses in England. The Arts Council of Wales’ existing relationship with Nesta (managers of the English scheme) might provide a basis for progressing a similar scheme for Wales.”

- Percentage legislation, whereby taxpayers may designate a certain percentage of their income tax to be allocated to a specific non-profit, non-governmental organisation.

### The Wales Wellbeing Bond

In April 2016 the Welsh Government announced the creation of the Wales Wellbeing Bond. The bond was intended to enable the NHS, local authorities and the third sector to invest in schemes which improve people’s health and wellbeing.

Arts organisations and projects are eligible to apply for funding under the scheme.

**56.** G39 stated that:<sup>58</sup>

“The consultation should also identify the value of current support for the arts from non-public sources that cannot be evidenced in financial reports, e.g. rent reduction and rates relief’. It also suggests that the Welsh Government could “provide incentives for businesses to support arts.”

**57.** Ffilm Cymru noted that funding for films provided through the Welsh Government and Pinewood Studios (Pinewood managed the Welsh

<sup>57</sup> <http://senedd.assembly.wales/documents/s68064/ART06%20Arts%20Council%20Wales.pdf>

<sup>58</sup> <http://senedd.assembly.wales/documents/s68074/ART16%20G39.pdf>

Government's Media Investment Budget) "is offered on commercial terms", meaning that it tends to favour "more established companies based outside of Wales".<sup>59</sup>

### Our view

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Given the difficulties faced by arts organisations when attempting to raise non-public funding it is essential that every avenue of financial support is explored fully. We have set out above the ideas raised during this inquiry which we believe deserve particular consideration by the Welsh Government.

We welcome the introduction of the Welsh Government's "Wellbeing Bond" and encourage those within the arts sector to familiarise themselves with the scheme and to apply for funding as appropriate.

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<sup>59</sup> <http://senedd.assembly.wales/documents/s68077/ART19%20Ffilm%20Cymru%20Wales.pdf>

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## 9. Current initiatives and ways forward

**58.** The Arts Council’s written evidence<sup>60</sup> explained that 53 members of Arts Portfolio Wales are currently taking part in its Resilience Programme, which it describes as a “new approach to developing sustainable business models”. Contemporary art gallery G39 described how useful the Resilience programme had been so far, whilst noting that similar work had begun in Arts Council England some years ago.<sup>61</sup>

**59.** Blue Canary explained<sup>62</sup> that it has been commissioned by the ACW to:

“...run a consultation and a scoping review of the challenges (and successes) of arts organisations across Wales, and across art-forms, with work to diversify income streams.”

**60.** This report was due at the end of October 2017.

**61.** Blue Canary also stated that “the sector has had an unhealthy reliance on the ACW”, and that the Arts Council “needs to enable organisations to take those necessary risks that are required to truly diversify income streams”.<sup>63</sup>

**62.** Arts and Business Cymru noted that there is currently an “insufficient number of skilled arts fundraisers in Wales”, and was running a Creative Internships programme to try and rectify this. It also stated that organisations “must be open to employing a part-time fundraiser who is likely to be fundraising for other arts organisations at the same time”.<sup>64</sup>

**63.** In its consultation response,<sup>65</sup> National Dance Company Wales said:

“Encouraging skills exchanges between organisations and improving access to relevant training courses (mainly in England) could help develop and retain staff.”

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<sup>60</sup> <http://senedd.assembly.wales/documents/s68064/ART06%20Arts%20Council%20Wales.pdf>

<sup>61</sup> <http://record.assembly.wales/Committee/4381#A40056>

<sup>62</sup> <http://senedd.assembly.wales/documents/s67395/Paper%204%20-%20Blue%20Canary.pdf>

<sup>63</sup> <http://senedd.assembly.wales/documents/s67395/Paper%204%20-%20Blue%20Canary.pdf>

<sup>64</sup> <http://senedd.assembly.wales/documents/s68083/ART25%20Arts%20Business%20Cymru.pdf>

<sup>65</sup>

<http://senedd.assembly.wales/documents/s68078/ART20%20National%20Dance%20Company%20Wales.pdf>

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**64.** In its written response, A&BC said that “the only way to increase this vital pool of professionals in the long term, is to establish arts fundraising as a viable and attractive career path”.<sup>66</sup>

**65.** The Welsh Government intends to establish Creative Wales, an arms’-length body to develop the creative industries. The Arts Council’s paper calls this a “strategically significant development”.<sup>67</sup>

**66.** The Minister told the Committee:<sup>68</sup>

“I do value the way in which the Arts Council is now seeking to build up resilience across the board among its artistic clients through making it clear that there are forms of support available, both for the development of the artistic endeavour and also of the business side. And this is where I’m now in the process of looking at what has been described as ‘Creative Wales’ and how that could relate to ‘artistic Wales’ in a federation of support so that the elements of the creative side of business, if you like, and the creative side of the artistic endeavour work together as teams that will be able to—not to be interventionist, but to be supportive of creating the atmosphere where businesses will see the opportunity of investing.”

## Our view

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It is important that the income streams of arts organisations in Wales are as sustainable as possible. We welcome, therefore, the Arts Council for Wales’ Resilience Programme, which seeks to achieve this aim. However, only the Arts Council’s portfolio organisations are eligible to benefit from the programme and we are concerned over the level of support available to non-Arts Portfolio Wales organisations.

Blue Canary have been commissioned by the Arts Council to conduct a scoping review of the funding challenges facing arts organisations across Wales. We welcome this review and hope the findings will help facilitate targeted and urgent action on an all-Wales level. Given that the findings of the review were due in October 2017 we hope to see this work published as soon as possible.

In 2016 the Welsh Government announced its intention to establish ‘Creative Wales’, an arms-length body aimed at developing the creative industries.

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<sup>66</sup> <http://senedd.assembly.wales/documents/s68083/ART25%20Arts%20Business%20Cymru.pdf>

<sup>67</sup> <http://senedd.assembly.wales/documents/s68064/ART06%20Arts%20Council%20Wales.pdf>

<sup>68</sup> <http://record.assembly.wales/Committee/4382#A40311>



However, we note that there is currently a lack of clarity – both within the arts sector and the Welsh Government – as to precisely what the role of this body will be. It is essential that before this body is established its role is clearly articulated and communicated.

A lack of appropriate skills within the sector is something which was clearly articulated throughout this inquiry. We are pleased that Arts & Business Cymru have recognised this and are taking steps to address it through their Creative Internships Programme. Any such activity – aiming at reducing the skills deficit within the arts sector – should be assessed by the Welsh Government and funded appropriately.

**Recommendation 8.** The Welsh Government should provide a source of fundraising expertise to help small arts organisations increase their non-public fundraising in an analogous fashion to the support it currently provides for small businesses through Business Wales.

**Recommendation 9.** We recommend that, given the difficult financial climate facing arts organisations in Wales – and subject to an impact assessment of the work carried out so far – the Arts Council considers whether the Resilience Programme can be expanded to help improve the financial resilience of non-revenue funded organisations.

**Recommendation 10.** The Welsh Government sets out clearly its aims for Creative Wales along with a timeframe for its establishment and how the new body will help arts organisations increase their non-public income.

## Annex A – Oral evidence sessions

The following witnesses provided oral evidence to the Committee on the dates noted below: Transcripts of all oral evidence sessions can be viewed in full at:

<http://record.assembly.wales/Search/?type=2&meetingtype=445>

Webcasts are available on [www.senedd.tv](http://www.senedd.tv)

Date	Name and Organisation
4 October 2017	<p>Nick Capaldi, Chief Executive, Arts Council of Wales David Alston, Arts Director, Arts Council of Wales</p> <p>Paul Kaynes, National Dance Company Wales Michelle Carwardine-Palmer, National Theatre Wales Leonora Thomson, Welsh National Opera Mathew Milsom, Wales Millennium Centre</p>
18 October 2017	<p>Andy Eagle, Director, Chapter Arts Centre Sybil Crouch, Director, Taliesin Arts Centre</p> <p>Rachel Jones, Chief Executive, Arts &amp; Business Cymru Emma Goad, Manager, Blue Canary Arts and Heritage Fundraising</p> <p>Yvonne Murphy, Artistic Director, Omidaze Theatre Company</p>
30 November 2017	<p>Rebecca Gould, Head of Arts, British Council Wales Eluned Haf, Head, Wales Arts International Clare Williams, Chief Executive, Hijinx Theatre Pauline Burt, Chief Executive, Ffilm Cymru</p> <p>Stephen Thornton, Refinery Public Affairs Manager, Valero Hoodi Ansari, Trustee, G39</p> <p>Mathew Prichard, Chair of Trustees, Colwinston Trust</p>

6 December 2017	Dafydd Elis-Thomas AM, Minister for Culture, Tourism and Sport. Jason Thomas, Director Culture, Sport and Tourism, Welsh Government Peter Owen, Head of Arts Policy Branch, Welsh Government
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## Annex B – Written evidence

Evidence to the committee was received throughout the inquiry. The Committee consultation ran from Friday, 28 July 2017 to Friday, 25 August 2017. The responses we received are listed below and are available in full at:

<http://senedd.assembly.wales/mgIssueHistoryHome.aspx?IId=19746>

### Reference

### Organisation

ART01	Theatre Wales
ART02	Mission Gallery
ART03	Achates Philanthropy Foundation
ART04	Llantarnam Grange Arts Centre
ART05	Mid Wales Opera
ART07	Chapter
ART06	Arts Council of Wales
ART08	TRG Arts UK
ART09	Samuel Murray MA
ART10	Welsh Green Party
ART11	Arts Development UK
ART12	Cardiff Metropolitan University
ART13	Art Fund
ART14	Voluntary Arts Wales
ART15	Arts Alive Wales
ART16	G39
ART17	Theatr na nÓg
ART18	Swansea University, Taliesin Arts Centre
ART19	Ffilm Cymru Wales
ART20	National Dance Company Wales
ART21	National Companies of Wales <ul style="list-style-type: none"><li>■ BBC National Orchestra of Wales</li><li>■ Ffilm Cymru Wales</li><li>■ Literature Wales</li><li>■ National Dance Company Wales</li><li>■ National Theatre Wales</li></ul>

- Theatr Genedlaethol Cymru
- Wales Millennium Centre
- Welsh National Opera

ART22	Laura H Drane
ART23	National Theatre Wales
ART24	Rose
ART25	Arts & Business Cymru
ART26	Welsh National Opera
ART27	Blue Canary
ART28	Hijinx
ART29	Valero
ART30	Wales Arts International
ART31	British Council Wales
ART32	Omidaze
ART33	Ministerial Evidence
ART34	Arts Council England