

Review of the Film Sector in Scotland

Creative Scotland

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BOP
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1. Executive Summary

1.1 Introduction

This Review of the film sector in Scotland is one of a series commissioned by Creative Scotland that examine key cultural or creative sectors. It is a recognition by Creative Scotland of the importance of film in the Scottish cultural landscape: the current crop of successful films such as *Sunshine on Leith* and *For Those in Peril* show what Scottish talent is capable of. Yet the film industry in Scotland remains a small part of what is a globalised industry. Scottish talent crosses borders easily and often works on projects with no distinctively Scottish flavour, while audiences in Scotland are happy to watch films from all over the world, especially from America. Wider global forces, from the emergence of new technologies to fluctuations in exchange rates, can often have more effect on the level and nature of filmmaking in Scotland than the activities of any public agency. Nevertheless, many in the film industry feel that, despite the current successes, the industry is at something of a crisis point, with levels of production that are too low to sustain a viable domestic industry. This Review therefore comes at an opportune time, when both the industry and Creative Scotland are thinking hard about the future of the sector and the roles they have to play in it.

That said, this review does not focus exclusively on the making of films. It looks at the sector in its entirety, devoting a chapter to each of four activities: watching films, learning about them, making them, and earning a living from them. There is then a shorter fifth chapter, examining the public agencies that shape Scottish film, before the review sets out a vision for the future and how Scotland might get there.

The review is an independent one. The consultancy team (led by BOP Consulting) that Creative Scotland commissioned are responsible for the Review and for the conclusions it reaches. However, the consultants

carried out extensive consultations with all branches of the sector, and those views have informed the proposed vision.

1.2 Watching film

For the majority of Scotland's population their connection with film is as a viewer. Most have good access to high-quality film experiences – either on cinema screens, television (TV) or via a computer.

More than half of Scots (54%) went to the cinema in the last year, making it the most popular form of cultural activity outside the home. In 2013 there were 65 cinemas in Scotland with 337 screens. Multiplex cinemas account for 76.3% of all screens in the country. Scotland also has two of the three most important film festivals in Britain: the Edinburgh International Film Festival (EIFF) and Glasgow Film Festival (GFF).

However, there are significant gaps in cinema coverage, especially in accessing venues offering a diversity of programming, and many of the worst-affected areas (such as the Borders or the Highlands) also lack or have patchy access to superfast broadband.

Television remains the single largest platform for film consumption. However, while 70% of films watched in Scotland are watched on TV these are rarely Scottish or even UK films and the majority were not made in the last five years. New online channels for viewing film are growing fast, and a Scottish company, Distrify, is particularly prominent in this field.

1.3 Learning about film

Film education serves a number of purposes. It is a route into professional practice for some, but for the majority it is a training in audio-visual literacy, a chance to learn some skills with potentially wider applicability, and a source of intellectual engagement. In schools, it is increasingly seen as a fundamental form of literacy, and is explicitly recognised as such in Scotland's Curriculum for Excellence.

However, school qualifications in Scotland do not as yet reflect this greater awareness of the role of moving images. There is no dedicated high tariff qualification in moving images or film in Scotland, as there is in

other nations of the UK. Take-up levels for media courses in Scottish schools are generally low, and there are few teachers with specialist skills in these areas

At tertiary (college and university) level, there would seem to be an adequate provision of courses – though the landscape, especially in colleges, is changing fast, as institutions and courses are consolidated. Scotland has some notable pockets of film-related excellence in its universities, including Screen Academy Scotland in Edinburgh, one of only three Skillset Film Academies in the UK, and the Royal Conservatoire of Scotland.

Skills training for those looking to break into the sector or working in it already is delivered through a number of routes. The forthcoming Skills Investment Plan for the creative industries (which includes the film sector in its remit) is being led by Skills Development Scotland, and will seek to better co-ordinate the supply and demand for such training.

1.4 Making film

As Scotland remains (for now at least) part of the UK, many of the factors shaping the level of production are determined at the UK level, such as policies on film tax relief, the allocation of National Lottery funding and the exchange rate. Film in the UK is a London-centric business, and Scotland's film sector is perceived to be remote from that centre.

Most feature films made in the UK require public funding in some form or another. The BFI notes that the principal sources of public funding for film in 2011/12 were the film production tax relief (58.5% of public funding), the National Lottery (14%) and grant-in-aid from central government (11%).¹ Film production and development received 70% of the total financial support.

The 1990s and early 2000s saw the development of institutional structures to support indigenous filmmaking in Scotland and attract international production. This, coupled with the availability of lottery funding for film from 1995, led to a rise in Scottish feature film production

from an average of two per year in the early 1990s to around six in the early 2000s, where it has remained since (though the number fluctuates from year to year).

Scotland strives to encourage a mix of large inward investment productions and smaller indigenous productions. It has had some recent successes in this respect. *Skyfall* and *World War Z* were filmed in part in Scotland while this year indigenous films such as *Sunshine on Leith* and *Filth* have attracted critical and commercial acclaim. However, these tend to be exceptions rather than the rule: Scotland makes too few films to be able to produce a regular supply of box-office hits.

The BFI and Creative Scotland are the most significant potential funders – and talent developers – within the Scottish film industry. Creative Scotland administers National Lottery funding for film in Scotland. This amounted to approximately £5.3m in 2011/12 and £6.2m in 2012/13. Of that £2.7m in 2011/12 and £3.5m in 2012/13 was allocated to production and development funding.

Scotland's animation companies work across television, film, advertising, visual effects, gaming and online content. Much of their work is shown outside Scotland and some companies reported their Scottish revenues were as little as 10% of their total turnover. Most companies work in television, with few developing feature productions.

Looking at Northern Ireland and Denmark, places often mentioned during the consultation, it is clear that consistent and long-term support for screen at government level has played an important part in establishing a critical mass and attracting world players. If Scotland wishes to compete in a meaningful and sustainable way at that level, a long-term strategy supporting film development, production and distribution is needed.

1.5 Earning from film – supporting enterprises and employment

Film-related businesses cover a broad spectrum of activity from archives, training agencies and cinemas to production companies, facilities and studios, all generating jobs and revenue. In Scotland it is

¹ Figures from *BFI Statistical Yearbook 2013*

rare for a business to focus solely on film; instead, most work across the screen sector. The majority of film-related businesses are based in the central belt.

Creative Skillsset estimates there are 2,692 people working in film in Scotland, accounting for approximately 8% of the UK total. Of these, 2,018 were classed as employees, while 674 were freelance.²

Micro-businesses dominate the film sector numerically (as they do the creative industries more generally). Film businesses, especially in production across all its forms (features, shorts, animation, documentary) are often built around one or two key creative talents. For many, this is their preferred business model and they are not looking to grow substantial businesses (though many struggle even to build sustainable businesses). Others prefer to work as freelancers, building a reputation for themselves as individuals rather than trying to turn this into a free-standing enterprise.

Although Scotland has a number of purpose-built facilities for use as workspaces, the lack of large-scale studio space has a detrimental effect on the country's ability to attract big-budget productions, other than for location shooting. A number of empty buildings have been pressed into service for film production on an *ad hoc* basis but this imposes additional costs on the production to find and adapt the buildings for temporary use.

TV production is vital for maintaining facilities businesses and allowing crew to make a living. UK government taxation policy has recently changed in this area to offer tax relief for high-end TV production. Incoming and UK television therefore both offer important opportunities for the sector, but while UK broadcasters do work with Scottish companies, the extent of this has been limited.

Tourist agencies have recognised that films made in or depicting Scotland have brought in visitors, and are trying to strengthen the 'offer' associated with them. In 2012, VisitScotland built its biggest promotional

campaign to date around the release of the animated Disney feature film, *Brave*.

1.6 Public agency support for film

In Scotland screen support is led by Creative Scotland, the successor body to the Scottish Arts Council and Scottish Screen. It was established to work across the arts and creative industries, an arrangement unique in the UK. This means, however, that Creative Scotland has no public-facing screen or film brand other than that of its locations service. The majority of countries in Europe, including those which aim to attract film and television production, have a distinct screen agency where information, advice, contacts and funding arrangements can be found by both the local film community and those throughout the world who wish to work there.

However, digital convergence means that a film agency – or even one focused just on television and film – would feel out of date. Markets and audiences have shifted considerably, even since the days of Scottish Screen, to a complex and changing pattern of content consumption.

There is an acceptance in Creative Scotland and the Scottish Government, as well as across the sector, that Scotland would benefit from a fully developed screen policy. Such a policy is essential to achieve sustainable success in this field. That said, it is evident that Creative Scotland (along with other agencies) is providing a significant level of support to the sector already, as well as to the development of content: TV programmes, films, games, and apps.

1.7 Vision for the future

The Review was never intended to provide detailed policy recommendations for Creative Scotland. However, the wealth of information and opinion given during the consultations does represent a view of the future that needs to be captured. The approach the consultants have taken, therefore, is to set out a vision of where the film sector could (and perhaps should) be in ten years' time, together with some thoughts on the actions required to reach these goals. There are 14 objectives to aim for:

² Creative Skillsset (2010) *Labour Market Intelligence Digest*

1. Film in and from Scotland is celebrated domestically and renowned internationally. Practitioners develop a range of cultural and commercial projects across platforms; the infrastructure required to service both local and incoming production to international standards is in place; and audiences of all ages enjoy a diverse range of films

How to get there: A strategy for the development of a sustainable film and screen sector should be developed by the Scottish Government and the agencies responsible for the sector.

2. A screen-focused public agency, most likely based within Creative Scotland, with a clear strategy and brand identity is known internationally for championing and networking across the sector, as well as for welcoming international production for all screens

How to get there: Branded 'agency' or 'super-hub' within Creative Scotland develops strategy across the breadth of the film and screen chain – continuing the dialogues established by this Review. It is supported with long-term commitment by the Scottish Government and the Board of Creative Scotland, and enjoys a productive relationship with all other relevant agencies.

3. Diverse audiences across Scotland enjoy film choice, at the cinema, on the move and at home, including a range of productions from Scotland. Online platforms make Scottish film available to worldwide audiences

How to get there: Develop and sustain an integrated network of high quality modern cinema provision available to all, in a variety of venues and through online platforms supported by Scotland's cultural cinemas.

Film Hub Scotland, working in conjunction with Creative Scotland, is best placed to lead. Complete the roll-out of next-generation broadband across Scotland, a key enabler of audience access.

4. Audiences have a deeper and broader engagement in Scottish film, with stronger links between communities and filmmakers. UK and Scottish networks of audience development agencies work together for ever greater success

How to get there: Again, Film Hub Scotland to lead and to develop networks with training providers and BFI/Creative Scotland.

5. More Scottish films are being made – documentaries, features, animation, art films – and public funding plays a part in their success. Targets are established for numbers of feature films per year and share of domestic box office – for example, the support requirements for doubling production to 12 feature films a year and 5% of domestic box office might be investigated. Scottish and UK public funders nurture talent in Scotland and financially support production

How to get there: More production funding and more active support for producers to find production partners. Initiatives such as Market Leaders and those of TRC Media are built upon. To increase production levels producers need to have more funds committed earlier in the process, and be connected across the UK and internationally.

6. There are multiple sources of funding available for film development and early support and funding, tailored to suit producers, writers and directors

How to get there: As well as a greater level of funding overall, development funding should be more diverse. It should be committed earlier and support a range of styles and genres, recognising that different types of production have different development needs.

7. More inward investment production in both film and television. More production means more jobs – and keeps the production pipeline busy

How to get there: Within the constraints of state aid rules it is vital to consider incentives to encourage production to come to Scotland. These incentives should be spend-related and linked to the employment of Scotland-based crew, particularly in senior grades.

8. Broadcasters play an integral part in the film sector – with Scotland's broadcasters offering airtime for Scotland's features and shorts, participating in production and talent development, and providing programmes for audiences and jobs for the sector. UK broadcasters with film divisions engage with talent in Scotland and

support its producers. TV production – both from UK and international broadcasters – offers employment and talent development

How to get there: Strong linkages and encouragement of television production are essential to bring in additional projects, develop talent and sustain business. The sector itself must develop further relationships with broadcasters. Whilst under the current constitutional arrangements the Scottish Government lacks powers in relation to broadcasting, through persuasion it may be able to influence broadcasters to engage more fully with Scottish film. The Scottish Government and its agencies actively engage in encouraging international television production to come to Scotland.

9. Enterprise support will be robust across the film sector, including commercially appropriate support for talent driven micro-businesses

How to get there: The enterprise agencies – Scottish Enterprise, Highlands and Islands Enterprise, Business Gateway and the Cultural Enterprise Office – work with Creative Scotland and the Scottish Government to ensure commercially appropriate, well-marketed support for film-related businesses to ensure growth, sustainability and stability.

10. Digital technology and distribution allows access to filmmaking and viewing as never before. A mutually supportive sector embraces new ways of working and new filmmakers across all platforms

How to get there: Develop marketing and distribution platforms, particularly for low budget productions where online distribution platforms offer hitherto unexplored potential. R&D funding will be vital.

11. Festivals across Scotland are key dates in international and local calendars, and develop professional and audience engagement, enhancing Scotland's reputation as an international centre for film

How to get there: A coordinated festival network serves and anticipates audience need. Edinburgh International Film Festival engages fully with industry and establishes a strong international position, and Glasgow Film Festival develops its reputation. Both are flagship festivals and as such require funding and capital to build and develop.

12. The Curriculum for Excellence has film/screen at its heart, taught by teachers whose training gives them confidence in theory and practice. Moving Image Arts is taught in secondary schools across Scotland. Film clubs for watching, making and understanding, in schools and elsewhere, will be available for all

How to get there: Both the curriculum and teacher education (initial training and in-service) support the development of practical and pedagogical excellence in Moving Image Arts. Creative Scotland champions screen education, working with Education Scotland to ensure good provision.

13. Higher education sector provision has clear aims and provides, where appropriate, pathways into careers. Screen Academy Scotland's postgraduate courses are funded at conservatoire level to match the National Film and Television School (NFTS). Undergraduate courses offer both theory and practical training in a coordinated way to provide a range of skills and career development

How to get there: Coordination of provision to ensure that graduates have appropriate skills to enter the broader film sector – not just the industry. Linkages between the higher education sector and internship programmes will be beneficial, as will the development of the Modern Apprenticeship Scheme (to ensure it is viable within the film sector where many are employed on a freelance basis). There is development of other models which help bridge the wide gap between graduation and significant employment.

14. Skills provision, across the sector rather than just for industry, is coordinated and provided in further education as well as by independent training providers. With significantly increased production, on-the-job industry training may be accessed more frequently.

How to get there: A consistent analysis of skills requirements is needed and it is hoped that the Skills Investment Plan being led by Skills Development Scotland will provide a strong framework for the creative industries, including film. Skills Partnerships, which have worked well in other sectors, are also needed.

2. Introduction

2.1 Film Sector Review

In its 2011-14 Corporate Plan Creative Scotland stated that it would conduct a series of reviews into several important cultural sectors to investigate the issues they faced. The Film Sector Review is one of these.³ The reviews will help Creative Scotland develop its own thinking but are also intended to provide guidance on the role public policy can play in the various art forms under discussion.

These reviews are not, however, confined simply to the production aspects of their sectors. Instead, they look at their art forms in the round, also examining consumption, education and skills, and the commercial role of the sector in the Scottish economy. The reviews also pay attention to the wider contexts in which their sectors operate, from the effects of technology to the state of the market in the UK and beyond. The Film Sector Review thus provides an overview of all the main elements of film activity in Scotland. It describes and analyses the sector's strengths and weaknesses and considers the opportunities and challenges it faces.

The Review argues that the sector's cultural and commercial potential could be further enhanced, and concludes by putting forward a vision of where the film sector might be in ten years time, making a series of recommendations for how the sector might get there.

2.2 The project

In January 2013 Creative Scotland appointed BOP Consulting, in partnership with Whetstone Group and Olsberg SPI, to carry out this review. During the research the consultants reported to a Creative Scotland Board sub-committee, consisting of Robin MacPherson (chair),

³ By the end of 2013 three of these reviews had been published, looking at theatre, dance and music. A review of visual arts and crafts is underway.

May Miller and Richard Scott. A Film Reference Group, representing interest groups and key individuals in the sector, was also set up to guide, test and challenge the consultants as they carried out their work. (See Appendix 10.1 for membership.)

The Review is not intended directly to determine the strategy of Creative Scotland (or any other public agency) or the Scottish Government. That is a matter for those agencies and the sectors they serve. The brief for the Review asked instead for an accurate picture of film in and from Scotland, which might then be used as a basis for decisions about the formulation of policy.

The Review is an independent one, but the recommendations it puts forward were drawn up after an extensive period of consultation with the sector and other interested parties. This took three forms. Firstly, stakeholders were spoken to, both individually and in groups. Secondly, an Open Call for written responses to a series of questions about the sector's future was issued. Thirdly an Open Meeting was held for the sector.

In total, 62 stakeholders were consulted either individually or in groups; the Open Call elicited 87 responses from individuals, as well as a range of responses from organisations; while around a hundred representatives of the sector attended the Open Meeting. The consultants are grateful to all those who took part for sharing their hopes and ideas for the future of Scottish film.

2.3 Structure of the Review

This is a Review of all film-related activity in Scotland. The structure of the report reflects that, with five main chapters examining the key aspects of film in turn. They are:

Enjoying film – the cinema experience, watching films on TV or online, festivals, and preserving and maintaining Scotland's screen history

Learning about film – from school and non-formal learning through to further education (FE), higher education (HE) and industry training

Making film – the development and production of shorts, documentaries and feature films

Earning with film – making a living from film, including related businesses such as TV production and related employment such as film tourism

Public agencies for film – the public agencies and structures which support film have changed dramatically over recent years and this was a topic that provoked considerable debate during the consultations. The consultants therefore felt it merits its own separate section.

Each chapter considers what activity is taking place, where it is happening and who is delivering it, where their support comes from and the opportunities available to them to become stronger and more sustainable. (There is, inevitably, a degree of overlap between some of these chapters.) There are also distinct sections in each chapter reporting the views given by the consultees where they differ from, or are additional to, the material covered in the main body of the chapter. Each chapter then concludes with an assessment by the consultants of the issues related to the subject.

These five chapters form the ‘meat’ of the Review. They are bookended by a short chapter outlining the wider context in which Scotland’s film sector operates, including the global trends which are shaping cinema as an art form and the role of technology, and the Review’s conclusions. These put forward a vision of where Scottish film might be in ten years time, together with a series of steps that might help the sector get there.

3. Context

3.1 Introduction

This report looks at several aspects of Scotland's film sector. However, it is important to remember that film is a global industry, with makers, producers and the films themselves constantly crossing national boundaries. Its scale means that international developments or shifts in technologies can affect Scottish film in ways that Scotland itself has little control over. To make sense of Scotland's film sector it is necessary to acknowledge the connections it has to the rest of the UK, to Europe and to the wider world. This short chapter of the report therefore gives a brief account of the film world in which the Scottish sector operates.

3.2 Watching film

Cinema attendance has come back into fashion in Britain in the last three decades. While the attendance levels of the 1930s and 1940s will not be repeated, there has nonetheless been a dramatic reversal of the steep decline caused by the spread of television. A key driver of this change was the introduction into the UK of the multiplex cinema. The first of these opened in Milton Keynes in 1985, and they have since spread rapidly across the country. Screens in multiplexes now make up the vast majority of screens available for film-watching, in Scotland as well as in the UK. Even the economic problems of the last few years have not deterred people from going to cinemas – attendances in 2012 were the third-highest in the last forty years.

Although multiplexes usually offer a more varied diet than the one- or two-screen cinemas they have replaced, with commercial films often being supplemented by indie and Bollywood films, they do not cover the full spectrum of film. A range of publicly-supported cinemas, often part of multi-art form venues, draw on a long tradition of film societies and public support for film exhibition and audience development to show more 'arthouse' fare, such as independent and foreign-language films. More recently many have begun to screen live broadcasts of leading

theatre or opera productions (as do some multiplex chains such as Cineworld). Scotland has several of these 'cultural' or specialist cinemas⁴ including the Glasgow Film Theatre and the Edinburgh Filmhouse.

Attendance at cinemas has risen steadily over recent decades, and Scots have become some of the keenest cinema-goers in Europe – as a nation, attendance per head is second only to France.⁵ Cinema is now the most popular cultural activity in Scotland outside the home.

Scots, though, like everyone else, also watch films at home. Technological changes have re-shaped viewing habits significantly. In television, the emergence of satellite channels dedicated to film, led by Sky Movies, have changed the market for film on TV, with first-run films generally now being shown on such channels before eventually crossing over to the mainstream channels such as BBC1 or ITV. Satellite movie channels are an important part of the 'package' offered by Sky in particular.

However, the rise of the internet and the increasing spread of high-speed broadband, allowing for the streaming of film on computers, is changing the market here too. Services such as Lovefilm and Netflix built a business by offering online rental of DVDs – which largely took over the video rental businesses developed by the likes of Blockbuster – but are now developing Video-on-Demand (VOD) services, letting people download films as and when they want. This poses challenges to the business model of 'bundling' of films into packages, offered by the satellite channels. It seems likely that internet services of one kind or another will play an increasingly important role in film consumption at home.

⁴ The BFI refers to cinemas showing non-mainstream films (such as foreign language and subtitled films, feature documentaries and 'arthouse' productions) as specialised cinemas. In this Review the term 'cultural' cinemas has been preferred.

⁵ MacPherson, R. (2010) *Is bigger better? Film success in smaller countries – the case of Scotland, Ireland and Denmark*

3.3 Making film

Changing consumption patterns have helped to change production patterns. Whilst Hollywood remains the centre of the film business, as it has been for a century, the growth of overseas markets (especially China's) has helped shift the nature of the business. Hollywood films no longer earn the majority of their revenue in North America, and have to appeal to audiences who do not speak English and who may be relatively new to cinema-going. The result has been a focus on special effects-rich, action-driven blockbusters, often using characters familiar from other media such as comic books or children's fiction. These blockbusters can be hugely expensive to make – the Batman film, *The Dark Knight Rises*, is thought to have cost \$250m – and demand enormous technical expertise. Such films are often 'globalised' in other ways too, using a range of locations and actors from a number of countries. The most recent James Bond film, *Skyfall*, has sequences set in Shanghai, Macau and Istanbul (as well as London and Scotland) and uses actors from Britain, Spain, France, Sweden and Hong Kong.

New technology such as digital cameras and editing tools has reduced the entry barriers to making films, though this does not necessarily reduce costs. It may contribute to a new wave of innovation in both making and marketing: Ben Wheatley's recent low-budget feature, *A Field in England*, cost just £300,000 to make and was the first UK film to be released simultaneously in cinemas, on DVD and BluRay, on TV and on video-on-demand (VOD).

Nevertheless, filmmaking remains a precarious business. The BFI calculates that, of the 626 domestic UK films and UK co-productions shot between 2003 and 2006, only 199 (32%) were released theatrically in the UK within two years of completing principal photography. Shifts in market power and the continuing problem of film piracy have helped undermine existing business models – the sale of film videos and DVDs has fallen in value in Britain from £1.55bn in 2004 to just under £1bn in 2012. With Hollywood focusing on high-budget blockbusters, mid-budget films have lost ground. The reduction in independent film financing that followed the credit crunch in 2008 has compounded the problem. Indeed, in the United States and, to a lesser extent, the UK much of the talent and resources that previously made such films is

moving into high-end TV production. Such productions are often innovative in both style and delivery – Netflix's decision to release all the episodes of its *House of Cards* TV drama simultaneously broke new ground – and are, like film, increasingly globalised: HBO's *Game of Thrones* TV series is filmed largely in Northern Ireland. Such TV shows have budgets comparable to mid-level films, and provide considerable opportunities for film-trained talent. While this Review is not primarily about television, the significance of it as a potential market cannot be ignored, and it will be discussed later on in this report.

3.4 Scottish film talent

Scotland has contributed much to the film world over the decades. From directors like Alexander Mackendrick, Bill Forsyth and Lynne Ramsay to actors like Sean Connery, Ewan McGregor and Tilda Swinton, Scots have helped define the possibilities of cinema. Yet the number of 'Scottish' films produced in any given year is small. The result is that Scottish talent tends to move across borders in this globalised industry, often producing work that has no obviously Scottish element.

Three types of film can lay a claim to being 'Scottish'. The first of these are 'indigenous' productions, drawing largely on Scottish funding, talent, source material and locations to tell stories of Scottish life. A group of such films is currently attracting much attention, among them *I Am Breathing*, *Starred Up* and *For Those in Peril*. However, such clusters of successful films have been rare, and more often it is an individual work that catches the attention of the wider world, a *Trainspotting* or a *Gregory's Girl*, for instance. Even films that are considered to be indigenous and recognisably Scottish often include producing, writing or directing talent from outside Scotland.

The second type is film that draws on Scottish material and locations for its story but also uses international funding and talent (at times combined with Scottish talent) to realise it. Examples include *The Railway Man*, *The Illusionist*, *Braveheart* and, going further back, the *Highlander* films and *Local Hero*. Films of this type are sometimes the work of Scots based elsewhere: *Rob Roy*, for instance, was directed by the American-based Scot, Michael Caton-Jones.

The third type of film is shot (at least in part) in Scotland, but does not present itself as Scottish. A recent example is the Hollywood blockbuster, *World War Z*, starring Brad Pitt, which included an extensive period of location shooting in Glasgow yet is ostensibly set in Philadelphia. Such films can nevertheless make a significant contribution to the Scottish economy.

The cultural significance of the relative paucity of Scottish film is a topic of some debate. The BFI produced a report in 2011 (*Opening our Eyes, how film contributes to the culture of the UK*) that suggested most people feel films have shaped their view of the outside world and society, and have been catalysts in the development of their personal identity. Yet the extent to which a national cultural identity is shaped by film is less clear. The 'national' cinemas of the 1950s and '60s, such as those of Italy, France, Poland and Japan, have faded in the more globalised Hollywood-dominated film world that exists today. Few would argue that there is a unifying Spanish, French or German style in film any more (as opposed to the individual visions of filmmakers from those countries). Given the small number of Scottish films made each year, Scottish cultural identity must largely derive from other sources – in film, perhaps only *Braveheart* in the last two decades can be said to have significantly shaped the ways Scots see their country.

Some consultees argued film needs to be seen primarily as a cultural form, and be financially supported on that basis, as something that is necessary for the nation. As one put it: “do we want film in Scotland or don't we?” Most countries, even large ones, struggle to sustain an indigenous film industry. In this view, Scotland is too small ever to have a commercially sustainable cinema; instead film's cultural impact rather than its economic one should be prioritised.

3.5 The past ... and the future

Scottish film has a small domestic market and a limited filmmaking base. Nevertheless, a series of changes have taken place over the last twenty years which have created opportunities. These will all be discussed in more depth in later chapters, but will be outlined here:

- The creation of the UK National Lottery in 1995 has led to the establishment of a pool of public funding to support film production
- Scotland has long had distinct public support structures for the creative sector, and devolution has changed the political landscape within which they operate. The history of these developments is described elsewhere, but currently there is a single body charged with developing the cultural and creative sector as a whole: Creative Scotland
- The current UK government has introduced a series of tax credits, for high-end TV, animation and (subject to EU state aid approval) video games development, to supplement the film tax credit set up by the previous government. The result is generally considered to have created a favourable tax environment for film and related industries in the UK. In addition, Britain's economic problems since the credit crunch have seen sterling fall against both the dollar and the euro, making British locations more cost-competitive
- New technology is creating new ways both to make films and to distribute them.

The combination of relatively favourable exchange rates and tax incentives, an ever-more globalised industry and a strong domestic appetite for film ought to create opportunities for Scottish film, especially in attracting inward investment. However, there are many challenges to realising those ambitions, and those are what this Review explores.

4. Enjoying film

4.1 Introduction

Film in its various forms is ubiquitous in 21st century Scotland: in cinemas, on TV and online. For most of the population their primary engagement with film is as a viewer and they watch it in ever-growing numbers. This chapter explores current developments in Scots' viewing habits and experiences, considers the range of film offered across the country, and examines the impact of film on Scottish culture more generally.

4.2 Cinema-going

Cinema attendance is by no means the only source of public engagement with film but it remains the most influential. (In 2012, cinema ticket sales became the largest single source of gross revenue for the film industry, overtaking physical DVD retail sales.⁶) Cinemas are an important environment for audiences of all ages to enjoy films. They offer a communal experience, and space for contemplation, inspiration and debate. They are hubs of expertise, not only of film knowledge but also for work with schools and local communities. They also provide wider cultural and skills-building opportunities in both formal and informal educational contexts.

UK cinema admission numbers have recovered sharply from their low point, reached in 1984. They increased from 64m admissions in 1982 to 103.6m in 1992 to 175.9m in 2002. However, in the last ten years they have levelled off, and in 2012 there were 172.5m admissions. The number of cinema screens, on the other hand, continues to grow. There were 3,817 screens in 769 cinemas in the UK in 2012, 50 more than in 2011.

A total of 647 films were released in the UK and Ireland in 2012. American and US-backed UK films took 84.2% of the UK and Ireland box office in

2012. *Skyfall* (officially a UK/US co-production) was the most successful film of the year, earning £103m, which made it the highest-earning film ever in the UK. British independent feature films took 9.2% of the box office in that same year, with *The Woman in Black* leading the way with a take of £21.3m. The annual market share of independent UK films has varied considerably since 2000, from a low of 3.8% to a high of 13.2%, and is heavily affected by the success of individual films. For instance, the 13.2% share was achieved in 2011 when *The King's Speech* and *The Inbetweeners Movie* did very well. Between them, they earned two-thirds of all the UK independents' box-office take that year.

Scotland's population seems to be especially keen on cinema. According to the 2013 Scottish Household Survey, watching films at a cinema has been consistently the most popular form of cultural attendance and has increased from 51% of those surveyed in 2010 to 54% in 2012. Attendance levels are high by European standards and there are more cultural (or arthouse) cinemas per million than anywhere else in UK outside London.

However, serving audiences across the north, west and south of the country, where the population is often thinly dispersed, is challenging. Audience choice is lacking in some areas: eight out of 32 Scottish local authorities do not have any full-time cinema in their area. Given the popularity of cinema in Scotland this represents a substantial gap in public access.

The number of indigenous films produced and distributed from Scotland is small, and as a consequence both the number of films made and the size of the audience fluctuate significantly. In the past ten years, the number of indigenous films made has ranged from three (in 2009 and 2011) to eight (in 2004 and 2006), while the annual audience share for indigenous Scottish productions in Scotland has varied from as much as 7% to as little as 1%.⁷ Once again, a single hit film can make a noticeable difference to a year's figures.

⁶ BFI (2013) *Statistical Yearbook 2013*

⁷ MacPherson, R. (2011) *Film success in small countries – from Scotland to Singapore*

The small volume of production and the fact that many films do not achieve widespread distribution means that these figures may not reflect the true demand for 'Scottish' film. According to the BFI's *Opening our Eyes* report, people in Scotland are keen to see more films from their home nation, with just over 50% of respondents feeling that there were too few films set in Scotland. Only in the North of England and Northern Ireland did respondents feel as strongly.

When films with Scottish themes or characters reach audiences in Scotland they are often well received. A comparison of Scottish Screen-funded features⁸ made between 1997 and 2008 at the Scottish and UK-wide box office shows that Scotland generated an average of 23.7% of the UK audience for those films, three times the proportion that would be expected on a *pro rata* population basis. The BFI calculates that 17% of all UK audiences who saw *Brave*, a Disney animation with a Scottish theme, in 2012 lived in Scotland.⁹

The view from the consultation:¹⁰

- It is acknowledged that modern cinemas encompass more than just the screens and are not necessarily based in a traditional cinema building. They are daytime and evening community hubs, can drive regeneration, and can draw a diversity of audiences as never before
- Audiences, filmmakers, educationalists and young people would benefit from better links between them to understand each other's needs and potential. A national network, perhaps encouraging the major cinemas to work with smaller venues, could unite talent and audience to provide a platform to showcase, curate, promote and disseminate Scottish screen culture
- Consistent public sector partnerships across agencies and councils would benefit audiences and help the film sector to deliver a more substantial and broader offer
- Audience development hubs in major cinemas should work with training and learning providers to spread knowledge and enthusiasm
- Youth audience networks need coordination to develop and become sustainable
- Documentaries – there is a need to develop the audience appetite for these
- There were a number of contributors who questioned whether Scotland's filmmakers fully embrace audiences' tastes (those of Scottish as well as international audiences) when developing their work: "Sell at home then you'll sell abroad".

¹⁰ This box, and the others like it throughout the report, picks out some of the points raised during the three stages of the consultation that relate to this section of the report. It is not intended to be a comprehensive summary of all that was said; instead, there has been an attempt to identify points that add to, or differ from, the issues raised in the main body of the Review text.

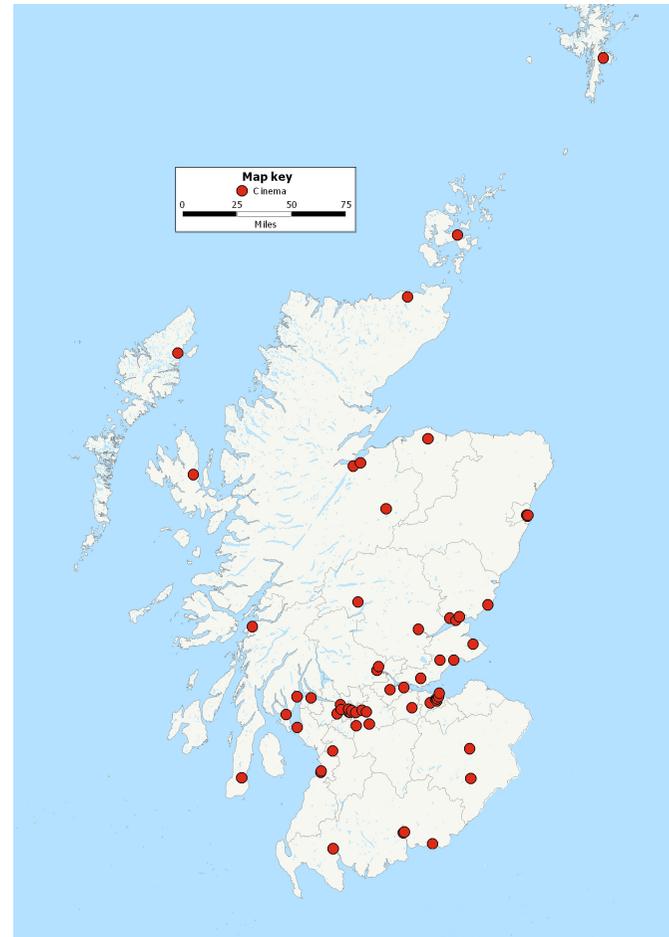
⁸ Scottish Screen was the national body for film and TV in Scotland from 1997-2010.

⁹ BFI (2013) *Statistical Yearbook 2013*

4.3 Scotland's cinemas

In 2013 there were 65 cinemas in Scotland with 337 screens. Two new multiplexes are planned to open in 2014, which will bring the numbers up to 67 cinemas and 352 screens. Multiplex cinemas account for 76.3% of all screens in Scotland, and more than three-quarters of the exhibition sector is owned by four companies. There is a higher concentration of cinema venues in the central belt, especially of multiplexes, 80% of which are located there. Central Scotland has approximately 6.4 screens per 100,000 population, higher than the UK average of 6.1. Only Northern Ireland (11.2 screens per 100,000 population) and London (6.6 screens per 100,000 population) have significantly higher numbers among UK areas. Scotland has more 'cultural' screens (i.e. non-mainstream ones) than the UK average, with over five per million people compared with the UK average of four. Only London has more, with ten per million.¹¹

Figure 1: Location of cinemas in Scotland



Source: BOP Consulting (2013)

Community cinemas

Eight of the 32 local authority areas in Scotland have no permanent cinema provision. One way in which they and other thinly populated districts can have access to cinema is through community cinemas. This is provided in a variety of ways across Scotland. Some commercially run cinemas (such as Thurso's) also serve in effect as community cinemas. In other areas film societies perform this function and often operate in urban areas too. The Screen Machine mobile 80-seat cinema also tours

¹¹ Figures in this paragraph are sourced from *BFI Statistical Yearbook 2013*

to 30 communities across the Highlands and Western Islands. Sometimes a cinema can be re-opened – Birks in Aberfeldy is an excellent example – by a community as a local hub adapted to suit their needs.

The BFI has just launched a new initiative, the Neighbourhood Cinema Fund, to support community cinemas. With a budget of £2m over four years, the Fund is intended to help new and existing touring cinema operators bring community cinema activity, including film screenings and events, training for staff and volunteers and the licensing of films for exhibition, to areas without easy access to cinemas.

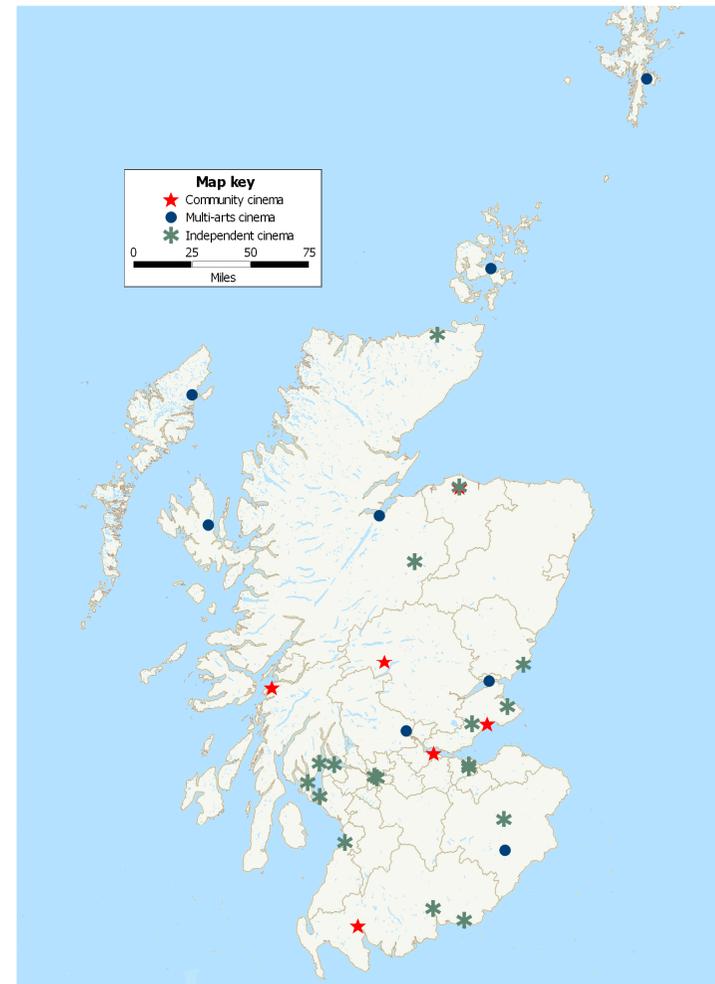
Multi-art form venues

Many successful cinemas are operated as integral parts of multi-art form contemporary arts centres. Examples include Dundee Contemporary Arts and Eden Court in Inverness. However, unlike in England, where there are two small circuits¹² (Merlin and WTW), Scotland has no group ownership of such cinemas.

'Cultural' cinemas

Two of the top cultural (or arthouse) cinemas in the UK are in Scotland: Edinburgh Filmhouse and Glasgow Film Theatre. Scottish Screen had identified the need for a National Film Centre but no bidder has yet emerged from the cinema sector to champion the venture.

Figure 2: Location of community and cultural (non-mainstream) cinemas, and multi-arts venues with cinema screens



Source: BOP Consulting (2013)

¹² Circuits are networks or chains of cinemas with a common owner.

The view from the consultation:

- A healthy Scottish cinema sector doesn't depend on a healthy Scottish film industry – but it would welcome one
- Networks connecting world class cinema spaces to community ventures are beneficial, but need superfast broadband. Many communities lack cinema access and the development of a range of cinema ventures, not necessarily in traditional spaces, is seen as necessary to ensure equality of public access
- Core venues have the potential to offer creative programming opportunities that can be effective across smaller venues as well as their own. They can also develop and implement seasons such as that being generated for the forthcoming centenary of the Scots-Canadian animator Norman McLaren
- There is a lack of circuits in Scotland and this needs examination
- Learning opportunities provided by cinemas, either through outreach or by bringing audiences in, are a valuable element of their business and seek more stable funding
- More ownership of cinema (and distribution) in Scotland and more locally run venues such as Thurso cinema and Birks in Aberfeldy were called for. There was a recognition that venues whose business model relies on, for example, a mix of catering and auditorium revenue, are good models
- Screen Machine delivers to rural audiences; other innovative ways of linking film societies to cinemas are needed
- Capital development is needed, particularly for GFT and Edinburgh Filmhouse.

4.4 Films on television

Cinema may still be the most influential way in which film is watched – a film's success at the cinema will largely determine its potential earnings from other revenue streams – but in terms of viewer numbers, television remains the single largest platform for film consumption. In the UK 77% of all film viewings are on TV.¹³ In 2012, there were almost 3.9bn such viewings in total, approximately 22 times the number of UK cinema admissions for the same year. The most popular films on terrestrial television tend to be family films such as *Shrek Forever After* (2010) or adventure features like the *Indiana Jones* films.

In 2012, 13% (269 films) of films broadcast on terrestrial television were premieres (showing for first time on terrestrial television). Of these, 53 were UK films. Channel 4 was the top premiere screening channel with 118, of which 20 were UK films. ITV1 showed the smallest number with 15, only three of which were UK films. The top UK independent movie on terrestrial television in 2012 was *The Inbetweeners Movie* which attracted 4.2m to Channel 4. On multi-channel digital, the top film was *Mr Bean's Holiday* on ITV2 and CITV with a total audience of 7.2m from 22 transmissions.

Terrestrial television also provides second-chance viewing opportunities for independent UK films (and therefore Scottish indigenous productions), and presents them to audiences who may not have encountered them in cinema. However, while 70% of films watched in Scotland are watched on TV these are rarely Scottish or even UK films and the majority were not made in the last five years. Television may therefore be seen as stimulating and catering to the nation's appetite for film but without contributing significantly to the availability of Scottish (or British) film for Scottish audiences.

It is worth noting that Microsoft's recent Xbox venture into content development brings them into the broadcast arena. Although Microsoft is unlikely to develop films they offer a new way of viewing TV content (including film) by providing immersive, interactive experiences.

¹³ Figures from *BFI Statistical Yearbook 2013*

The view from the consultation:

- The participation of broadcasters in Scotland in film is small and they offer little opportunity for audiences to see films from Scotland, despite evidence of audience appetite
- Scotland's broadcasters have little scheduling flexibility and therefore limited possibilities to screen local work. Documentary and short filmmakers commented on partnerships with broadcasters whose contribution is valuable but who then lack airtime to show their work
- It is rare to see Scottish movies or even high-end drama on television. Most audiences watch the films they see on TV – so aren't seeing Scotland represented and independent films from around the world are rarely shown outside specialist channels or in primetime. The importance of screening a diversity of films to Scotland's audiences was noted
- Do the online platforms attached to Scotland's broadcasters offer potential for Scottish film?

4.5 Films online and DVD

Online channels have grown rapidly in popularity as a way of viewing film content, linked to the spread of broadband services. (Ofcom reported that 70% of Scottish homes had broadband in 2013, though this still lags behind the UK average of 75%.) Accessing the web through mobile phones is also growing: 44% of Scots said they had done this in 2013.¹⁴

While 'free' services such as YouTube continue to grow in popularity, one of the striking developments in the last couple of years has been the growth in video-on-demand (VOD) services. There was a 123% increase in online film revenues in 2012, driven by the emergence of Netflix and Lovefilm Instant that year. According to the BFI, revenues earned by film

for online services overtook television-based earnings for the first time in 2012.

As broadband connectivity spreads and its average speed increases, the potential for delivery of high-quality film-streaming across Scotland also grows. The Scottish Government aims to ensure that 85% of Scottish properties have access to next generation broadband services by the end of 2015/16 and 95% by the end of 2017/18. The introduction of 4G networks will also further improve mobile connectivity. These developments could greatly extend audience choice, but it is important to note that in Scotland connectivity tends to be poorest in those areas which currently lack cinema provision.

GFT and Edinburgh Filmhouse both have branded 'players' allowing audiences to access curated film at home or by mobile. These are leading initiatives, built and operated by the Scottish company, Distrify, and sit at the forefront of video-on-demand services within the UK.

The growth of these new online services has helped to erode the market for physical DVDs. Nevertheless, the video retail and rental market for feature films (which includes DVD and BluRay as well as VHS) remains very valuable, with gross revenues of just under £1.2bn in the UK in 2012. There were 127m sales of feature films on physical video and 78m rentals. UK films accounted for around 23% of all films sold on video. The value of video sales of film (i.e. excluding rentals) has, though, fallen significantly in recent years, from a peak of £1.55bn in 2004 to just under £1bn in 2012. This reflects both a reduction in the number of units sold and a fall in the average price of DVDs. The bestselling and most rented DVDs tend to be those which have been most successful in the cinema.¹⁵

¹⁴ Figures in this paragraph from Ofcom's *Communications Market Report 2013*

¹⁵ Figures in this paragraph from *BFI Statistical Yearbook 2013*

The view from the consultation:

- New filmmakers are making films for new communities using new technologies and are often bypassing cinemas altogether
- An online portal where viewers can see Scotland's films – new and back catalogue – should be developed. Examples cited were Lux, Lighthouse, Canyon
- Research and development to extend early partnership work between cinemas, BAFTA and online distribution platforms such as that run by Distrify offer great potential
- Online learning possibilities extend cinema and archive reach
- A national network and forum for screening short films – a community from ground up – is needed, not only to draw filmmakers together but also to showcase their work to audiences and funders.

4.6 Festivals

There are 34 film festivals scheduled to take place in Scotland in 2013 (see list in Appendix 10.3). About two-thirds take place in Glasgow or Edinburgh, and two of them rank in the top three film festivals in the UK: the Edinburgh International Film Festival (EIFF) and Glasgow Film Festival (GFF). EIFF, established in 1947, enjoys a long-standing international reputation as a business hub for UK and international filmmaking; GFF is a more audience driven festival with 35,000 admissions. Both of these festivals are changing and developing their industry and audience potential, but both currently operate from inadequate facilities that restrict their capacity to expand as they would like. There is a further discussion of this in Section 7 – Earning of this report.

Youth festivals, particularly Discovery in Dundee and the Glasgow Youth Film Festival, have good reputations and have formed sustainable partnerships locally. It is intended that the forthcoming Film Nation

Youth Film Festival will work with existing entities such as these two, as well as creating new opportunities.

In Inverness (with a touring element) the Screen HI supported goNORTH Creative Industries Festival is developing its film strand and international engagement to bring creative industries together. This year it screened 50 films.

Specialist touring festivals, some of which are UK-wide, are delivered across Scotland's cultural cinema network, attract niche audiences, potentially reaching publics not usually seen in those cinemas. The subject matter for specialist festivals is very varied, and includes geographically or artistically specific screenings (e.g. Africa in Motion, Alchemy Film and Moving Image Festival) and special interest festivals (e.g. Fort William Mountain Festival or Dead by Dawn) as well as those aimed at certain audiences (e.g. Take One Action).

The view from the consultation:

- EIFF and GFF are significant in UK and international terms. Traditionally EIFF has been more industry focused, Glasgow more local audience focused – they both want to develop and grow. There was discussion about whether EIFF should retain its current June slot or rejoin the August festival offer in Edinburgh
- Some festivals lack much of a Scottish element: for example, only 5% of Alchemy entries are from Scotland
- The range of local festivals offers good opportunities for filmmakers and communities to work together. Core venues, local and specialist groups all curate these events
- Establishing networks of short-film makers is a potential area of interest for festivals. Young Cinema Audience Network Scotland (YCANS) may need coordination support from established networks
- Filmmakers claim Creative Scotland reacts slowly to requests to attend festivals - they wanted support to be automatic for certain prestigious events

- Scotland's other cultural festivals (for instance, Wigtown Book Festival) host events that could potentially provide home-grown live programming for cinemas to complement the popular seasons of live theatre and opera from outside Scotland.

4.7 Archives

The Scottish Screen Archive was established in 1976 to find, protect and provide access to Scotland's moving image heritage. It has been part of the Collections Department of the National Library of Scotland since 2007.

The archive includes both professional and home-movie films from across the 20th and into the 21st century and houses more than 32,000 items. It is also home to the broadcast archives of Scottish Television.

The archive undertakes extensive education work in collaboration with education agencies.

It is soon to move from its out-of-town Hillington base to Kelvin Hall in Glasgow, where it will be more accessible to the public. The Archive plans to make more extensive use of its unique collection in its new home and is collaborating with Creative Scotland to ensure its collection keeps pace with Scotland's filmmaking output.

The view from the consultation:

- There is a need to invest more in preserving, cataloguing, researching, and making Scottish screen heritage more widely available. This would also create opportunities to access, compile, republish and devise new content
- Build on the existing work of the archive and education
- Archive needs to be flexible and encourage ideas coming forward for uses of their material outside the formal tendering process. Establishing ways of working with producers would be welcomed – by both sides
- Filmmaker and archive partnerships have met with limited success to date.

4.8 Cultural impact of film

The sections in this chapter so far have looked at the way film is enjoyed. What, though, is the cultural impact of this consumption? Given that Scotland produces relatively few films, and those it does do not all receive wide distribution, does film shape Scottish culture in any significant way? Scotland's communities are diverse with a multiplicity of voices. Does its cinema reflect this diversity?

The BFI's *Opening our Eyes, how film contributes to the culture of the UK* report of 2011 sought to explore this issue. It found that, of films set in Scotland, *Trainspotting* (1996) and *Braveheart* (1995) are regarded as the ones which had the greatest cultural impact.

According to the report, 17% of Scottish people choose *Trainspotting* as their 'significant film' (as did 9% of the UK's population as a whole). The film was also voted the best Scottish film of all time in a poll by *The List* magazine in 2004. The movie's commercial success and cultural impact was such that it brought UK and even international visitors to the (previously) rundown Leith district of Edinburgh where most of the film takes place.

Opening our Eyes suggests that *Braveheart* had perhaps the biggest cultural and emotional impact on Scots. It fuelled debate about Scottish identity and it has been linked to the campaign for Scottish devolution in 1997. The report goes on to mention that “even the unhistorical blue face-paint worn by Gibson’s warrior found its way into popular culture and behaviour, becoming common among Scottish sport fans”. The international success of the movie also boosted location tourism to the William Wallace monument in Stirling for years following its release.

Both these films are now close to two decades old. While there have been a number of critically acclaimed Scottish films made since, none of them seems to have achieved the same level of impact.

The view from the consultation:

- Cinema is where the country sees itself reflected – or should be
- Do we want film in Scotland that generates a wide range of voices for a range of communities – if so that needs financing and support
- Independent and indigenous cinema struggles across the world – Scotland is no different from other countries in this respect. Cultural film is vital for identity, as is the case with other art forms, is often not financially viable without public sector input
- Successful films may be rare, but hits can reflect well on a nation for many years
- There is a need for more and better film journalism, criticism, debate and discussion on all aspects of film across both traditional and new media
- Touring Scottish productions on a Scottish cinema circuit could generate an appetite for Scotland’s films and increase pride in local work
- Independent cinema is vital for cultural diversity.

4.9 Consultants’ assessment of the issues

For the majority of Scotland’s population their connection with film is as a viewer. Most have good access to high-quality film experiences – either on cinema screens, TV or via a computer. However, there are significant gaps in cinema coverage, especially in accessing venues offering diversity of programming, and many of the worst-affected areas (such as the Borders or the Highlands) also lack or have patchy access to superfast broadband. Cinema networks seek to provide a comprehensive offer across the country and a planned strategic approach to serving these more dispersed audiences, in addition to building on existing work with hard to reach audiences, is required.

A market development strategy linking Scotland’s films to audiences at home and across the world is needed. Innovative online work, such as that of Scotland’s cinemas and festivals with Distrify, needs further research and development to explore its full potential. As technological change continues, online ventures can extend the capacity of Scotland’s cinemas to engage its audience, make the best use of curatorial skills across the country and could even offer the possibility of a virtual National Film Theatre of Scotland.

Even though market data makes it clear that the VOD market is growing, the *BFI Statistical Yearbook 2013* notes that more research in this area is needed to start drawing lessons about VOD audiences, especially for independent and specialist film. Such research might be instructive for lower-budget Scottish indigenous productions, which may find significant additional audiences when distributed via such platforms.

Initiatives such as the partnership between Centre for Contemporary Arts, GFT and Cineworld in Glasgow suggest there is scope for cinemas to work together to provide for all audiences.

GFT and Edinburgh Filmhouse and their related festivals, Glasgow Film Festival and Edinburgh International Film Festival, face infrastructure problems, such as a lack of audience capacity and screens, which hamper their ability to grow. GFT and Filmhouse (and other cultural cinemas) have lacked sufficient capital investment over the years and

this has taken its toll. Whilst the cinema sector does not have as many large and ageing buildings to maintain as, say, the theatre sector, it is not without capital requirements. These festivals are both world-class but need to develop if they are to flourish. EIFF is re-establishing its credentials as an industry-focused event and needs to consolidate its standing worldwide. It has no ambition to become a film market, and as Scotland's sector is small, with little co-venture funding to offer, this seems the right approach.

The Screen Archive is a valuable resource and partner. While it is well connected to the education sector, particularly schools, it seems less integral to the industry and the wider audience. Its new home in Glasgow may encourage accessibility but strategic ventures with filmmakers, festivals, educational institutions and Creative Scotland need active engagement from both sides.

The interpretation and use of film data is limited. Between the requirements of Creative Scotland, the BFI and the new Film Hub Scotland¹⁶ a wealth of data is being collected, but little innovative use is made of this potentially valuable resource. It could help ensure Scotland's practitioners and agencies have the tools to plan ahead and react to audience development opportunities. The recently launched BFI Film Research and Statistics Fund may offer a way forward for collaboration between agencies that could lead to more effective collection and usage of valuable data.

The lack of sales agents and distributors in Scotland is a difficult issue to resolve. The market is too small to support companies aiming simply to sell or distribute product from Scotland, but Park Circus and Distrify prove that world-class companies offering global services can be based in Scotland and embrace Scottish talent and production.

Throughout the consultation contributors from across the sector called for more collaboration between professionals, linking the various

elements of the film world. It is encouraging that Regional Screen Scotland and the individual cinemas and audience development initiatives are taking the opportunity to extend their work by participating in the audience and talent development initiatives being rolled out across the UK by the BFI and local agencies. Film Hub Scotland offers possibilities for partnership hitherto unavailable.

These initiatives come at a time when networks are clearly needed and are there to be developed if practitioners take the lead, with public sector backing. Networks will not be made to work simply by injecting public money: they need the enthusiasm and input of all concerned.

¹⁶ Film Hub Scotland is part of the BFI Film Audience Network (FAN), and is a consortium of film bodies that aims to boost audience choice and deliver more diverse cinema content across the nation.

5. Learning about film

5.1 Introduction

This chapter explores the ways Scots learn about film. It begins by reviewing the way film is used and taught in schools and, less formally, outside them. It then goes on to examine provision at further and higher education levels. Finally the chapter turns to the question of professional skills training for those wanting to or already working in the industry.

There are many reasons for learning about film. It is increasingly seen as a fundamental form of literacy, recognised as such in Scotland's Curriculum for Excellence and in the film literacy strand of Creative Europe¹⁷; it is a rich expressive medium, the art form of choice for many people; and it plays an immensely influential role in culture and society.

Film education can also deliver a range of transferable skills – especially useful given that new technologies are making film ever more accessible – and specific film skills training can lead to careers in the screen industries. Yet despite these benefits, film education remains relatively marginal within education systems across the developed world.

5.2 Film education and learning for 3-18 year olds

Scotland's schools education system has long been distinct from that of the other nations of the UK. Scotland has its own school curriculum and qualification framework, as well as a separate teacher education framework. Within this, its approach to moving-image education (MIE) and film literacy also differs from that of other parts of Britain.

¹⁷ Creative Europe is the EU's support programme for Europe's cultural and creative sectors (including film)

Current course teaching in Scotland is shaped by the Curriculum for Excellence (CfE) document, published in 2004 by the Scottish Government. This had the ambition “to ensure that all children and young people in Scotland develop the attributes, knowledge and skills they will need to flourish in life, learning and work”. It marked the start of a rolling programme of research and consultation designed to modernise the school curriculum. The reformed curriculum began to be introduced in 2010/11, and will be completed in 2016.

Over the past ten years there have been a number of pilot programmes and trials of moving image education (MIE) in Scottish schools, many of them promoted by Scottish Screen. As a result, there is a considerable legacy of materials and experience to draw on, including:

- A six-year local authority-wide development of MIE in Angus, covering all stages, with in-depth evaluative research by the University of Glasgow
- A major R&D project developing MIE in early years (see *Learning Journeys: Moving Image Education in the Early Years*¹⁸), with follow-up research three years later
- Four large-scale pioneering MIE websites, tailored to CfE, produced with Education Scotland and the National Library of Scotland
- A nationwide network of MIE ‘Lead Practitioners’
- Teacher education, including the development of postgraduate and undergraduate modules in several universities, and CPD for serving teachers
- A significant body of evaluative research of MIE in a wide variety of contexts and stages, including outside school.¹⁹

Nonetheless, the BFI-led *EU Media Literacy in Europe* study of 2012, perhaps the most authoritative recent study in this area, suggests that

¹⁸ http://www.scottishscreen.com/content/sub_page.php?sub_id=164&page_id=17

¹⁹ All the research completed by 2010 was published on the Scottish Screen website, and is still available on the archive site: http://www.scottishscreen.com/content/sub_page.php?sub_id=166&page_id=17. A number of reports completed subsequently are unpublished but available on request.

only 10% of Scottish children receive film education, compared with 10% in Northern Ireland, 25% in England, 80% in the Republic of Ireland and 81% in Denmark.

The Curriculum for Excellence has taken a major step towards recognising the growing importance of the moving image. It has redefined literacy to explicitly include film texts, an approach that contrasts sharply with the situation in England. CfE's definition states:

*The definition of 'texts' needs to be broad and future proof: therefore within Curriculum for Excellence, a text is the medium through which ideas, experiences, opinions and information can be communicated ... Texts not only include those presented in traditional written or print form, but also orally, electronically or on film.*²⁰

Films, games and TV programmes are all listed as examples of texts within this definition, and the Scottish Qualifications Authority adopted this approach in the *2012 Scottish Survey of Literacy*, which saw film texts used as literacy test items in every school in Scotland.²¹

However, school qualifications in Scotland do not as yet reflect this greater awareness of the role of moving images. There is no dedicated high tariff qualification in moving images or film in Scotland, as there is in other nations of the UK. Northern Ireland's Council for the Curriculum, Examinations and Assessments (CEA) offers a Moving Image Arts GCSE, with approximately 450 students, and GCE AS level (c.800 students) and A2 level (c.600 students). The Welsh Joint Examinations Committee (WJEC) offers Film Studies GCSE (c. 6,000 students), AS level (c. 12,000) and A2 (c. 7,500).²² Both of these programmes (Moving Image Arts and Film Studies) have significant creative components, with Moving Image Arts comprising 60% creative production.

In Scotland the moving image can be studied only within the new Media qualification (at National 3/4/5 and Higher), and in the media unit within English, but in neither it is obligatory. The new Media qualification and

the Media Studies qualification that preceded it have struggled to attract significant numbers of students, with only c.700-900 per year completing the Media Studies Higher.

One significant problem is that many teachers lack confidence in their knowledge and use of film. Figures from Skills Development Scotland suggest that out of a total teacher population of 22,460 in Scotland in 2012, just 11 were Media Studies specialists. (By contrast, 1,121 were specialists in Art.) This may be a problem in another respect as well. The new SQA assessment methods are much more flexible than before: they no longer just include essays, but can be delivered in other media, such as videos or podcasts. However, teachers may be unwilling to encourage this, given their own lack of expertise in their use of such technologies.

BFI

Education and Learning is one of three priority areas for the BFI set out in its strategy document, *Film Forever*. The BFI Youth Film Academies programme is being rolled out (including in Scotland) and Film Nation is establishing its offer across 5-19 year-old education. The BFI is currently undertaking a consultation to enable it to develop a strategy for lifelong learning, taking into account the rapidly changing environment for film viewing and making. The BFI aims to provide leadership and advocacy, to encourage good practice in the classroom and online, and to draw upon the BFI's resources as an institution and archive to enrich its contribution to the sector. BFI Education works with partner organisations across Scotland.

Film Nation

The BFI has just awarded £26m of National Lottery funding to Film Nation UK to deliver a new film education programme (though some of this budget is in effect transferred from other programmes). Film Nation began in September 2013 and will last four years. It aims to increase learning and appreciation of film, and to stimulate a new generation of filmmakers and film talent. It will do this by creating and supplying a set of film education resources, clubs, events, teacher training and other initiatives for the benefit of 5-19 year olds across the UK, both inside and outside formal education.

²⁰ Curriculum for Excellence – literacy and English – principles and practice

²¹ <http://www.scotland.gov.uk/Topics/Statistics/Browse/School-Education/SSLN>

²² All figures approximate

Film Nation will be a significant new opportunity for Scottish film education which, *pro rata*, could expect more than £2m of support over the four years of the scheme. The new approach plans to ensure national reach by working with the BFI's strategic partners: Creative Skillset, Creative England, Film Agency Wales, Northern Ireland Screen and Creative Scotland, as well as the devolved governments and assemblies. Creative Scotland is in the process of finalising its partnership with Film Nation and BFI.

Film Nation has been established by two organisations, FilmClub and First Light, which have merged to create this new project. FilmClub was a charity that offered a catalogue of films to some 7,000 film clubs that have grown up in schools since it started in 2007. FilmClub was government-supported in England, Northern Ireland and Wales, but was not so in Scotland, where it had little penetration. Film Club recently launched a free service in Scotland alongside its first Curriculum for Excellence resource. Previously the service was not free to schools.

First Light was a UK-wide National Lottery-funded initiative to encourage young people up to the age of 25 to make films, and to develop skills in film and media production.

5.3 Learning outside formal education

There are also opportunities for young people to learn about film outside formal education (what this Review calls non-formal learning). While many of these schemes are available to all young people, a number of them strive to target hard-to-reach children who are in one way or another disengaged from schools.

Scotland has some important and well-regarded non-formal initiatives in the film sector. They have built up considerable experience and expertise in delivery over the years, but are not robustly funded and have a restricted reach. Most of the specialised film exhibitors in Scotland, especially Glasgow Film Theatre, Dundee Contemporary Arts (which produces the Discovery Film Festival for Young Audiences), Centre for the Moving Image, and Eden Court, have significant film education programmes, both in-cinema and beyond. (Three of these, which make up the YCANS network, recently won a major European award for their

work with young people.²³) Their activities include both watching and making film.

Other important agencies include GMAC Film (Glasgow Media Access Centre in Glasgow), Screen Education Edinburgh, SKAMM (Scottish Kids are Making Movies, at Edinburgh Filmhouse), VOMO (Voice of My Own) in the Borders, and Station House Media Unit in Aberdeen. They are charitable or project-based initiatives offering practical hands-on experience of filmmaking for young people. Much of their work is aimed at broad learning outcomes and transferable skills, and is often targeted at disadvantaged young people. Some participants progress into industry-focused careers or further education.

The **Cashback for Creativity** initiative, a £2.25m fund managed by Creative Scotland, invests the confiscated proceeds of crime into community arts, including film, music and dance. It is targeted at communities where there is an identified and demonstrated need, and as such is an important source of funding for these non-formal film education organisations.

BFI Film Academies

The BFI has recently launched a new programme, BFI Film Academies, to give talented 16-19 year olds the opportunity to work with film professionals. It aims to offer hands-on filmmaking experience to develop practical knowledge and skills. There are also two residential programmes, designed to develop more specialist filmmaking skills. Again, these involve working closely with leading industry professionals.

There are currently three of these academies in Scotland: DCA, Screen Education Edinburgh and GMAC. Creative Scotland is partnering with the BFI on the programme.

²³ <http://www.mediadeskuk.eu/latest-news/general-news/2011/december/three-scottish-cinemas-win-europa-cinemas-awards/>

5.4 Tertiary education

At further and higher education levels, courses tend to divide along analytical or content creation lines. Some are devoted to the study of film as an art form, and tend to be primarily academic in nature. Such courses focus on film history and the development of the critical faculties of their students. They can be offered as either bachelors or postgraduate degrees, and are often combined either with closely related topics, such as the MA (Hons) in Film and Television Studies at the University of Glasgow, or as a joint degree with another subject entirely, such as the MA (Hons) in Film Studies and German at the University of Aberdeen. While such courses have produced notable figures in the film industry – the critic and director Mark Cousins has a BA in Film and Media Studies with Art History from the University of Stirling, for instance – they are not intended to offer a formal training in the practice of filmmaking.

The second type of course does provide a grounding in filmmaking, and is a step on the road to professional practice. Such courses are available as HNC/HNDs, BAs/BScs or MAs/MScs. They may have a focus on a particular sub-discipline or technology, such as animation or visual effects. Examples include the HNC in Filmcraft and Animation from Motherwell College, BA and BA (Hons) in Filmmaking and Screenwriting from the University of the West of Scotland and the MA film with pathways in directing, cinematography, editing and producing at Screen Academy Scotland. However, given that film work alone is likely to be insufficient to support a career, filmmakers and technicians may also emerge from related fields, such as digital technology, design, theatre studies or photography.

Gaelic filmmaking is supported at Sabhal Mor Ostaig, the National Centre for Gaelic Language and Culture on Skye. It is one of the University of Highlands and Islands colleges and its Arts and Development faculty offers short and undergraduate media courses, including filmmaking. The campus also has extensive broadcast facilities.

College education

Most of the professional fields for film sector workers fall into the remit of Creative Skillset, the sector skills council for the creative media industries. Its data for Scotland suggests there were 13,421 students enrolled onto Creative Skillset-relevant courses in further education institutions within Scotland in 2011/12. Photography (3,361) and Communication/Media (general) (3,307) were the largest categories of these. Film and video production accounted for 657 students, with audio and visual media responsible for another 1,107.

Figure 3: Creative Skillset-relevant enrolments in college courses in Scotland

Superclass subject area	Number
Software for Specific Applications/Industries	1,011
Design (non-industrial)	1,073
Fashion/Textiles/Clothing (craft)	2,145
Fabric Crafts/Soft Furnishings	213
Communication/Media (general)	3,307
Journalism	96
Photography	3,361
Film/Video Production	657
Audio and Visual Media	1,107
Print and Publishing	377
Textiles/Fabrics (industrial)	74
Total	13,421

Source: Scottish Funding Council via Infact database (2013)

Close to three-quarters of these students (i.e. those studying at FE colleges) were taking further education courses. However, a quarter were taking higher education courses, including the majority of those enrolled on film and video production and audio and visual media

courses. (HNCs, HNDs and foundation degrees are classed as higher education courses in the current qualification framework but are often offered by further education colleges.)

Figure 4: Level of Study of college students in Scotland

	Higher Education	Further Education	Total
Software for Specific Applications/Industries	180	831	1,011
Design (non-industrial)	335	738	1,073
Fashion/Textiles/Clothing (craft)	553	1,592	2,145
Fabric Crafts/Soft Furnishings	0	213	213
Communication/Media (general)	464	2,843	3,307
Journalism	77	19	96
Photography	706	2,655	3,361
Film/Video Production	446	211	657
Audio and Visual Media	379	728	1,107
Print and Publishing	238	139	377
Textiles/Fabrics (industrial)	45	29	74
Total	3,423	9,998	13,421
%	25.5%	74.5%	100%

Source: Scottish Funding Council via Infact database (2013)

The largest numbers of students of film and video production were to be found at City of Glasgow College and Aberdeen College. Between them they had 40% of such students. The largest numbers of audio and visual media courses students were attending John Wheatley College (Glasgow) and Stevenson College (which since this data was published has merged with two other colleges to form Edinburgh College). Between them, the two accounted for 42% of such students.

Six of these FE Colleges – Aberdeen, Adam Smith, Cardonald, Dundee, Perth and Reid Kerr Colleges – have partnered to form a network, **Creative Loop**, to try and bridge the gap between the creative media industries and the education sector. It uses a mix of training, seminars, festivals and online content, as well as the colleges' own facilities, to connect media students with professional individuals and companies.

It should be noted that the further education landscape is changing, with both colleges and courses being consolidated. This may have implications for the provision of these courses in the future.

University education

The numbers studying film-related courses at Scottish universities is, as might be expected, smaller. HESA data suggests there were 1,245 students studying in the main subject areas at nine of Scotland's biggest universities.²⁴ It is noticeable that some of the subjects most closely tied to filmmaking, such as directing or scriptwriting are studied by only a handful of students (15 and 10 respectively). Even cinematography has only 40 students. The most popular subjects are classed as 'cinematics & photography'.

²⁴ The nine were Aberdeen, Dundee, Edinburgh Napier, Edinburgh, Glasgow School of Art, Glasgow, St Andrews, Stirling, West of Scotland. These figures include both bachelors and postgraduate courses.

Figure 5: Students studying film-related subjects at higher education institutions in Scotland in 2011/12 (figures subject to rounding)

4-digit JACS subject	Numbers
Film studies	155
Theatre studies	140
Cinematics & photography	550
Directing motion pictures	15
Film & sound recording	20
Visual & audio effects	0
Cinematography	40
History of cinematics & photography	200
Cinematics & photography not elsewhere classified	10
Imaginative writing	100
Scriptwriting	10
Total	1,245

Source: Higher Education Statistics Authority (2013)

Skillset-accredited courses

Creative Skillset reports that the film sector tends to favour practical skills over academic qualifications – an opinion confirmed in the consultation for this report. To help strengthen the skills base Skillset therefore runs an accreditation scheme for institutions and courses that it regards as having particularly strong links with industry.

Screen Academy Scotland is a collaboration between Edinburgh Napier University and Edinburgh College of Art, both of which ran filmmaking courses before the establishment of the Academy. Screen Academy Scotland is one of only three Skillset Film Academies in the UK, along with the National Film and Television School in Buckinghamshire and the London Film School. It offers postgraduate courses.

The DCMS Review of film policy in 2011, led by Lord (Chris) Smith, recommended that the BFI, together with Skillset, HEFCE and the Scottish Funding Council, undertake a review of the three Skillset Film Academies to establish their readiness to be considered for the equivalent of ‘Conservatoire’ status, similar to that enjoyed by leading music, drama and dance academies. In 2012, BFI’s Future Plan – *Film Forever* – committed the BFI to such a review.

Several other institutions in Scotland offer courses that have been accredited by Skillset. These include the MA Television Fiction Writing at Glasgow Caledonian University, BSc and MSc (Hons) in Computer Games Technology at the University of Abertay Dundee, and the BA and BA (Hons) in Filmmaking and Screenwriting from the University of the West of Scotland. There are no accredited courses in animation in Scotland.

One other institution is particularly worth noting. The Royal Conservatoire of Scotland is not Skillset accredited, but it has a three year undergraduate degree in film and television production that offers craft specialisms and is designed by industry professionals.

Creative industries courses

It should be pointed out that these courses are part of a much wider spread of creative industries-related courses in Scotland, which may also be a source of talent for the screen industries. Skills Development Scotland (SDS) has estimated that at FE level, 38,000 people take a creative industry-related course, while in higher education, 11,960 people are studying Mass Communications, Marketing, Creative & Arts Design, a category which includes (among other subjects) Media Studies, Cinematography, Design, Computer-Assisted Design and Journalism.

5.5 Skills training

Some training is much more directly related to the world of work. These include Modern Apprenticeships, internships and professional training courses.

Modern Apprenticeships

Modern Apprenticeships were first introduced in the UK in 1994. Frameworks were devised which combine knowledge-based and competence-based elements. Apprentices receive support both from employers and from the state (for the off-the-job training aspects). There has been an effort to extend these frameworks well beyond the manufacturing sector, which has a history of employing apprentices. In 2008, for example, Creative & Cultural Skills introduced a set of Creative Apprenticeships, while a Freelance Music Apprenticeship is available in a handful of colleges in England.

In Scotland the Creative and Digital Media Modern Apprenticeship Scheme is run by Creative Skillset. It is responsible for developing and implementing the Modern Apprenticeship (MA) framework with the industry and formally registers MA providers and individual Modern Apprentices.

Skillset research shows that workplace learning is appreciated but the film industry has been resistant to formal apprentice type schemes. Although the new pathway has started slowly – there were only 16 enrolments on the new Creative and Digital Media pathway in 2012 – these new initiatives are expected to pick up speed. BBC Scotland is responsible for the majority of Modern Apprenticeship enrolments so far, and 8 out of its 10 apprentices through this scheme have gained work. The creative industries are a priority sector for the Scottish Government and the sector is expected to grow, so Modern Apprenticeships could potentially play a valuable role in increasing the skills of the workforce.

Internships

In 2013 Creative Scotland and Skills Development Scotland launched an internship programme, led by the Scottish Council for Voluntary Organisations (SCVO), which aims to offer paid internships across the creative industries. To date there are few film-related companies

directly offering internships but there are a number within the television sector and this may have knock-on benefits for film, given the sectors' close relationship.

Professional training courses

Even after someone has graduated and, with luck, managed to secure themselves a position within the industry, they are likely to need to update their skills periodically, particularly given the rapid changes in technology that affect the film business. (It is worth noting in this context that many of those who work in film or TV either do not have degrees or have ones in unrelated subjects.) Professional training courses will vary in length from a couple of days to a few months, and may be supplied either by the public or private sectors: Screen Academy Scotland, for example, runs many such courses. Funding for professional training is available from Creative Skillset and Individual Learner Accounts (ILA) Scotland, though there are restrictions on the availability of such grants.

Because of the sheer number and variety of these courses, this Review is not able to estimate the scale of provision in this field. Research by Creative Skillset²⁵ suggests, however, that demand for such training is considerable: 48% of the film workforce felt that they had a need for learning or skills development. The most common areas of need were computer skills in specific software packages (19%), accounting and finance (19%), general technical or craft skills (18%), writing and copy-editing (12%) and business development and commercial awareness (10%).

NETS

The Screen NETS Advance scheme builds on the 30 years of expertise and reputation of the New Entrants Training Scheme. Managed since 2011 by Screen Academy Scotland, Screen NETS Advance provides up to 20 weeks of funded on-the-job training. Trainees also receive short course or tailored training and/or mentoring from an industry practitioner. In 2012/13 Screen NETS Advance will support trainees in the following departments: Animation Production, Assistant Directing, Editing, Production Accounts and Script Supervision.

²⁵ Creative Skillset *Sector Skills Assessment for the Creative Media Industries in Scotland*

5.6 Public agency support for skills

Creative Skillset

Much of this activity is shaped by Creative Skillset, the sector skills council for creative media industries, so it is worth at this point describing Skillset's role in a little more depth. It is funded jointly by government and industry, and focuses on strategic funding support for skills development, rather than delivering courses directly. Its priorities are research into skills gaps and shortages, informing and influencing training provision and qualification development, and the provision of careers information and advice.

Skills in film, high-end TV, animation, games and visual effects (VFX) are supported through Skillset's Skills Investment Fund. The UK government is offering funding of up to £16m (if matched by the industries) leading to a total funding pot of £32m over two years.

In 2010/11 Skillset suffered a cut in core funding and has had to move to a bid-based project funding model. The level of grants it gives has dropped significantly. Scotland won 6.5% of the available funding in 2011/12, compared with 7-11% in the last few years of the old system.

Figure 6: UK and Scotland Skillset grants for film

Financial Year	UK	Scotland	Scotland's % of UK total
2006/2007	£8,050,615	£804,321	10%
2007/2008	£6,921,474	£782,823	11%
2008/2009	£8,489,696	£704,320	8%
2009/2010	£7,310,757	£545,933	7%
2010/2011	£4,293,828	£199,150	5%
2011/2012	£3,261,317	£211,266	6.5%

Source: Skillset/Robin MacPherson

Skills Development Scotland

Skills Development Scotland (SDS) is the national skills body for Scotland. While its responsibilities cover all sectors, it has an important strategic role in the creative industries sector, and through that on film. It

is the lead agency on the development of the Creative Industries Skills Investment Plan (SIP) and its particular relationship to the screen industries.

The new SIP will work to identify employer skills demands in support of sectoral growth, and will seek to re-calibrate supply-side provision (i.e. in further and higher education) to address this. SDS and Creative Scotland are also piloting the new Certificate of Work Readiness in the creative industries in 2014 and it is hoped that film facilities, services and production companies will participate in the pilot.

SDS is also a funder of several significant screen training initiatives, such as the BECTU Stepping Up project, BBC Scotland MA and Glasgow 2014 MA Schemes, and is a co-funder with the Scottish Funding Council of the Creative Loop Glasgow 2014 Host Broadcaster Training Initiative. In 2013 SDS provided some £223,000 in support of these initiatives.

Creative Scotland

In 2011/12 Creative Scotland spent £755,857 on film training and talent development, some 14% of its film-related budget. If contributions from Creative Skillset and the EU MEDIA programme are added to this figure then support for training and talent development totals £1,432,695 for that year. Taken as a whole, this represents 21% of identified public sector support for film.

The view from the consultation:

- There was relatively little non-expert comment on education, with commentators stressing their belief in the value of film education as part of a general education, with the increasing presence of the moving image in society warranting it gaining greater educational significance
- There was a recognition that people who do film or media courses aren't necessarily being trained for a career in the industry, but do acquire a set of skills that they might use elsewhere

5.7 Consultants' assessment of the issues

- Those commenting on education/learning noted how valuable hands-on experience was as a stimulus for involvement and enthusiasm
- There are a number of screen education support websites, originally developed by Scottish Screen, Education Scotland, and the National Library of Scotland, but it was suggested each needed some revisiting from the point of view of purpose, use and resourcing
- It was suggested that non-formal initiatives were the best way to get to hard-to-reach groups, but that beyond the Cashback scheme few initiatives directly support these activities
- Coordination of formal and non-formal education opportunities is needed and there was concern at the lack of training in film for teachers
- The lack of an exam in film means that 16-18 years olds are not systematically introduced to film culture in the way they are in Wales and Northern Ireland
- The lack of an exam is arguably also an indication of the (low) status of film in Scottish society and how film is reflected in public policy
- Education Scotland needs to champion the widely applicable value of film teaching and hands-on filmmaking experience
- A national youth film and media academy network was suggested.

Film education serves a number of purposes. It is a route into professional practice for some, but for the majority it is training in audio-visual literacy, a chance to learn some skills with potentially wider applicability, and a source of intellectual engagement. In this, it is typical of many subjects: few people who study English go on to become professional writers, for example, yet the subject provides a useful underpinning for their personal development and future careers.

That said, film education in Scotland does have its challenges. Although the country seems to have many of the structures in place to provide a solid grounding, a lack of take-up and funding is restricting their potential. Take-up at school level has been poor. Relatively few Scots study film in their school career, even as part of other broader subjects, while opportunities such as FilmClub failed to take hold. Progress will depend on being able to enthuse and train teachers, many of whom lack confidence in moving image education. That, in turn, depends on the wider educational agendas of the Scottish Government, local authorities, Education Scotland, Scottish Qualifications Authority, universities and others. Interventions by Creative Scotland in advocacy and in promoting collaboration and networking will be important.

The non-formal learning sector's organisations have done valuable work over the years on shoestring budgets but are arguably too small individually to sustain significant outreach, and may need to think about sharing resources or merging.

There are a number of creative learning initiatives that offer potential for film and for partnership work with Film Nation and other organisations. The Youth Arts Strategy was launched in November 2013 and its governance structure for delivery will soon be in place, offering opportunities for cross-art form work, particularly on inclusion, to complement both film-specific offers and Creative Scotland's participation and engagement programmes. Scotland's Creative Learning Networks in local authorities offer potential partnership opportunities, and Creative Scotland, Skills Development Scotland, the

General Teaching Council and Education Scotland are already collaborating through the Creative Learning Plan.

At tertiary level, there would seem to be an adequate provision of courses – indeed, some of those spoken to during the consultation suggested too many students were graduating from film-related courses, given the employment levels in the Scottish screen sector. Concerns were also raised in the consultation about the quality of students being produced by some of these programmes. Nevertheless, there are pockets of excellence. Screen Academy Scotland is one of only three Skillset Film Academies in the UK, indicating that its work is highly thought of within the industry, although it has fewer resources than the other two Film Academies (the NTFS and London Film School), while the Royal Conservatoire of Scotland and the University of Abertay Dundee also have strong reputations in particular fields.

Many industry professionals feel they have gaps in their skills. Training courses to remedy these are available UK-wide, though some are expensive, and there is no real evidence that Scottish professionals are less able to access these than are, say, professionals in England or Wales.

Talent and professional development for those working, or seeking to work, in audience development, exhibition and archive is perhaps less resourced and certainly less high profile than that for industry professions. In changing times, where support mechanisms for training are shifting and digital developments have created wider horizons, a new strategic approach may be required here.

Digital technology has changed much of the landscape and a regrouping of organisations to deliver skills training is needed to reflect the changing marketplace. Enterprise agencies, Creative Skillset, Creative Scotland, the Scottish Funding Council and Skills Development Scotland need a joint focus. The Skills Investment Plan for the creative industries, being led by Skills Development Scotland, should bring together further and higher education and the skills agencies and give a strong foundation for a skills partnership, as it does in other sectors.

6. Making film

6.1 Introduction

The Review now turns to the question of how films are made in Scotland. As Scotland remains (for now at least) part of the UK, many of the factors shaping the level of production are determined at the UK level, such as policies on film tax relief, the allocation of National Lottery funding and the exchange rate. This chapter will therefore consider both UK-wide and Scotland-specific elements of the filmmaking process.

Most feature films made in the UK require public funding in some form or another. The BFI notes that the principal sources of public funding for film in 2011/12 were the film production tax relief (58.5% of public funding), the National Lottery (14%) and grant-in-aid from central government (11%).²⁶ Film production and development received 70% of the total financial support, with smaller sums going to distribution and exhibition (7%). The value of all public funding for film production was £271.2m, equivalent to around about 9% of the production sector's turnover.

There has been a steady rise in the number of feature films made in Britain over recent decades, from an average of 43 a year in the 1980s to 83 in the 1990s and 136 in the 2000s. However, there are stark differences between the types of films made. Of the 133 UK features made in 2011, 28 were inward investment productions. These accounted for 80% of the total UK production spend: their UK spend totalled £1,012m. This figure was the highest yet recorded for inward investment, up 4% from 2010. The 2011 films included a number of big-budget productions such as *The Dark Knight Rises*, *Prometheus* and *Skyfall* (all of which filmed sequences in Scotland).

Inward investment features, and hence the amount of money they bring in to the UK economy, are sensitive to fluctuations in the exchange rate.

Between 2007 and 2008, for example, an appreciation in the strength of sterling led to a drop in the total value of UK film production.

UK domestic features generally have much lower budgets: in 2012, 62% of such films were made with budgets of less than £500,000. However, many British films do not get a theatrical release. The BFI calculates that, of the 626 domestic UK films and UK co-productions shot between 2003 and 2006, only 199 (32%) were released theatrically in the UK and Republic of Ireland within two years of completing principal photography.²⁷

6.2 Filmmaking in Scotland

The 1990s and early 2000s saw the development of institutional structures to support indigenous filmmaking and attract international production. This, coupled with the availability of lottery funding for film from 1995, led to a rise in feature film production from an average of two per year in the early 1990s to around six in the early 2000s, where it has remained since (though as Figure 8 shows, the number fluctuates from year to year). These production levels are low by comparison with countries of a similar size. The Republic of Ireland averages 18 films each year yielding an average 5% domestic box-office share, while Denmark averages 30 films a year with an average 25% domestic box-office share. These differences reflect a number of factors. Denmark and Ireland, as independent countries, have been able to devise their own tax regimes for film, while culturally, Denmark has historically been a high-tax, high-spending country with a tradition of generous spending on cultural activity of many kinds.

Scotland strives to encourage a mix of large inward investment productions and smaller indigenous productions. It has had some recent successes in this respect. *Skyfall* and *World War Z* were filmed in part in Scotland while this year indigenous films such as *Sunshine on Leith* and *Filth* have attracted critical and commercial acclaim. However, these seem to be unusual: Scotland has produced few films in the last five years or so that have achieved significant success. The exceptions have

²⁶ Figures from *BFI Statistical Yearbook 2013*

²⁷ Figures from *BFI Statistical Yearbook 2013*

been *The Last King of Scotland* (2007), filmed outside Scotland with an African-American lead actor but with a predominantly Scottish cast and crew, the Scottish-French animation *The Illusionist* (2009), and Ken Loach's comedy drama *The Angels' Share* (2012).

Recent Scottish films have tended to be dramas and thrillers, though there does seem to be an increase in the number of comedies too.²⁸ Scotland has seen a rise in co-productions especially with Nordic countries, coupled with a rise in low-budget filmmaking, such as May Miles Thomas' *Devil's Plantation* and Black Camel Pictures' *Outpost*. Feature documentaries have been growing in popularity in the UK, and in Scotland makers such as Mark Cousins are finding success with their work: funders of his *Story of Film* have seen their investments returned already. Scottish filmmakers are also producing experimental films.

View from the consultation:

- There is general agreement that Scotland lacks a stable and sustainable film industry, with low indigenous production levels and variable success from year to year in attracting inward investment. The call is for more films across all genres and more scale – “a business functioning creatively and economically with people and businesses making a living” rather than “a small underfunded service industry”
- Others suggest that a Scottish film industry will never be able to sustain many businesses and that success can only lie in a boosted television industry, allowing film to develop as part of a thriving television economy
- There is a mix of filmmakers in Scotland aiming at critical, public and commercial success in fields ranging from ‘art’ or experimental films to commercially or socially driven features. There is a need to develop this diversity strategically and

empower risk taking. Alongside this there has to be recognition that film is an art form as well as a business

- Many contributors cited a lack of infrastructure, investment and development funding as causing a loss of talent to other areas/countries where there is a more vibrant sector
- Some perceived that the subject matter and genre of films from Scotland is narrow – for some “strong realist drama is one of Scotland’s finest exports” whereas others perceive the self-same films to be “dreary social conscience dramas that few outside Scotland’s inner cities are going to understand let alone appreciate”
- Games creators, TV writers and producers, authors all embrace genre – does film?
- Talent ‘packaging’ of filmmakers with those working in, say, games or TV could be a useful form of collaboration
- The film sector rarely gathers to network and discuss its future – there were calls for annual meetings around specific hot topics.

6.3 Funding sources for film

Film production tax relief

The UK government has offered support to the film industry for decades in a variety of ways, from quotas for British films (first introduced in the 1920s), a public body to make loans for film production – the National Film Finance Corporation, set up in 1947 – and a tax on cinema tickets to support production (the Eady levy, introduced in 1950. All three elements were swept away in the early 1980s, and film production slumped for several years until the creation of a film production tax relief in 1992. This scheme ran for some time and saw the number of films produced rise, but concerns about it being abused for tax avoidance led first to the rules being tightened and then, in 2006, its replacement by a new film tax credit. The tax credit is now a key determinant of the number

²⁸ See e.g. <http://robinmacpherson.wordpress.com/2013/11/03/goodness-knows-were-not-so-miserable-now/>

of feature films made in the UK, and is currently the largest source of public funding for the industry.

Currently, British qualifying films (films that either pass the Cultural Test or qualify as official co-productions) that are intended for theatrical release can qualify for a rebate of up to 25% of UK qualifying film production expenditure (for a film with a budget of up to £20m), or a rebate of 20% for a film with a budget of over £20m, subject to rules about minimum spend.

National Lottery

The National Lottery was launched at the end of 1994. A fund for 'good causes' was established, which receives 28% of the revenue from the sale of lottery tickets. Film was identified as one of those causes, and lottery funds began to flow into film production in 1995. It is now an important source of public funding for indigenous film production. In 2011/12 £51.6m of National Lottery funding was allocated to film across the UK, distributed via the DCMS through the BFI and agencies such as Creative Scotland.

Broadcasters

Although broadcasters, by definition, spend most of their budgets on television production, several of them have film units which are another source of funding for feature films. BBC Films invested in 63 film projects in the years 2010-2012, with a net film spend in 2012 of £12m.

Film4 has invested in around 200 films since 2000. In the years 2010-2012 it invested in 55 film projects, with a net film spend in 2012 of £15m.

Foreign broadcasters, notably American ones, make TV production in the UK (HBO's *Game of Thrones*, Starz' *Outlander*) but to date have had little involvement in film production in the UK.

6.4 Scotland-specific funding sources for film

BFI and Creative Scotland are the most significant potential funders – and talent developers – within the Scottish film industry. Creative Scotland administers National Lottery funding for film in Scotland. This amounted to approximately £5.3m in 2011/12 and £6.2m in 2012/13. Of

that, £2.7m in 2011/12 and £3.5m in 2012/13 was allocated to production and development funding. Creative Scotland can invest a maximum of £300,000 into any one feature film, a lower figure than that for some comparator funds. The Northern Ireland Screen Fund, for example, can invest a maximum of £800,000 in a feature film from a total screen fund of over £12m. Since the cessation of the Glasgow Film Fund²⁹ there is no other major source of public funding for production in Scotland.

In 2011/12 Creative Scotland provided financial support of one kind or another to 29 feature films (including development, production, 'recce', and festival attendance).

Scottish films are also eligible for wider UK funding support and of the top 30 National Lottery awards distributed by the BFI in 2011/12, two related to Scottish productions (*Sunshine on Leith* and *Under the Skin*). *Sunshine on Leith* received £545,000; the largest award for a UK film was for £1.6m.

Both the BFI and Creative Scotland work with producers in Scotland and with Scottish producers based elsewhere. The funding they offer falls into four broad areas:

1. Project Development

Both Creative Scotland and BFI support the development of feature films. Creative Scotland requires 25% co-funding to be in place prior to their investment being confirmed. Although projects can be considered without secured co-funding there is a perception that this can leave producers without home agency support during the early stages of development and that agencies and funders outside Scotland (with more generous rules) are the first to consider projects from Scotland.

The BFI can fully fund development and also fund 50% of production costs.

Writers cannot apply for script development funding without a producer.

²⁹ Glasgow Film Fund was a partnership between Strathclyde Regional Council, Glasgow City Council and Glasgow Development Agency which provided funding to a range of films including *Shallow Grave*, *My Name is Joe* and *The House of Mirth*.

2. Development Slate/Multi-Project Funding

Slate support is available from Creative Scotland through the Multi-Project Development Funding, while the BFI offers Vision Awards with a similar remit, though there are currently no Scottish-based companies receiving this BFI funding.

This slate funding is of great importance for producers and demonstrates confidence in their decision-making and business acumen.

3. Production Funding

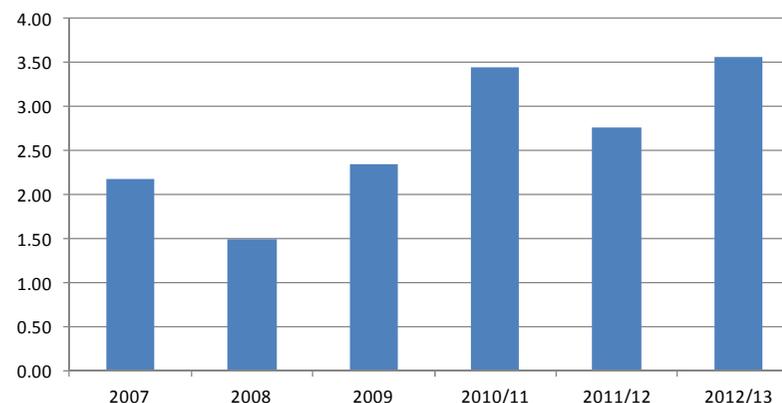
Creative Scotland’s maximum funding for production in any one film is £300,000. Scottish Screen adopted this limit after reducing investment from a maximum of £500,000 (at a time of reducing National Lottery funds) and Creative Scotland maintained the lower ceiling in an effort to spread a small fund around more productions and therefore increase the number of supported films.

Investment decisions for Creative Scotland production support are taken once 30% of the funding has been secured. This can be a problem for Scottish producers looking to partner in co-productions, as they may have little local funding to bring to the table.

4. Markets and Festivals Attendance

Creative Scotland has helped a number of production teams attend markets and festivals. This lets them explore market possibilities, make deals or screen finished work.

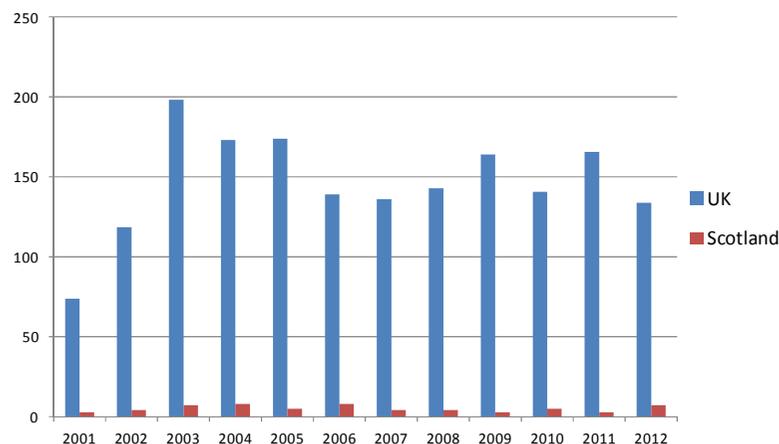
Figure 7: Scottish Screen and Creative Scotland “Film Production” and “Content Development” Investment Awards* 2007-2013 by year (£m)



Source: Creative Scotland/Scottish Screen

*TV related awards not included

Figure 8: Volume of UK and Scottish productions since 2001 (films with minimum budget of £500,000)



	2001	2002	2003	2004	2005	2006	2007	2008
UK	74	119	198	173	174	139	136	143
Scotland	3	4	7	8	5	8	4	4

	2009	2010	2011	2012
UK	164	141	166	134
Scotland	3	5	3	7

Source: BFI Statistical Yearbooks/BOP Consulting (2013)

The view from the consultation:

- Calls come from commercial and cultural filmmaking alike for more funds, invested early and flexibly managed, allowing a range of work to be developed and produced
- Contributors want to see a mix of films aiming at critical and commercial success. There is a varied talent base within Scotland and producers are not all aiming to make the same type of film – some require substantial funds for complex deals whereas others need only small amounts
- Many commented on the reliance of film production in Scotland on lottery funding, rather than Scottish Government funds, and saw this, alongside the recoupment of investment in profitable films by Creative Scotland, as indicating film is treated differently from other art forms
- Make track record matter by rewarding success to enable producers to build sustainable businesses. Ensure recoupment corridors and adopt a system of allowing development spend to be rolled into the next production. Tax credit should be deemed producer equity
- Producers call for early commitment of funds to signal the support of their home funder before they enter the competitive international market. Producers recognise tying funds to projects for indefinite periods could potentially put a small fund in jeopardy and also recognise that closing films takes time. However, they need cornerstone funding
- The £300,000 upper limit on production funding causes concern, particularly as it represents the only likely funding from Scotland and means producers have less to offer than, say, counterparts from Northern Ireland (where the maximum is £800,000)
- There was also much discussion about the value of small interventions for those filmmakers whose projects are made to tighter budgets. In an age of digital distribution, a fund with a

quick turnaround time and the ability to take risks which could offer small investments would be welcomed (“small strategic grants can have a significant impact on a filmmaker’s development”)

- Crowdfunding was little mentioned though *Dummy Jim* was cited as a film that made good use of that method of fundraising
- More regular contact between Scotland’s producers and BFI would be welcomed to ensure the BFI is up to date with development slates – and producers are up to date with BFI funding strands and thinking. Producers were unsure how effectively BFI and Creative Scotland work together to both develop talent and maximise funding for projects from Scotland
- Some wondered whether a lack of Scottish based development funding early on in the filmmaking process could be influencing people’s choices of project
- Writers questioned the rules preventing them from accessing development funding without a producer – even to produce a speculative script for those contemplating changing medium. Whilst there is a recognition that the most effective development includes editorial support they urge a more flexible approach.

Broadcasters

The two main UK broadcasters that fund film, the BBC and Film4, have had an impact on Scottish film. Film4 has been a major financier of Scottish film since 1995, contributing to some 15 indigenous features. This represents 5.5% of all Film4 projects since 1995.

BBC Films has also invested in a number of productions in Scotland. It invested in three indigenous Scottish productions in the 1990s and six since 2000. This represents a total of 5.5% of BBC Films funded productions since 1990. While BBC Films and BBC Scotland have no formal links, they have collaborated in the past and the drama

department at BBC Scotland is interested in strengthening the partnership.

BBC Scotland has no formal policy on feature film support though its Television Commissioner has made small investments in a number of documentary productions and shorts, and has secured TV rights in two low budget feature films. More recently it moved from supporting short-film making to investing in a small number of low-budget feature film development projects in a co-venture with Screen Academy Scotland known as Lo-Fi.

There is a drive within the BBC to increase the share of network airtime given to programming from the nations and regions. BBC Scotland has little opt-out airtime available and therefore has few opportunities to screen even the small number of films it supports. This affects its ability to purchase rights for screening in Scotland.

The commercial broadcaster, Scottish Television, has no formal involvement in feature films other than through the acquisition of TV rights. The last fiction feature supported in production was *Gregory’s Girl*, in 1981. Recently, though, the production side of the company has had success with a feature documentary, *Fire in the Night*, a co-production with the BBC, which opened at Edinburgh International Film Festival and won its Audience Award. Scottish Television has recently acquired city licences (for Edinburgh and Glasgow) for local content and will have broadcast hours to fill. Though minimal budgets will be associated with the service, local channels may offer outlets for locally produced work. Scottish Television’s strategy of opting out of the ITV network may potentially offer an opportunity to screen purchased film, given its ability to broadcast to Scotland only.

As noted elsewhere, television production is critical to the film sector. It not only provides significant employment but also develops talent (on and off screen), generates revenues and provides audiences with insight into their world. International broadcast production, such as *Game of Thrones* and *Outlander*, can have significant knock on effects by generating investor confidence and raising profile as well as being valuable employment engines.

The view from the consultation:

- There is no strategic commitment from Scotland's broadcasters to the development of cultural or commercial film from Scotland, although BBC Scotland supports individual productions
- Some called for Scotland's broadcasters to be obliged to support the film industry as part of their cultural commitment
- Lack of airtime is an issue and frustrates those whose work could, they feel, reach an audience in Scotland
- Broadcasters are active in training.

6.5 Inward investment

Scotland produces only a handful of indigenous films a year. If the film community's skills are to be properly used, therefore, they need to attract films into Scotland on which Scottish talent can be employed

On this score, Scotland's recent record is encouraging. The country's landscapes (both urban and rural) have attracted a significant number of international Hollywood productions. In the past five years, an average of six inward investment feature films was filmed in part in Scotland. In 2011, scenes for major international productions such as *Dark Shadows*, *Prometheus*, *Snow White & the Huntsman*, *Cloud Atlas* and *World War Z* were filmed in Scotland. Reported local spend for features films made in Scotland that year reached around £12.7m, a large majority of which can be attributed to these inward investment features. The positive impact of such feature film productions filming on a local economy can be considerable. Glasgow City Council estimated that the economic impact on the local economy from the filming of *World War Z* was likely to be in excess of £2m. However, the majority of inward investment filming in Scotland is location work, often by the second unit. Scotland lacks the studio facilities that would enable it to sustain a big-budget production in its entirety.

Figure 9: Location Spend in Scotland 2008-2012

Year	Reported Spend from Film Production	Reported Spend from All Production (Film, TV, Commercials etc)
2012	£6.6m	£27m
2011	£12.7m	£29.3m
2010	£5.9m	£21.5m
2009	£8.3m	£24m
2008	£3.5m	£28m

Source: Creative Scotland

The UK has recently introduced a tax credit scheme for high end television drama, to match the credit for film. Both the Treasury and the DCMS have argued that screen offers significant potential for export growth. International TV productions therefore are a significant potential source of revenue for Scotland's screen-related businesses. It may well be that the development of high-end television capacity, alongside existing local television, becomes the most likely source of sustainable income for the screen sector in Scotland, with film being a minor, if important, part of the sector's revenue streams.

The view from the consultation:

- Incoming production is vital for a sustainable industry
- Crews and facilities need incoming production for employment and turnover as well as to develop their skills and talent
- Other nations offer incentive funding (linked to spend) to attract production. Scotland must do this and increase its facilities to compete
- Location offices need robust links to local authorities to coordinate the services required for production, but the location network is not a priority for local authorities whose support for their services is declining.

6.6 Animation

Scotland's animation companies work across television, film, advertising, visual effects, gaming and online content. Much of their work is shown outside Scotland and some companies reported their Scottish revenues were as little as 10% of their total turnover.

Most companies work in television, with only small numbers developing feature productions. This mix means that the high-end television tax credit is likely to have more impact on the animation sector in Scotland than the tax credit for film. Even 'low-budget' animation features can cost between £5m and £20m – very high by comparison with live action low-budget filmmaking. The funds that can be raised in Scotland for productions of this scale are low, contributing to the lack of animation feature development, as does the longer lead time required for production of this scale and type.

Of the 18 company members of the Scottish Animation Network only a handful are well networked internationally and have been supported by the enterprise agencies through account management or other interventions. Some do not see themselves fitting the profile of Creative Scotland clients, especially those whose business is primarily service, rather than IP, development. Collaboration and networking between the prolific games, comic book and graphic novel sectors seems rare yet has the potential to develop new talent relationships and new ways of working.

There is little animation studio activity in Scotland, whereas in the Republic of Ireland and Northern Ireland small companies have grown into successful studio businesses working on television series primarily aimed at the international children's TV market. The new animation and television tax credits should make production in the UK more attractive, though Britain will still struggle to compete with the incentives and cheaper labour of some overseas studios.

Animators pointed out that festivals, particularly EIFF and GFF, are a significant showcase for short animations and although the animation sector is small, individuals and companies have been successful in winning awards – including BAFTAs, Emmys, and Cannes Lions.

Short-film making is of critical importance to animation – it develops the skills required for storytelling across all platforms. Producers sometimes use shorts as calling cards, to trial ideas for full length production. For all filmmakers, shorts are vital to talent development and the current Digicult/Hopscotch short film scheme includes animation production within its scope. The gulf between short-film making and first feature is particularly significant in animation where even low budget films command substantial budgets. There are few opportunities for filmmakers to bridge that gap with, for example, 30 minute shorts.

Animation courses in Scotland are thought to be good, with Duncan of Jordanstone, Abertay, the University of the West of Scotland and Edinburgh College of Art being seen as developing internationally recognised talent, albeit on a small scale. Many graduates gravitate towards the more lucrative games industry, where Rockstar alone employs 350 people (though not all of these are animators). There is, though, stiff competition in this field, with Bournemouth and Teesside Universities in particular seen as excellent. Looking internationally, French and German animation schools (Superinfocom and Gobelins, for example) are recognised as producing large numbers of high calibre graduates, sought after by US talent scouts.

The view from the consultation:

- Animation companies have a broad spectrum of work across advertising, online, gaming, TV and film
- Scotland develops very few animation feature films and few companies focus on this element of their business
- Some reported collaborations between animation companies and TV and film
- There is good animation training yet few jobs for animators *per se* in Scotland post graduation
- Funding levels from Scotland are low and the lack of incentives poses issues for animation where the business is global and other countries/regions bring more to the table.

6.7 Short films

Shorts are invaluable for their ability to ‘break’ new talent, and can encourage both consumers and filmmakers to experiment. The opportunities for creating and showing short films have expanded enormously with the advent of the internet. YouTube and sundry other platforms offer a wealth of distribution channels, and digital technology has reduced the cost and difficulty of making films very considerably. However there is still a place for professional filmmaking schemes and platforms to provide a pathway into the industry and to provide screening opportunities at festivals, online, on TV and in cinemas.

Creative Scotland currently supports short-film making through the Scottish Shorts scheme run by Hopscotch Films and Digicult. This provides a bridge for the best emerging talent in fiction and animation to be guided into production. For producers, directors and writers it offers the opportunity to be mentored through development and production to make new work for audiences in Scotland and beyond. The present scheme will end soon and Creative Scotland is currently tendering for providers of a successor scheme. Other than initiatives run by the Scottish Documentary Institute,³⁰ this is the only public funding scheme operating in Scotland for short films, although there is some public sector support for the Glasgow Short Film Festival, which showcases Scottish talent.

The view from the consultation:

- Many contributors mentioned past short film schemes and the success they generated (such as Tartan Shorts, Cineworks, Newfoundland). While it is now possible for anyone to make a short with little or no funding, it was also recognised that high-end short films are still an important introduction to professional filmmaking and are a tool for talent development

- There are currently only two support schemes running. Many agencies including BFI have moved from short schemes to bespoke support. The reliance on one scheme was seen as a loss: a ladder of support is no longer there and the gap between short-film making and feature is too great
- Many commented on the practice of not paying professionals working on shorts (and of employing friends and family). It was argued that those in receipt of public funds should pay crew members
- Others questioned whether involvement in short schemes was the best development tool for writers and sought writer-only public support to encourage development of sample feature scripts.

6.8 Gaelic filmmaking

The distinctiveness of Gaelic language and culture creates opportunities for screen-based storytelling. Gaelic-language animation is particularly strong. The inauguration of BBC Alba as a Gaelic language channel was a vital step in the development of programming for, by and about Gaelic life.

Very few Gaelic-language feature films have been produced to date. Mike Alexander’s *As an Eilean* (1993) was the first, followed by Simon Miller and Chris Young’s *Seachd: The Inaccessible Pinnacle* (2007).

FilmG, Scotland’s national Gaelic film competition, which develops new talent and produces online content, is now in its sixth year. FilmG training includes school and community-based sessions on story development, filming and editing, alongside masterclasses with prominent actors and filmmakers.

³⁰ SDI is a documentary research centre at Edinburgh College of Art specialising in documentary training, production and distribution. It was established in 2004.

6.9 Equalities and diversity

There are very few feature films produced in Scotland which reflect Scotland's ethnic minority communities: only *Nina's Heavenly Delights* (2006), directed by Pratibha Parmar, and Ken Loach's *Ae Fond Kiss* (2004) come to mind. With the partial exception of Gaelic speakers, other minorities too are largely absent from Scottish features. There are also few films by or about women. This is largely a function of the small number of films made in Scotland generally, and the limited domestic market, both of which arguably push filmmakers towards more mainstream subject matter. Nevertheless, in the Open Call consultation there was a strongly expressed view that Scottish films needed a greater diversity of tone and subject.

6.10 Consultants' assessment of the issues

Scotland's film industry makes too few films to be a conveyor belt for success. Hits do come, and there is currently an array of popular movies from Scotland on UK screens. However, there is no guarantee that others will follow next year – or even in the next five years. The last cluster of successful Scottish films before the current batch dates from the mid-late 1990s.

While there is no guaranteed formula for a hit film, Scotland needs to make more films if it wants to produce more hits. Setting a target to produce significantly more – say, doubling annual average output to 12 in five to ten years – might be a useful approach. This would have implications for development with significantly larger slates being required to feed a bigger production pipeline as well as potential changes in talent development support structures. The BFI has adopted a more bespoke approach to talent development and Creative Scotland might consider how it develops individuals (including writers) to bring more developed work to production readiness.

Alongside commercial filmmaking it is important to encourage the development of film as a cultural medium, one where a range of voices can tell Scotland's stories and reflect their world. These films should not

be judged purely on commercial grounds but on the richness of their contribution to society and cultural identity.

Inward investment production is vital for jobs, as is television production from both international and UK broadcasters. All need strategic support to develop and thrive. This mixed economy is essential if film is to be sustained within the screen sector. Film alone is unlikely to generate sufficient business to maintain an industry.

Looking at Northern Ireland and Denmark, places often mentioned during the consultation, it is clear that consistent and long-term support for screen at government level has played an important part in establishing a critical mass and attracting world players. If Scotland wishes to compete in a meaningful and sustainable way at that level, a long-term strategy supporting film development, production and distribution is needed.

The funding environment is difficult. The current economic situation affects private sector investment in film as in other sectors. Public sector funding is constrained, with the Scottish Government and its agencies limited to an overall funding envelope determined by the UK Government, which has been reducing. The Scottish budget is being cut by close to 11% in real terms between 2010/11 and 2015/16, and based on the projections set out in this year's UK Spending Round, it is likely that further budget reductions will be imposed on Scotland until at least 2017/18. Despite that, the Scottish Government has sought to prioritise support for culture and the creative industries.

Creative Scotland is the only significant funder for production and development in Scotland. This lottery funding (around £3.5m) supports both local and inward production. It is clear that a sustainable industry would need both greater funds and a review of funding strands.

Creative Scotland is aware of the criticisms of its funding streams and a more flexible approach to, for example, match funding and early commitment to projects is under discussion. These are good developments and should be enshrined in any new funding model.

Film in the UK is a London-centric business, and Scotland's film sector is perceived as remote from that centre. Stronger linkages for both producers and agencies with their counterparts and potential funders in

London are essential. The BFI is the key film agency in the UK yet many contributors had little connection with its work. Its current interventions to develop a more rounded UK offer for training and audience development are heightening the potential for partnership between Scotland and the BFI, and it is important to take this chance to build better links for development and production.

The sector has to be flexible. Technological development allows individual filmmakers to make and distribute films that may have previously struggled to be commissioned. This not only presents opportunities for a diversity of voices to be heard, it democratises professional filmmaking and creates alternative business models. Other aspects of the business are changing too – development monies are drying up as funders focus risk on production, broadcasting is becoming more important, co-production is essential and track records are more scrutinised than ever.

Small films with small budgets need only make modest returns to be profitable, and Creative Scotland should ensure that funding streams are flexible enough to support such projects. Digital distribution routes are vital for many of these filmmakers and development of suitable resources is necessary.

Films with budgets under £1m are unlikely to include major stars, and therefore also unlikely to attract significant pre-sales. These are the films most likely to rely on public funds. Genre films need international talent and often need a higher budget; an issue for Scotland given the relatively low level of public funding support.

The television production market is changing internationally – partly because new distribution models are bringing new commissioners into the market (such as Netflix and Sky) and partly as a result of the changes in the US film market, where mid-range and independent films are struggling to maintain market share. Storytellers and actors who hitherto would not have chosen to work in TV now do. The high-end television tax credit in UK offers a catalyst for Scotland to profit from this change which will impact on film. The shooting of the *Outlander* TV series coming to Scotland offers significant opportunities. This is US TV's first Scottish venture and more should be encouraged. For crews, high-end television offers the possibility for more work at home which in turn

should attract new talent. For facilities and studios it offers additional sources of business. For producers, the potential to diversify, to add or develop competence in TV production, especially drama, to their portfolio may help them develop more sustainable businesses. As a catalyst for growth, particularly for facilities and location spend and with potential for producers, broadcast business offer a hugely important market.

The advent of video-on-demand services as commissioners and funders of original shows (the Netflix model with *House of Cards*) heralds potentially enormous change in the market. In the UK the arrival of services such as Blinkbox (part of the Tesco group) bring new services to mass audiences and disrupts the status quo in a way that may have direct effects for Scotland's producers. Microsoft's Xbox is now a broadcast platform looking for long-form and feature length content and commissioning in the UK. It too changes the environment within which producers operate, therefore changing their development needs, and is important to monitor and investigate.

Scotland benefits from its diaspora of influential producers. Established names such as Iain Smith, Steve Clark-Hall, Mairi Bett, Andrea Calderwood and Margaret Matheson are being joined by newer filmmakers: Siri Rødnes, Jamie Stone, David Stoddart, Johnny Barrington and Scott Graham. Despite their desire to bring business to Scotland they have been unable to bring large-scale productions because Scotland's infrastructure lacks suitable studio facilities. Whether productions such as *The Man from UNCLE* and *Frankenstein* (both produced by Scots) could be made entirely in Scotland remains to be seen but even a small influx of such blockbusters would create employment and develop skills. These producers recognise both the screen value of Scotland for location shooting and the skills of crews. A formal network of these 'global' Scots – perhaps in association with BAFTA – could be beneficial.

There could be more collaboration among the sector – perhaps the opportunities to diversify into television work will be a catalyst for this. The establishment of Independent Producers Scotland provides opportunities for collaboration and ideas exchange and may see more co-ventures between producers.

7. Earning – supporting enterprises and employment

7.1 Introduction

In this section the earning potential of film across the supply chain is explored, by examining the structure of the industry and its related activities together with the characteristics of its workforce.

Film-related businesses cover a broad spectrum of activity from archives, training agencies and cinemas to production companies, facilities and studios, all generating jobs and revenue. In Scotland it is rare for a business to focus solely on film; instead, most work across the screen sector. The majority of film-related businesses are based in the central belt, particularly those which focus on production. However, film-related activity can benefit firms across the country – from caterers on Skye to film-tour operators in the Highlands.

A recent study³¹ calculated that film and video businesses had a total turnover in 2010 of £201.6m and generated £118.4m in Gross Value Added (GVA) for the Scottish economy. (Film and video as a category will obviously include more than just film businesses.)

The BFI suggests that Scotland's film production companies had a total turnover of £32,851,000 in 2012, representing 1.2% of the total turnover of all UK film production companies. In all, 80% of UK turnover in the film production sector was generated by London-based companies,

³¹ DC Research (2012) *Economic Contribution Study: An Approach to the Economic Assessment of Arts and Creative Industries in Scotland*, Creative Scotland

reflecting major inward investments through the London-based UK subsidiaries of US studios. The ten film exhibition companies thought to be present in Scotland had a total turnover of £10,006,000 in 2012.³²

7.2 Workforce characteristics

Creative Skillset carries out detailed surveys of the workforce across the 'creative media' industries. In the UK the film workforce comprises 7% of the total for creative media. Creative Skillset estimates there are 2,692 people working in film in Scotland, accounting for approximately 8% of the UK total. Of these, 2,018 were classed as employees, while 674 were freelance.³³

Film production

Within this overall figure 702 people worked in film production, having an average annual salary of £26,260. This salary is lower than the average for the UK as a whole.

Only 62 of these people are employed full time, meaning that 640, or 91% of all people working in film production, are freelancers. (A similar pattern is seen across the UK, where 89% of people working in the sector were freelance in 2010.) In Scotland, 46% of those working in film production are women and 2.3% are black and minority ethnic (BAME).

Film distribution

There are 160 people working in film distribution in Scotland, according to Creative Skillset.³⁴ Of these, 126 are employed and 34 are freelance. A quarter of the total are women.

Cinema exhibition

There are 1,830 people working in cinema exhibition in Scotland with an average annual salary of £15,131. Women represent 53% of all workers.

³² BFI (2013) *Statistical Yearbook 2013*

³³ Creative Skillset (2010) *Labour Market Intelligence Digest*

³⁴ This figure was queried by some consultees as being too high. Creative Skillset points out that over-estimates are possible when dealing with smaller numbers and geographies.

Figure 10: Film workforce in Scotland

	Full Time Employees	Freelance	Total Workforce	Female	BAME	Av. Salary
Film Distribution	126	34	160	25%	0.0%	n/a
Film Production	62	640	702	46%	2.3%	£26,260
Cinema Exhibition	1,830	0	1,830	53%	n/a	£15,131

Source: Skillset 2012 Employment Census of the Creative Media Industries & 2010 Creative Media Workforce Survey

7.3 Film producers and production

Scotland has only a small number of film producers, who struggle to make a living on their output. There are very few (if any) sustainable businesses relating exclusively to film. Businesses are small, most supporting only a single producer, and no major production companies operate from Scotland. The majority of the producers and production companies are based in the central belt.

Most producers in Scotland aim to make fiction films but a number work in documentary. Some also work on television projects (either as freelancers, within broadcasters or through their companies) and this can potentially generate income, experience and talent relationships. However, the small volume of TV production, particularly in drama, and the non-Scottish base of the big TV producing companies is a constraint on such activity.

The view from the consultation:

- The call generated discussion on whether there is a need to encourage a diversity of small companies or have a smaller number supported by public funding (to encourage them to have a talent development role)

- Producers and filmmakers acknowledge they do not collaborate and put that down to a lack of resources creating competition
- At the review's Open Meeting, when asked by one of their number to raise a hand if they were making a decent living from film, no-one did so
- Some contributors suggested producers make a film without giving enough thought to its effect of the sustainability of their business. It was suggested that, to succeed, there must at least be the intention for one film to generate enough revenues (cashflow at least, profits at best) for the producer to begin their next project
- Producers tend to put all their efforts into getting one film made – even if it is a hit they don't have a pipeline in place for the next production. Working alone or in small companies exacerbates this problem
- Businesses need to understand and utilise the breadth of opportunities to make money from digital production and distribution
- Development for producers – from mentoring and shadowing schemes for new producers to market initiatives for established producers with market-ready projects – was much discussed. The Market Leaders scheme³⁵ was praised and there were calls for more of its type. Such schemes are intended to bring revenue to companies and films by developing their market, and should be supported as such (support is currently coming from the training budget; in other countries, such schemes are supported as marketing or development interventions).

³⁵ Market Leaders aims to help established film producers in Scotland find international partners for their projects

Crew

Scotland's crew base moves easily across film, television and commercials work. For many crew members there is little distinction between these media, and in any case there is insufficient production in any one medium to allow specialisation. However, while there is talent in Scotland, there is a lack of production activity to maintain a pipeline of good skills in each department. This has depleted the skills base, flattened pay rates and led to an ageing workforce in some departments, with young people leaving Scotland to gain experience. These and other changes have prompted crew members to establish a lobbying group, the Association of Film and Television Practitioners Scotland (AFTPS).

Crew depth (the number of productions that can be simultaneously staffed) is low as crew members often have to leave Scotland to find work. In a global market such as film it is inevitable, and often desirable, that there is freedom of movement for skilled personnel. For some, working outside Scotland is a positive choice, while for others it is a necessity. Some may return in time, and many maintain a home base in Scotland, but those with families may find the working environment difficult, requiring long periods away from home. Scotland is a small country, so there will never be a constant flow of productions, but more production would obviously change the balance of home/away working, as it has done in Northern Ireland. Indeed, it is reported that many Scottish crew are choosing to re-locate to the province.

Creative Skillset's³⁶ survey reported that there was a view that skills development should be targeted at entry-level recruits and at improving transferability of skills between TV and film production in the existing workforce.

There are some key issues that must be considered in any skills strategy. There is a need to pass technical, production and craft skills on to the next generation through apprenticeship-style courses. The industry faces challenges in this regard from the emergence of digital as a tool for both production and exhibition. New HD cameras, new formats and computer technology demand new methods, particularly in camera,

design and make-up. Digital projectors too demand new skills of projectionists and exhibition staff. 3-D is beginning to be adopted as a commercially viable technology across a range of production types and needs a new set of production and post-production skills. More generally, freelancers often have ambitions to set up small companies, and need business, finance and marketing skills.

The view from the consultation:

- There was a significant response from crew members and most report a desire to work at home more – but there simply isn't enough production. Senior crew with a home base in Scotland report that up to 90% of their earnings were derived from outside the country
- Many report static or declining earning power even on television productions
- Some also report skills gaps though it was not possible to tell which departments are most affected
- A lack of production makes it hard to keep young crew here, and difficult for them to gain skills if they do
- The lack of production infrastructure in Scotland – especially studio and sound stages – is especially lamented by crew for whom the knock-on effect is lack of employment in Scotland.

Facilities

A strong facilities base is essential for attracting production, but equally facilities need more production to maintain their viability as businesses. Scotland has many first class facilities companies and personnel who provide good service, mainly to TV production. There are reported strengths in audio post, foley, editing and VFX.

³⁶ Creative Skillset (2011) Sector Skills Assessment for the Creative Media Industries in Scotland

Creative Skillset estimates that 18% of Scotland's creative media workforce is employed in facilities for film and TV.³⁷ Facilities companies offer full-time employment opportunities and invest in up-to-date equipment and technology. They also offer skills training to staff and placements for students with some being in a position to offer Modern Apprenticeship schemes.

Scottish facilities companies have recently banded together as Screen Facilities Scotland (SFS). Many have film experience but turnover from film business is not thought to represent a large or regular slice of their business currently (though there is a shortage of research on this subject). However, it is believed in the sector that they have the capacity, expertise and technical ability to grow their businesses, widen their experience, develop talent, invest in new equipment and work with different crews and production companies from around the UK and further afield. More film business in Scotland would have the potential to deliver this, though productions shooting in Scotland to date have often brought facilities and services from outside, meaning this valuable opportunity is lost. Collaboration through SFS has already resulted in increased work for the sector – shown by, for example, the success of Serious, Savalas and 422.tv's joint work on *MI High*, a show with a heavy dependence on VFX. That level of VFX servicing had not previously been achieved in Scotland, and while it is an example from television, the skills are transferable to film.

Screen Facilities Scotland reports a growing trend within film production (though not exclusively in film) to drive particularly hard bargains and pricing can be driven down to unsustainably low rates, sometimes below cost. This is a widespread problem in the industry: London-based facilities houses report similar concerns. However, the problem seems particularly marked in Scotland where the production pipeline invariably is neither as full nor as diverse as in London.

Incentive funds are offered in many countries and territories and these undoubtedly attract production. These funds are typically spend-related and require there to be a range of facilities available locally for

productions to use to fulfil those requirements. Were such funds to be established in Scotland they could be expected to have knock-on benefits for facilities businesses locally.

Cross pollination of skills in film facilities with those in the games industry, particularly to grow visual effects (VFX) skills, could be beneficial.

The view from the consultation:

- Facilities to support any studio are essential to ensure it can locally provide all the needs of production, both incoming and local
- Incentive funds would attract business and bring additional turnover but a connection between these funds and use of local companies would be beneficial
- Producers are believed to expect special deals, often below cost. Engaging and negotiating with facility companies for services much earlier in the production planning process can work better for all
- Each time an incoming or indigenous production brings in facilities and services from outside Scotland is a lost opportunity to develop Scotland's facility infrastructure and appears to demonstrate lack of understanding and trust in the local offer
- Games synergies should be developed – some facilities are working on US games yet have no links with locally based games companies.

Studios and workspaces

Creative Scotland's Screen Locations service has a listing of industrial spaces and purpose-built facilities that can be used for workspace and studio/build spaces throughout Scotland. Of the eight studio facilities listed, six are in the central belt, one is in Inverness and one is in Stornoway. In late 2013, 22 facilities were listed as providing buildspace, only three of which were outside the central belt.

³⁷ Creative Skillset (2012) Creative Media Workforce in Scotland

Television production, both local and network, is an important business driver for these spaces. The majority host little film work and a mix of revenue streams is essential to sustain their continued existence.

The lack of large-scale studio space has a detrimental effect on Scotland's ability to attract big-budget productions, other than for location shooting. This limits potential income streams. A number of empty buildings have been pressed into service for film production on an *ad hoc* basis but this imposes additional costs on the production to find and adapt the buildings for temporary use. Even if such a project makes a building 'production-ready', there are no resources in place to maintain them for future use. Permanent facilities, including sound stages and workspaces adapted for mixed use, are needed.

Outlander, the new US television series that is shooting its first season in Scotland, is using a factory building in Cumbernauld as its base. There are discussions underway about whether this base has the potential to expand and become something more permanent.

The absence of a film studio is a hot topic at the moment, and Scottish Enterprise and Creative Scotland have been examining the case for public intervention in this area. A Film Studio Delivery Group has been established by the Scottish Government to consider a number of sites as potential location for a facility. It is anticipated that a decision on the suitability of identified sites will be made public in the near future.

Securing studio facilities would be a first step to placing Scotland on the world stage, but other steps would be needed too to make it a success: marketing, securing productions and skilling up to sustainable levels. Any new studio will need public support in its early years to allow it to grow and secure sustainable business in addition to any capital infrastructure funding it might receive.

The view from the consultation:

- There were few who did not support the call for increased studio provision. The majority, and all crew members consulted, agree that without additional sound stages and flexible spaces it

would be impossible to attract more production and sustain jobs

- However, there was a variety of opinion on what type of studio provision is needed, its location, the extent to which Scottish producers would benefit from its introduction, and its impact on charging rates for people and facilities. Concerns were raised that a new facility primarily aimed at attracting inward investment would absorb scarce resources that might otherwise support indigenous production
- AFTPS supports moves to expand Film City Glasgow and the plans to establish a large scale studio
- Crew members from Scotland have experience of working in studios around the world – suggesting that an appropriate domestic skills base could be developed quickly
- The current use of temporary spaces requires constant funding to find, make ready and maintain facilities. There are also health and safety implications for cast and crew in using many of these buildings
- New facilities should be production 'villages': multi-purpose mixed use with stage/s. They should also be incubators for talent in Scotland. Wales, Northern Ireland and the Republic of Ireland were thought to have achieved this, but have done so only with public support.

Location services

Location offices work with local authorities to meet the needs of incoming producers, whether they are from Scotland or further afield. Local authority support for such services is variable, as budgets are often small. Much production takes place within the central belt, especially within a thirty-mile radius of Glasgow to avoid 'over-nighting' crews.

There is also support at a national level from the Locations team within Creative Scotland. There have been calls for match funding to encourage local authorities to maintain and support these services. A vibrant location network, linked to local authority location offices is necessary if the geographic spread of production is to be maximised. While a network currently exists it is funded primarily by local government, which has many other demands on its budgets and leaves individual offices vulnerable to policy change. A central hub for signposting and marketing, most likely based within Creative Scotland and working with EventScotland and VisitScotland, could greatly enhance the offer for producers, particularly inward investment.

The view from the consultation:

- Fostering a reputation as a film-friendly country with a network of local, well connected film offices is vital for success. These should be funded by, and connected to, both Creative Scotland and local authorities
- Local authority support for many location services has declined rapidly during the last five years leaving a patchy service. There is a need for coordination of the network to ensure coverage is plentiful and well connected to local authority services
- Access to 'recce' funds is needed to put location services in Scotland on a par with other areas. These have diminished over the years, especially in some local authority areas, and central coordination of funds may be a solution
- Branding and marketing of Scotland's films would benefit from linkage to location services
- Location offices could be local gateways, helping production and industry to work with local businesses and facilities as well as fostering links with tourism agencies.

7.4 Film distribution

According to Skillset's 2010 Workforce Survey there are 160 people working in distribution in Scotland. Park Circus is the largest distributor in Scotland and their successful business is based upon the reissuing of existing work rather than distribution of new titles. Their distinctive offer has brought significant success.

Distrify operate a successful and innovative online platform for filmmakers to self-distribute. Their technology also powers the online players from GFT and Edinburgh Filmhouse and they are currently working with Creative Scotland on scottishfilms.com to clear worldwide streaming rights.

7.5 Cinema exhibition

According to Creative Skillset there are 1,830 people working in cinema exhibition in Scotland with an average annual salary of £15,131. Women represent 53% of all employees. People working in 'cultural' cinemas receive higher wages on average than those in the commercial sector.

As the commercial exhibition sector dominates cinema exhibition in Scotland (multiplex cinemas account for 76.3% of all screens) and is owned by non-Scottish companies, the majority of its profits do not stay in Scotland. The only exhibition companies in Scotland run the cultural cinema venues. The BFI estimates there were ten film exhibition companies in Scotland in 2013. They had a combined turnover of £10,006,000 in 2012: just 0.8% of the total turnover of all UK film exhibition companies.

7.6 Television production

TV production is vital for maintaining facilities businesses and allowing crew to make a living. UK government taxation policy has recently changed in this area to offer tax relief for high-end TV production. Incoming and UK television therefore both offer important opportunities, but in both cases it will be important to ensure that any incentives for these business streams avoids having the public sector take on risk that should be borne by the broadcasters.

UK broadcasters do work with Scottish companies, but the extent of this is limited. Yet productions are placed in different parts of the country to fulfil the demands of UK-wide production and in particular to satisfy the broadcasters' responsibilities to commission work from the nations and regions. Scotland should, in theory, be well-placed to win such work, but seems to be struggling to do so. This reduces the scope for Scottish producers to become trusted suppliers for UK broadcasters.

International broadcasters generally expect to receive incentive funding to locate productions. There is significant competition among countries to attract such work, especially high-end drama productions, but there is robust data to demonstrate the economic effectiveness of incentive approaches in providing employment, ensuring crew sustainability and maintaining and developing businesses.

BBC Scotland has in recent years supported a number of films – mostly documentaries – which could be released theatrically. Investments are small but have been significant for the productions involved. BBC Scotland does not generally fund development, though its recent venture into low-budget feature films, Lo-Fi, breaks this rule. BBC Scotland feels it lacks the budget to support feature film development, and believes that funding production is more an effective use of limited resources.

View from the consultation:

- Some producers suggested that a focus on television is the only way to develop a sustainable screen economy and that now is a good time for Scotland to encourage international TV business – building on the *Outlander* success
- Incentive schemes are vital to encourage and sustain incoming television production
- UK broadcasters make less product in Scotland than could be accommodated by crew and facilities
- AFTPS has called for more Scotland-based commissioning of network production.

7.7 Film-related tourism

Oxford Economics³⁸ has published research claiming that around a tenth of Britain's revenues from overseas tourism – around £1 billion of UK GDP – is generated either directly or indirectly by film. This includes visits to locations used in films, such as the Rosslyn Chapel (a setting for *The Da Vinci Code*) or attractions based on films such as Warner Bros Tours' newly opened *The Making of Harry Potter* in Leavesden.

Tourist agencies have recognised that films made in or depicting Scotland have brought in visitors, and are trying to build on it. In 2012, VisitScotland invested a reported £7m into a campaign built around the release of the animated Disney feature film, *Brave*.³⁹ This was VisitScotland's biggest promotional campaign to date and was the first time that Disney had linked up with a national tourism organisation on such a scale. According to VisitScotland, the joint marketing campaign reached 505m people worldwide and is already attracting visitors. It expects that *Brave* will generate more than £140m in business for Scotland over the next ten years.

Other films too have had positive effects. The National Trust for Scotland media agency advised that the sections of *Skyfall* shot on National Trust for Scotland property had a screen value of £2.9m and were seen by 270m people worldwide. Such success may have contributed, at least in part, to CNN voting Scotland its 'top tourist destination for 2013'.

The Edinburgh International Film Festival attracts more than 5,000 visitors per year (making 45,000 visits to the festival), of whom 15% came from outside Scotland.⁴⁰ According to the Edinburgh Tourism Action Group, and in comparison to other local festivals, the Edinburgh International Film Festival brings in higher than average spending visitors.

³⁸ Oxford Economics (2012) *Economic Impact Study of the UK Film Industry*

³⁹ Scottish Government press release, accessed on 13/12/13:

<http://www.scotland.gov.uk/News/Releases/2012/07/Tourism-Brave24072012>

⁴⁰ Figures for 2010, from BOP Consulting (2011) *Edinburgh Festivals Impact Study*

The view from the consultation:

- There was significant mention of the potential film offers tourism in depicting Scotland to different audiences
- Tourism in return offers benefits for many businesses – both film and others.

7.8 Enterprise support for film businesses

Enterprise support for film-related businesses (and others in the creative industries) is vested in Scottish Enterprise, Highlands and Islands Enterprise, Business Gateway and the Cultural Enterprise Office as well as Scottish Development International (SDI), which encourages inward investment and helps Scottish companies develop international trade.

Enterprise agencies are tasked with supporting and driving economic growth, and supporting businesses with commercial ambitions to grow. The creative industries is a priority sector for **Scottish Enterprise** where the focus is on helping companies increase in value; broadening innovation beyond research and development; driving collaboration and supporting companies to secure international business.

As well as focusing on company development **Highlands and Islands Enterprise** supports firms by offering assistance and training for R&D; distribution, marketing and showcasing; and networking and profile-raising at a national and international level.

The **Cultural Enterprise Office** (CEO) is Scotland's specialist business support and development service for creative businesses and practitioners. It has a focus on creative micro-businesses (defined as those having less than ten employees) and is responsible for the Creative Scotland-funded Starter for Six scheme of support for developing creative businesses. Some film businesses appear unaware that CEO supports established businesses as well as start-ups and many have not found appropriate enterprise support – particularly talent-driven small companies who seek sustainability rather than growth.

European Union (EU) funding is sometimes available for film companies. The EU's **MEDIA programme** focuses on activities before and after production, and offers support for training, project development, distribution and promotion. In the last four years Scotland has received between £350,000 and £470,000 of support for film businesses a year through this channel. The EU MEDIA Desk in Scotland (Media Antenna Scotland, based in Glasgow) helps companies new to European funding programmes to access such monies and there has been some success in doing so.⁴¹

The view from the consultation:

- Reward success to enable producers to build sustainable businesses. Ensure recoupment corridors and adopt system of allowing development spend to be rolled into the next production (as the BFI locked box system offers). Tax credit to be deemed producer equity
- Enterprise support is perceived as patchy for Scotland's film (and other screen) companies and there is a belief that the specific needs and ambitions of the sector are not fully understood by the enterprise agencies
- Enterprise funding is seen as focusing on the few companies whose turnover and growth potential is evident, while the Cultural Enterprise Office is perceived as focusing primarily on start-up businesses. Many film-related businesses do not see themselves as being in either category and can 'fall through the cracks' between agencies.

7.9 Equalities and diversity

In Scotland women represent 53% of all employees in distribution and exhibition and 46% in film production (slightly higher than the UK figure across all film which stands at 41%, according to Skillset's Labour

⁴¹ From January 2014 the EU's Media, Media Mundus and Culture programmes will be replaced by the new Creative Europe programme, which will run from 2014-2020

Market Index 2010). Across the UK certain occupations are majority female: in particular make-up and hairdressing (81%) and costume and wardrobe (73%). Women also make up over half of the legal workforce (56%), distribution, sales and marketing (55%), business management (52%) and broadcast management (51%) but less than half in every other occupational group. In Scotland, the female percentage share tends to be a little higher, reflecting the relative importance of television and radio broadcasting, which tend to employ higher shares of women than the film sector does.

In Scotland 2.3% of all employed are BAME (lower than the UK average of 6%). Overall across creative media, the proportion of the workforce described by their employers as disabled has remained steady since 2006, at 1.0%. This is significantly lower than the proportion reporting themselves as disabled in Creative Skillset's 2010 Creative Media Workforce Survey, where 5.6% of the workforce reported they have a disability.

The average age of film production personnel in UK is 39 (slightly younger than in the 2005 LMI) with 58% being over 35. In exhibition, the average age is 29, with 75% under 34. The average ages for women are younger than for men.

27% of production crew have a dependent child (under 16) while in exhibition the figure is much lower at 13%, perhaps reflecting the younger make up of that sub-sector. 40% of women in film production, compared with 14% of men working in the sector, report they have a dependent child. This gender variation exists across the creative media industries whereas across the wider economy three-fifths (62%) of the workforce has a dependent child under 16 years and there is no real difference between men and women. The lack of production forces film crew to be mobile, which can be difficult for those with families. This may affect women more than men.

7.10 Consultants' assessment of the issues

For those involved in production the simple truth is that there is not enough production in Scotland to ensure they can make a living each year. There is an urgent need in particular to remedy the decline of services and crew migration which threatens the industry. More production, in TV and film, both local and incoming, is necessary to retain skills and to encourage new talent into the industry.

Whilst recognising that EU state aid regulations make the awarding of incentive funding to encourage inward production difficult, it seems evident that without incentives it will be hard for Scotland to compete with other areas of the UK and internationally. This intertwines with the debate about studio development and the need to incentivise business for those putative facilities. Linking spend-based incentives to engagement of crew, as in Northern Ireland, adds benefits for talent retention. Further investigation of this area is essential for the industry. Public sector responsibility for incentivising production lies within the remit of Creative Scotland and it is theirs to drive forward, alongside the work of the enterprise agencies in supporting infrastructure development.

Micro-businesses dominate the film sector numerically (as they do the creative industries more generally) yet they report a lack of appropriate enterprise funding support from the public sector. Film businesses, especially in production across all its forms (features, shorts, animation, documentary) are often built around one or two key creative talents. For many, this is their preferred business model and they are not looking to grow substantial businesses (though many struggle even to build a sustainable business). Others prefer to work as freelancers, building a reputation for themselves as individuals rather than trying to turn this into a free-standing enterprise.

One interesting model is that of Screen Facilities Scotland, which made use of Scottish Enterprise's Cooperative Development Scotland funds for its marketing and launch. Exploring support for cooperative development or social enterprise may be an option worth considering. Scotland is a world leader in the development of social enterprises, and

the creative sector might find it worthwhile to examine the suitability of this model for its needs.

Networks for ensuring that the public sector is connected to the sector are patchy. For example, for location services to be effective they have to liaise with local authorities, VisitScotland, EventScotland, Creative Scotland, and producers and facilities at a local level. Such local gateways exist, and operate well in some regions, but are not found across all of Scotland. There is a role for Creative Scotland, perhaps in association with COSLA, in the coordination of a stronger, pan-Scotland network.

8. Public agency support for film

8.1 Introduction

The issue of the level of public support that is offered to film, and the structures that should be in place to deliver it, came up repeatedly in the consultations. For this reason, it warrants a short chapter of its own, explaining how the current arrangements came about and what might be done to modify them. The chapter also looks at Northern Ireland, which was cited many times in the consultation as an example of what is possible for a nation of the UK to achieve.

The situation in Scotland reflects the country's distinct political history. Education, skills, enterprise and culture are all devolved powers, allowing Scotland to develop its own approach to the film sector. In Scotland screen support is led by Creative Scotland, a creation of the devolved government, and a body which is designed to work across the arts and creative industries, an arrangement unique in the UK. This means, however, that Creative Scotland has no public-facing screen or film brand other than that of the locations service. The majority of countries in Europe, including all of those which aim to attract film and television production, have a distinct screen agency where information, advice, contacts and funding arrangements can be found by both the local film community and those throughout the world who wish to work there.

The film sector has made clear its desire to have some kind of film or screen branded agency, and the topic has been much debated in the Scottish press and within Creative Scotland.

8.2 A short history of public agencies for film in Scotland

Funding for filmmaking in Scotland (as an entity distinct from the UK) began in 1982 with the establishment of the Scottish Film Production Fund, which started with an annual film budget of £80,000. It operated alongside the Scottish Film Council, which had responsibility for film culture, exhibition and education.

In 1997 Scottish Screen was created as a single umbrella organisation responsible for supporting Scottish film culture and production, taking over the responsibilities of the Scottish Film Production Fund, the Scottish Film Council, Scottish Screen Locations and Scottish Broadcast and Film Training. Scottish Screen had two main objectives: the development of a sustainable production industry and the promotion and nurturing of film culture. The agency was intended to be a centre of knowledge and expertise on the screen industries, though business support largely remained with enterprise agencies including Scottish Enterprise. In 2000 Scottish Screen took over lottery disbursement for film (from the Scottish Arts Council).

In 2001 a Scottish Executive review concluded that Scottish Screen should work more with other agencies, and suggested the formulation of a range of strategies to support archives, regional film theatres, locations and marketing. The 2001 review concluded that film production had the *“potential to be an influential and high profile promoter of contemporary Scottish culture in an international context”* and that a radical approach would be to *“restructure existing agencies to form an agency with responsibility for creative industries including screen”* with joint-working as an interim approach. The road to the establishment of Creative Scotland had begun.

Scottish Screen's 2002-05 plan aimed to develop world-class production businesses in Scotland, attract major productions, champion a culture of investment in the screen industries, nurture and develop talent and audiences, preserve and present Scottish screen production, encourage and support an international outlook and drive screen policy. This approach helped consolidate production levels at between six and eight films a year.

In 2006-09 there was a shift towards supporting enterprise and skills, market development and talent and creativity. The rationale was that major (c£500,000) investments in film productions were unsustainable given the limited funding available, and more could be achieved through support for talent and audience development. Partly as a result of this shift, the boost to production achieved in Scottish Screen's early years did not continue and indeed the scale of production within Scotland has made little progress since. During this time Scottish Screen and Scottish Enterprise invested jointly in businesses (£440,000 in 2003/4 and £440,000 again in 2007).

Creative Scotland, a Non Departmental Public Body (NDPB) was established by the Scottish Government to succeed Scottish Screen and the Scottish Arts Council. It was launched in 2010. Creative Scotland's first corporate plan, for 2011-14, states its commitment to investment in talent; quality artistic production; audiences, access and participation; the cultural economy and places. Film and television activity was noted as significant particularly within the creative industries agenda, and Creative Scotland funds film production and development at a higher level than Scottish Screen did (see Chapter 6, figure 7). Nevertheless, the film sector perceived a shift in the status of screen activity, and despite increased investment levels keenly felt the loss of its sector specific agency.

In 2011 BFI succeeded the UK Film Council as the lead agency for film at the UK level following the UKFC's abolition, and in 2012 both the Smith UK Film Policy Review and the BFI's *Film Forever* strategy were published. BFI had, and continues to have, an impact in Scotland as the UK advocate for film policy and through its support to production, festivals, and cinema and talent development. Creative Scotland and BFI are developing partnerships to enhance support available for audience development, film education, and talent development in Scotland.

In Scotland and across the UK the film agency network has been subject to significant change over the last decade. A period of stability in policy, strategy, approach and resource would be welcomed across the sector.

8.3 Creative Scotland

A review of Creative Scotland's current involvement in film demonstrates the breadth of its support. Creative Scotland currently funds work in each aspect of the film sector, as follows:

Figure 11: 2011-2013 Creative Scotland Film Sector Investment Awards*

	2011/12	2012/13
Film Production & Content Development	£ 2,755,937	£3,556,943
Venues and Exhibition Facilities	£791,800	£795,800
Film Training and Talent Development**	£755,857	£980,106
Audience Development and Education	£215,691	£145,483
Film Festivals	£574,200	£584,129
Film Related International Engagement	£64,000	£190,807
Film Related Marketing	£48,597	£51,727
Locations	£130,620	£92,780
Total	£5,336,702	£6,397,775

Source: Creative Scotland Investment Awards 2011-2013

*TV related awards not included

**Film Training and Talent Development includes residencies, training programmes, small grants for professional development, filmmaker's forums and programmes to increase network and mutual learning opportunities.

There are five Foundation Organisations within the sector receiving long-term support from Creative Scotland. They are the Centre for the Moving Image (CMI), Dundee Contemporary Arts (DCA), Eden Court Highlands, Glasgow Film Theatre (GFT), and macrobert Arts Centre. All five focus on the consumption of film rather than on the production side.

In addition to its support for the Foundation Organisations Creative Scotland funds a suite of talent development initiatives which are devolved to third parties to deliver (such as the Margaret Tait Award, Lo-

Fi, Market Leaders and Bridging the Gap). Originally funded until the end of 2013, these programmes are currently being re-tendered and will run to 2015.

Creative Scotland's Locations Service conducts significant international trade show activity, attending key film marketplaces around the world to support producers and to encourage productions to film in Scotland.

8.4 Northern Ireland

During the time of this Review the example of Northern Ireland has been repeatedly raised, to show what might be possible. The funding arrangements in place in Northern Ireland are therefore described here in more detail, to see what lessons they might have for Scotland.⁴²

Northern Ireland Screen (NIS) awarded a total of £12,626,799 to the sector in 2012. This included £5,193,347 for the Northern Ireland Screen Fund, £860,121 for the Ulster-Scots Broadcast Fund and £2,890,008 for the Irish Language Broadcast Fund. Approximately 20% of funding did not relate to production but to skills and education.

Detailed breakdowns of investments under the Ulster-Scots Broadcast Fund and the Irish Language Broadcast Fund (£3,750,121) have not been obtained. These funds are primarily aimed at television though they include support for training and skills which can include film.

The Northern Ireland Screen Fund is the major fund available at NIS for film production and development. It is funded by Invest Northern Ireland, not lottery funding. The Lottery Film Funding Programme in Northern Ireland in 2012 amounted to £574,190 and is focused on script development, short film production and documentaries.

In 2012/13 the Screen Fund awarded £1,700,000 to film production, £4,671,724 to television production and £864,070 to development for film and television (this last figure is not broken down between the two).

Even if the assumption is made that all development awards were given for film (which they are not), it would imply that the Northern Ireland Screen Fund gave £2,564,070 to film in 2012, which when added to lottery funds, would imply a funding pot for film production of £3,138,000. Creative Scotland gave £3,556,943 to film production and development in 2012/13.

The difference in Northern Ireland, then, is less about the amount available to fund feature films and more about the total public sector contribution to the sector as a whole through significant television investment and its support for infrastructure. The investment in Belfast's Titanic studios alone outweighs any infrastructure support mooted for Scotland.

Northern Ireland's strategy has been to consider the screen industry as a whole including the development of animation, gaming and mobile content, and aims to attract production across film, television and commercials by supporting incoming and local production with incentive funding. The primary driver is to develop an indigenous industry and there is also large support for screen investment in Northern Ireland to win inward investment. This fund currently achieves a striking 4.6:1 return on public investment. Attracting HBO's *Game of Thrones*, the most expensive US TV production in Europe, is the fund's greatest single achievement. In this there have been knock-on benefits for the local industry where the percentage of local crew in key jobs and the quality of local production have both grown.

Five years ago Northern Ireland was not on the international screen map – it had little reputation in television drama, lost out to the Republic of Ireland as a screen location due to preferential incentive support, and produced few home-grown films. By adopting a screen-wide strategy and injecting very significant public funding, these disadvantages have been overcome. *Game of Thrones* brings many of these advantages and opportunities for employment and for training, but the effects of this investment are felt beyond that production.

⁴² Figures in this section come from Northern Ireland Screen Commission, Directors' Report and Financial Statements for the year ended 31 March 2012

8.5 Public sector and film

There is an acceptance in Creative Scotland and the Scottish Government, as well as across the sector, that Scotland would benefit from a fully developed screen policy. Such a policy is essential to achieve sustainable success in this field.

Scotland's Creative Industries Partnership (SCIP) continues to consider film within a creative industries context, and recent developments such as the establishment by the Scottish Government of a Film Studio Delivery Group, which has brought together the key public sector agencies to actively pursue proposals for a new film and TV studio for Scotland, indicate the appetite for this kind of cross-agency collaboration on infrastructure issues.

8.6 View from the consultation

This topic (funding structures and policies) was the area over which there was most discussion during the consultation. The views voiced in those meetings therefore need to be set out at length. Some were more general points, some were more specific. They have been grouped together under four headings.

General thoughts:

- Any screen agency should have a clear identity, a dedicated website and easy-to-access information for incoming and local engagement, alongside a mission statement and open and transparent funding criteria
- There was a recognition that Creative Scotland alone cannot change the sector. The sector itself needs to participate in change, as do other public agencies
- A vision with alternative routes to growth is called for and that means a mixed economy – with projects and support of varying scale, aiming towards different measures of success

- Some called for distinct support for the industry side of film (“a lean and mean agency”), with learning and audience development remaining as currently serviced within an agency supporting cultural activities rather than economic development. The majority of contributors, however, suggested a shared vision connecting art and industry, old and new practices, and social and economic goals should be the basis for any lead agency and its strategy
- There is a need for a long-term vision and strategy that is insulated from political change (as in Northern Ireland or Denmark). Need to build a consensus around a vision
- There is need for a clear enterprise agenda, and calls for a focus on how to sustain companies that can create wealth in Scotland.

The first group of specific comments relates to **lobbying, advocacy, and a sense of community:**

- Many sought agency support in lobbying and advocating government on their behalf
- The absence of a screen agency to drive forward government policy and the lack of supporting organisations and networks were thought to explain the sense that there was no film ‘community’ in Scotland
- Understanding and buy in from the Scottish Government and all of its agencies of the importance of film is vital.

The next group of comments refers to **Creative Scotland support mechanisms:**

- People believed that within Creative Scotland there is knowledge, understanding and enthusiasm for the sector, which was welcomed. Efforts in production, development, digital

developments, and learning offer good services but they do not feel joined up and there seems to be less attention paid to delivering services 'in the round'

- It was suggested that for those Creative Scotland staff members who don't have experience within the film sector, participation in shadowing schemes could be helpful to enable them to gain insight into the sector with which they work.

The final set of comments explores **applying for support/funding applications**:

- Some respondents believed that there is a preference for certain types of film over others
- Others reported finding decision-making frustrating and debilitating. This was a view widely held by newer, less established members of the film community and may reflect the process used for small amounts of funding rather than that specifically for film-related funds. Even seasoned applicants, though, seemed to lack up-to-date knowledge of funding requirements
- There is a concern that Creative Scotland's funding requirements make it risk-averse. Whilst accepting that public funds must be responsibly used, some find decision-making 'safe'
- While most welcome Creative Scotland steering clear of creative decision-making on film projects, some were concerned that it may lead to a lack of knowledge of projects and therefore a reduced ability to assess a project's chances of success
- Directors and producers were frustrated by the need for match funding before Creative Scotland can offer support. This can feel like Creative Scotland is allowing other agencies to lead.

Directors mentioned this has led them to work with non-Scotland based producers whose local sources of finance can become the match funding Creative Scotland requires

- There was a sense that officers' hands are tied which means that instincts cannot be followed. Some reported that they'd rather self-fund for small amounts than go through the hoops of gaining support – yet they also said that they want to work with their film agency and gain its involvement and support
- There is a lack of synergy with the games and apps world – companies working in games don't always consider themselves as potential Creative Scotland clients and therefore may miss funding opportunities. Further encouraging participation between games and film companies could help develop partnerships which could leverage additional public funds
- New groups are being formed across the sector – Screen Facilities Scotland, the Association of Film & TV Practitioners Scotland, Independent Producers Scotland. Many in the sector do not perceive Creative Scotland as a screen agency but as a mixed arts and culture agency with screen personnel working across its departments. There are calls for a public facing screen presence, a new presence to work with these other new organisations.

8.7 Consultants' assessment of the issues

Digital convergence means that a film agency – or even one focused just on television and film – would feel out of date. Markets and audiences have shifted considerably, even since the days of Scottish Screen, to a complex and changing pattern of content consumption. It is evident that Creative Scotland (along with other agencies) is providing a significant level of support to the sector, to the development of content – TV programmes, films, games, apps – and to brokering people to co-develop projects.

The consultants note that Creative Scotland currently has a screen brand, Film in Scotland. This does not, at present, cover the full breadth of Creative Scotland's work across the sector and it is recommended that a screen brand, underpinned by a screen policy supported by Creative Scotland and led at Scottish Government level, be developed. A separate agency is not considered necessary, nor is it thought likely that the Scottish Government could be persuaded to introduce a distinct new agency. A focused and strategic approach within Creative Scotland, branded distinctively and accessible directly – whether that is online, in person or by phone – could prove effective. That 'agency' should have a clear lead role, within Creative Scotland, for the support of development, growth and sustainability across the screen sector. For this to work effectively, agreement must be reached concerning areas where Creative Scotland has to deliver with other agencies – most notably, enterprise support (particularly for micro-businesses), skills development and education (with a strategy from school to professional practice) and encouraging collaboration with other creative industries. The SCIP⁴³ process is believed to have been hampered by lack of a clear lead and it is important to learn from this and ensure there is clear agreement on strategy delivery. The Film Studio Delivery Group is a welcome initiative, including some of the SCIP partners, which may support one element within this.

Understanding the political and economic drivers of success is vital. There is good practice in small countries that might be instructive to consider. Where there is a successful film culture and industry there is:

- Sustained high level and joined up support – at Government as well as agency level with an integration of support in production, appreciation and availability
- Successful countries such as the Nordic countries and, closer to home, Northern Ireland recognise that policy support must be long-

term, sustainable and based on cultural as well as economic indicators

- Government leadership to deliver across agencies and agendas is required
- Significant and early funding is necessary – compensating for market difficulties should not be viewed as subsidy but investment
- Local funding to attract spend and bring economic and tourism benefits
- Broadcasters play their part in talent development, development and production and distribution through transmission. Television business is crucial to success. It offers jobs, potential business diversity and growth and therefore has knock-on benefits for film
- Networks across the screen sector help to facilitate sector development among practitioners.

⁴³ Scotland's Creative Industries Partnership (SCIP) is a partnership between various public bodies including Creative Scotland, the Scottish Government and Skills Development Scotland that sets out recommendations for supporting creative industries.

9. Vision for the future and next steps

9.1 Introduction

Film is an important part of the cultural diet for many Scots and screen is the most accessible form of communication and cultural expression. This Review has considered film as a viewing experience, a learning tool, an art form, and a commercial venture. Joining these elements together is important for future development.

9.2 Vision for the future

The Review was never intended to provide detailed policy recommendations for Creative Scotland. However, the wealth of information and opinion given during the consultations does represent a view of the future that needs to be captured. The approach the consultants have taken, therefore, is to set out a vision of where the film sector could (and perhaps should) be in ten years' time, together with some thoughts on the actions required to reach these goals. There are 14 objectives to aim for:

1. Film in and from Scotland is celebrated domestically and renowned internationally. Practitioners develop a range of cultural and commercial projects across platforms; the infrastructure required to service both local and incoming production to international standards is in place; and audiences of all ages enjoy a diverse range of films

How to get there: A strategy for the development of a sustainable film and screen sector should be developed by the Scottish Government and the agencies responsible for the sector.

2. A screen-focused public agency, most likely based within Creative Scotland, with a clear strategy and brand identity is known internationally for championing and networking across the sector as well as for welcoming international production for all screens

How to get there: Branded 'agency' or 'super-hub' within Creative Scotland develops strategy across the breadth of the film and screen chain – continuing the dialogues established by this Review. It is supported with long-term commitment by the Scottish Government and the Board of Creative Scotland, and enjoys a productive relationship with all other relevant agencies.

3. Diverse audiences across Scotland enjoy film choice, at the cinema, on the move and at home, including a range of productions from Scotland. Online platforms make Scottish film available to worldwide audiences

How to get there: Develop and sustain an integrated network of high quality modern cinema provision available to all, in a variety of venues and through online platforms supported by Scotland's cultural cinemas.

Film Hub Scotland, working in conjunction with Creative Scotland, is best placed to lead. Complete the roll-out of next-generation broadband across Scotland, a key enabler of audience access.

4. Audiences have a deeper and broader engagement in Scottish film, with stronger links between communities and filmmakers. UK and Scottish networks of audience development agencies work together for ever greater success

How to get there: Again, Film Hub Scotland to lead and to develop networks with training providers and BFI/Creative Scotland.

5. More Scottish films are being made – documentaries, features, animation, art films – and public funding plays a part in their success. Targets are established for numbers of feature films per year and share of domestic box office – for example, the support requirements for doubling production to 12 feature films a year and 5% of domestic box office might be investigated. Scottish and UK public funders nurture talent in Scotland and financially support production

How to get there: More production funding and more active support for producers to find production partners. Initiatives such as Market Leaders and those of TRC Media are built upon. To increase production levels producers need to have more funds committed earlier in the process, and be connected across the UK and internationally.

6. There are multiple sources of funding available for film development and early support and funding, tailored to suit producers, writers and directors

How to get there: As well as a greater level of funding overall, development funding should be more diverse. It should be committed earlier and support a range of styles and genres, recognising that different types of production have different development needs.

7. More inward investment production in both film and television. More production means more jobs – and keeps the production pipeline busy

How to get there: Within the constraints of state aid rules it is vital to consider incentives to encourage production to come to Scotland. These incentives should be spend-related and linked to the employment of Scotland-based crew, particularly in senior grades.

8. Broadcasters play an integral part in the film sector – with Scotland’s broadcasters offering airtime for Scotland’s features and shorts, participating in production and talent development, and providing programmes for audiences and jobs for the sector. UK broadcasters with film divisions engage with talent in Scotland and support its producers. TV production – both from UK and international broadcasters – offers employment and talent development

How to get there: Strong linkages and encouragement of television production are essential to bring in additional projects, develop talent and sustain business. The sector itself must develop further relationships with broadcasters. Whilst under the current constitutional arrangements the Scottish Government lacks powers in relation to broadcasting, through persuasion it may be able to influence broadcasters to engage more fully with Scottish film. The Scottish Government and its agencies actively engage in encouraging international television production to come to Scotland.

9. Enterprise support will be robust across the film sector, including commercially appropriate support for talent driven micro-businesses

How to get there: The enterprise agencies – Scottish Enterprise, Highlands and Islands Enterprise, Business Gateway and the Cultural Enterprise Office – work with Creative Scotland and the Scottish Government to ensure commercially appropriate, well-marketed support for film-related businesses to ensure growth, sustainability and stability.

10. Digital technology and distribution allows access to filmmaking and viewing as never before. A mutually supportive sector embraces new ways of working and new filmmakers across all platforms

How to get there: Develop marketing and distribution platforms, particularly for low budget productions where online distribution platforms offer hitherto unexplored potential. R&D funding will be vital.

11. Festivals across Scotland are key dates in international and local calendars, and develop professional and audience engagement, enhancing Scotland’s reputation as an international centre for film

How to get there: A coordinated festival network serves and anticipates audience need. Edinburgh International Film Festival engages fully with industry and establishes a strong international position, and Glasgow Film Festival develops its reputation. Both are flagship festivals and as such require funding and capital to build and develop.

12. The Curriculum for Excellence has film/screen at its heart, taught by teachers whose training gives them confidence in theory and practice. Moving Image Arts is taught in secondary schools across Scotland. Film clubs for watching, making and understanding, in schools and elsewhere, will be available for all

How to get there: Both the curriculum and teacher education (initial training and in-service) support the development of practical and pedagogical excellence in Moving Image Arts. Creative Scotland champions screen education, working with Education Scotland to ensure good provision.

13. Higher education sector provision has clear aims and provides, where appropriate, pathways into careers. Screen Academy

Scotland's postgraduate courses are funded at conservatoire level to match the National Film and Television School (NFTS).

Undergraduate courses offer both theory and practical training in a coordinated way to provide a range of skills and career development

How to get there: Coordination of provision to ensure that graduates have appropriate skills to enter the broader film sector – not just the industry. Linkages between the higher education sector and internship programmes will be beneficial, as will the development of the Modern Apprenticeship Scheme (to ensure it is viable within the film sector where many are employed on a freelance basis). There is development of other models which help bridge the wide gap between graduation and significant employment.

14. Skills provision, across the sector rather than just for industry, is coordinated and provided in further education as well as by independent training providers. With significantly increased production, on-the-job industry training may be accessed more frequently

How to get there: A consistent analysis of skills requirements is needed and it is hoped that the Skills Investment Plan being led by Skills Development Scotland will provide a strong framework for the creative industries, including film. Skills Partnerships, which have worked well in other sectors, are also needed.

10. Appendices

10.1 Research team and Steering and Reference Groups

Research team:

The review was led by BOP Consulting, in partnership with Whetstone Group and Jonathan Olsberg (Olsberg SPI). The team consisted of:

- Barbara McKissack, BOP Consulting (Project Director)
- Matthieu Prin, BOP Consulting
- Chris Gibbon, BOP Consulting
- John Sanderson, Whetstone Group
- Paul Askew, Whetstone Group
- Jonathan Olsberg, Olsberg SPI

BOP Consulting is a research and policy consultancy specialising in culture and the creative industries. Established in 1997, it has built up a reputation as a leader in its field, especially in understanding the economic and social impacts of culture, media and creativity. BOP has offices in London and Edinburgh.

Whetstone Group is a strategy consultancy working with a range of businesses and public sector organisations to help them understand their markets.

Jonathan Olsberg is a leading consultant to media and creative industries organisations in the UK and internationally. He has a particular specialism in public policy for the film sector.

Creative Scotland Board sub-committee (steering group):

Robin MacPherson (Chair)
May Miller
Richard Scott

Reference Group:

The review was overseen by a Reference group with members drawn from across the spectrum of film in Scotland. Its membership consisted of:

Film Groups and Representatives:

Belle Doyle, Association of Film and Television Practitioners Scotland
Alan de Pellette, BAFTA Scotland
Alison Goring, BECTU
Andrew Poole & Phil Clapp, Cinema Exhibitors Association
Grant Ritchie, Creative Loop
Stuart Hepburn, EQUITY
Ros Davis, Locations Network
Eddie Dick, Producers Group
Noé Mendelle, Producers Group (Documentary)
Cameron Fraser, Scottish Animation Network
Ken Hay, Scottish Film Exhibitors Group
Dr Jonny Murray, Scottish Media and Communications Association
Joanna Dewar Gibb, Screen Facilities Group
Alistair Rutherford, Writers Guild

Individuals:

Beth Armstrong, GMAC
Andrea Gibb, Writer
Andy Green, Distrify
Nick Varley, Park Circus
Zam Salim, Director

10.2 Scotland's film policy environment and background timeline

- **1976** sees the establishment of Film Bang – Scotland's film directory
- **1977** Cinema and the Small Country looks at the world stage and partnership development for Scotland's filmmakers
- **1980** Scottish Film Council allocates £5,000 to film production and BBC Scotland establishes its Drama Department
- **1982** Scottish Film Production Fund established with an annual film budget of £80,000
- **1986** IPPA (PACT forerunner) proposes a Scottish Screen Commission and a working party is established
- **1989** Working Party rejects Screen Commission proposal on a number of grounds, including that there was not sufficient material to promote; that productions needed to achieve commercial viability; and that there needed to be evidence of the availability of matching private finance. It also cited a lack of comparable Screen Commissions worldwide
- **1990** establishment of Scottish Screen Locations
- **1993** establishment of Glasgow Film Fund and the Charter for the Moving Image calls for a single body for screen. Annual budget for film £500,000
- **1995** lottery funding for film begins. The level of feature film production in the UK rose steadily through the 1990s from 46 feature films in 1994 to a peak of nearly 196 films in 2003
- **1995** Hydra Report commissioned by Secretary of State to identify future development of the industry in Scotland with consideration of likely economic and cultural impact. The report concluded a commercial rationale would also benefit culture and heritage
- **1997** saw Scottish Screen's birth as a single umbrella organisation with responsibility for supporting all aspects of Scottish film culture and production
- **1998** SAC Lottery Review proposed that 80% of funding should go to projects judged to be "commercially viable within two years"
- **1999** saw the establishment of the Scottish Parliament
- **2000** Scottish Screen took over lottery disbursement (from Scottish Arts Council) and took annual available spend to £3.5m including £500,000 of Glasgow Film Fund
- **2000** also saw the birth of UK Film Council
- **2001** Scottish Executive Review of Scottish Screen concluded that on establishment "little care was taken in setting out what clearly could be achieved" but that the creation of Scottish Screen reflected two underlying objectives – the development of a sustainable production industry and the promotion and nurturing of film culture. This was felt to ensure one agency would be a centre of knowledge and expertise on the screen industries. It concluded Scottish Screen should make more of the potential to work with other agencies, and suggested a range of underlying strategies were needed to support archive, regional film theatres and locations and marketing support. It identified shorts as important talent development initiatives and the lack of opportunities for second feature films. A suggestion that ministers "may wish to explore further a radical option to restructure existing agencies to form an agency with responsibility for Creative Industries including screen" with joint working as an interim approach. It concluded that film production had the "potential to be an influential and high profile promoter of contemporary Scottish culture in an international context"
- **2001** report on Scottish Film to Scottish Parliament's Education Culture and Sport Committee identified the need for a film studio, tax and other fiscal incentives, funding of script and project development and distribution, encouraging indigenous production, training and terms and conditions and remuneration of those working in the industry as key issues
- **2002-05** Scottish Screen Corporate Plan aims to develop world class production businesses in Scotland, attract major productions to Scotland, champion a culture of investment in the screen industries, nurture and develop talent and audiences, preserve and present

Scottish screen production, encourage and support an international outlook and drive screen policy from school to statute

- **2006-09** Scottish Screen Corporate Plan looks to support enterprise and skills, market development and talent and creativity. A points system for lottery funding is introduced
- **2010** Creative Scotland launched, taking on the responsibilities of both the Scottish Arts Council and Scottish Screen
- **2011** BFI took over from now defunct UK Film Council
- **2012** Smith UK Film Policy Review and BFI *Film Forever* published
- **2013** Scottish Film Studio Delivery Group established
- **2013** Creative Scotland Film Sector Review.

10.3 Film festivals in Scotland

Figure 12: Film festivals in Scotland⁴⁴

Location	Festival
Touring Festival	French Film Festival Italian Film Festival Scotland Africa in Motion Film Festival Scotland Loves Anime
Bo'ness	Hippodrome Festival of Silent Cinema
Cairndow	International Metaphysical Film Festival
Cromarty	Cromarty Film Festival
Dundee	Dundee Mountain Film Festival Discovery Film Festival Dundead Horror Film Festival
Dunoon	Dunoon Film Festival
Inverness	Inverness Film Festival GoNORTH
Edinburgh	DANCE:FILM Edinburgh International Film Festival Take One Action Film Festival Africa in Motion Film Festival Dead by Dawn (Horror Film Festival) Middle Eastern Film Festival Play Poland Film Festival Edinburgh Mountain Film Festival Bootleg Film Festival
Glasgow	Glasgow Film Festival Glasgow Short Film Festival Glasgow Youth Film Festival 48 Hour Film project Creative Loop Student Media Festival Southside Film Festival
Hawick	Alchemy Film and Moving Image Festival
Kingussie	Food on Film
Lerwick	Screenplay
Loch Ness	Loch Ness Film Festival
Lochaber	Fort William Mountain Festival
Tarbert	TT16

Source: *Guide to Scotland's Festivals 2013*, The List in partnership with Creative Scotland, EventScotland and VisitScotland

⁴⁴ This list does not include festivals that are predominantly trade events, nor ones (such as the Celtic Media Festival) which are held only intermittently in Scotland.

10.4 Higher education provision

Figure 13: Practice-based film-related courses offered at Scottish universities and art colleges⁴⁵

University	Undergraduate	Postgraduate
University of Abertay Dundee	BSc (Hons) Creative Sound Production	n/a
Duncan of Jordanstone College of Art and Design	BDes Animation	MSc Animation and Visualisation
Edinburgh College of Art	BA (Hons) Visual Communication (Animation) BA (Hons) Film and Television (through Screen Academy Scotland)	MA and MFA in Animation MSc (research) in Digital Animation MA and MFA in Film Directing PG Cert in Screenwriting (Online) (through Screen Academy Scotland)
Edinburgh Napier University	BA (Hons) Film BA (Hons) Television (through Screen Academy Scotland) BA/ BA (Hons) Acting for Stage & Screen (jointly with Queen Margaret Univeristy)	MA Screen Project Development MA Film MA, PG Cert Screenwriting MFA in Advanced Film Practice MA/MDes Motion Graphics (through Screen Academy Scotland)

Glasgow Caledonian University	BA/BA (Hons) 3D Computer Animation	MA Television Fiction Writing
Queen Margaret University, Edinburgh	BA/ BA (Hons) Acting for Stage & Screen (jointly with Edinburgh Napier)	n/a
Robert Gordon University	BA (Hons) Media	n/a
Royal Conservatoire of Scotland	BA Acting BA (Hons) Digital Film and Television	n/a
University of the West of Scotland	BA and BA (Hons) Filmmaking and Screenwriting BA and BA (Hons) Performance BA (Hons) Contemporary Screen Acting BA/BA (Hons) Commercial Sound Production BSc and BSc (Hons) Computer Animation (options in Digital Art) BA/BA (Hons) Broadcast Production	PG Dip. MA Creative Media Practice

Source: Creative Skillset, BOP Consulting

⁴⁵ Efforts have been made to identify as many of these courses as possible, but some courses may have been missed

Figure 14: Theory-based film studies courses in Scottish universities

University	Undergraduate	Postgraduate
University of Aberdeen	MA (Hons) Film and Visual Culture in combination with one other subject	n/a
University of Dundee	MA English and Film Studies	n/a
University of Edinburgh	n/a	MSc Film Studies MSc Film Studies (by research) PhD in Film Studies
Edinburgh Napier University	BA (Hons) English and Film	n/a
University of Glasgow	MA (Hons) Film and Television Studies MA (Hons) French: Option on French Cinema MA (Joint Hons) Film and Television Studies	MLitt in Film & Television Studies MLitt in Film Journalism
Queen Margaret University, Edinburgh	BA and BA (Hons) Film and Media BA/ BA (Hons) Theatre and Film Studies	n/a
University of St Andrews	MA (Joint Hons) Film Studies in combination with one other subject	MLitt, PG Dip, MPhil and PhD in Film Studies
University of Stirling	BA (Hons) European Film and Media BA/BA (Hons) Film and Media Studies BA (Joint Hons) Film and Media Studies in combination with one other subject	PG Cert, PG Dip, MLitt in Film Studies: Theory and Practice

Source: Creative Skillset, BOP Consulting

10.5 Organisations supported by Creative Scotland in 2011/12

Figure 15: Organisations supported by Creative Scotland in 2011/12

Category	Organisation
Film	Aconite Productions Ltd
Production & Content	Black Camel Pictures Ltd
Development	Cacti Films
	Cloud Atlas Ltd
	CONNECTfilm Ltd
	Country Music
	Ecosse Films (Scotland) Ltd
	Faction North Ltd
	Free Swimmer Ltd / BBC
	Glasgow Film Festival
	Holdings Ecosse Ltd
	Hopscotch Films Ltd
	Initialize Films
	Intrepid Cinema
	Ko Lik Films Ltd
	Koco Drama Ltd
	La Belle Allee Productions Ltd
	Lithium Pictures
	Makar Productions Ltd
	Met Film Production Ltd
	PACT (Producers Alliance for Cinema and TV)
	Plainview Films
	Pure Magic Films
	Railway Man Limited
	Rob Roy Films
	Ruby Films Limited
	Scottish Documentary Institute (SDI)
	Sigma Films Ltd
	Sinner Films Ltd
	Tiny Spark Productions/Sam Firth
Venues and Exhibition Facilities	Centre For The Moving Image
	Dundee Contemporary Arts
	Eden Court
	Falkirk Community Trust
	Friends of the Birks Cinema
	Glasgow Film Theatre
	macrobert Arts Centre
	Oban Phoenix Cinema
	Regional Screen Scotland
	Screen Bandita
	The Byre Theatre
Film Training and Talent Development	Anne-Marie Copestake
	British School at Rome
	Centre for the Moving Image (CMI)
	Digicult
	Edinburgh International Film Festival (EIFF)
	Glasgow Film Festival
	Initialize Films
	Minttu Maari Mäntynen
	Park Circus
	Playwrights Studio Scotland
	Plum Films
	Proud Mary
	Scottish Documentary Institute
	Screen Academy Scotland
	SDI Productions Ltd
	The Scottish Association for Marine Science (SAMS)
	Shetland Arts Development Agency
	Valentina Bonizzi
Audience Development and Education	Dundee Rep Theatre Ltd
	East Dunbartonshire Leisure and Culture Trust
	Eden Court
	Glasgow Film Theatre
	GMAC
	Media Education
	Project Ability
	Pure Media UK Ltd
	Renfrewshire Arts and Museums
	Rural Nations Ltd

Film Festivals Document Film Festival
Edinburgh International Centre for Spirituality
and Peace
Edinburgh International Film Festival
French Film Festival
Glasgow Short Film Festival 2012
Scotland Loves Animation
Stop and Stir Arts (Africa in Motion Film
Festival)
Take One Action Film Festival

**Film Related
International
Engagement** Aconite Productions
Brocken Spectre
Concept & Graft Ltd
Crab Apple Films Ltd
Crow Hill Films Ltd
Holdings Ecosse Ltd
Ickleflix Ltd
Initialize Films
Jane McAllister
Joern Utkilen
Julian Schwanitz
Kate Burton
Ko Lik Films
Lindsay Goodall
Lou McLoughlan
Lucy Asten Holmes-Elliott
Lucy Elliott
Mediaco-op
Mirza Films Ltd
Once Were Farmers
Plum Films Ltd
Pure Magic Films
Scottish Documentary Institute
Sigma Films Ltd
Simon Arthur
SKAMM (Scottish Kids Are Making Movies)
Stuart Elliott
The 48 Hour Film Project (Edinburgh &
Glasgow)
Young Films Ltd
Zam Salim

10.6 Location services in Scotland

Figure 16: Location Services in Scotland

Regional Office	Location
Aberdeen City & Shire Film Office	Arts Development Team Education, Learning and Leisure Viewmount, Arduthie Rd, Stonehaven AB39 2DQ
Argyll & Bute Council	Planning & Development Services 1a Manse Brae, Lochgilphead PA31 8RD
Clackmannanshire On Screen	Kilncraigs, Greenside St., Alloa FK10 1EB
Outer Hebrides	Economic Development Section Department for Sustainable Communities Sandwick Rd, Stornoway Isle of Lewis HS1 2BW
Edinburgh Film Focus	1a Glenfinlas St, Edinburgh EH3 6AQ
FifeScreen & TayScreen – Angus, Dundee, Fife, Perth & Kinross	DCA 152 Nethergate, Dundee DD1 4DY
Glasgow Film Office	Exchange House George St, Glasgow G1 1QU
Highlands of Scotland Film Commission	Planning & Development Highland Council HQ Glenurquhart Rd, Inverness IV3 5NX
Inverclyde Council	Economic Development Business Store 75-81 Cathcart St Greenock PA15 1DE
Lanarkshire Screen Locations - North & South Lanarkshire	Regeneration & Infrastructure Services, 3rd Floor Civic Centre, Windmillhill St, Motherwell ML1 1AB
Moray Council	Economic Development Council Office, Elgin IV30 1BX
North Ayrshire Council	Cunninghame House, Irvine, Scotland, KA12 8EE
Orkney Islands Council	Dept of Development & Protective Services Development Section, School Place Kirkwall, Orkney KW15 1NY
Renfrewshire Council	Renfrewshire House, Cotton St, Paisley, Renfrewshire PA1 1UJ
Screen Stirling	Economic Development Viewforth, Stirling FK8 2ET
Shetland Islands Council	Economic Development Service 3 North Ness Business Park, Lerwick Shetland ZE1 0LZ
South West Scotland Screen Commission – Dumfries & Galloway	Militia House, Dumfries DG1 2HR
South Ayrshire Council	County Buildings, Wellington Square, Ayr KA7 1DR

Source: Creative Scotland Locations Service

10.7 Public agencies and networks with influence on the Scottish film sector

Association of Film and Television Practitioners in Scotland is a political lobbying group set up by people working in the film and television industry in Scotland to counter the growing levels of unemployment and lack of prospects in Scotland. The Association's committee is made of experienced industry professionals across the various disciplines and sectors.

Association for Media Education in Scotland (AMES) is a registered Scottish charity representing the interests of film and media teachers in schools and further education colleges to public sector agencies, holds an annual conference, delivers CPD and publishes Media Education Journal.

British Academy of Film and Television Arts (BAFTA) is a registered UK charity that supports, promotes and develops the art forms of the moving image – film, television and video games - by identifying and rewarding excellence, inspiring practitioners and benefiting the public.

Broadcasting Entertainment Cinematograph and Theatre Union (BECTU) is the UK's media and entertainment trade union; sectors covered include broadcasting, film, independent production, theatre and the arts, leisure and digital media.

British Federation of Film Societies (BFFS) is the national support and development organisation for the film society and community cinema movement.

British Film Commission (BFC) is the UK government's national agency responsible for supporting the production of international feature film and television in the UK.

British Film Institute (BFI) combines cultural, creative and industrial roles, being the home of the national archive for film and television, a centre for film exhibition and festivals, and a publisher of film-related materials. In 2011 the BFI became the lead organisation for film in the UK and the distributor of National Lottery funds for film. BFI's mission is to ensure that film is central to the UK's cultural life, in particular by

supporting and nurturing the next generation of filmmakers and audiences. It has a strategic relationship with Creative Scotland.

Cinema Exhibitors Association (CEA) is a membership organisation representing the interests of the cinema trade. It has a branch in Scotland.

Creative Skillset is the sector skills council for the UK's creative media industries. It works alongside the film industry to create jobs, strengthen and build skills and ensure world-class film education. It also conducts research into its industries. The agency focuses on craft and technical skills and offers career and business support as well as developing writers, producers and directors.

Cultural Enterprise Office provides business support services which help creative micro-businesses based in Scotland build their skills and knowledge.

Education Scotland is an executive agency established in 2011 and charged with supporting quality and improvement in Scottish education and thereby securing the delivery of better learning experiences and outcomes for Scottish learners of all ages.

Film Hub Scotland, part of the BFI Film Audience Network (FAN), is a consortium of Scotland's leading cultural cinemas and film festivals, its cinema development agency and its national film school. The consortium's mission is to boost audience choice and deliver more viewing opportunities and diversity of cinema content across the nation.

Glasgow Media Access Centre (GMAC) is a project-based social enterprise supporting filmmakers, with an emphasis on under-represented groups and new entrants to film.

Highlands and Islands Enterprise is the Scottish Government's economic and community development agency for the north and west of Scotland. It works extensively with the creative sector, reflecting the importance of creative industries to the region.

Independent Producers Scotland (IPS) represents film and TV producers in Scotland to government, public agencies and the public. It aims to create a more stable, vibrant and internationally recognised film sector in Scotland.

Producers Alliance for Cinema and Television (PACT) is the UK trade association representing and promoting the commercial interests of independent feature film, television, digital, children's and animation media companies.

Regional Screen Scotland (RSS) is the development agency for cinema in Scotland, providing information, support, and advice and funding for exhibitors, communities and organisations. RSS operates the mobile cinema Screen Machine throughout remote and rural areas of Scotland. RSS is the lead partner for Film Hub Scotland (see below).

Scottish Animation Network is the hub to connect animation practitioners in Scotland and aims to raise the profile of all animation produced in Scotland, from graduate films to studio production.

Scotland's Creative Industries Partnership (SCIP) brings together Scottish local government, Creative Scotland, Scottish Enterprise and Highlands and Islands Enterprise, Scottish Funding Council, Skills Development Scotland and Scottish Government in a partnership that sets out recommendations for supporting creative industries.

Scottish Development International aims to assist in the growth of the Scottish economy, by encouraging inward investment and helping Scottish-based companies develop international trade.

Scottish Documentary Institute Set up in 2004, the Institute has now become an internationally recognised documentary research centre at Edinburgh College of Art. It specialises in documentary training, production and distribution.

Scottish Enterprise aims to identify and exploit opportunities for Scotland's economic growth by supporting Scottish companies to grow. Scottish Enterprise supports businesses in the creative industries via **Interactive Scotland**, a specialised service for digital media companies, which is available to film companies. It provides market intelligence, strategic guidance on content distribution, signposting, networking and events. Through Interactive Scotland, Scottish Enterprise works with some 15 companies who are active in (or closely related to) the film sector.

Screen Facilities Scotland is a trade body affiliated to UK Screen. Working as a flexible consortium it represents companies working in facilities and services across Scotland.

Scottish Kids are Making Movies (SKAMM) is an Edinburgh-based charity offering filmmaking workshops for young people where they get the chance to work with professional filmmakers.

Scottish Locations Network (SLN) is a network of the regional film offices in Scotland, working with Creative Scotland's Locations service, and providing information for filming in Scotland.

Screen Education Edinburgh is Edinburgh's hub for digital filmmaking providing access to education opportunities and production, especially for young people and 'new voices' from the city's minority communities.

Screen HI is one half of Creative Highland (the other half is goEvents). It was set up as a not-for-profit organisation to provide unique job, training and networking opportunities and to encourage local economic activity within the Creative Industries across the Highlands and Islands, specifically in the music, screen and broadcast sectors.

Skills Development Scotland is the national skills body for Scotland. It is the lead agency on the development of the Creative Industries Skills Investment Plan and its particular relationship to the screen industries. SDS also funds several significant screen training initiatives.

Youth Cinema Audience Network (YCANS) is a small grouping which works with individual cinemas and The Audience Network to expand young audiences across the country.

Voice of My Own (VOMO) is a Scottish Borders Council funded project to encourage young people in all aspects of filmmaking, radio broadcasting and journalism skills.

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