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**Television drama production in small nations: mobilities in a changing ecology**

**ABSTRACT**

*For small nations, the television industry functions on a number of interlinking levels constructing a sense of identity, contributing towards a democratic public sphere, and providing an important cultural and economic resource. Television drama is particularly important to these functions due to its ability to tell stories about and for a nation (Nelson 2007). However, the ecology of television drama production is changing in terms of technological innovation, greater competition, downward pressure on costs and evolving audience consumption patterns. Set within this context, this article investigates the television industry of a particular small nation, Wales, and*

*its most recent creative infrastructure project, the BBC's Roath Lock Studios.*

*One of the key features of the Welsh production ecology is mobility, and the authors frame this research around three aspects of mobility which condition the making of television drama: how production and symbolic value are mobilized in small nations, the consequences of production mobility between regions and nations, and the impetus for content mobility through the international sale of series and formats. These forms of mobility are intimately linked to the negotiation of power which circumscribes all indigenous drama production, but which may be felt more acutely by smaller nations where access to talent, greater limits on resources and questions of sustainability condition the everyday realities of television professionals.*

*Using interviews with key stakeholders in the field of television drama production in Wales, this article argues that the voice and lived experience of television practitioners and stakeholders is a vital element in the academic critique of cultural and industrial developments in television production. The research suggests that Roath Lock would seem to be a success within its principal term of reference, which is to house more efficient and well-made drama for the BBC network and for S4C. On a more subjective level, it has been used by a variety of stakeholders to create positive perceptions of Welsh creative industries and 'put Wales on the map', to compete with other locales within and outside the United Kingdom, for international productions, capital investment, talent and industry legitimacy. However, real concerns remain about whether it enables drama production which adequately represents contemporary life in Wales, and delivers on the cultural aspirations of television*

*workers and viewers.*

**KEYWORDS:** BBC, small nations, production, television drama, regions and nations policy, Wales

Over the past decade, Wales has developed a relatively small but significant television production centre specializing in drama. Cardiff, the capital city, has enjoyed much of the focus of this industrial activity, and in 2012 the BBC's Roath Lock Studios were formally opened as part of the Corporation's strategy of developing regional and national 'centres of excellence' for production, and also as the latest large-scale creative development in the Porth Teigr area of the city. Roath Lock is a £20 million, 170,000 square feet facility with nine acoustically-sealed, permanent, purpose-built studios providing a home for both temporary productions and four flagship, returning BBC dramas: *Doctor Who* (2005-), *Casualty* (1986-), *Wizards vs Aliens* (2012-) and the BBC's longest running television soap *Pobol y Cwm* [trans. People of the Valley] (1974-) made for the Welsh-language broadcaster, S4C. Able to house 600 staff, it is built as a series of 'large sheds interspersed with functional courts and alleys, as in a Hollywood film lot, punctuated with sets of extreme specificity' (Moore 2012), with a frontage comprising production and support offices that has become iconic in the midst of what remains a dockland development site.



*Figure 1: BBC Roath Lock drama studios (Source: Creative Commons)*

This article is the first piece of academic research to assess the development of the BBC's Roath Lock Studios. We approach this major infrastructural development culturally and industrially to examine the opportunities and challenges drama production affords a small nation like Wales. Whilst the mobility of production is a global phenomenon, in small nations this is particularly pertinent because of the structural challenges which condition labour markets in those nations (Iosifidis 2007; Hjort and Petrie 2007). Our ambition is to identify some of the most immediate and important trends in the culture of television drama production, and the policy and industry imperatives that have strategically shaped the movement of television production within and out of the United Kingdom. We ask: what are the external and internal conditions shaping drama production in small nations? How are these negotiated by television professionals in this genre? In order to understand the ecology of television drama production, attention needs to be paid to how new policy initiatives and the movement of production centres are experienced on an everyday

level by these professionals. Our original, empirical research reveals the aspirations, achievements and disappointments that those working in both the television industry and in closely related domains, such as creative industries policy, face in trying to make high-quality drama that appeals at home and abroad. We insist that an examination of the relationship between the macro and micro levels is vital to understanding contemporary television production.

## **METHOD**

This research emerges from an earlier report, *Screening the Nation: Landmark Television in Wales*, undertaken in 2009-10 by Blandford, Lacey, McElroy and Williams for BBC Audience Council Wales. That report was launched as Roath Lock was in development and its main focus was in analyzing textually, and with reference to original audience research, the impact of series such as *Doctor Who* on the representation of Wales on screen.

The primary method employed in the research presented here was semi-structured interviews lasting approximately 60 minutes and conducted in South Wales and Bristol and in English and Welsh in 2013 with eighteen key stakeholders, including staff at the main public service broadcasters (BBC and S4C), the Welsh Government's (WG) Creative Industries Department, independent producers, Creative Skillset, the trade union BECTU, and local screen development agencies. Hjort and Petrie (2007) argue that the specific discursive terrain occupied by creative professionals in small nations contexts is significant in their struggle for power and to

fix narrative meanings. We resolved upon a qualitative methodology precisely in order to capture these struggles and negotiations as opposed to aiming for a quantitative mapping of Roath Lock's economic contribution to the Welsh creative industries, and to Cardiff as a city. We take up the challenge of analyzing this terrain by examining the materiality of policy and how it is experienced by such professionals. For example, whilst discussion of nations and regions policy shapes professional discourses, little academic analysis has considered *how* this is negotiated on the ground.

We frame our analysis around the concept of mobility in three specific forms: firstly, how the production value and symbolic value of television's creative output are mobilized in small nations; secondly, the consequences of mobility between regions and nations, and thirdly, the significance of content mobility in the form of the international sale of series and formats. The concern with mobilities emerged from the social sciences in the 1990s in response to globalization and migration, leading to critical discussions about the fixity of place (Urry 2007). Mobility always occurs between places, and how place and space gets imbued with cultural meaning retains its significance in a mobile world. In this research, mobility is a key characteristic of television drama production in small nations.

## **SMALL NATIONS AND DRAMA PRODUCTION**

Geo-political shifts, such as the political push in the Basque Country, Catalonia, Flanders and Scotland for greater political and cultural autonomy, the collapse of the

Soviet Union and enduring debates about the effects of and resistance to globalization, have meant the particularities of media made in, and by, small nations has received greater academic attention. Particular consideration has been given to how media such as radio (Hand and Traynor 2012), cinema (Hjort and Petrie 2007) and theatre (Blandford 2013) may operate differently from larger nation-states. However, television within the conceptual frame of small nations is relatively underdeveloped, though important exceptions to this include Iosifidis (2007), Dhoest (2011) and Castelló (2011).

Several structural challenges shape the position of small nations which are deemed 'small' in terms of population, landmass or political influence (Hjort and Petrie 2007; Iosifidis 2007). Less access to talent, fewer capital resources, higher production costs and a smaller market for advertising and license fee revenue, can make smaller nations dependent on importing global content – a situation often framed as threatening their economic potential and cultural identity. In this context, media professionals are doubly tasked serving the needs and demands of local audiences and keeping local resources alive (such as language), while also plugging into international markets in a bid for economic viability, cultural autonomy and political visibility. The analytical value of 'small nations' lies in its relational focus not only in terms of size or scale, but on the relative power of small as opposed to large nations, something which is all the more apparent in those small nations with imperilled minority-languages such as Wales. The international success of 'Nordic Noir' highlights how an indigenous asset, constituting a particular set of production



values and aesthetics, may be leveraged for both commercial and critical success across multiple television markets (Waade and Jensen 2013).

However, across the television industry there are significant changes taking place including: uncertainty over the future of European models of public service broadcasting, increased competition amongst national and transnational broadcasters and production companies, evolving consumption patterns amongst audiences, decreased budgets for production and greater casualization of the labour market. These factors have coalesced to create a new ecology for the commissioning, production and consumption of drama, in which ‘critical mass appears to have become a necessary condition for competing in today’s global television market’ (Nelson 2007: 58). In order to achieve this critical mass of infrastructure and output and thus create a sustainable production base, international, multi-partner co-productions, overseas sales of programmes and formats, and international divisions of labour spanning multiple territories are now an established part of the ecology of drama production.

## **TELEVISION IN WALES**

Television has always occupied a privileged position in the Welsh media landscape, due partly to the weakness of the Welsh press (Barlow et al. 2005). Speaking on the fiftieth anniversary of BBC Cymru Wales, its controller Rhodri Talfan Davies (2014) reflected that, ‘The launch of BBC Wales at last gave a nation the ability to see itself and to speak to itself on its own terms, about its own affairs and to do so in both its

languages'. This potential to facilitate cultural expression was evident, for example, in the 1970s language campaigns of the Welsh Language Society (Cymdeithas yr Iaith Gymraeg) for the establishment in 1981 of S4C.<sup>1</sup>

Nevertheless, there have been heated debates amongst Welsh politicians about the place of media in the newly devolved nation (The Task and Finish Group Report on the *Future outlook for the media in Wales* 2012). A rare all-party response from Welsh Assembly Members in 2010 criticized the decision of the UK government's Department of Culture Media and Sport (DCMS) to alter S4C's statutory footing. Whilst broadcasting is not a devolved power it has been implicit in wider Welsh creative industries policy. Welsh Government (WG) cites creative industries as a key growth sector (WG 2013) and the emergence of Roath Lock needs to be understood within that strategic context.<sup>2</sup>

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<sup>1</sup> S4C is a Welsh-medium public service commissioning broadcaster that began transmission in 1982. The BBC is one of the main suppliers of programmes for S4C including its nightly news bulletin. Until 2010, it was funded principally through a direct grant from the UK government's Department of Culture Media and Sport. As part of the Coalition Government's spending review, this grant was cut and responsibility for funding S4C transferred in 2013 to the BBC to be supported through the licence fee. Advertising and programme sales are also sources of revenue for the channel.

<sup>2</sup> These studios are part of a wider Porth Teigr development, a joint venture between Welsh Government and Igloo who aim to develop the site as a media hub.

To date, the BBC's contribution to this agenda in Wales has stemmed mainly from its television drama production for network, including series such as *Doctor Who*, *Sherlock* (2010-) and *Torchwood* (2006-11), which have also been exported internationally including to the United States, historically a difficult market for European content to penetrate successfully. As discussed below, the BBC's decision to make *Doctor Who* in Wales has been attributed to the creative partnership between Julie Gardner (then Head of Drama at BBC Cymru Wales) and writer, Russell T. Davies, but it is also part of the 'Out of London' strategy to source more content from the nations and regions, thus addressing criticisms of a metropolitan bias in UK television. The King Report (BBC Trust 2008), for example, declared Wales to be 'the invisible nation' on network UK screens, prompting a substantial rethink by the BBC on how it should serve a post-devolutionary United Kingdom. Several responses have sought to address these criticisms, including the development of regional/city production bases like Roath Lock (e.g. MediaCityUK in Salford and Pacific Quay in Glasgow) and the introduction of quotas for regional commissioning and production by the UK regulator OFCOM and by broadcasters (for example, Channel 4's Alpha Fund). However, results from these initiatives have been mixed. As Tony Hall (BBC Director General) acknowledges, whilst improvements have been made to news reporting and Cardiff now houses some of BBC network's most popular dramas, indigenous Welsh television production remains seriously under-developed:

Despite BBC Wales' very real success, we must also acknowledge that English language programming from and for Wales has been in decline for almost a decade [...] What does that mean for audiences here? It means, inevitably, that there are some aspects of national life in Wales that are not sufficiently captured by the BBC's own television services in Wales [...] Does this matter? Of course it does: the vitality of any nation must surely rest on more than its journalism. One cannot fully realise a nation's creative potential or harness its diverse talents through the important, but narrow, prism of news.

(Tony Hall BBC Director General 2014)

The picture in Wales is therefore complex. Cuts at ITV and BBC have done nothing to increase the range of original indigenous content, especially in English, available to Welsh viewers. Indeed 'between 2004 and 2009, investment in English-language programmes for viewers in Wales was down 11 per cent per year since 2004, a decrease of 44 per cent in absolute terms' (OFCOM 2010: 8). The impact of this cultural inadequacy is illustrated by Ron Jones, Chairman of the Welsh Government's Creative Industries Sector Panel:

The approach taken by the BBC has not been to our advantage. Firstly, they have chosen high cost drama that produces few hours and little network

portrayal of Wales. Secondly, the absence of most other genres creates an industrial mono-culture that precludes a balanced television economy. One side-effect of this will be largely to exclude local production companies and indeed local talent. [...] As a country we need to identify those elements of television that we need for specifically Welsh cultural, linguistic, social or democratic reasons.

(Ron Jones 2011)

Despite such criticisms it is clear that BBC Cymru Wales has recently enjoyed significant critical and popular success through its drama productions. Much of this has been attributed to Julie Gardner and Russell T. Davies, and the strength of their creative partnership in convincing the BBC to bring *Doctor Who* to Wales in the first instance, and then in making it a launch pad for other spin-off successes such as *The Sarah Jane Adventures* (2007-11) and *Torchwood*. Gardner's ability to nurture close relationships with writers has commonly been cited by industry figures including Jane Tranter, with whom Gardner went to work at BBC Worldwide America in 2009. Talent biographies are often repeated in industry discourse and, as Hjort and Petrie argue, 'individual initiatives and artistic leadership can play as a complement or alternative to cultural policy in a small nation contexts' (2007: 17). Here, we are struck by the commonalities in Wales, at least between cinema and television talent. Gardner's talent biography evidences how senior personalities matter not only

industrially (a talent for working with writers and in delivering numerous award-winning productions in an environment where, only a few years previously, there was a dearth of Welsh drama on the BBC), but also culturally. Notable here is the persuasive talent in convincing London-based executives to take Wales seriously as a place for excellent network drama production, a skill which should not be underestimated (Blandford and Lacey 2011). Moreover, mobility is central to Gardner's talent biography, encompassing both her own international mobility as a successful senior industry figure, and also her contribution to the BBC's mobility into Wales.

S4C is the other major commissioner of drama in Wales. The period 2010-14 has seen considerable development in the relationship between S4C and BBC Cymru Wales. In 2011, both broadcasters appointed new heads who appear to be working collaboratively with independent producers to maximize their productions' access to funding including co-production and export. Perhaps the most celebrated example is the crime drama *Hinterland/Y Gwyll* (2013), a co-production between S4C, Fiction Factory, the S4C Co-Production Fund and All3Media International. As in the case of Gardner, the narratives woven around *Hinterland* often cite the significance of Ian Jones (S4C's Chief Executive) and his particular international experience of television production. Jones, previously President of National Geographic Television International, was mentioned by several respondents as the key instigator in leveraging international distribution from All3Media to the *Hinterland* project. Different as Gardner's and Jones' roles are, their own professional mobility and talent

in making content mobile exemplifies how porous small nations can be, and may need to be, in sustaining a television production industry.

## **MOBILIZING PRODUCTION AND SYMBOLIC VALUE IN SMALL NATIONS**

The significance of Roath Lock for television drama production in Wales can be seen *both* in terms of its production value *and* in its broader symbolic value. In discussing the initial development of Roath Lock as a facility, Julie Scott (Head of Production, BBC Cymru Wales) noted that when they were designing the studios:

[W]e were accommodating *Casualty*, *Pobol*; both with enhanced studio sets and lots. It was also designed primarily for *Doctor Who*, because that's our continuing drama and, hopefully, the children's drama. Originally, it was *The Sarah Jane Adventures* and now we make *Wizards vs Aliens*. So in terms of the studio design, we don't have an awful lot of spare capacity. That was the whole point. We weren't designing it for a lot of extra productions.

As narrated here, the production value of Roath Lock to the BBC lies in the specificity of its design for drama production, and its efficiency as a facility that can operate continuously at capacity. The efficiency of delivery was also noted by Faith Penhale (Head of Drama, BBC Cymru Wales) when she recounted:

[The] feeling of success in Roath Lock was that it had happened. It had come in on budget, it had come in on time, everyone moved in, a few teething problems, but generally people were really excited to be here. And to have a facility like this in itself, it's almost unheard of nowadays in drama. We're used to going in to warehouses, and kind of grotty bits of town having to really kind of make, do and mend, and then suddenly we were given this incredible facility.

Part of the production value of Roath Lock lies in its timely delivery within budget in an era of austerity, coupled with state of the art technological capabilities that are rarely experienced by most UK drama producers who more commonly find themselves working in multi-purpose studios or buildings adapted (but not designed) for television production. In this respect, Roath Lock becomes a tangible expression of the BBC's investment in, and commitment to, network television drama from Wales. Furthermore, the proximity of drama productions under the same roof affords particular efficiencies and potential for talent-spotting and development:

[I]t means we've got the opportunity to develop talent across the shows. For, example, Brian Minchin who is now exec producer on *Doctor Who*, talent-spotted a script editor on *Being Human* when he was responsible for *Being Human*, and they have come in here and are now working on *Doctor Who*. So it means, in terms of staffing across all the shows, that there's a great



sense of camaraderie, but also potential to spot talent and develop talent.

(Julie Scott, Head of Production, BBC Cymru Wales)

The benefits of proximity were further exemplified by Scott when she recounted how productions have been able to use each other's lots:

So we'll all scrounge off, each production will scrounge off somebody else, and it's a benefit for all [...] we're always talking to one another, can we borrow, can we reuse, what can we do to share? Because it's the obvious thing to do. So in terms of production efficiency, it's good, but it's also developed collaboration.

Notable here is the particular communal reality of drama production. Roath Lock, before being officially named, was referred to as the 'drama village' (Wightwick 2012). That earlier name foregrounded both genre and community, which is evident in how Roath Lock is conceptualized today:

[W]e were quite lucky in that *Doctor Who* was already up and running, and *Casualty* came over obviously and a number of people did come with *Casualty*, but also *Being Human* was already running here. *Sherlock* was here, *Da Vinci's Demons* was just starting. There was a real sense that there was already a community of shows being produced in South Wales and, with that,

really skilled crews.

(Faith Penhale, Head of Drama, BBC Cymru Wales)

As Scott recounted, one of the benefits of Roath Lock is that ‘it really gives a focus for everybody that the BBC makes drama in Wales’. Far more contested, however, is the extent to which it represents the creation of a sustainable base with long-term potential for growth. Indeed, any narrative of progress is interrupted by the realities reported by the trade union representatives we interviewed. They tell a more complex story about how readily craft and skilled workers can or cannot move into Roath Lock, and the kind of production experience it represents. A survey conducted with camera crew by BECTU, for example, reported that members felt a ‘lack of access to the Drama Village and [...] lack of recognition of the work that they’ve been doing’ (Sian Gale, Project Manager, CULT Cymru). Here, both access and recognition of existing expertise and experience was seen to be problematic for members of the local Welsh industry:

A lot of those camera people, for example, have been working on those [S4C] dramas, but they wouldn’t get a look in as a DOP [Director of Photography] on the BBC Drama Village, because the BBC now are so terrified of risk [...] they don’t want to take any risk with anyone else because they can’t afford to fail. They need big names [...] our local drama people often aren’t getting a look in. That is a huge concern for us.

(Sïan Gale, Project Manager, CULT Cymru)

One of the limitations of Roath Lock, despite its potential then, is that for *some* companies it does not represent a direct solution to the risky realities of independent production, for instance by offering more access to commissioners who remain based in London. As one indie reported, ‘Roath Lock is a meaningless institution to us. It might as well be in Salford, it might as well be in Belfast, it might as well be in London – it bears no relation to us’ (Ed Thomas, Creative Director, Fiction Factory).

Notwithstanding such trenchant criticisms, Roath Lock has accrued a wider symbolic value, not only for television, but the creative industries in Wales. The discourse surrounding Roath Lock evidences the complex ways in which material investment in specific locales can be narrativized into a story of expertise, reputation and heritage and thus mobilized for specific external audiences:

It’s a manifestation of what we think of as a selling point for Wales, the Creative Industries in Wales in particular, which is that we have a particular heritage and particular strengths in producing television and particularly in producing drama television bilingually some of which is recognized internationally particularly in the last few years; the likes of *Doctor Who* and *Sherlock* and *Atlantis* are things that are visible internationally. Roath Lock is a focal point of attention for that kind of activity.

(Jo Wright, WG Creative Industries Team)

Symbolic value is a difficult concept to define, though it enjoys a prominent place in the literatures and practices associated with place branding and creative clusters (McElroy 2011). The team responsible for delivering the creative industries agenda for WG are alert to this ambiguity: '[t]he utility of Roath Lock as being a manifestation of a sector strength is actually hard to nail down because it's based on skills of a fairly mobile workforce, changing industry, changing support structures and so on' (Jo Wright, WG Creative Industries Team). It is precisely because symbolic value can be so elastic a concept that the physical reality of Roath Lock as a building and a production base takes on so much meaning. This symbolic value is put to work both within and beyond the borders of the small nation. A marker of the success of this narrative can be seen in the recent announcement that the film company Pinewood is to set up a new studio in Cardiff, offering a 'priceless opportunity to promote Wales as a world-class location for film and television production' (First Minister of Wales, Carwyn Jones, cited in BBC 2014).

In his essay on Icelandic cinema Björn Norðfjörð cites the anti-hero of the novel *101 Reykjavik* as he travels around the world watching television 'I watch the Pakistani news, mainly to see if they have included Iceland on their world map [...] Iceland isn't there. That's the deal with Iceland. Iceland is the kind of country that sometime is there and sometimes isn't' (2007: 43). This illustrates one of the more mundane realities for the citizens of small nations: an experience of cartographic invisibility which often necessitates an explanatory narrative of where you're from. It

is perhaps because of this everyday reality that the metaphor of coming to be ‘on the map’ is used so readily by our respondents: ‘[Roath Lock] just kind of further put Wales on the map as a place to come and live, and work’ (Faith Penhale, Head of Drama, BBC Cymru Wales). At other points however, being ‘on the map’ is understood as integral to the narrative of professional career development and expertise. The transformation of BBC Cymru Wales’ fortunes, so that it has come to be on the radar for London-based BBC commissioners, also benefits the professional narratives of some creative workers in Wales, even if only tangentially:

I think the big shift, [...] is when *Doctor Who* was commissioned here [...] that had such an impact and it showed everyone that you don’t have to make the dramas in London with London crew and it really put BBC Wales drama on the map straight away.

(Brian Minchin, Executive Producer, BBC Cymru Wales)

Beyond the creative labour market, and the ways it is mobilized by Welsh Government, the value of Roath Lock for the BBC also lies in its public visibility to licence fee payers. At a time when substantial cuts at the BBC and S4C have elicited public criticism, Roath Lock can stand as something tangible for audiences to visit and celebrate, while the output it generates helps cultivate a narrative of national creative achievement. This research does not purport to represent public opinion in Wales regarding Roath Lock per se, but instead notes a discourse amongst

respondents about the public value that the BBC can attach to Roath Lock, and which it can exemplify through events such as the open weekend:

It was lovely when we had the open weekend [...] we opened the studios up to the public, and it was an opportunity to show and tell, what had been built here, but also we had displays from the indie productions that I've been talking about. It was just great to interact with the audience, because there's a real sense of ownership then about everything that's happening in Wales at the moment. Which, of course, is really, really constructive.

(Julie Scott, Head of Production BBC Cymru Wales)

Such footfall is actually very unusual as the facility is not routinely open to the public, unlike the nearby *Doctor Who* exhibition which attracts numerous paying visitors.

To conclude this section, the significance of Roath Lock for television drama production in Wales lies in both its constructive and persuasive function. On the one hand it provides a physical state-of-the-art home for several network drama productions, drawing together a host of creative workers required for the production of such content, and delivering necessary financial and resource efficiencies. On the other hand, it has the potential to persuade a range of stakeholders (including licence fee payers, London commissioners and the international television industry) that Wales is a place in which to make excellent television drama.

## **REGIONS, NATIONS AND THE ADVANTAGE OF DISTINCTION**

Roath Lock's production and symbolic value coheres in how it can mobilise an image of Wales as a place of expert television drama production and thus compete in global markets. An important aspect of competition is distinctiveness: 'every nation in the world that's got creative industries as one of its priorities will say "we're great for creative industries"'. You've got to come up with a differentiator' (Jo Wright, WG Creative Industries Team). From a government perspective, success in television drama can be a distinct advantage to be mobilized for the benefit of wider creative industries policy:

At the centre of this is some kind of strength in TV drama production that we think we can shout about and that helps us with several of our tactics or strategies for developing the creative economy in Wales. One of them is get more network commissions coming to Wales, if we can demonstrate we can produce high quality television particularly... it's useful to focus on a genre and say we're really, really good at that.

(Jo Wright, WG Creative Industries Team)

There are benefits in focusing on drama, including both its relatively higher cultural and financial value, which can generate revenue in each new season and in new territories: '[t]he benefit [...] in TV drama production is that often these things last for several series so you get a permanence that you wouldn't get from a film project for

example’ (Jo Wright, WG Creative Industries Team). Throughout our interviews with BBC and government staff, Roath Lock was situated in a much longer narrative of expertise in drama production in Wales. Story is one way in which people make sense of the myriad, often contradictory experiences of everyday, professional life. The narrative construction of Roath Lock interests us in how it works performatively both to describe recent activities and to instantiate their significance. In attending to the narrative and symbolic significance of Roath Lock we are aiming not to validate these accounts as ‘true stories’ of the ‘real value’ of the facility but instead as revealing insights into how different actors interpret and take ownership of the meanings of Roath Lock as part of a broader process of making sense of professional and national changes. Commonly, this story began with the mythology of *Doctor Who*, Russell T. Davies and Julie Gardner (‘they were the ones who put it on the map’: Julie Scott, Head of Production BBC Cymru Wales), and progressed through to current productions such as *Sherlock* (produced by Hartswood Films for BBC Cymru Wales) that are housed within that facility, and their network and export popularity. The studios’ current full capacity, though potentially limiting future growth, was seen as a measure of its success:

Well, I think the huge thing its [Roath Lock] affected is the perception of drama production in Wales. [...] ten years ago, I think there was just one network drama series being produced here [...] There tended to be a pattern where you’d get a series or maybe a film or a one-off, and then nothing would



be re-commissioned for a number of years [...] That seems to have improved, and I think with a perception of an increase in volume, what has happened, is you've started to see now successes outside of the BBC in terms of independent production as well.

(Gareth Williams, CEO Rondo Media)

Roath Lock is here associated with a plenitude of productions that offers continuity and potential sustainability in terms of re-commissions and future possibilities for success within, and beyond, the BBC through reference to a slate of forthcoming productions (e.g. *War and Peace* (2015)). Together, this works to present a coherent past, present and future for television drama production in Wales. Nonetheless, there are genuine dissonances in this narrativization, including the contrast between seeing Roath Lock as a catalyst for growth on the one hand, and as a place to which local creative workers may struggle to gain access on the other. Even more telling, is that whilst Cardiff is home to some of network television's most popular dramas and successful exports, 'Wales has seen the biggest decrease, by more than a fifth, in spend on nations' programming since 2008' (OFCOM 2014). Nevertheless, this narrative of continuity is important in the context of the risks associated with television production in general, but particularly in drama, because of the cost associated with the genre (Nelson 2007: 63). Moreover the narrative of evolving expertise also works to historicize relations between Wales and London. Here, the story of Roath Lock resonates with wider cultural concerns to challenge metropolitan

perceptions:

I started working as a script editor on *Belonging* which was a local series made for BBC Wales. And when I first knew the BBC Wales drama department, it made a lot of local dramas but it didn't really have a presence on network television at all. There was always a perception at the time that people didn't want stuff from Wales [...]. The big shift which everyone knows is when *Doctor Who* was commissioned here.

(Brian Minchin, Executive Producer BBC Cymru Wales)

The mythology of *Doctor Who* allows for a narrative of progress that mobilises Wales into a place to be recognized as a good place for television drama production as opposed to its earlier history (as recounted to us by some participants) as a place that did not seem to be acknowledged or given its due by the powerful centre.

However, Wales' success at articulating value and converting this into production investment has also been seen by some as coming at the expense of English regions. Prominent in our research was concern that the English regions had lost out in competition to the devolved nations. A recent PACT report notes that 'in addition to the macro trends in PSB spending out of London there have been significant shifts in the distribution of spending across the English regions and UK Nations' (2013: 10), with growth in network spend in Cardiff and Glasgow, for example, and declines in the Midlands, North East and East of England: 'The English regions have done

incredibly badly out of the BBC. Well, I mean, they've invested, and they should do, they should invest in the nations, but what's the population of Wales?' (Caroline Norbury, CEO, Creative England). This criticism illustrates both the geo-political realities which shape the positioning of the United Kingdom's devolved small nations in relation to their larger neighbour, and the challenges posed within England by the ongoing process that is devolution. Nowhere is this tension more vividly exemplified than in the relocation of *Casualty*, the BBC's long-running medical drama, from Bristol (its base since 1986) to Roath Lock in 2011. This move was publicly criticized by the local Bristol press and by numerous professional campaigners in Bristol. They cited research by Bristol City Council and South West Screen (until 2011, the region's development agency for film, television and digital media), which found that the total financial impact of *Casualty* leaving Bristol amounted to £25m per year (Sweney 2009).

Here again the voice of trade unionists illustrates the complexities at play: 'We supported our colleagues in the Southwest because, yes, we want more work, but again it's about that cultural thing. We would rather more work that reflected [Wales]' (Sïan Gale, BECTU/CULT Cymru). When seen in the context of both regions *and* nations Roath Lock can appear as either the epitome of politically driven favouring of the devolved nations or as a long overdue investment and response to greater recognition for the devolved nations.

Whilst it is television production that is ostensibly being discussed, the cultural geography being articulated speaks to a bigger political picture in which Wales, as a

small nation, has to negotiate its place, its prominence and its relationship to its much more powerful neighbour. Such relational thinking is an important element in many small nations' self-perceptions, and is, perhaps, one reason why a facility that produces no English-language dramas about Wales or specifically for Wales (i.e. for BBC Cymru Wales opt-out) can be held up by so many as evidence of Welsh success.

### **MOBILE CONTENT: EXPORTING DRAMA FROM SMALL NATIONS**

In his assessment of the challenges facing public service television in small European nations, Petros Iosifidis (2007: 78) argues that the small market size 'makes it hard to support large-scale domestic production'. The result is that broadcasters in these territories are often 'reliant on imports for more expensive forms of programming, such as dramas and documentaries [and are] unable to produce sufficient levels of in-house productions, or modernize in terms of greater use of independent programme commissions or co-production financing' (ibid). In a Welsh context, Roath Lock challenges this model, offering instead an example of how public service television in small nations can work outwards from a domestic base into both proximate (i.e. UK network), and more international markets. Therefore, mobility in small nations can extend inwards, but also crucially outwards too.

In Wales, this process is most commonly exemplified with recourse to *Doctor Who*, but more recently it is *Hinterland/Y Gwyll* which offers the most fêted example of this amongst our interviewees. Transmitted in Welsh in autumn 2013, it was also secured by BBC Cymru Wales where it was transmitted in a bilingual version in

winter 2014, and by BBC Four where it was shown as part of the international crime drama offering in spring 2014. Working with international distributors, All3Media, the series has also been sold to DR Denmark and Netflix, realising an international audience for indigenous Welsh drama production. This therefore begs the question of whether small nations export differently.

In the case of Wales, one of the defining routes outwards for content lies with the international clout of the BBC. Of considerable benefit is this small nation's proximity to one of Europe's most dominant and successful broadcasters (in terms of longevity and its institutional presence internationally). Furthermore, a significant asset is expertise in forms of content that can more readily cross linguistic borders. S4C's success in the 1980s in the field of animation, perhaps best exemplified by *Super Ted* (1983-86), demonstrates that these strategies have an institutional history. This also resonates with Scandinavia, where there is a strong strategic collaboration based on shared histories of commitment to public service, and to a common aesthetic that emerges from cinema and literary crime fiction that works to cohere the reputation of Scandinavian content abroad:

The success of DR Drama [drama department of the Danish public service broadcaster DR Denmark], domestically *and* internationally, has been attributed to the so-called 'dogmas', applied from the mid-1990s onwards [...]

four dogmas summarise the peculiarities of DR's approach to television drama production: one vision, double story, crossover and producer's choice,

respectively. These dogmas have allowed DR to create a new conception and interpretation of Danish television drama, in combination with a change in the production culture of DR Drama itself.

(Waade & Jensen 2013: 197-198)

Whilst the histories, aesthetic sensibilities and strategies of broadcasters and producers are key to international mobilisation from small nations, other stakeholders, notably distributors and government, also play an important part. The case of *Hinterland/Y Gwyll*'s international distribution is a case in point. Executive producer Ed Thomas credits the series' international distributor, All3Media, for their commitment to the project but also their facility in adopting the BBC brand as an asset in international markets:

We discussed long and hard with All3Media who said it would be useful. Even though BBC aren't the co-producer on *Hinterland*, it looks good for our sales if we could put BBC. So the fact is that they were quite happy to put a non-co-producer on their posters.

Also key was the Welsh Government: its creative team explained that one of the highest order priorities for the sector was 'helping Welsh content owners to sell internationally'. Thus:

[I]n international markets [...] we are not spending lots and lots of time and money trying to help companies get S4C commissions because that's not where the market failure is. Arguably the production base has been too dependent on BBC Wales and S4C investment and that has been squeezed in the past few years. If you've only got one or two customers you're highly vulnerable. When they come under pressure it's why aren't you out there selling stuff to China, Mexico or Germany.

(Jo Wright, WG Creative Industries Team)

Here we can also see how the success and sustainability of the television production sector in small nations remains orientated to the markets of larger dominant nations. It is not only the Welsh Government that is aiming strategically to grow the international value of television content and production but also the UK government:

I think that will make a big difference with the introduction of the UK tax credit. It'll be interesting to see how many other American producers are attracted here [...] obviously Northern Ireland with *Game of Thrones*, very, very popular. But with the UK tax credit, hopefully that will be spread around.

(Julie Scott, Head of Production, BBC Cymru Wales)

Persuasive value lies in how prominent individuals, together with institutional credibility and the presence of excellent locations and crews, can attract inward investment of the kind that the UK tax breaks policy aims to achieve.

## **CONCLUSION**

The analysis of a specific infrastructural investment in one small nation, Wales, offers an opportunity to better understand the competing dynamics facing small nations as they seek to develop their television production capacity. Whilst some aspects of our case study may be specific to Wales, the issue of power – including the degree to which small nations and institutions (both government and broadcasting) enjoy autonomy over their own activities and spend – is likely to resonate beyond Welsh borders. Further comparisons with other small nations, including those that collaborate regionally such as Scandinavia, would be valuable additions to this debate.

Moreover, one of the defining characteristics of small nations – their tendency to have populations that move to other places for reasons of work, education and business opportunities – needs also to be developed further in our thinking about the lived geographies of creative industries in small nations. In our research, mobility proved to be a defining characteristic not only of the ecology of TV drama production, but also of how people and places operate dynamically in relation to one another. Our research testifies to the circuits of mobility that shape the contemporary TV industry, including movement of productions, locations shoots, investment and people into



small nations, and of people and content outwards into the international TV marketplace. However, we contest that mobility cannot be reduced purely to physical assets as is apparent in the narrativization of Roath Lock's symbolic value. It is the discursive mobility of such stories, and their rhetorical value, that puts Wales 'on the map', and grants it the status of really being somewhere to make television; as one of our respondents expressed it, becoming 'a serious contender' (Julie Scott, Head of Production, BBC Cymru Wales).

This discursive mobility exemplifies the media's power in making place and in transforming the fortunes and perceptions of existing places in the cultural and political imagination. It was something of this nature that seemed to underlie Tony Hall's (2014) personal reflections on returning to Wales and on finding it transformed:

I was BBC's Director of News during the uncertain days of 1997 when the very idea of devolution in Wales was so hotly contested and divisive. Coming back now, I find a nation that exudes a self-confidence, a clearer sense of itself and its own values, and an ambition that feels very different. But it is not just Wales that has changed. I have also come back to find a BBC Wales that's transformed. Truly transformed.

Roath Lock is integral to that transformation and, at this early stage in its development, appears to be successful within its principal term of reference, namely to house more efficient and well-made original drama for BBC network and for S4C.

Roath Lock represents for many stakeholders a key stage on the journey towards a sustainable creative base in Wales. This base would include a critical mass of home-grown independent production companies, and a skilled and sustainable labour force that includes opportunities for new entrants and senior talent, who share the view of Wales as a good place to make television drama (including new commissions and returning series) with export potential. It is, however, harder to judge whether this ambition of sustainability is yet being fully realized.

Further, it is even less clear what the place of indigenous programming (that is television *by* and *for* Wales, rather than being only *from* Wales) should be in securing a sustainable base that might ‘build up a critical mass of representations’ (Blandford 2000: 15) so that the culture can represent itself *both* to the wider world *and*, just as importantly, to itself. While Roath Lock testifies to progress made in persuading London to make Wales a base for drama production, thereby offering greater opportunities for some creative workers, far less progress has been achieved in realizing the ambition to develop ‘strong committed indigenous work’ (Berry 2000: 129) which represents the diversity of contemporary life in Wales. As television producer Angela Graham (2014), recently argued:

We cannot be complacent about the welcome success of network product.

Although that benefits Wales in many important ways it is, more often than not, content which is not culturally specific to Wales. It could be made anywhere, and we in the business in Wales don’t need to be told we have

world-class skills – it’s not news to us; it’s only news to those who didn’t know us.

It is in these diverse elements of the debate on the future sustainability of Welsh television production that we would argue it is vital to attend not only to the voices of the broadcasters, but also to trade unions and independent production companies whose experiences are not always heard in the celebratory place-making narrative of Roath Lock and BBC Cymru Wales’ success. Again, as argued earlier, the voice and lived experience of television practitioners and stakeholders should become a vital element in the academic critique of cultural and industrial developments in television production. This is one of the most important methodological and ethical challenges in television industry research and is part of what gives the research of small nations its critical edge.

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