



Screen Agencies: An Overview

Working Paper

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EKOS Limited, St. George's Studios, 93-97 St. George's Road, Glasgow, G3 6JA

Reg 145099

Telephone: 0141 353 1994

Web: www.ekos-consultants.co.uk

Direct enquiries regarding this report should be submitted to:

Brian McLaren, Managing Director, EKOS

Email: brian.mclaren@ekos.co.uk

Tel: 0141 353 1994

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Contents

1.	Introduction	1
2.	Commentary	4
3.	Agency Summaries	9
4.	Tax credits	37
5.	Final Comments	40

1. Introduction

Context

The current assignment was commissioned by Creative Scotland as part of a wider programme of work to inform the development of a Screen Unit within the organisation. In particular, the information reported here is intended to inform one of a number of work streams defined within the overall programme – the Strategic Approach Work Stream.

The Strategic Approach Work Stream is examining comparable and alternative strategic approaches to address the issues affecting the screen sector in Scotland, and deliver positive change through the opportunities presented by the Screen Unit project.

The primary deliverable of the Strategic Approach Work Stream will be a paper containing:

- a summary of three relevant international approaches/ strategies to deliver growth in Screen Sector strength, capacity and impact together with economic, cultural and social benefits;
- critical ‘gap’ analysis of application within a Scottish context and objectives for the Screen Unit Project; and
- a maximum of three options for a Strategic Approach for Scotland.

Study Brief

The brief for the current project was to gather information on screen agencies in the following nations/ regions:

• Northern Ireland	• Australia
• Republic of Ireland	• Denmark
• Wales	• Vancouver

In particular, Creative Scotland provided a list of questions/ issues to be covered, as follows:

- how does each territory structure its approach to Screen e.g. one body or more, how governed and reporting to which part of its Government? What

remit(s)? How funded, with what balance of public/ non-public or leveraged funds?

- does the territory have a strategy for the Screen Sector as a whole? If so what is it, e.g. across TV and film, and how does it link its strategy to success e.g. growth, employment etc.?
- which other public agencies are drawn into that strategy and how do they each contribute to its delivery?
- where does public sector Screen Sector support for content development/production and exhibition, business development/enterprise support, internationalisation, inward investment, skills/talent development sit? One public body or more than one with specific remits?
- how is it funded and what is the source of the funding?
- does the agency impose conditions on access to funding and if so, what sort of conditions?
- how do relationships work with broadcasters and do they have formal partnership agreements? If not what sort of arrangements do they have?
- how do they work with new commissioners like Netflix/Amazon
- what is their approach to data gathering for the Sector and reporting on activity to Governments?
- what do they consider to be the key opportunities for next 3-5 years?
- what published evaluations exist of other approaches, and what can Scotland learn from these in relation to boosting sector growth, employment, sustainability, resilience and audience reach?

It is important to note that it was not the purpose of the work to identify strategic options nor make recommendations regarding the scale, form and function of the proposed Screen Unit. Instead, the focus was on simply collecting and presenting (preferably in a tabular form) the information outlined in the question set.

Approach

The data collection was largely desk based, making use of published sources and online information, including corporate documents, information from agency websites and wider research materials. We have also benefitted from comment and input from Dr Michael Franklin of Goldsmiths University.

The work was conducted over a three week period, effectively limiting the depth and extent of the review work that would be possible. In particular, there are significant and complex strategic issues raised by some of the questions set out above, and which cannot be addressed in a study of this nature, or with such limited time and resources. It is important that the information provided herein is viewed in this context.

We would also add that there are gaps in the evidence base, particularly regarding the efficacy of particular approaches and the extent to which growth or success in the screen industries (however measured) can be attributed to the actions of screen agencies. Thus we can identify the range of approaches and support activities, but drawing firm conclusions on their relative effectiveness is not possible on the basis of the information that is currently available. With this in mind, we have indicated where we think further research would be of value to Creative Scotland and its partners, from which an informed strategy could be developed.

2. Commentary

Information for each of the selected territories is presented in the following section. Here we offer some broad commentary on the issues that arise.

Structures

In each of the territories examined, there are specific structures dedicated to supporting the screen sector. In some, this comprises a number of agencies with different functions (e.g. Ireland, Vancouver), and in others the activities are more concentrated within a single body (e.g. Northern Ireland, Denmark), albeit working with partners. In Scotland, support for screen sits with the cultural agency (Creative Scotland) with some functions picked up also by the Enterprise Agencies and Skills Development Scotland.

In each territory the screen agencies appear to have a direct relationship with government, although NI Screen is funded via Invest NI, the region's arms-length economic development agency, lending its strategy and the performance measures agreed with Invest NI a strongly economic focus. Film Cymru Wales works in close partnership with the Arts Council for Wales (ACW), and receives funding from ACW. In the other territories, the agency strategies refer mainly to partnership working with government and in the case of Vancouver, with the civic authority.

All are publicly funded, usually directly by government (apart from NI Screen and in part FCW) and the extent of private leveraged funds is not known. It is also not clear what is meant by this insofar as this could relate to private funding into the agencies themselves or (more likely) private investment into screen production that has been levered by the agencies' own investments. It is perhaps worth noting that NI Screen's strategy identifies a direct role for broadcasters (BBC and HBO) as well as public sector partners in supporting screen investment. Further research would be required to determine the extent of this in each territory and the extent to which that levered investment could be attributed to the screen agencies' efforts.

It might be useful to consider a short study to establish the totality of investment in screen sector support in a selected number of territories drawing in the investment and support provided by all agencies, including in areas such as training and infrastructure, which may be the role of organisations other than the screen agencies. This could investigate the nature of leveraged funds, including those mediated by tax credit provision, European regulation and international partners.

Our view is that the structure is actually less important than its capacity to deliver against a clearly defined strategy.

Strategy and Focus

A number of issues arise when considering the strategic direction of each territory. First, there are different overall definitions proposed for the screen industries, with some working in more narrowly defined areas (e.g. film) and others talking a wider approach that includes newer digital media sector such as games, mobile content and apps and online and social media.

In Scotland this remains somewhat unclear. Creative Scotland's screen team focussed largely on film and TV production, but the organisation is also involved with areas such as games. The Enterprise Agencies have interests across all of these areas, and focus on support for businesses. This is similar to the arrangements between NI Screen and Invest NI for example, although Invest NI tends to default to NI Screen for all screen related activity. NI Screen also has a broad remit which includes digital content.

The point here is that clarity on definition of terms will be important such that the wider screen community understands where to go for what support. It is perhaps also worth noting the growing trend towards diversification in parts of the screen sector, suggesting a case for any new Screen Unit to have some overview of the digital media opportunities for production companies.

The second comment we would make on strategy is to note the degree of similarity across many of the territories, as well as some quite striking differences. Most of the agencies in the territories examined are working to strategies that are expressed in quite general language, and that typically address three broad areas:

- economic development/ growth of the sector;
- cultural considerations; and
- education and learning.

The first is rarely defined in clear terms, with strategies instead seeking to create 'sustainable screen sectors' or support 'growth'. Cultural issues tend to relate to representation on and off screen, diversity considerations and in specific cases the promotion of indigenous languages. Education is typically expressed in vague terms with unclear priorities. Published strategies do not typically make clear the relative

emphasis on different areas and priorities. For example, if economic growth is the goal, then how much effort might be directed toward attracting inward investment and how much towards indigenous growth? This is rarely made clear.

Looking across the territories the clarity and specificity of the language used by the Danish Film Institute (DFI) (and arguably, although to a lesser extent, by the agencies in Vancouver) is striking. DFI articulates clear and specific targets against its priorities. Few others do this with quite the same degree of clarity.

Activities

Usually there are commercial and creative elements to screen strategy and agency delivery, yet typically the economic ones are not explicitly set out, especially in relation to company development. Indeed, company development tends to have a lower profile than support for projects (productions). This may reflect organisational structures and remits, with economic development and enterprise agencies sometimes retaining (not sector-specific) company support responsibilities (even if the extent of their engagement with screen businesses is not clear).

Funding schemes are more often described in detail.

Typically the Annual Report/ website/ Corporate Plan language is very vague although the range of functions and areas of funding seem broadly consistent across the territories and are based around the value chain model.

Of course, fiscal incentives are also an issue, and these are typically provided by government in the form of tax relief on qualifying expenditure but indigenous or incoming productions. Of the territories examined, only Denmark does not have tax incentives, but there is a Copenhagen Film Fund which fulfils a similar purpose. Other territories have access to funds and incentives over and above the tax credits, for example the Pinewood Film Fund run in partnership with the Welsh Government.

The best opportunity for analysing what the agencies actually do and prioritise is in their funding awards and their terms. Usually for public agencies, lists of amounts, recipients and funding tracks are available and so are the application forms with terms and conditions. It was not possible within the time and resources allocated to the work to undertake this analysis, but that would offer the best prospect for more detailed insights into the activities of the screen agencies.

Based on the broad information gathered here, most of the agencies are funding development, production and some form of distribution, but the detailed terms are not always fully transparent (via publicly available information). Based on experience, these are likely to include some combination of:

- funding support, usually at the higher risk ends of the value chain (e.g. in development);
- debt finance;
- cashflow support for tax credits; and
- equity finance, often on less than purely commercial terms.

Some form of 'cultural' eligibility test is also common whereby to qualify for support a production must demonstrate its contribution to the territory through direct spend, employment and/ or on-screen representation.

Further work would be needed to provide a detailed comparison of the terms and conditions (T&Cs) attached to different funding programmes operated by the various agencies. Terminology is inconsistently applied, and a useful exercise would be to review the T&Cs in some detail to develop a consistent taxonomy and comparative assessment of the funding structures. In the summaries that follow we have simply used the terminology used by each of the agencies in their public information. Regrettably, time did not permit a more detailed review of all of their terms and conditions.

Many agencies are also involved in supporting inward productions in finding suitable locations and crew, promoting the territory and in supporting education and training.

There is little information on the role of screen agencies in infrastructure development. Screen agencies rarely hold capital budgets, therefore public investment in infrastructure (such as studios) is more likely to come from government or other agencies (often those involved with economic development). This is an important issue for Scotland in light of the lack of dedicated studio facilities. Infrastructure, talent and the exchange rate, plus the tax credit, are the key industry drivers for the UK, and the sources of funding, nature or public partnerships in infrastructure creation, management and operation are vital to long term development.

How studio facilities, related innovation and services businesses, including private assets are brought into the wider industry landscape to be harnessed towards the

overall goals for the screen sector, is a critical question for the Screen Unit, and one that requires significant further research to address.

Finally, some of the agencies examined are also involved in skills and talent development although the scale and extent of this is not clear.

Despite the limitations there is, at a high level at least, a degree of consistency across the agencies in terms of their activities, which typically include:

- support for content development, either as grant or debt finance;
- support for production, usually as some form of recoupable investment (equity or debt) but on varying terms;
- support for distribution, again on varying terms;
- company support, although it is less clear what this might comprise, nor how it relates to support that might be available from other agencies;
- skills and talent development via training schemes; and
- incentives to attract mobile production activity, usually in addition to, but interacting with, fiscal measures from governments.

Some also operate more cultural programmes for example those focussed on indigenous language content, as well as educational initiatives (as opposed to industry training).

Effectiveness

Establishing the effectiveness of the different models and approaches would be a significant research undertaking and is beyond the scope of the current assignment. While many of the agencies publish headline data in annual reports and similar (typically highlighting amounts being spent, number and value of productions in the territory, employment in the sector and more specific measures such as numbers in training schemes etc.) this does not constitute evaluation.

This is, in any case, a vexed issue. Both critical and commercial film successes are largely unpredictable. The international nature of talent means attributing responsibility for success to any one nation/ source is sometimes spurious. Then there is the issue of additionality. If a screen agency invests in a successful production, can that success be directly attributed to their investment or would that have happened otherwise? Similarly, looking at broader sector performance as a

proxy for agency effectiveness is also problematic, as this will be subject to factors beyond the control of any agency or organisation. These are tricky issues to be wrestled with in the development of a Screen Unit and its strategy, and require substantial, informed work.

3. Agency Summaries

Tabular summaries for each of the selected territories are presented in the following pages.

Scotland	
<p>How does that territory structure its approach to Screen e.g. one body or more, how governed and reporting to which part of its Government?</p>	<p>Creative Scotland is the public body that supports the arts, screen and creative industries across Scotland. Creative Scotland is governed by a board of eleven directors appointed to the body by the Scottish Government. Support to screen industries is also provided by the Enterprise Agencies (Scottish Enterprise and Highlands and Islands Enterprise), Skills Development Scotland and the Business Gateway. Partnership working across the agencies is co-ordinated via the Scottish Creative Industries Partnership group (SCIP).</p>
<p>What remit(s)?</p>	<p>Creative Scotland absorbed the functions of the Scottish Arts Council and Scottish Screen, and aims to promote and develop every aspect of film, television and new media in Scotland.</p> <p>Creative Scotland achieves their remit by distributing funding projects within the arts, screen and creative industries. Creative Scotland's activities can be summarised under three key aspects:</p> <ol style="list-style-type: none"> 1.) <u>Advocacy</u> – Creative Scotland work to raise the profile of Scotland's arts and creative sectors, helping to promote their excellence at home and abroad to a wide range of audiences. 2.) <u>Development</u> – Creative Scotland work in partnership with other bodies to create the best conditions possible for artists, creative people and organisations in order for them to thrive. 3.) <u>Influence</u> – Creative Scotland use their overview of the arts, their research, and their knowledge of the industries to help bodies and companies to work with creative sectors to the benefit of all involved. <p>The Enterprise Agencies' remits, while slightly different in some respects, are driven by economic development goals as defined in the <i>Scottish Government Economic Strategy</i>. Both have a role in screen through the provision of support to account managed companies, some of which may be screen industries companies, and through other business support programmes. HIE also supports XPONorth, a broad sector network for creative industries, which has a range of screen industries focussed support delivered by Screen HI (also HIE funded).</p> <p>Skills Development Scotland is also focussed on the <i>Scottish Government Economic Strategy</i> but is concerned with skills and training across the economy. It developed a <i>Skills Investment Plan for the Creative Industries</i> and has a range of skills and training projects within the creative sector, some of which relate to the screen industries.</p> <p>Business Gateway provides support for new and growing businesses through a range of support products and programmes, and is delivered by local authorities across Scotland.</p> <p>Further support to screen companies will be provided via the Cultural Enterprise Office, an agency dedicated to working with creative practitioners and businesses.</p>

<p>How funded, with what balance of public/ non-public or leveraged funds?</p>	<p>Creative Scotland distributes funding on behalf of the Scottish Government and National Lottery. The total budget in 2015/16 was £76.6m of which £46.6m was direct Government funding and £30m was Nation Lottery funding. The organisation employed 105.7 FTEs, of which 12.5 worked in the Screen team.</p>
<p>Does the Territory have a strategy for the Screen Sector as a whole?</p>	<p>Creative Scotland's 10-year plan, 'Unlocking Potential, Embracing Ambition', is a shared plan for the arts, screen and creative industries between 2014 and 2024 The plan sets out five central and collective aims for Creative Scotland to tackle over the next 10 years, which are summarised below.</p> <ol style="list-style-type: none"> 1.) To ensure that excellence and experimentation across the arts, screen and creative industries is recognised and valued. 2.) To make sure that everyone in society can access and enjoy artistic and creative experiences. 3.) To see that places and quality of life are transformed through imagination, ambition and an understanding of the potential of creativity 4.) To help creative ideas be brought to life by a diverse, skilled and connected leadership and workforce 5.) To ensure that Scotland is seen as a distinctive creative nation connected to the rest of the world. <p>The '<i>Creative Scotland on Screen: Film Strategy 2014-17</i>' explains how the agency plans to work with the sector and its partners within the context of the ambitions set out in the 10-year plan, in the context of film.</p> <p>The Strategy aims to:</p> <ul style="list-style-type: none"> - create the conditions necessary in order to position the film sector at the heart of Scotland's economy and culture; - make sure that film and moving image is a part of Scotland's education systems and school curriculums; - ensure there is a structure in place for identifying and nurturing emerging talent within the film sector; - develop and skilled and diverse workforce for the film sector, by creating sustainable careers and professional opportunities to attract talent; - ensure that there is a wide breadth of commercial and experimental film being made, which could appeal to international markets; - secure inward investment and work with partners to develop Scotland's reputation as a culturally and commercially successful filmmaking nation; and - broaden cinema access the widest and most diverse audience possible, to encourage and strengthen audiences engagement with film.
<p>If so what is it, e.g. across TV and film, and how does it link</p>	<p><u>Creative learning</u>: Creative Scotland is committed to increasing the quantity and quality of opportunity for people of all ages to learn through engagement with the arts, screen and creative industries.</p>

<p>its strategy to success e.g. growth, employment etc?</p>	<p><u>Equalities and diversity:</u> Creative Scotland aim to put equalities and diversity at the heart of all their activities enabling people from different backgrounds, communities and of all ages to access increased opportunities through access to arts and culture.</p> <p><u>Digital:</u> As new digital channels continue to emerge, they plan to support the arts and creative sectors to fully utilise all the benefits of these tools.</p> <p><u>Environment:</u> Creative Scotland will operate in an environmentally sustainable manner and will work to ensure that the individuals and organisations that they support do as well.</p>
<p>Which other public agencies are drawn into that strategy and how do they each contribute to its delivery?</p>	<p>Their 10-year plan does not call on any new agencies for support with achieving the goals set-out. They will however, continue to request support from the Scottish Government and National Lottery Fund for financial support to complete these goals.</p>
<p>What is the public sector/territory support for content development/production/ etc.</p>	<p>Creative Scotland provide funding from two main sources; the Scottish Government and The National Lottery, and through three funding routes:</p> <ul style="list-style-type: none"> - Regular Funding for organisations: offering financial support for three years; - Open Project Funding supporting individuals and organisations with time limited projects; and - Targeted Funding to deliver shared strategic goals with partners. <p>In 2015/16 Screen Funding was delivered via the continuation of a dedicated Film Fund, alongside the introduction of a new Production Growth Fund and a Screen Sector Skills Fund, and the launch of a Tax Credit Advance Facility. The Film Fund provided nearly £4m of support for emerging and established film and television talent to create distinctive and engaging work that promotes Scotland’s creativity.</p> <p>In 2015/16 this fund focussed on:</p> <ul style="list-style-type: none"> - The development, production and exploitation of feature films, feature documentaries, animation and television drama series - Attendance at key markets and festivals <p>The fund made 129 awards, including support for 20 features films, feature documentaries and TV drama productions.</p> <p>The Production Growth Fund went live in October 2015 with a budget of £750k in 2015/16 and £1m in 2016/17 for qualifying productions in the form of a non-recoupable grant. Its purpose is to help grow the screen production sector, create employment opportunities for crew based in Scotland, encourage the use of production facilities companies based here, and deliver a direct and significant economic benefit to Scotland. The fund supported 3 projects, including 2 feature films in its first year.</p>

	<p>In September 2015 CS announced the first awards to the Screen Sector Skills Fund to stimulate growth in the screen industry, addressing some of the key priorities set out in the Film Strategy 2014-17. In total 14 additional awards were made through this programme, to the value of just over £1m.</p> <p>Creative Scotland does not provide explicit business development support to screen businesses, this being the remit of the Enterprise Agencies and to some extent also the Business Gateway and Cultural Enterprise Office. The Enterprise Agencies set criteria for businesses that they support through account management structures (usually tied to growth potential) and also have universal business development products that any business can access. HIE also supports trade networks that offer more dedicated support to screen businesses including advice support and access to markets (trade fairs etc). Business Gateway and CEO operate more at the start up and small business end of the spectrum and have a range of support and advice services.</p> <p>Skills Development Scotland is the lead agency for skills development and has a Creative Industries Skills Investment Plan which guides their activities in relation to screen (as well as other creative industries).</p> <p>Inward investment is complex. Company FDI is the responsibility of Scottish Development International, but attracting mobile production activity is more usually led by Creative Scotland, working in partnership with other agencies as appropriate to develop packages of support.</p> <p>Only Creative Scotland funds content development, production and exhibition. Scottish producers have in the past accessed EU funding, but this will obviously cease post Brexit.</p>
<p>How is it funded and what is the source of the funding?</p>	<p>All funding programmes are made available through the annual funding budget provided to Creative Scotland by the Scottish Government and National Lottery Fund.</p>
<p>Does the agency impose conditions on access to funding and if so, what sort of conditions?</p>	<p>The following are some conditions attached to applying for Creative Scotland funds:</p> <ul style="list-style-type: none"> - individuals who are not based in Scotland may not apply; - students in full-time formal education at the date of the project start, will not be successful; - individuals working in museums or the heritage sector may not apply unless they can demonstrate that the main benefit of the project will be to one the creative areas supported by the agency; and - academics or other education professionals looking for professional development funding.
<p>How do relationships work with broadcasters and do they have formal partnership agreements? If not, what sort of arrangements do they have?</p>	<p>No publicly available information on this</p>

<p>How do they work with new commissioners like Netflix/Amazon?</p>	<p>No publicly available information on this</p>
<p>What is their approach to data gathering for the Sector and reporting on activity to Government</p>	<p>Creative Scotland provides Annual Reports containing among many things performance and budget information for that year. Award Listing's also provided monthly information on the awards granted by the agency. Creative Scotland also make available Sector Reviews which aim to improve the way the art, screen and creative industries are funded. Sector Reviews contain information on the following:</p> <ul style="list-style-type: none"> - Audit and mapping: understanding the current sector landscape; - Sector analysis: understanding the dynamics of the sector and what that could mean for the future; - Gap analysis: identifying where gaps and opportunities exist; and - Reporting their recommendations for further strategies. <p>The last Sector Review for film was published in the January of 2014.</p>
<p>What do they consider to be the key opportunities for next 3-5 years?</p>	<p>Having completed their 2014 to 2017 Film Strategy, Creative Scotland will continue to fulfil their remit by working to accomplish the aims and goals set out in their 2014 to 2024 Strategy.</p>
<p>What published evaluations exist of other approaches, and what can Scotland learn from these in relation to boosting sector growth, employment, sustainability, resilience and audience reach?</p>	<p>No publicly available information on this</p>
<p>Important web links:</p>	<p>http://www.creativescotland.com/data/assets/pdf_file/0012/25500/Creative-Scotland-10-Year-Plan-2014-2024-v1-2.pdf</p>

Northern Ireland	
How does that territory structure its approach to Screen e.g. one body or more, how governed and reporting to which part of its Government?	<p>Northern Ireland Screen is the lead agency for the film, television, and digital content industry in Northern Ireland.</p> <p>NI Screen is governed by a board of 13 directors, and reports to three government departments under its remit: Department for the Economy, Department for Communities and Department for Culture Arts and Leisure.</p>
What remit(s)?	<p>Northern Ireland and NI Screen aim to maximise the economic, cultural and educational value of the screen industry in the region. NI Screen provides focused intervention in eight key areas:</p> <ol style="list-style-type: none"> 1.) <u>Filming in Northern Ireland</u> – helping with all aspects of filming locally; budgeting, studios, crew, locations, permissions and services; 2.) <u>Investment and Funding</u> – funding for development and production; skills development is encouraged through both individual and company initiatives, whilst education and archive, film festivals and cultural cinema receive core funding. 3.) <u>Business and Skills</u> – supporting businesses and individuals through training, skills development and funding programmes. 4.) <u>Irish Language Broadcasting Fund (IBLF)</u> – the IBLF was set up with the dual aim of funding Irish language content and of fostering the Irish speaking independent production sector in Northern Ireland. 5.) <u>Ulster-Scots Broadcast Fund (USBF)</u> – the USBF was set up to ensure that the heritage, culture and language of Ulster-Scots is expressed through moving image. The USBF also aims to foster the Ulster-Scots independent production sector in Northern Ireland and fund Ulster-Scots cultural TV programmes for local audiences. 6.) <u>Archive and Exhibition</u> – providing local people with the opportunity to see the widest possible range of moving image. 7.) <u>Marketing and Information</u> – developing multi-faceted campaigns to market Northern Ireland as a centre for independent film, television and digital content production. 8.) <u>Education</u> – NI Screen aims to ensure the use of moving image and related digital technologies is used across the formal and non-formal curriculum.
How funded, with what balance of public/ non-public or leveraged funds?	<p>NI Screen is publicly funded by contributions from the following public agencies:</p> <ul style="list-style-type: none"> - Invest Northern Ireland (Invest NI), the regional economic development agency; - the Government Departments for the Economy, Communities and Culture Art and Leisure (DCAL); and - the Arts Council of NI (ACNI), a funding and development agency for the Arts in the region which enables NI Screen to administer Lottery Fund funding for film projects. <p>NI Screen had a total income of c. £18.5m in 2016 and employed an average of 27 FTEs.</p>

	<p>Invest NI is the largest source of funding for NI Screen and allocates funding according to the strategy produced by NI Screen. The strategy, while produced by NI Screen, is negotiated and agreed with Invest NI, which then makes recommendations to the NI Government for the funding allocation. Invest NI will also agree a set of targets with NI Screen against which progress and performance is monitored.</p> <p>Direct government funding to NI Screen mainly supports cultural and educational activities, including the Irish language and Ulster Scots broadcast funds (see below).</p>
<p>Does the Territory have a strategy for the Screen Sector as a whole?</p>	<p>'Opening Doors' is a four year strategy designed to make the Northern Ireland screen industry the strongest in the UK and Ireland outside London. The strategy is committed to taking an integrated approach to the intertwined development of the economic, cultural and educational value of all screen industries, with the three main objectives being:</p> <ul style="list-style-type: none"> - to ensure that NI has the strongest screen industry outside of London in the UK and Ireland (to 2018); - to guarantee that the screen industry in NI is supported by diverse cultural voices that are recognised and celebrated both within the region and abroad; and - to assure that the screen sector in NI is reinforced by the most successful screen and digital technologies education provision, and that these provisions are accessible for all in society.
<p>If so what is it, e.g. across TV and film, and how does it link its strategy to success e.g. growth, employment etc?</p>	<p>The Strategy is designed to make the screen industries as diverse and as strong as possible, by focusing equally on each of seven priority sectors (Animation, Large-Scale Production, Television Drama, Irish Language, Factual/Entertainment Television, Independent Film, and Gaming, Mobile, E-Learning and Web Content).</p> <p>In terms of contributing to employment within Northern Ireland, the Strategy has skills development and modern apprenticeships schemes as a core element. Increasing the size of the screen industry and continuing to develop the skills base will contribute to the overall proportion of the working age population in employment.</p> <p>The Strategy will ensure that NI is still able to compete in a global economy by continuing to attract companies like HBO and Universal Pictures and supporting home-grown companies to produce content for global markets.</p> <p>While it is designed to deliver long term sustainability, it is primarily an immediate economic strategy with a direct achievable levered value of £250 million over 4 years, to ensure business economic growth for Northern Ireland.</p>
<p>Which other public agencies are drawn into that strategy and how do they each contribute to its delivery?</p>	<p>For this Strategy, NI Screen will require Invest NI and DCAL, to continue to provide the strong leadership necessary to link the diverse elements impacting on the growth of the screen industries, and ensure that all social and economic outcomes are supported. Invest NI continues to support screen businesses that meet the growth thresholds and criteria defined for specific forms of support.</p>

	<p>The Strategy also calls on support from government bodies to ensure steady and stable growth of the screen sectors in Northern Ireland.</p> <p>The UK Government will be asked to support on matters where decision making powers are not yet devolved in NI.</p> <p>Much support will be sought from the Northern Ireland Executive, to develop a funding model that allows for a reduction of financial support over time without there being a corresponding reduction in economic value of the sector.</p> <p>The Strategy will also receive support from HBO, the Irish Film Board, the BBC and Raidió Teilifís Éireann, to contribute to large-scale production ventures.</p>
<p>What is the public sector/territory support for content development/production/ etc.</p>	<p>NI Screen offers the following funding schemes:</p> <p><u>Production</u> – funding in the form of a (soft) recoupable loan, or in some circumstances a grant for feature films, television drama, animation, factual and entertainment television and interactive content. This funding scheme is intended to assist in completing the budgets of productions which are almost fully financed.</p> <p><u>Development</u> – NI Screen support the development of feature film and television drama scripts for individuals and companies, project development for companies with feature films, television and interactive content, and slate development funding for companies with two or more projects, which can be feature film, television and interactive content.</p> <p><u>Cultural Funds</u> - includes the Irish Language Broadcast Fund (ILBF) and the Ulster-Scots Broadcast Fund (USBF); and <u>Other funding programmes</u> - Film Education; Digital Film Archive; Cultural Cinema, Film Festivals; Skills and Training funding programmes.</p> <p>The NI Screen Fund, can invest a maximum of £800,000, up to a ceiling of 25% of the overall project budget in feature films, television and digital content productions.</p> <p>NI Screen, was an early funder in the Game of Thrones TV series, now has funding pot which is in effect from 2014 to 2018. This is forecasted to add £250m to the local economy through inward investment in films, animation, TV drama, factual/entertainment TV and independent film.</p> <p>Although NI Screen has some business development activities, company support is more often the responsibility of Invest NI and relevant local authorities (notably Belfast City Council). As with the Enterprise Agencies in Scotland,</p>

	<p>account management support in Invest NI is focussed on higher growth potential businesses and it is not known how many of these are in the screen sector.</p> <p>NI Screen also offers skills and training courses and Invest NI offers more general skills support to businesses.</p> <p>Company FDI is the responsibility of Invest NI, but NI Screen plays the lead role in the attraction of mobile productions to the territory, co-ordinating packages of support as required.</p>
How is it funded and what is the source of the funding?	The money for these funding ventures comes from a range of sources including Government Departments, Lottery funding, Invest NI and the BFI.
Does the agency impose conditions on access to funding and if so, what sort of conditions?	<p>Some of the funding conditions are as follows:</p> <ul style="list-style-type: none"> - <u>Production</u> - NI Screen will not consider a production with less than 65% of its funding already in place. Productions must contribute to building a sustainable screen industry in Northern Ireland, and be able to show a direct economic benefit to the region, whilst providing proof of being commercially viable. AS noted, the funding is usually in the form of a recoupable loan. - <u>Development</u> – NI Screen supports innovative ideas that will connect with local and international audiences and attract critical acclaim. Applicants must be based within Northern Ireland or have staff who are based in the country. Project development and slate development funds also exclude projects made for local television outputs. Development funding appears to be in the form of a grant. The Irish Language Broadcast Fund and the Ulster Scots Broadcast Fund require projects to have broadcaster interest.
How do relationships work with broadcasters and do they have formal partnership agreements? If not, what sort of arrangements do they have?	NI Screen has formal partnership agreements with a number of broadcasters, including the BBC, STV and Irish Language Broadcast Fund.
How do they work with new commissioners like Netflix/Amazon?	No publicly available information on this.
What is their approach to data gathering for the Sector and reporting on activity to Government	<p>NI Screen is committed to gathering and reporting data to the various involved public agencies and Government departments (DCAL and Invest NI).</p> <p>NI Screen make annual Funding Decisions publically available through their website. These reports detail all decisions made across their Screen Production, Screen Development, Lottery and Ulster-Scots Broadcast Funds. Information on such decisions has been gathered since 2010. NI Screen also report updates with regards to achieving the economic,</p>

	education and cultural aims set out in their 'Opening Doors' strategy, and provide the actions which will be taken in the coming year to remain on-track with accomplishing these.
What do they consider to be the key opportunities for next 3-5 years?	In line with the 'Opening Doors Strategy', NI Screen aims to continue to work towards their outlined aims for the screen industry sectors.
What published evaluations exist of other approaches, and what can Scotland learn from these in relation to boosting sector growth, employment, sustainability, resilience and audience reach?	NI Screen has published two reports on its performance (<i>Adding Value Vols 1 and 2</i>) which quote some headline statistics (e.g. total investment in production, value of production, employment etc) and presents case study examples of economic and cultural successes alongside an account of its activities. These do not constitute evaluation either of the agency's impacts or of its approach.
Important web links:	http://www.northernirelandscreen.co.uk/ http://www.northernirelandscreen.co.uk/wp-content/uploads/2017/01/Opening-Doors-Northern-Ireland-Strategy-2014-2018.pdf

Republic of Ireland	
How does that territory structure its approach to Screen e.g. one body or more, how governed and reporting to which part of its Government?	<p>There are a number of agencies within the Irish screen industry, such as the Arts Council, the Screen Directors Guild of Ireland, and the Irish Film and Television Academy.</p> <p>However, the Irish Film Board (IFB), is the national development agency for Irish filmmaking and the Irish film, television and animation industry.</p> <p>The IFB is governed by the Department of Arts, Heritage and the Gaeltacht, which oversees the protection and exhibition of Ireland's heritage and cultural assets.</p>
What remit(s)?	<p>The IFB aims to support writers, directors, and production companies across the film, television and animation sectors in Ireland.</p>
How funded, with what balance of public/ non-public or leveraged funds?	<p>The annual budget of the IFB is determined by the Irish Government, and was €16.5m in 2015. The organisation employed an average of 20 people in 2015.</p>
Does the Territory have a strategy for the Screen Sector as a whole?	<p>The IFB's Strategic Plan 2016-2020, 'Building on Success', aims to continue the recent success of Irish film, television and animation sectors.</p> <p>The IFB believes that recent achievements are the result of the investment and support provided by the IFB over many years and that in order to continue to receive national and international recognition, investment (and continued investment) in home-grown talent it required.</p> <p>The strategic plan was been developed to support this ambition, and the three key 'pillars' were identified as: Vision for 2020; Building on Core Strengths; and Strong Foundations.</p>
If so what is it, e.g. across TV and film, and how does it link its strategy to success e.g. growth, employment etc.?	<p><u>Vision for 2020:-</u></p> <p>- Working with industry stakeholders, the IFB will promote an overall vision for the industry, focusing on leadership, gender and diversity, and building audiences for film, television and animation.</p> <p>Highlights under this 'pillar' include; providing strong industry leadership; working with the Government and the wider industry to provide a coherent public sector approach to the development of the sector; achieving a target of 50/50 gender equality in creative talent working with screen content; and positioning and building audiences as a central part of the work they support.</p>

	<p><u>Building on Core Strengths:-</u></p> <ul style="list-style-type: none"> - The IFB will build on the success achieved to progress and develop creative screen talent production, the development of talent and skills, and inward production and investment; and - Funding of, and support for, creative development (and the necessary organisational arrangements) will be central to this. <p>Targets under this pillar include; the creation of a new position of Head of Creative Production and Talent Development to provide artistic and creative leadership in support of screen production, as well as developing talent and skills through training initiatives to meet the growing needs of the sector.</p> <p><u>Strong Foundations:-</u></p> <ul style="list-style-type: none"> - In order to deliver on the ambitious vision and for the IFB to deliver on its priorities, strong foundations will be required, including; increased funding for investment in film, television, and animation; dynamic partnerships within the sector; and an effective organisation. <p>Goals under this pillar include; seeking increased funding from all potential avenues, including contributions from public service broadcasters and content distributors to Irish film and screen storytelling content; and continuing in the creation and nurturing of partnerships with stakeholders including IDA & Enterprise Ireland, and other public film funding agencies.</p>
<p>Which other public agencies are drawn into that strategy and how do they each contribute to its delivery?</p>	<p>The IFB will call upon the same support from the Department of Arts, Heritage and the Gaeltacht, and the Irish Government, to ensure it meets its strategic goals.</p> <p>The IFB also asked that their funding budget be restored to €20 million, as they felt this funding would be central to ensuring that the strategy is successful.</p>
<p>What is the public sector/territory support for content development/production/ etc.</p>	<p>As the main development and funding agency for the screen industry in Ireland, the IFB offers support for the following:</p> <ol style="list-style-type: none"> 1.) <u>Film Development:</u> <ul style="list-style-type: none"> - supporting creative talent and Irish production companies; - providing development loans for feature films, feature documentaries, TV animation and international TV dramas; and - enabling Irish companies to own and exploit their own intellectual property. 2.) <u>Film Production:</u> <ul style="list-style-type: none"> - providing debt finance for feature films, feature documentaries and TV animation projects;

- enabling Irish companies to own and exploit their own intellectual property; and
- support short film schemes across live action documentary and animation.

3.) Film Distribution:

- funding prints and advertising spend and assisting with the promotion and distribution of the feature films in cinemas throughout Ireland; and
- assisting distributors with distribution strategies.

4.) Film Industry Support:

- through Screen Training Ireland, investing in people and skills development; and
- supporting other industry guilds;

5.) Film Audience:

- supporting the Irish film programme in local festivals;
- supporting Irish film and television awards; and
- supporting and promoting Irish films at major international markets and festivals which provide an international sales launch pad.

6.) Film Location:

- promoting inward investment and Ireland as a location for international production;
- providing advice and support for international companies interested in locating their production activity in Ireland;
- organising a number of inward and outward trade missions on an annual basis; and
- working in partnership with EU counterparts on co-production.

The Irish Government also offers a tax rebate on film and TV production that meets the Section 481 Cultural Test. The rebate is up to 32% of all qualifying expenditure.

Company support is the remit of Enterprise Ireland, although support is focussed on high growth potential firms and on manufacturing. Support for small companies and sole traders is provided through local enterprise offices throughout the country. It is not known how many of the firms supported through these structures are within the screen sector.

	Skills and training support is delivered through Screen Training Ireland, which is part of IFB. Wider skills and training activity is co-ordinated by the Further Education and training Authority (SOLAS) but the extent of its involvement with the screen sector is not known.
How is it funded and what is the source of the funding?	Funding for projects falls under the IFB's remit and so is funded from their agreement with the Irish Government. The tax rebates are administered by the Irish Government.
Does the agency impose conditions on access to funding and if so, what sort of conditions?	The amount of funding that can be awarded to applicants by the IFB under many of the above programmes is limited by regulations agreed with the Irish Government or laid down by the European Commission. Another condition of IFB funding is that the entire amount invested in a project must be spent on Irish employees, goods and services. Where only part of the production will take place in the region, producers should be aware that the amount of funding requested from IFB may be limited by the amount of such Irish expenditure to be gained. As well as this, under European Commission rules the amount of state aid used to finance a film project must not exceed 50% of its total cost. IFB development funding is in the form of a loan repayable on the first day of principal photography. Production funding is provided in the form of limited-recourse loans recoverable from a share of revenues from the project and also entitles the IFB to a share of net profits. IFB also requires a theatrical window, particularly for broadcaster projects. Support for distribution comes again in the form of a loan recoupable from theatrical revenues.
How do relationships work with broadcasters and do they have formal partnership agreements? If not, what sort of arrangements do they have?	IFB seeks to work in partnership with RTÉ and TG4 to encourage investment in, and broadcast of, feature films, television drama, and animation content.
How do they work with new commissioners like Netflix/Amazon?	No publicly available information on this.
What is their approach to data gathering for the Sector and reporting on activity to Government?	The IFB make available annual Production Catalogues, which contains a detailed guide to the films funded by the Board that year. The IFB also provide information on gender statistics with regards to the split between the number of successful applications received to their Production, Development and Irish Feature Film Funds. There is also trend data available showing IFB Exchequer Funding from 2004 to 2017, as well as total IFB funding, investment and spend from 2006 to 2016.
What do they consider to be the key opportunities for next 3-5 years?	The IFB will continue to work towards their outlines key objectives from their Strategic Plan 2016-2020 'Building on Success', focusing on the three key pillars identified of Vision for 2020; Building on Core Strengths; and Strong Foundations. The challenges identified are:

	<ul style="list-style-type: none"> - Positioning the sector as an important contributor to the cultural and economic life of the country; - Identifying, nurturing and developing creative talent and building a film culture in Ireland; - Embracing diversity and gender equality and ensuring the participation and representation of a diverse range of voices in Ireland; - Strengthening the links between creative vision, quality of work and audience engagement to achieve critical and commercial success for Irish screen content; - Restoring IFB funding levels to enable the Board to achieve its remit; - Improving the local landscape by way of partnerships with state agencies, broadcasters and content distributors; - Strengthening the position of Irish film, television and animation in the international marketplace; - Ensuring the right skills and training facilities are available to enable continuous industry growth; - Ensuring that infrastructure to support production is available; and - Ensuring Ireland is considered competitive within the international landscape for screen production.
<p>What published evaluations exist of other approaches, and what can Scotland learn from these in relation to boosting sector growth, employment, sustainability, resilience and audience reach?</p>	<p>No publicly available information on this.</p>
<p>Important web links:</p>	<p>http://www.irishfilmboard.ie/files/reports/IFB%20Five%20Year%20Strategy%202016.pdf http://www.irishfilmboard.ie/</p>

Wales	
How does that territory structure its approach to Screen e.g. one body or more, how governed and reporting to which part of its Government?	<p>Within Wales there are two main screen sector bodies; Film Cymru Wales (FCW) and Wales Screen.</p> <p>FCW, formerly known as the Film Agency for Wales, is an external lottery delegate of the Arts Council of Wales (ACW) and British Film Institute (BFI).</p> <p>Wales Screen is a small but dedicated and knowledgeable team within the Creative Industries sector of the Welsh Government.</p>
What remit(s)?	<p>FCW supports the strategic development of the film sector in Wales, in addition to devising, funding and delivering further projects, and projects that generate earned income, as an independent company and business in its own right.</p> <p>Wales Screen works with international and domestic projects, including: short films, feature films, documentaries and television dramas. The team also provides support to productions filming in the region, with permits and such.</p>
How funded, with what balance of public/ non-public or leveraged funds?	<p>As an external lottery delegate of ACW, a significant proportion of Film Cymru Wales' income comes from the Department of Culture Media and Sport, via ACW.</p> <p>Wales Screen is funded entirely by the Welsh Government. Its total income is c. £2m and it has 13 employees.</p>
Does the Territory have a strategy for the Screen Sector as a whole?	<p>Film Cymru Wales has a current Business Plan (2015 to 2018), which gives details of the companies overarching priorities for that period, as described under their 'Make, See, Learn' banners of operation</p>
If so what is it, e.g. across TV and film, and how does it link its strategy to success e.g. growth, employment etc?	<p>FCW's Business Plan aims to:</p> <ul style="list-style-type: none"> - support the growth of the Welsh film sector, with allied benefits for job and wealth creation, by identifying and supporting talent, companies and sector infrastructure, through project, company and individual funding and training opportunities; and - support film as a means towards community regeneration, including developing the range of places that film can be seen and opportunities for people to engage, participate and learn from film.
Which other public agencies are drawn into that strategy and how do they each contribute to its delivery?	<p>Film Cymru Wales site the ACW as their continued partner agency throughout their strategy. Therefore, the ACW will continue to provide a significant proportion of the necessary funding for the Strategy.</p>

<p>What is the public sector/territory support for content development/production/ etc.</p>	<p>Film Cymru Wales supports Welsh or Wales-based writers, directors and producers with development and production funding, industry assistance and mentoring opportunities.</p> <p>Wales Screen funding for film and television production is available through the Welsh Government’s Media Investment Budget (MIB). The MIB is available for commercial investment in film and TV productions filming in Wales and incurring Welsh spend. Investments can consist of debt, gap and equity funding. Debt funding can include cash flowing tax credits and/or pre-sales. Decisions on whether to invest are made on a case-by-case basis. Wales Screen also provides a free locations service to help producers find suitable locations, crew and facilities.</p> <p>Sky Vision funding is also available for independent production companies based in Wales, or a UK based company looking to produce shows in Wales.</p> <p>Film and TV production activity in Wales qualifies for the UK tax incentives.</p> <p>Economic development is the responsibility of the Welsh Government and there is no arms-length enterprise agency. Business support is delivered via Business Wales and FDI is the responsibility of the Welsh Government. Finance Wales is the national investment agency and support businesses with investment finance. It does not offer dedicated screen sector funds nor investment in content development or production.</p> <p>General skills support is again delivered by the Welsh Government.</p>
<p>How is it funded and what is the source of the funding?</p>	<p>FCW is prepared to fund projects up to £200K, and a further £100k is available via Film Cymru Wales’ new Magnifier scheme, aimed at supporting project costs such as digital development or the exploitation of intellectual property.</p> <p>With regards to Wales Screen, Pinewood Pictures advises the Welsh Government on the MIB, which has £30 million available for film and television projects that can shoot 50% of their principal photography in Wales.</p> <p>Sky Vision has teamed up with the Welsh Government to support independent TV production in Wales by investing £400,000 in funding for new factual and entertainment programmes.</p>
<p>Does the agency impose conditions on access to funding</p>	<p>Film Cymru Wales’ investment in development is recouped when the project proceeds to production and becomes repayable on the first day of principle photography or other exploitation. FCW’s investment in production is lottery funding and it is treated as equity investment to be recouped alongside other equity investors.</p>

and if so, what sort of conditions?	
How do relationships work with broadcasters and do they have formal partnership agreements? If not, what sort of arrangements do they have?	No publicly available information.
How do they work with new commissioners like Netflix/Amazon?	No publicly available information.
What is their approach to data gathering for the Sector and reporting on activity to Government	Film Cymru Wales have annual reports available, which provide information on the funding awards given that year to enable Production, Development, Cinema, Festival and Education. These reports also provide information on how FCW have brought films to new audiences during that time, with admission numbers and data on the number of screenings.
What do they consider to be the key opportunities for next 3-5 years?	In line with their Business Plan, FCW will be continuing to work towards to goals set out towards 2018. However, no further information on their sector objectives or future opportunities has yet been made available.
What published evaluations exist of other approaches, and what can Scotland learn from these in relation to boosting sector growth, employment, sustainability, resilience and audience reach?	None identified.
Important web links:	http://www.ffilmcymruwales.com/index.php/en/ http://www.ffilmcymruwales.com/attachments/article/104/Business%20Plan%2015-18%20refreshed%202016.pdf

Australia	
How does that territory structure its approach to Screen e.g. one body or more, how governed and reporting to which part of its Government?	There are ten screen agencies based in Australia, including those associated with each of the federal territories. However, Screen Australia is the Australian Federal Government's key funding body for the Australian screen industry.
What remit(s)?	Screen Australia aim to support and develop a spotlight for home-grown talent and indigenous talent, encourage innovation within the industry and build audience bases. See below for their remit as defined in legislation.
How funded, with what balance of public/ non-public or leveraged funds?	Screen Australia, is funded from the governments federal budget and received c 84m Australian dollars in 2016 of a total income of c110m \$Aus. The balance is earned income and revenue generated through sale of assets, interest and recoupment on investments made.
Does the Territory have a strategy for the Screen Sector as a whole?	<p>Each territory has its own strategy for the screen industry, and Screen Australia has a Corporate Plan setting out its own priorities and planned investments. The priorities identified in the Plan are those set out as the functions of the organisation in the Screen Australia Act 2008 which established the agency. They are:</p> <ul style="list-style-type: none"> a. support and promote the development of a highly creative, innovative and commercially sustainable Australian screen production industry; and b. support or engage in <ul style="list-style-type: none"> i. the development, production, promotion and distribution of Australian programs; and ii. the provision of access to Australian programs and other programs; and c. support and promote the development of screen culture in Australia.. <p>This also contains some performance indicators mainly relating to the numbers of productions that will be supported, but also some relating to box office, TV ratings and diversity in the employment base on support productions.</p>
If so what is it, e.g. across TV and film, and how does it link its strategy to success e.g. growth, employment etc?	See above.

<p>Which other public agencies are drawn into that strategy and how do they each contribute to its delivery?</p>	<p>This is not clear other than government connections and support, and the regional film commissions.</p>
<p>What is the public sector/territory support for content development/production/ etc.</p>	<p>The Enterprise Ideas Program funds screen sector proposals that are aiming to impact the entire screen industry. Screen Australia will give particular consideration to those proposals that seek to do one or more of the following:</p> <ul style="list-style-type: none"> - Create a genuinely innovative development model; - Unlock new sources of finance for Australian development, production and distribution; - Expand the international profile and presence of Screen Australia by developing international business and creative relationships in international markets; - Build new audiences for Australian content or create new avenues for distribution and release; - Encourage new voices that truly reflect the rich diversity of Australian society, including those from regions outside of the major production centres; - Open up the creative and commercial possibilities of an emerging field of screen production; and - Advance the exploration of new technologies and platforms. <p>Enterprise Ideas will seek to fund a diverse range of companies with a variety of budgets and projects. The program will support the strongest proposals addressing the objectives of the program, with funding levels in line with the scale of the activity and supported by an appropriate budget.</p> <p>Economic development is supported via a network of Regional Development Agencies (RDAs) supported by the federal and regional governments in each territory. The RDAs provide funding and support to encourage economic development and while many have interest in the creative industries, we found no dedicated screen sector schemes.</p>
<p>How is it funded and what is the source of the funding?</p>	<p>Enterprise Ideas will offer funding to deliver diverse initiatives costing between \$100,000 and \$400,000 over a maximum of two years. Screen Australia consider supporting projects across this entire budget range.</p>
<p>Does the agency impose conditions on access to funding and if so, what sort of conditions?</p>	<p>In order to be considered eligible for this funding program, the application must meet the below criteria:</p> <ul style="list-style-type: none"> - Meet the General Eligibility requirements set out in Screen Australia's Terms of Trade, including the requirement to be incorporated and carrying on business in Australia, and have its central management and control in Australia; - Employ at least one company director with a minimum of five years of relevant and/or associated participation in the media and entertainment industry; and - Demonstrate a commitment to contribute financially to the delivery of the proposal.

	<p>Previous recipients of funding under Enterprise Classic are eligible to apply, and if successful, must fully acquit any loan repayments.</p> <p>SA's investments are recoupable if they exceed a total value of 0.5m \$Aus (including development funding and producer offset (tax rebate)). Below this threshold they are in the form of a grant.</p>
<p>How do relationships work with broadcasters and do they have formal partnership agreements? If not, what sort of arrangements do they have?</p>	<p>SA has schemes that support development and production for TV broadcast but there is no information on broadcaster partnerships.</p>
<p>How do they work with new commissioners like Netflix/Amazon?</p>	<p>SA has schemes that specifically support development and production for online and SVOD platforms but there is no information on new commissioner partnerships.</p>
<p>What is their approach to data gathering for the Sector and reporting on activity to Government</p>	<p>Screen Australia, make available a number of performance infographics as well as reports and discussion papers relating to screen industry themes. Screen Australia tasked also provide data and research insights to both the industry and government.</p> <p>Screen Australia gather and present statistics on the production and release of feature films, TV drama, documentary and other screen content in Australia. As well as data on audiences, markets and how Australia compares with other countries. Reports made available contain information about funding granted, and how Screen Australia are helping to fulfil their remit, as well as discussion papers highlighting some of the main issues and challenges facing the industry.</p>
<p>What do they consider to be the key opportunities for next 3-5 years?</p>	<p>Screen Australia has outlined some of the key issues and challenges facing the industry, including:</p> <ul style="list-style-type: none"> - challenges facing feature film production and distribution within the country; - the lack of gender and cultural diversity within all areas of the industry; and - the impact that developments in digital content delivery (online and on demand) is having on the Australian screen sector.
<p>What published evaluations exist of other approaches, and what can Scotland learn from these in relation to boosting sector growth, employment, sustainability, resilience and audience reach?</p>	<p>None identified.</p>
<p>Important web links:</p>	<p>https://www.screenaustralia.gov.au/</p>

Denmark	
How does that territory structure its approach to Screen e.g. one body or more, how governed and reporting to which part of its Government?	The Danish Film Institute (DFI) is Denmark's national agency for film and cinema culture, operating under the Ministry of Culture.
What remit(s)?	The Danish Film Institute is active within three main areas: <ul style="list-style-type: none"> - Production and development of all types of films; - Distribution and communication of films and film culture; and - Archives and museum activities.
How funded, with what balance of public/ non-public or leveraged funds?	The DFI is funded by the Ministry of Culture within the Danish Government and has an annual budget of c 0.5m Danish Kroner
Does the Territory have a strategy for the Screen Sector as a whole?	The Danish Film Agreement sets out the sector plans for 2015 to 2018. The Film Agreement provides the overall economic and film-policy framework for the work of the Danish Film Institute over the next four years, and was passed by the Danish Parliament.
If so what is it, e.g. across TV and film, and how does it link its strategy to success e.g. growth, employment etc?	The key Agreement objectives are as follows: <ol style="list-style-type: none"> 1.) <u>More films</u> - A support scheme for low-budget films will be introduced that will lead to the production of more features per year. These low-budget films will give experienced filmmakers and emerging talents an opportunity to try different forms of film-making. Up to 24 low-budget films could be supported over the four-year period. 2.) <u>Doubled support for video games</u> - The funding for video games is being increased from DKK 20 million (2.7m euros) to 40 million (5.4m euros) in the agreement period. The Danish Film Institute will establish a games office that, in addition to distributing funds, will assist in fostering an innovative game environment in Denmark. 3.) <u>Strengthening the economy of Danish film</u> - Danish film production will receive an amount of DKK 70 million (9.4m euros) from 2015-2018, to help aid the industry in converting to digital film sales. 4.) <u>New opportunities for talents</u> - Low-budget films will give film talents a chance to tackle a feature-film format. A minimum of DKK 128 million (17,2m euros) will go to New Danish Screen over the agreement

	<p>period.</p> <p>5.) <u>Media studies for children and young people</u> - The Media Council for Children and Young People will enhance their efforts in media studies for children and youth.</p> <p>6.) <u>Film in the classroom</u> - The DFI will set up a close partnership with the Ministry of Education and the teachers colleges to develop new educational programmes in the film and media sectors.</p>
<p>Which other public agencies are drawn into that strategy and how do they each contribute to its delivery?</p>	<p>The Agreement will rely on the DFI's current relationship with the Ministry of Culture and Danish Government, as well as forming new partnership with other government departments, such as the Ministry of Education.</p>
<p>What is the public sector/territory support for content development/production/ etc.</p>	<p>The DFI allocates subsidies for the development, production and distribution of Danish films as well as international co-productions. Support programmes also extend to film education and international promotion at film festivals</p> <p>An important task of the DFI is to provide a framework for film funding which promotes diversity and risk-willingness in the industry. They do this by offering production support, highlighting talent development and monitoring new digital platforms.</p> <p>The DFI supports the production of 20-25 feature films and 25-30 documentary and short films every year. There are three kinds of support: the film commissioner scheme, the market scheme and the talent development scheme at New Danish Screen.</p> <p>International partnerships are strongly encouraged by the DFI and they allow for 5-9 minor co-productions in feature film and 4-6 minor co-productions in documentary film per year.</p> <p>In line with government policy, the agency is also required to allocate 25% of all subsidies towards funding children and youth films.</p> <p>The Danish Government's Ministry for Culture is also responsible for media policy and the Radio and Television Board is the regulatory authority for radio and television and provides grants for non-commercial radio and television.</p>
<p>How is it funded and what is the source of the funding?</p>	<p>All funding for development, and production etc. is determined by the annual budget set out by the Danish Government for the DFI.</p>

<p>Does the agency impose conditions on access to funding and if so, what sort of conditions?</p>	<p>Some of the conditions of the funding offered by the DFI include:</p> <ul style="list-style-type: none"> - the DFI can only award subsidies to the production of Danish feature films; - before funding is awarded, the DFI performs a production and financial assessment of the project as well as an assessment of the film's target groups and distribution potential; - films which are in production at the time of their application, must ensure they do not apply for funding after a rough cut of the feature is ready; and - projects cannot apply for the same funding more than twice.
<p>How do relationships work with broadcasters and do they have formal partnership agreements? If not, what sort of arrangements do they have?</p>	<p>Not clear from available information.</p>
<p>How do they work with new commissioners like Netflix/Amazon?</p>	<p>With a focus primarily on independent Danish features, the Institute does not make clear their stance on relationships with larger commissioners.</p>
<p>What is their approach to data gathering for the Sector and reporting on activity to Government</p>	<p>The DFI create annual reports, which contain key facts and figures on film production and the cinema market in Denmark. These reports also include audience data, an overview of which projects received funding that year and the DFI's budget for the year to come. These reports are available from 2002 to 2017.</p>
<p>What do they consider to be the key opportunities for next 3-5 years?</p>	<p>The DFI is expected to fulfil their 2015-2018 Film Agreement in the near future, after which no information has been provided as to the direction of DFI's strategy or focus.</p>
<p>What published evaluations exist of other approaches, and what can Scotland learn from these in relation to boosting sector growth, employment, sustainability, resilience and audience reach?</p>	<p>None identified.</p>
<p>Important web links:</p>	<p>http://www.dfi.dk/Service/English.aspx</p>

Vancouver	
How does that territory structure its approach to Screen e.g. one body or more, how governed and reporting to which part of its Government?	<p>The Vancouver Economic Commission (VEC) focuses on growing the Vancouver economy by means of investment, business development, and bettering business practices.</p> <p>The Film & Media Centre (FMC) and the Vancouver Film Commission (VFC) both of which are part of the VEC, work together to deliver Vancouver's Film and TV industry.</p> <p>Another body, Creative BC was formed by the provincial government of British Columbia and focuses on the growth and development of the province's creative industries. Creative BC is governed by the Province of British Columbia and a board of eleven directors. It administers the tax credit funding for film, TV, digital animation and VFX projects.</p>
What remit(s)?	<p>The FMC and VFC work on the basis of three core objectives:</p> <ul style="list-style-type: none"> - market Vancouver to strengthen its position as a global leader in the screen industry; - advocate to all levels of government on key issues related to growing the industry; and - attract future investment to all companies that constitute Vancouver's Film & TV Industry. <p>They do this by building upon their outlined four 'pillars' of activity of investment, promotion, advocacy and talent.</p> <p>Creative BC promotes the development of creative industries (motion picture, interactive digital, music and publishing sectors), in British Columbia and provides them with point of access for industry programming, production support services, tax credit administration, international marketing assistance and policy development.</p>
How funded, with what balance of public/ non-public or leveraged funds?	<p>The VEC and all related departments are funded by Vancouver City Council. Creative BC is funded entirely by the Province of British Columbia.</p>
Does the Territory have a strategy for the Screen Sector as a whole?	<p>In an annual update report from 2016, the VEC indicated that its goal for the sector was to expand and maintain Vancouver's leadership position as a global centre for the Digital Entertainment & Interactive (DE&I) sector.</p> <p>Vancouver's DE&I sector is defined as the screen-based entertainment sectors of Visual Effects (VFX), Animation, Film & TV Production, Digital Media, Video Games Development and other Interactive Media such as Augmented Reality and Virtual Reality which rely on similar infrastructure, talent and technology to create quality content.</p> <p>Creative BC aims to provide the programs, services and expertise needed to expand and diversify British</p>

	<p>Columbia's creative industries, generate investment and employment in the industries and promote the regions creative content and production abilities both at home and internationally.</p>
<p>If so what is it, e.g. across TV and film, and how does it link its strategy to success e.g. growth, employment etc?</p>	<p>The proposed mandate of the Vancouver Film Commission Office is to support the growth and success of the Vancouver Film, TV & Digital Entertainment industry, via three key activities:</p> <ol style="list-style-type: none"> 1.) <u>Investment</u>.- Attract investment for local Film, TV and Digital Entertainment production as well as investment for the cultivation of locally-owned intellectual property. Attracting investment for digital and entertainment infrastructure (such as specialized studios and digital rendering farms) will also be a part of the mandate; 2.) <u>Marketing, promotion and business development</u> - Market Vancouver as a destination for Film, TV & Digital Entertainment business, further strengthening its reputation and position as a global leader in this industry; and 3.) <u>Advocacy</u> – Lead and support advocacy efforts to ensure that government regulations and policies best support the local Film, TV & Digital Entertainment production industry.
<p>Which other public agencies are drawn into that strategy and how do they each contribute to its delivery?</p>	<p>No other public agencies will be drawn into this mandate, and instead the VEC will continue receive and require funding and support from the Vancouver City Council only.</p>
<p>What is the public sector/territory support for content development/production/ etc.</p>	<p>With regards to skills development, Creative BC offers scholarships and funding to support British Columbians interested in pursuing careers in film, television and digital media.</p> <p>Creative BC also offer Motion Picture Production Support as well as Location Support. The agency provides complete script breakdown services for Features, TV Series, Pilots and Movies. Based upon production and script requirements, Creative BC may provide location scouts to accompany producers and directors around the province in search of suitable locations. Funding is provided for development, slate development and production, often as a top-up on other national funding schemes such as the Telefilm Canada Feature Film Fund. There is also support available around tax credits for production and some limited skills and training programmes.</p> <p>Film & Media Centre (FMC) and the Vancouver Film Commission (VFC) are largely focused on advocacy, promotion and the attraction of investment into the sector.</p>

How is it funded and what is the source of the funding?	Funding for such scholarships comes from the annual allowance provided to Creative BC by the Province of BC.
Does the agency impose conditions on access to funding and if so, what sort of conditions?	Motion picture services are free of charge.
How do relationships work with broadcasters and do they have formal partnership agreements? If not, what sort of arrangements do they have?	No public information on this.
How do they work with new commissioners like Netflix/Amazon?	No public information on this.
What is their approach to data gathering for the Sector and reporting on activity to Government?	The FMC and VMC will report directly to the City Council of Vancouver, whilst Creative BC gather data and provide this to the Province of British Columbia. Creative BC make available Activity Reports which present information on the key achievements reached during that period, program activities and the corresponding resources used. They also contain performance indicators which help to summarize the goals and objectives established and how they were met over the fiscal year. Creative BC also provide data and statistics on film and television production in British Columbia based on information they collect as part of its administration role of the provincial governments film and television tax credit programme.
What published evaluations exist of other approaches, and what can Scotland learn from these in relation to boosting sector growth, employment, sustainability, resilience and audience reach?	No public information on this.
Important web links:	http://www.vancouvereconomic.com/vancouver-film-media-centre/ https://www.creativebc.com/

4. Tax credits

Northern Ireland, Wales & Scotland

Support for film culture and the film industry in the UK is broad, with tax breaks in place for film, high-end TV, animation and children's live action drama. The British Film Institute's (BFI) Cultural Test is in place to decide which productions qualify.

For film, a tax relief is available for productions that are identified as British and spend at least 25% of their production costs in the UK. This includes pre-production, principal photography and post-production. As of August 2015 producers could benefit from the availability of a tax relief at 25% on all production expenditure regardless of the overall budget for the production.

In April 2013, a tax relief was introduced by the government to high-end TV (in particular drama) and animation, applying to productions with budgets exceeding £1m per hour of TV. If a tax relief is granted to a production (providing it also identified as British or European in the Cultural Test), it can claim back 25% back as a cash payment, provided that money is spent on core production expenditure.

As well as this, in April 2015, a tax relief of 25% of production expenditure to children's live action drama also came into effect in the UK.

Republic of Ireland

As of January 2015, Ireland's tax incentive programme "Section 481" for film and television increased its rate of relief from 28% to 32%. The payable tax credit is now based on the cost of all cast and crew working in Ireland, regardless of their nationality.

"Section 481" is administered by Ireland's Revenue Commissioners (Revenue), and applies to feature film, TV drama (singles or series), animation (excluding computer games), & creative documentary.

Projects must either pass the Cultural Test or qualify as an official co-production under one of Ireland's Bilateral Co-Production Treaties or the European Convention on Cinematographic Co-Production.

Australia

Tax credit incentive schemes differ in Australia by territory, which each having a variety of different funds to attract productions across the screen industries.

However, federally, Australia has three incentives schemes available for large budget film and television productions:

- the Producer Offset gives a rebate of 40% for Australian expenditure on a feature film and 20% for Television and other projects;
- the Location Offset is a 16.5% rebate which is available to large budget film and television production companies filming in Australia. The minimum amount of expenditure required to access this scheme is AU\$500,000; and
- the Post/Digital/VFX (PDV) Offset offers a 30% rebate to projects that spend at least AU\$500,000 on post, digital and VFX works in Australia, regardless of where the production is shot

Vancouver

Film Incentive British Columbia (FIBC), is a labour based tax credit available to Canadian owned and controlled production corporations that have a permanent establishment in British Columbia.

FIBC provides refundable tax credits to Canadian controlled production companies based on their eligible BC labour costs. This tax credit is designed to encourage the production of film, television, digital animation, and visual effects in British Columbia.

The program includes five initiatives, with differing tax credit levels: Basic FIBC (35%), Regional Tax Credit (12.5%), Distant Location Regional Tax (6%), Training (30%), and Digital Animation, Visual Effects and Post-Production (DAVE) (16%).

FIBC is a refundable corporate income tax credit, and production companies must apply to Creative BC to receive an eligibility and completion certificate for their productions, as well as file with the Canada Revenue Agency in order to receive the tax credits.

Denmark

There is currently no fiscal incentive available for productions looking to film in Denmark, other than the subsidies made available through the Danish Film Institute.

However, the Copenhagen Film Fund (CFF), founded in 2013 aims to fill this gap, and is designed to attract international productions partners to Denmark.

The CFF aims to provide investment capital to international and Danish film and television productions that will complete their productions within the CFF's member Copenhagen Municipalities, and distribute these works both nationally and internationally. Similar regional funds also exist for other parts of the country.

5. Final Comments

A short exercise such as this can only hope to scratch the surface of the relevant information and insights that could be available from more detailed study of comparator agencies. A more detailed exercise might consider some of the strategic choices that face Creative Scotland in developing the Screen Unit proposition, including, *inter alia*:

- how to define the scope of the screen industries for the purposes of support and intervention, how to define the goals of such intervention, and continuously measure and manage the process, and how this then relates to the remit and functions of partner organisations, in Scotland, the UK, EU and internationally;
- determining the appropriate scale of resources required to deliver against a robust screen industries strategy for Scotland (most of the comparator territories seem to have significantly greater resources than those currently available for screen industry support in Scotland);
- how to balance economic and cultural development objectives within effective financial instruments and support for inward investment;
- how to ensure that effective company development support is available (in addition to content development), even if delivered by partner agencies;
- identifying the skills and expertise required by the Screen Unit to deliver effectively against the agreed strategy; and
- defining the relationship between the Screen Unit and agencies responsible for infrastructure development at national and local levels to ensure strategic alignment.

At a high level, a strategic approach to some of these issues has been set out by the Scottish Screen Sector Leadership Group in its report of January 2017¹, in which it indicted strong support for the establishment of a Screen Unit with:

- an expanded remit across the Sector extending to digital content;

¹ *Scottish Screen Sector Leadership Group: Report to the Culture, Tourism, Europe and External Affairs Committee, January 2017*

- close working partnership across the relevant agencies (combining business, content and skills development functions);
- an increased level of overall resources;
- a clearly defined leadership role; and
- a governance model that prioritises advice from the sector.

With this framework in mind, a next step in the process might be to examine a smaller number of comparator agencies in greater depth. This could usefully include:

- **Northern Ireland:** on the basis that there are similarities in organisational remits and structures with the screen agency working in partnership with the economic development agency, and a clear economic development remit for the screen strategy. There is also consistency with the broad approach recommended by the SSLG report, as well as the region's widely recognised success in recent years particularly in attracting mobile production;
- **Republic of Ireland:** an early adopter of fiscal incentive mechanisms and a strong competitor to Scotland for internationally mobile productions; and
- **Denmark:** a model which has (reportedly) helped to develop a strong indigenous sector, albeit with a significantly smaller budget.

Some of the other comparators may be less suitable on the basis of differences of scale (e.g. Australia, Wales) and/ or political/ organisational structures (e.g. Australia, Vancouver).