

UK FILM | COUNCIL

Review of A Bigger Future – the UK Film Skills Strategy

October 2008

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Executive Summary

A Bigger Future was launched in 2003 by the UK Film Council and Skillset as a complete, five-year education and training strategy for film skills, designed to enable the UK film industry to compete globally on the basis of world-beating skills. It was intended to make a major contribution to the sustainability and competitiveness of film in the UK. Programme implementation began in 2004, and delivery is now in its final year.

A Bigger Future was the UK's first comprehensive national training and education strategy for the film industry. It encompasses four main strands:

- careers information, advice and guidance
- further and higher education
- training for new entrants, professional development for industry practitioners and support for companies
- research and labour market intelligence.

In addition, it is underpinned by three 'golden threads': diversity, the nations and regions of the UK and the implications of new technologies. The programme is financed through the Film Skills Fund, a combination of lottery funding and investment obtained via a levy on feature film productions.

Between April 2004 and March 2008, more than £29 million was allocated specifically to the delivery of A Bigger Future – an average of £7.3m per year. Of this, £25.6 million was delegated lottery funding and £3.4 million was from the Skills Investment Fund (SIF). Skillset has invested £21.4m to fund: Screen Academies, new entrants training schemes, industry-based training and approved screenwriting courses. This activity has encompassed more than 270 grants awarded to 96 organisations, although just 9 organisations have received more than two thirds of this investment, with the largest amount (25% of the £21.4m) going to the NFTS.

Main outputs and outcomes of the strategy

In the four years to date, A Bigger Future has:

- Provided one-to-one careers advice to more than 800 individuals in-person, and to many more by phone and email
- Established a network of seven Screen Academies (including the Film Business Academy at Cass) and accredited screenwriting courses in nine universities (four of which are Screen Academies)
- Supported the expansion of affordable, existing learning opportunities for the workforce and new entrants, and established new supply where required
- Supported Skillset to produce film-specific research and intelligence such as the Film Production Workforce Survey
- Attracted additional partnership funding to support delivery of aspects of the programme, including substantial investment from HEFCE, the devolved administrations and regional EU funding

- Supported a more diverse cross-section of individuals to undertake training than currently exists in the UK film workforce
- Created Standards and Qualifications for a number of technical and craft grades, developed by Skillset in partnership with industry.

In total, there were around 18,500 beneficiaries across all elements of the programme in the first four years. Of these:

- 5% received one-to-one careers advice from industry professionals
- approximately 33% benefitted from investment in Screen Academies and accredited screenwriting courses in HE, and more than 250 bursaries were awarded to individuals studying at Screen Academies over the three years from 2005
- 56% took part in industry-based professional development, and around 1,000 individuals received Skillset Screen Bursaries to enable them to take part in professional development training
- 2% benefitted from company development schemes and 1% took part in dedicated New Entrants schemes.

Conclusions

A Bigger Future was an ambitious strategy, the first national skills strategy of its kind, born out of research and consultation with the industry. Many of its objectives are long term, and it will only be possible to assess them fully over a similarly long-term time scale. The strategy's emphasis is on enhancing the education and training infrastructure for UK film and devising a process for managing its implementation. It defines the actions that need to take place, but does not describe in detail what would constitute success, for instance by setting performance indicators.

Balance of investment

Investment in A Bigger Future has been broadly in line with the intentions set out in the original strategy. Investment in Screen Academies has in fact been slightly lower than originally envisaged in the strategy, and roughly equivalent to the level of funding for industry-based professional development – despite a perception in some quarters that there has been an over-emphasis on Screen Academies.

- Though a modest element of the strategy, funding for Careers Information, Advice and Guidance services has delivered clear benefits for beneficiaries and careers guidance professionals
- The quality of industry training and new entrants schemes has been high, although not necessarily low-cost
- Programme expenditure across all delivery has emphasised the production sector, where a largely freelance workforce has historically struggled to access flexible, affordable and film-specific training.
- Concerns were expressed during the review, however, that there has been some under-provision for other sectors of the industry, and this should be re-assessed in the future.
- Spending on Research and Labour Market Intelligence has been slightly lower than anticipated, although the research that has been produced is of a high standard.

Screen Academies

Conclusive evidence of the effectiveness of Screen Academies will take some years to emerge, but initial signs are positive about the quality of provision and emerging talent – though there is an ongoing need for refinement and assessment of the number and types of graduates and post-graduates being produced. Consultation for this review indicates broad support for the Screen Academy model, but there remains a need to increase awareness of the Academies more widely with both industry and potential students. Academies will also need to move to a more sustainable model in the future, that is less heavily reliant on investment from A Bigger Future.

The Film Business Academy was an important element of A Bigger Future in its own right, a completely new initiative intended to provide high level business and management skills across the industry. Accredited programmes in the form of an MSc and an MBA have delivered, or are in the process of delivering, film business education to two cohorts of new entrants and existing film industry professionals respectively. But the Film Business Academy has taken longer to develop than anticipated. The full extent of its ambitions have not so far been realised – in relation to short course provision, the sharing of curricula content across the Screen Academy Network, and the brokering role with mainstream business support agencies. Consultation indicates, however, that the industry's main concern is more structural: that is, whether accredited courses based in HE is the best method for delivering business and management skills for the industry. The UK Film Council and Skillset are currently reviewing the partnership with Cass going forward.

Diversity

The thinking contained within the original A Bigger Future strategy regarding diversity is under developed. It is not made clear as to what exactly is meant by 'diversity'. This lack of clarity has, in turn, meant that the outputs and outcomes related to diversity have been uneven. Skillset has encouraged diversity in those parts of the programme it administers directly (CPD bursaries, new entrants schemes, IAG), with promising results. These elements of the programme have been delivered to a significantly more diverse cross-section of the population than is employed by the industry. In Screen Academies, the picture is more complicated. Screen Academy bursaries have been allocated based on means testing, and as such have enabled a higher proportion of students from lower income backgrounds to enrol. But in other respects (gender, ethnicity, disability) bursary recipients were not significantly more diverse than the existing industry workforce, and have been less diverse than the overall student body in Screen Academies. These issues are now being examined through the Screen Academy network, but in the future a clearer articulation of priorities will be required.

Nations & regions

All activities supported by A Bigger Future have been open to anyone in the UK, but the majority have been delivered in London and the South East, where most of the UK film industry is also based. However, nearly 20% of investment has been in universities, training organisations and individuals in the nations and regions. There seems to have been little ongoing, systematic and strategic co-ordination of delivery of film skills between Skillset and the NSAs/RSAs, with the notable exceptions of Film London and Scottish Screen, but a number of individual, joint-funded programmes have been delivered.

New technologies

A Bigger Future has supported skills development in newer technologies that are becoming established in the industry, such as software packages used in production and post-production. It has not yet invested heavily in exploring the skills implications of new, disruptive technologies, such as digital distribution, exhibition and convergence, and this will need to be a bigger priority in the future as the industry itself embraces these new technologies.

Overall, the strategy's achievements and activities were not well enough communicated to the industry and other stakeholders, though there is consensus that major improvements have been made in the last year. This led to a lack of awareness about what was being funded, how many people were being educated and trained in different disciplines and so on – and contributed to misgivings about the strategy in some parts of the industry. There still remains a need to build on the processes by which different industry sectors can discuss their requirements, and feed into the planning of programme delivery. Part of the challenge for Skillset lies in delivering a strategy that is 'employer-led', when not all sectors of the industry are as effective in making their case as others. Overall, however, Skillset is now winning the battle for credibility across the industry, helped by better communications and emerging evidence of success.

Recommendations

The review identifies the following priorities for the future development of the Film Skills Strategy.

Next steps

- Formally extend the funding and delivery of A Bigger Future for an additional year, while a new strategy is developed and existing knowledge gaps addressed.
- Conduct a full review of the Screen Academies to assess more fully the overall impact of the programme, the course portfolio and volume of students coming through the network, and the potential for efficiency savings.
- Review how film skills overlap with those in other creative media sectors in Skillset's footprint, assess the implications for the provision of education and skills development, and perhaps revisit the relationship between Screen Academies and Media Academies.
- UK Film Council to re-assess its position on how film fits within the digital, converging media and communications market, and what the implications are for its own role regarding skills, and to what constitutes 'film' and 'the film industry'.

Value for Money

Given the likelihood of reduced Lottery funding, there will be a need for both efficiency gains and economy savings. The priorities are:

- Investigate how overheads can be reduced in the delivery of a programme that processes and administers a large number of applications and grants.
- Continue to explore how Screen Academies could become less dependent on A Bigger Future investment, and the additional, time-limited funds it has levered. For example: continue to investigate how all Screen Academies could become eligible for mainstream higher education funding (currently, two are only eligible for discretionary funds); embed more course enhancement activity within core curricula;

continue to encourage Academies to generate income by providing CPD to practitioners; work towards increasing funding of film skills from HE sector funding streams and other sources of public funding more generally.

- Consider a reduction in the scale of the overall programme, given existing industry concerns about possible 'over delivery', and the reality of a smaller film workforce in the UK since A Bigger Future began.

Enhancing the Achievements of A Bigger Future

- Work with the Industry Training Board and newly formed Film Skills Council to ensure that complete engagement with all parts of the industry is achieved and maintained.
- Continue to develop a stronger communications and marketing strategy – the more that is known and understood about the strategy, the better the industry's engagement with it.
- Review how the balance of HE, FE and industry-based interventions relates to the sector's needs.
- Skillset and the National and Regional Screen Agencies to improve levels of engagement in the Regions and continue to build on the partnerships with the Nations of the UK.
- Identify and establish the appropriate vehicle to deliver business skills to the industry.
- Develop better longitudinal labour market tracking for industry-based training and graduates of HE and FE.

Future Priorities

- Investigate how film skills relate to other industries in the context of increasing convergence, and identify which are genuinely film-specific.
- Develop a new plan to encourage and deliver a more diverse workforce and increase the priority of Diversity in any future strategy, with greater clarity about priorities, successful outcomes and the levels at which interventions should focus upon.
- Ensure that future skills strategies provide a ladder of opportunity through effective alignment and integration with policies focusing on the development and education of young people.
- Determine indicators of success, robust metrics and targets for the next skills development plan.
- Ensure that future film skills strategies continue to address the cultural dimensions of film as well as its industrial requirements.
- Investigate how to achieve competitive advantage by reducing the environmental impact of the film industry.

1 Introduction

Published by the UK Film Council and Skillset in 2003, **A Bigger Future** was launched as a complete, five-year education and training strategy for the British film industry. It was developed through more than a year of research and extensive consultation with the UK film industry and other stakeholders. This process was led and overseen by the Film Skills Strategy Committee, a representative grouping of industry, trade associations, unions, skills and policy bodies. The strategy aimed to ensure that the UK would be able to compete successfully in the global marketplace on the basis of world-beating skills.

A Bigger Future is now in its final year, and UK Film Council has commissioned this review in order to assess its achievements and identify priorities for the future. BOP Consulting was appointed to carry out this work in March 2008. This document is the draft report of our findings.

A Bigger Future was designed as a five-year strategy, with delivery commencing in 2004. Skillset, the Sector Skills Council (SSC) for creative media, is responsible for managing its implementation. The strategy is financed through the Film Skills Fund (created in 2004), comprised mainly of lottery funding via the UK Film Council and contributions from film productions through the Skills Investment Fund (SIF).

The strategy is organised around four key 'strands':

- Careers information, advice and guidance (IAG)
- Further, Higher and Postgraduate education
- New Entrants, Professional and Company Development
- Collecting and analysing information.

In addition, it is under-pinned by three 'golden threads':

- The need to encourage a more diverse workforce
- That the UK's nations and regions play a central role in the strategy's delivery
- That the implications of new technologies are taken into account.

The main outputs that the strategy is intended to deliver are:

- An expert film-specific careers information, advice and guidance network developed and delivered throughout the UK
- An integrated approach to skills provision which assesses and calibrates demand from the industry for specific skills and matches this with the provision of education and training
- Industry to approve, via Skillset, relevant training and education provision
- Establish a small network of Screen Academies recognised to provide an agreed mix of creative and commercial skills needed by the industry

- Coherent and complementary programmes implemented to develop skills and talent, in priority areas, of:
 - new entrants;
 - people already working in the industry;
 - film companies

The purpose of this review is to:

- Assess the process of delivery to-date
- Assess the impacts/outcomes of A Bigger Future investment
- Make recommendations for skills investment going forward, particularly in the context of a possible reduction in public funding.

The review is not intended as an evaluation of individual programme components, but as an overview across the whole programme. The report is structured around a set of questions, as outlined in the project brief. These are grouped together under four categories:

- Outcomes – impacts of the strategy
- Process – delivery of the strategy
- Strategic alignment – with UK Film Council policy and wider government agendas
- Recommendations – for delivery of A Bigger Future going forward, including identification of skills needs.

1.1 Methodology

The review was conducted primarily through a combination of:

- Desk research and analysis of: project documentation, programme data and evaluation materials (provided by Skillset); film industry research and labour market intelligence; and relevant strategy and policy documents.
- Extensive consultation with: UK Film Council and Skillset staff (17); Screen Academy directors and coordinators, and other FE/HE representatives (20); providers of careers advice, new entrants training and CPD schemes (6); relevant industry and public bodies (12); students and beneficiaries of guidance and training (38); a range of senior film industry practitioners and representatives (23).

116 people were consulted in total, and a further 51 people were invited to take part in the consultation but either did not respond or were unavailable (including 36 industry practitioners). A full list of consultees is provided in Appendix 2.

The extent and standard of the data provided by Skillset should be commended. It allowed for robust analysis and we are therefore confident that our quantitative findings are accurate. The Steering Group (see below) was closely involved in suggesting consultees for the qualitative research, including a number of prominent individuals who have been critical of the strategy.

Steering Group

The members of the Steering Group for this review of A Bigger Future were:

Iain Smith (Chair)	Applecross Productions and Chair of the Film Skills Strategy Committee
Janine Marmot	Director of Film, Skillset
Tim Cagney	Head of UK Partnerships, UK Film Council
Paul Richardson	Senior Monitoring Executive, UK Film Council
John Lee	Monitoring and Evaluation Coordinator, Skillset
Phil Clapp	CEO, Cinema Exhibitors' Association
Neil Watson	Strategic Consultant, UK Film Council

2 Overview of the delivery of A Bigger Future to-date

A Bigger Future is an ambitious undertaking – what some consultees called an attempt to create a ‘cradle to grave’ skills strategy for the film industry. While this somewhat overplays the strategy’s coverage, it usefully captures the aspirations of A Bigger Future (the programme) and the idea of a holistic solution to skills needs that underpins the strategy. It represents a once in a generation attempt to establish a new architecture for the delivery of film skills in the UK.

The task is considerable; ensuring that all the different programme elements are designed, negotiated with partners, made operational and delivering effectively, is a significant achievement. Although there have been a few inevitable teething problems, particularly in the first two years of the strategy, the overall picture of delivery is one in which the extensive range of actions set out in A Bigger Future will largely have been met by the end of the current financial year (2008/09). But measuring the success of the strategy is not limited to noting the construction of the new architecture, it is about what these initiatives are perceived to be achieving for the film industry and the bulk of this report is concerned with investigating this in greater detail.

In order to provide some context for the following analysis, it is useful to provide an overview of the delivery of the programme: how much investment has gone into it, where and how the main funding streams have been spent, and what has been achieved with the expenditure in terms of outputs.

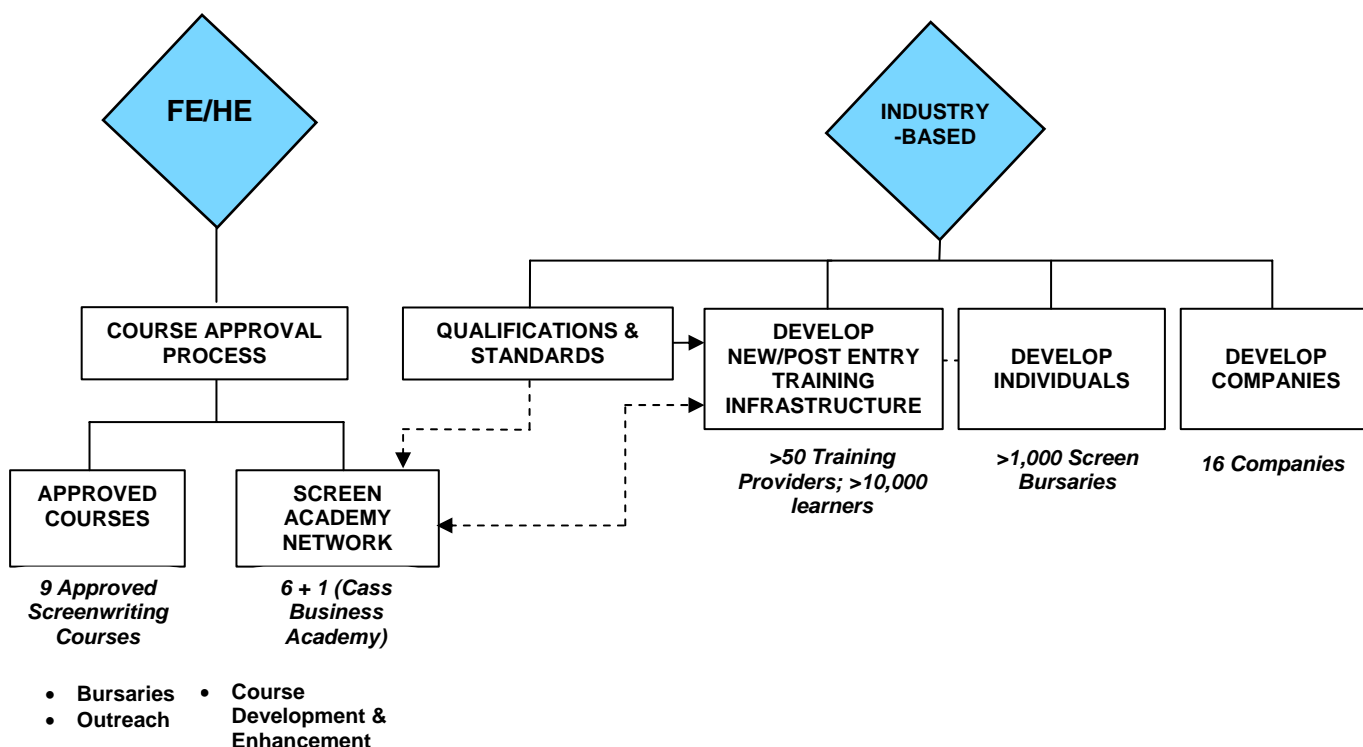
2.1 Programme elements

There are four main programme elements within the strategy. The purpose of the Careers Information, Advice and Guidance (IAG) strand has been to enhance Skillset’s existing and ongoing IAG service – Skillset Careers – to be more film-specific. This has been undertaken through a number of methods, most notably the development of a one-to-one, film-specific careers and advice service provided by trained industry professionals. Similarly, the Research and Labour Market Information (LMI) component within A Bigger Future builds on Skillset’s existing and ongoing programme of research and LMI, principally through the production of a dedicated biennial survey of the film production workforce.

Although there are four programme strands, as will become clear in Section 3.3, expenditure and activity within A Bigger Future has been heavily concentrated within the two remaining strands: the interventions in further and higher education (FE & HE) and industry-based training for New Entrants, Professional and Company Development. Figure 1 below therefore briefly illustrates what these major programme strands consist of, as well as providing a top line indication of the approximate numbers of partners and beneficiaries in each case.

UK Film Council and Skillset are jointly responsible for developing the overall A Bigger Future strategy, while Skillset lead on implementation. However, as Figure 1 shows, the ultimate success of the activity funded through the strategy depends on a much wider set of delivery partnerships.

Figure 1. Breakdown of A Bigger Future's FE/HE and industry-based CPD and company development activities



Source: BOP Consulting (2008)

Skillset's role in all aspects of A Bigger Future is pivotal: it has been key in the delivery of many of the industry CPD and company development activities; it is responsible for the process by which Screen Academies and associated courses are approved and established; and it is the interface with industry and UK Film Council regarding the implementation of the strategy.

2.2 Funding A Bigger Future

The programme is funded from two main sources:

- Lottery money of £6.5m per year for five years (2004/5-2008/9)
- Skills Investment Fund (SIF) derived from an industry levy¹ – actual income from SIF from April 04 – March 08 totals £3.4m².

Additionally, Pinewood Studios makes a voluntary contribution of 0.5% of their annual stage revenues, and the programme has levered in a wide range of match funding (e.g. fees paid for training by bursary recipients, use of resources and infrastructure in FE/HE, income from joint programmes with organisations such as regional screen agencies and guilds), that to-date is valued at just under £47m (see section 2.4.3 for further details).

¹ A contribution of 0.5% of the budget (up to a maximum of £39,500) of any film intended for theatrical release that is shot wholly or partially in the UK. The levy began as a voluntary contribution but will be compulsory from the end of 2009.

² Including bank interest of £247,000.

2.3 How the money has been spent

The vast bulk of the programme funds from lottery and SIF (74%) has been dispersed by Skillset to 96 different organisations to deliver a range of education and training opportunities, covering HE/FE (including Screen Academies), new entrants and CPD courses, as well as company development activities.

Expenditure on A Bigger Future activities delivered by Skillset itself constitute the second largest component of programme spend (13%). These includes services to end-users, notably the provision of IAG services and online information, and also activities to support the programme as a whole or elements of it, such as research, communications, standards & qualifications development, course approval and Screen Academy network support. This component also includes salary and overhead costs directly associated with the delivery of these activities (e.g. Screen Academy manager), accounting for 25% of costs for this area of programme spend.

Core Skillset salaries and overheads, primarily associated with the management and administration of funds, accounts for a further 11% of programme spend.

Skillset itself also administers a bursary scheme for individuals in the industry to use to part-pay for CPD that is not otherwise funded. Although Skillset has awarded over 1,000 of these bursaries, they account for a small proportion of the overall programme expenditure (2%).

Figure 2 – Main components of A Bigger Future programme expenditure (lottery + SIF), including overheads, March 2004 to March 2008

Area of expenditure	Amount (£) ³	% of Total Spend
<i>External spend⁴</i>		
Grants to education & training organisations (inc. HE/FE)	£21,445,000	74%
Skillset administered individual CPD bursaries	£568,000	2%
<i>Internal Skillset spend⁵</i>		
ABF Programme activity delivered by Skillset (e.g. IAG, research, communications, standards and qualifications, course approval, screen academy support)	£3,739,000	13%
Core salaries and overheads	£3,263,000	11%
Total	£29,015,000	100%

Source: BOP/Skillset (2008)

Although the 74% of the budget that is spent externally by Skillset is distributed across a large number of different grants (over 270) and organisations (96), the bulk is actually concentrated in a much smaller number of organisations. In fact, just nine organisations account for 69% of the £21.4m invested to-date in external education and training

³ Please note, all figures rounded

⁴ External spend derived from analysis of grants and bursaries awarded between April 2004 and March 2008, as detailed in spreadsheets compiled by Skillset: '9 – All Film Fund grants to organisations April 04 to March 08' and '4.1 – Bursaries awarded April 04-March 08'. Note that in practice, some of these grants and bursaries were not yet fully paid to recipient organisations at the time of writing, due to the time lag between awards being agreed and transactions being made against programme delivery.

⁵ Internal spend derived from Skillset's own analysis of annual income and expenditure for ABF.

providers. Unsurprisingly, each of the seven Screen Academies are included in the nine best-funded organisations, although two providers of industry-based training (FT2 and The Production Guild) have also received substantial sums, as Figure 3 shows.

Figure 3 – The nine organisations in receipt of the largest share of ABF expenditure, March 2004 to March 2008

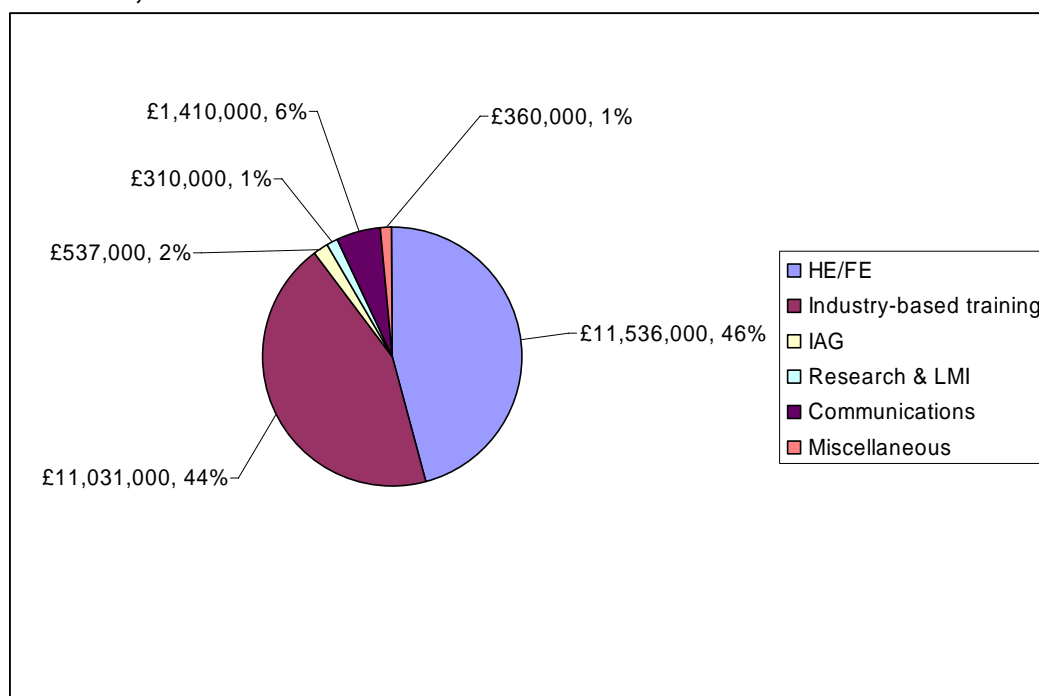
Organisation	Total value of grants	% of total external spend to organisations
NFTS	£5,510,000	25.0%
FT2	£1,820,000	8.3%
Cass, City University	£1,480,000	6.7%
LCC/Ealing	£1,100,000	5.0%
Napier University	£1,090,000	4.9%
London Film School	£1,040,000	4.7%
Bournemouth University	£994,000	4.5%
International Film School Wales	£990,000	4.5%
The Production Guild	£668,000	3.0%
Total	£14,700,000	66.7%

Source: BOP/Skillset (2008)

Special mention must be made here of the National Film and Television School (NFTS), which accounts for fully 25% of all expenditure to external training and education providers. The NFTS is in many ways a unique institution, and it has special status within A Bigger Future as it is in receipt of funding from all the main education and training strands: Screen Academy status, Approved Screenwriting course, and through 'Short Courses@NFTS', it has received over £330,000 to deliver industry-based training.

Looking at how the expenditure breaks down across the four main programme strands – HE/FE, industry-based training, IAG, Research and LMI – it is clear that the first two strands have accounted for the vast majority of A Bigger Future expenditure. Figure 4 below shows that the amalgamated expenditure across these programme strands was largely split between HE/FE (46%) and a range of industry-based training programmes (44%).

Figure 4 – Simplified breakdown of total ABF programme expenditure (lottery + SIF), minus overheads, March 2004 to March 2008



Source: BOP/Skillset (2008)

It is difficult to provide a detailed annual breakdown of A Bigger Future expenditure for every programme strand, due to the way in which some of the available budgetary information is structured. For instance, information available for 2004-05 is less detailed than for subsequent years, and some aspects of the programme cut across lottery and SIF funding, externally awarded grants and internal activities delivered by Skillset.

Figure 5 below provides an indication of how the A Bigger Future budget breaks down in its first four years between externally funded activities, elements of the programme delivered by Skillset and management/administration costs. The value of grants distributed externally is highest in 2005/06, the year in which Screen Academies were launched, while the cost of programme activity delivered directly by Skillset was at its highest in 2004/05, when the implementation of the strategy began and much of the development of the programme was undertaken.

Figure 5 – Annual Breakdown of A Bigger Future programme components, April 2004 – March 2008

	2004/05	2005/06	2006/07	2007/08
Grants to education & training organisations (including Screen Academies), individual CPD bursaries and company development ⁶	£4,355,000	£7,408,000	£5,151,000	£5,832,000
ABF programme activity delivered by Skillset ⁷	£991,000	£572,000	£663,000	£564,000
Salary and overhead costs for ABF programme activity delivered by Skillset	£201,000	£247,000	£240,000	£260,000
Skillset core salaries and overheads	£597,000	£732,000	£729,000	£757,000
Total	£6,145,000	£8,957,000	£6,783,000	£7,414,000

Source: BOP/Skillset (2008)

It is possible to make a rough comparison with how this expenditure breaks down when compared with the annual budget for a 'typical year' that was set out in A Bigger Future. Slightly more than 50% of the original budget was allocated to the Screen Academies (including the Film Business Academy), while spending on industry-based training accounted for slightly less than 40% of the budget. This means that, compared with the 'typical budget' outlined in A Bigger Future, proportionately slightly less money has actually been spent on the Screen Academies and slightly more money on industry-based training. The differences in spend for the other two programme strands (IAG and Research & LMI) are too small to be significant, given the difficulties in making an exact comparison between the two datasets.⁸

Figure 6 below provides a more detailed breakdown of expenditure that includes the split between:

- External grant expenditure and internal Skillset programme spend/Skillset administered bursaries spend.
- Individual funding streams within the overall programme strands.

This more detailed breakdown illustrates in particular how the HE/FE spend is concentrated in the Screen Academies, as well as how the industry-based training expenditure is dominated by CPD and New Entrants programmes.

⁶ Annual external spend indicated in Figure 3 is derived from total ABF lottery + SIF *income* (plus bank interest) less Skillset spend on internally delivered programme activities, salaries and overheads.

⁷ Internal spend derived from Skillset's own analysis of annual income and expenditure for ABF.

⁸ This arises due to a number of differences between the original budget contained within A Bigger Future and current data. First, there is no line in the original budget for 'Communications', meaning that all other programme strands will be inflated in comparison when looked at as a percentage of total spend due to the absence of this activity. Second, the Film Business Academy was combined with Company Development in the original A Bigger Future budget, meaning we have had to introduce estimation into the calculations in order to allocate a notional sum for the FBA from this combined figure and transfer it to the Screen Academies figure. Third, the total projected annual budget contained within A Bigger Future (£10m) is significantly larger than the actual annual average spend (£7.3m). The discrepancies between the two sets of figures means that they do not support any further more detailed scrutiny as the results will be overly influenced by these same discrepancies.

Figure 6 – Detailed breakdown of total ABF programme expenditure (lottery + SIF), March 2004 to March 2008

Strand	Total external grant expenditure	Total internal Skillset expenditure
HE: Screen & Film Business Academies	£9,906,000	£445,000
HE: Screenwriting	£1,035,000	
Course Approval		£155,000
Industry: CPD	£6,599,000	£91,000
Industry: New Entrants	£3,103,000	
Industry: Training linked to Production	£1,104,000	
Industry: Company Development	£161,000	
IAG	£106,000	£510,000
Research		£310,000
Communications		£1,944,000
Standards & Qualifications		£284,000
Total	£22,013,000	£3,739,000

Nb. excludes core Skillset salaries and overheads related to management and administration of funds
Source: BOP/Skillset (2008)⁹

2.3.1 By value chain and department area

We have undertaken an analysis of the external grant expenditure to organisations by value chain (see Figure 7 below). It should be noted that this analysis is based solely on grant expenditure data.

There are also several CPD courses that cover different elements of the value chain (as indicated in Skillset's grant classification data). In order to avoid double-counting, however, grants have been classified according to only one segment of the value chain in the following analysis. The exceptions to this are those grants that would genuinely be distorted by assigning them to only one segment of the value chain. Though small in number, these instances are significant in value as they include the large sums invested in the Screen Academies, which cannot be disaggregated by value chain. Screen Academy expenditure is therefore classified as 'cross cutting' and accounts for the vast majority of the expenditure as listed in Figure 7. This is because the Screen Academies cover a wide range of courses, from development (screenwriting) to production, post and (arguably) into distribution and sales¹⁰, but the available data does not allow for a more specific breakdown and attribution.

Inevitably, therefore, the analysis outlined in Figure 7 is relatively crude, but it does give an indication of the overall shape of spend. Greater attention should therefore be paid to the relative shares of expenditure across the value chain than to precise financial figures.

⁹ Note that figures for internal expenditure are estimates. Skillset was only able to provide an aggregate figure for internal expenditure of lottery funding and SIF on A Bigger Future for the first year of its operation (2004/5), rather than the detailed breakdown provided for subsequent years. Information on overheads and salaries linked directly to internal spend on programme delivery was also less detailed in 2005/6 than in 2006/7 and 2007/8. The figures presented in this table therefore include estimated figures for the breakdown of spending on Careers, Research, Communications, Standards & Qualifications and Approvals that occurred within 2004/5 and 2005/6, derived from applying averages generated for each area of programme spend in 2006/7 and 2007/8 (for which is there is detailed information).

¹⁰ In the form of the courses run by the Film Business Academy at Cass.

Figure 7 – ABF organisational grant expenditure by value chain, March 2004 to March 2008

Value chain	Total organisational grant expenditure	
	Amount	%
Cross cutting	£10,834,000	51%
Production	£5,115,000	24%
Pre-Production	£3,142,000	15%
Post	£1,777,000	8%
Exhibition	£382,000	2%
Distribution & Sales	£194,000	1%
Total	£21,445,000	100%

Source: BOP/Skillset (2008)

Aside from Cross-cutting expenditure, Table 4 shows that most financial resource has been invested in education and training related to Production, followed by Pre-Production.¹¹ Expenditure on Post Production/SFX is running at approximately 35% of the expenditure on Production.

The combined expenditure that specifically addresses the Exhibition and Distribution & Sales sectors is small when compared with the other four areas. Once again, it should be noted that, inevitably, there is expenditure that does address these sectors that is classified elsewhere, for instance, within the Cass programme. Specifically in relation to Exhibition, it should also be noted that the skills needs for the vast majority of the workforce relate more strongly to retail rather to film-specific skills.¹²

In order to ensure and enhance greater access, A Bigger Future also funds individual bursaries that help people already working in the film industry to access CPD training that is not otherwise supported through the strategy. From March 2004 to March 2008, Skillset allocated bursaries to the value of £568,000 to 1,011 individuals. The sums awarded ranged from less than £100 to a maximum of £1,000, with the average being approximately £562.

It is possible to examine these individual bursaries in terms of how they relate to the film value chain (see Figure 8), as they are by their nature tailored to address very specific skills needs. However, they follow a similar pattern to the distribution of grant expenditure, although fewer awards are classified as 'cross-cutting'. Thus Production and Pre-Production account for the largest share of expenditure, though the degree of difference between the two is less pronounced here than for the funds allocated to education and training providers.

Figure 8 – ABF expenditure on Skillset individual Screen Bursaries, March 2004 to March 2008

Value chain	Total individual bursary expenditure	
	Amount	%
Cross-cutting	£79,900	14%

¹¹ Pre-production here refers principally to development, covering script and storyboarding, but also producer training programmes that focus on development, finding out more about co-production opportunities, pitching and other financing options.

¹² Among the three large cinema chain operators, for instance, film-specific technicians typically account for slightly less than 10% of all employees.

Production	£225,000	40%
Pre-production	£144,000	25%
Post-Production	£100,000	18%
Distribution & Sales	£13,000	2%
Exhibition	£4,870	1%
Total	£568,000	100%

Source: BOP/Skillset (2008)

Analysis of expenditure allocated to more specific activities within the production chain shows that ten department areas (including 'Cross-department') account for 95% of all A Bigger Future organisational grant expenditure (see Figure 9 below). Department area categories are very specific (e.g. Camera, Costume, Construction), so most of the spend (60%) has to be described as 'Cross-department', because such a high proportion of courses address a number of subject areas. Even courses such as FT2's New Entrants Technical Training programme trains people across a number of technical department areas, albeit within the same 'Production' segment of the value chain. Otherwise, as Figure 9 shows, expenditure is particularly concentrated in four areas: Editing & Post Production (including Audio Post Production), Script, Production Office, and Construction.

Figure 9 – Top ten department areas by ABF grant expenditure, March 2004 to March 2008

Department area	Amount (£)	% of total grant expenditure
Cross-department	£12,800,000	60%
Editing & Post Production	£1,960,000	9%
Script	£1,680,000	8%
Production Office	£1,300,000	6%
Construction	£852,000	4%
Accounts	£449,000	2%
Camera	£349,000	2%
Art Department	£331,000	2%
Animation	£314,000	1%
Direction	£246,000	1%
Total	£20,300,000	95%

Source: BOP/Skillset (2008)

2.4 What are the main outputs from the strategy?

There are a variety of outputs that can be ascribed to A Bigger Future. This section provides a brief overview of the three most important areas:

- development of an enhanced infrastructure for the supply of skills
- beneficiaries of A Bigger Future programmes
- match funding which the strategy has generated.

The process of delivering these outputs and the outcomes arising from their delivery are covered in subsequent sections of the report.

2.4.1 An enhanced infrastructure for the supply of skills

Original A Bigger Future Outputs:

- Establish a small network of Screen Academies, and a Film Business Academy
- Coherent and complementary programmes implemented to develop skills and talent, in priority areas, of new entrants; CPD and company
- Industry to approve, via Skillset, relevant training and education provision

The main outputs of A Bigger Future, reprised above in Section 2.1, are a set of interventions that are designed to overhaul the system of the supply of skills to the film industry in the UK. As such, they privilege the development of the education, training and careers guidance infrastructure over the products of this infrastructure – the beneficiaries (which are considered below in section 2.4.2).

In some cases the strategy has funded delivery that is immediately identifiable as A Bigger Future-originated, by dint of it not having existed previously. The Film Business Academy at Cass is arguably the best exemplar here. But this type of intervention is not typical of the programme as a whole.

FE/HE

For instance, the remaining Screen Academies are still largely built on HE course provision at undergraduate and postgraduate level that pre-dates A Bigger Future – although the Screen Academies are a major innovation of A Bigger Future and in receipt of new monies to achieve a variety of new ends. Entirely new courses outside of Cass, such as the NFTS's MA Film Foundation and Foundation Course or the new LFS Craft Extension Programme, are the exceptions rather than the norm across the 56 FE/HE courses encompassed by the SA Network.¹³ Rather, priorities within the Screen Academies have focused on the enhancement of, and provision of bursaries to, existing courses.

The intention in A Bigger Future was to establish 'a completely new initiative ...which will provide world-class information and expertise needed to improve the UK film industry's management and business skills'. Therefore, the Film Business Academy (FBA) was key

¹³ See Figure 12 below for a list of all courses encompassed within the Screen Academy network.

not just to the plans for the Screen Academy ‘family’, but to the wider strategy. Its role was not simply to be achieved through the development of new academic qualifications, but through specialist short course provision for all sectors of the industry. Further, the intention was that:

“These resources will be offered across the industry and other education and training providers. This Academy will also work with the Business Link service ...and its equivalents in the devolved nations to improve access to the expertise on offer for companies in the film industry” (p.22-3)

This wide remit, coupled with the fact that the FBA had to be established from scratch, arguably means that it represents the most ambitious element within A Bigger Future.

Looking objectively at Cass’ track record of delivery, it is hard not to conclude that the level of ambition for the FBA within A Bigger Future has not been met. The first intakes of both the MSc in Management (Film Stream) and the MBA in Film Business were delayed due to staff changes within the FBA, and the quality of the courses heavily criticised by the first student cohort. The FBA has not to-date developed film business curricula content for the SA Network nor has it played a significant role to-date in the delivery of industry-based business and management training or company development, as the first pilot short course was only launched in Spring 2008 (business training for the Film Distributor’s Association)¹⁴.

Although Cass is now back on track to deliver its core outputs by the end of its current licence period, and student feedback has improved significantly, it has not proved to be an entirely successful undertaking. In particular, industry remain unsure as to whether postgraduate academic business qualifications are actually appropriate for the film sector (see section 4.2.3 below). With this in mind, the UK Film Council and Skillset are currently reviewing the partnership and looking at how best to meet the demand for business skills education and training across the industry.

New Entrants and CPD

The patchwork of enhancing existing provision/improving accessibility to it, and actively developing new provision where gaps are identified is also characteristic of A Bigger Future’s investment in New Entrants and CPD courses.

Over 20 New Entrants courses have been funded through the programme to-date. Some of these were already in existence in some form, though in the case of many, such as those run by FT2 and The Production Guild, they have been significantly revised and enhanced through the support of A Bigger Future. Elsewhere, A Bigger Future investment has supported the development of new, New Entrants programmes in areas such as Wardrobe Assistants (Morris Angel & Sons), Visual Effects Production Grade (Escape Studios) and digital feature film production (North West Vision and Media).

Well over 100 different courses, events and initiatives have been funded by A Bigger Future through the CPD strand. These include funding for a range of new courses, such as The National Film Theatre’s Digital Projection and Multimedia Box Training for Projectionists, NFTS’ Digital Post Production and Special Effects course and Film

¹⁴ The FBA has also not played a brokerage role in terms of interfacing with Business Link services, though this would have had to have been re-thought in any case due to major changes in the Government’s regime of business support services – the Business Support Simplification Programme (BSSP), launched by DTI in 2006 and ongoing by BERR, in particular.

London's Location Manager Training course. Otherwise, CPD programme grants have been given to subsidising training providers to offer existing courses at an affordable rate. This includes programmes and events across all department areas, such as Inside Pictures, attendance at the Berlinale Talent Campus, and many technology training courses, from providers such as VET, Escape Studios and Soho Editors.

Skillset's work to deliver a programme of industry-based training has also included work on standards and qualifications. New standards have been developed across a large range of grades, which has assisted training providers in the design of relevant courses. New qualifications have also been developed for Animal Trainers, Crane Technicians, Grips, Lighting and Set Craft.

Company development

In the absence of company development activities undertaken by the Film Business Academy (see above), the Skillset managed Company Development scheme is the key output. Although only a small element of A Bigger Future in terms of both expenditure and participant numbers, the Company Development programme has allowed for innovation and offered a high degree of flexibility in the delivery of skills. It rests essentially on a Training Needs Analysis (TNA), after which stage individual companies can bid for follow-on funding to support targeted skills development. In total 16 companies were supported to address specific skills needs after the TNA diagnostic stage. Examples of companies who received company development grants include City Screen, Framestore and Dogwoof Pictures.

Careers Information, Advice and Guidance (IAG)

Original A Bigger Future Output:

- An expert film-specific careers information, advice and guidance network developed and delivered throughout the UK

Skillset manages the coordination and delivery of Careers Information, Advice & Guidance services for film in-house as an enhanced, film-specific service within their overall Skillset Careers service. The key film-specific outputs since the launch of A Bigger Future are:

- The production of over 200 industry job profiles, written by practitioners, so that the skills required for each job are clearly recognised
- Seven experienced industry practitioners have been trained as careers advisers in specific film roles (there are 36 such advisers in total across Skillset's entire footprint)
- More than 800 film clients have received one-to-one careers advice from industry professionals
- Around 3,000 phone enquiries and more than 2,000 email enquiries have been answered by learndirect and Skillset in the UK.

In addition, Skillset has made their detailed film careers guidance resources available online on their website, and more than 1,000 general careers advisers in schools and colleges have been informed about working in the film sector, through a series of workshops and conferences that dealt with all of Skillset's sector footprint.

Summary

Establishing the *precise* degree of additionality of A Bigger Future in terms of the infrastructure for the supply of film skills is difficult. The strategy rightly started from building on the best of what was already available, whether this was existing HE courses, Inside Pictures, FT2 New Entrants courses or Skillset Careers. Additionality should not, then, simply be seen as how many new courses or initiatives were funded or developed. Even if this were the case, the baseline for exactly what provision existed prior to A Bigger Future does not exist, making this comparison impossible. Rather, additionality in output terms lies in the combination of:

- enhancements and revisions to existing provision
- making this provision more financially accessible
- ensuring that existing training provision continues at all (e.g. without the investment from A Bigger Future it is clear that in a small number of cases some training providers and courses would not have continued to operate); as well as
- entirely new provision.

Looking across the A Bigger Future programme, the 'infrastructure' outputs have largely been met. The only real failure in these terms relates to the wider activities of the Film Business Academy. Though this is a significant weakness – given the degree of additionality that the FBA was intended to deliver within the strategy – arguably the scope of its activities was too wide to realise within the timeframe.

Of course, simply having set up this infrastructure does not necessarily ensure its sustainability and we return to this issue in section 7.

2.4.2 Beneficiaries

Assessing the numbers of participants or beneficiaries of all training or business support programmes presents a recurring challenge. Beneficiary data is constructed by the providers of education, training and business support. What it counts is, in effect, the number of 'participations' rather than the number of unique individuals. A Bigger Future is no different in this respect. The 50+ training providers that have benefited from A Bigger Future-funding count the number of people that have been on each course or programme – they have no way of knowing if these individuals have taken-up other training courses offered by other providers, that have also been funded by A Bigger Future.

The Screen Academies present a related but slightly different issue. Funds have been provided to Screen Academies to fulfil two main purposes, namely to:

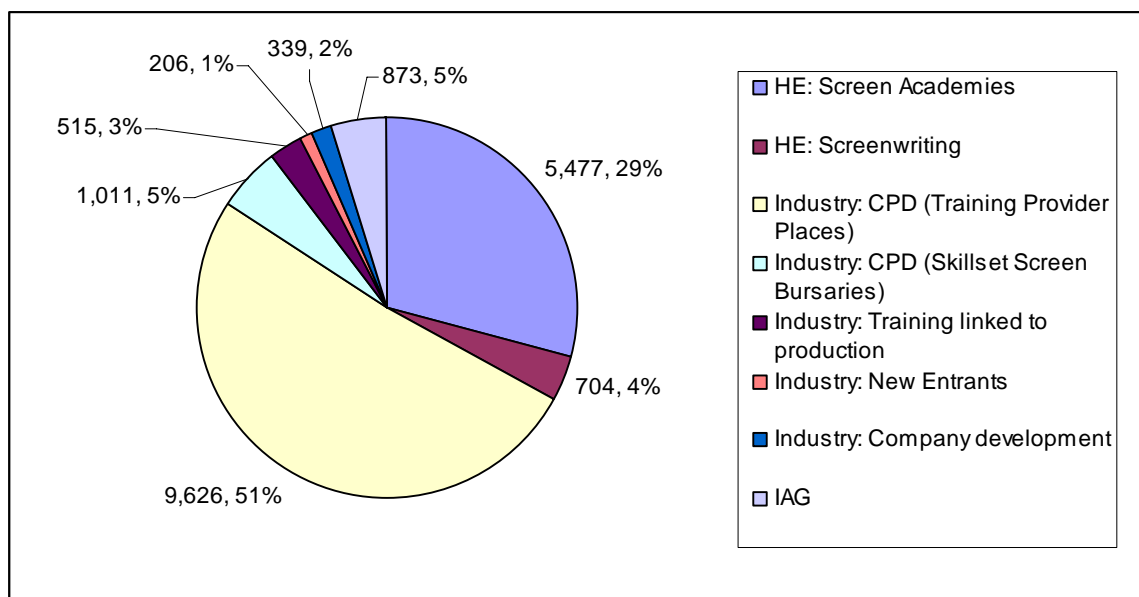
- widen access to high quality film skills provision through a system of bursaries that each institution awards
- improve the quality of course provision and make it more responsive to industry demand through a greater involvement in the design and delivery of courses by employers

What this means is that some individuals on Screen Academy courses will be beneficiaries of A Bigger Future as they are in receipt of bursaries (but not all students are), but all students on these courses will benefit from course development and

enhancement activities. This does mean that those students that are in receipt of bursaries get counted twice in effect – as they are receiving twice the benefits – and this is entirely standard practice within the evaluation of training and business support programmes. Similarly, some individuals will have benefited in successive years if they are on undergraduate programmes, and will have been counted in each year of study.

But it does mean that the following ‘headline’ figures regarding the beneficiaries need to be read with some caution. Between March 2004 and March 2008, there were over 18,500 beneficiaries of the programme. As Figure 10 below shows, CPD training funded by A Bigger Future accounts for 57% of all the beneficiaries across the programme (a combination of individual bursary recipients, and those attending training initiatives funded via A Bigger Future). This is not surprising, as CPD training largely consists of many very short courses and events. In contrast, New Entrants programmes account for just 1% of all beneficiaries funded through the strategy. But this is potentially misleading, as New Entrants schemes have generally been intensive and relatively long running, and therefore represent a far bigger proportion of A Bigger Future in terms of contact hours. An indication of this is provided in the analysis of value for money provided in section 4.3.

Figure 10. All beneficiaries across the ABF programme¹⁵, by programme component, March 2004 to March 2008



Source: BOP/Skillset (2008)

As with the financial data, it is also possible to analyse the number of beneficiaries according to the segment of the value chain for which the skills and training is most relevant. This follows a similar pattern to the expenditure analysis. After the ‘Cross-cutting’ category, participants in training related to Production are most numerous, followed by Pre-Production and Post.

¹⁵ It should be noted that the IAG beneficiaries included within this chart only relates to those that have received one-to-one support. It does not include the much larger numbers of people who have received some level of IAG support either by phone (3,000+ enquiries) or email, a further 2,000+ enquiries.

Figure 11. All beneficiaries across the ABF programme, value chain analysis by course, March 2004 to March 2008

Value chain	Number	%
Cross-cutting	8,404	45%
Production	4,530	24%
Pre-production	3,019	16%
Post-Production	1,133	6%
Distribution & Sales	841	4%
Exhibition	824	4%
Total	18,751	100%

Source: BOP/Skillset (2008)

There are two areas where it is possible to identify actual participant numbers more accurately. First, as Figure 12 below shows, for the academic year 2007/8, there were 2,226 individual students taking courses across the Screen Academy network, over 56 separate courses. The vast bulk of these students were taking undergraduate courses (79%), a fifth studying for postgraduate qualifications (20%) and only 1% took FE courses.

Figure 12 – Screen Academy courses and total student numbers, 2007/8

Screen Academy	Course	No. of Years	Total student	
			Numbers	
Screen Academy Bournemouth	BA (Hons) Acting for Theatre Film and Television	3 FT	97	
	BA (Hons) Animation Production	3 FT	130	
	BA (Hons) Costume for the Screen and Stage	4 FT (3+ Fdn)	157	
	BA (Hons) Film Production	4 FT (3+ Fdn)	210	
	BA (Hons) Modelmaking for Design and Media	3 FT	106	
	BA (Hons) Computer Visualisation and Animation	3 FT	134	
	BA (Hons) Scriptwriting for Film and Television	3 FT	110	
	MA/MSc 3D Computer Animation by project	1 FT	26	
	MA Creative Media Practice	1.4 PT	12	
	MA/PgDip Digital Effects	1 FT	23	
	MA Post Production Editing	1 FT/2 PT	13	
	MA Producing Film and Television	1 FT	18	
	MA Screenwriting	2 PT	35	
	MA Soundtrack Production	1 FT/2 PT	17	
TOTAL			1088	
Film Business Academy at Cass	Modular Executive MBA - specialism in Film Business	2 PT	24	
	MSc in Management (Film Business Stream)	1 FT	11	
TOTAL			35	
Screen Academy Scotland	Edinburgh College of Art	M.Des Animation	1 FT	3
		M.Des Film/TV	1 FT	2
		MA Animation	1 FT	2
		MA Film/TV	1 FT	7
		MFA 1 Film/TV	1 FT	1
		MFA 2 FilmTV	1 FT	4
		Total		
Napier University	MA Screen Project Development	45 wks FT/90 wks PT	24	
	MA Screenwriting	45 wks FT/90 wks PT	44	
	MFA Advanced Film Practice	45 wks FT	10	
	PG Cert Screenwriting	30 wks PT	16	
Total			94	
TOTAL			113	
Screen Academy Wales	Glamorgan	BA (Hons) Animation	3 FT	47
		BA (Hons) Film and Video	3 FT	64
		BA (Hons) Media and Performance	3 FT	47
		MA Film Producing and Business Management	1 FT/Online	13
		MA Moving Image	1 FT/2 PT	8
Total			179	
Newport	BA (Hons) Animation	3 FT	111	
	BA (Hons) Film and Video	3 FT	208	
	BA (Hons) Performing Arts	3 FT	85	
	MA 3D Computer Animation	1 FT	18	
	MA Film	1 FT/2 PT	1	
Total			423	
TOTAL			602	
Screen Academy at LCC & EIM	LCC	BA (Hons) Film and Video	3 FT	153
		FdA Animation	2 FT	34
		FdA Media Practice	2 FT	74
Total			261	
EIM	35mm Project - Carpentry	20 wks FT	12	
	35mm Project - Plastering	20 wks FT	6	
Total			18	
TOTAL			279	
Screen Academy at LFS	MA Film Making	2 FT	11	
	MA Screen Writing	2 FT	2	
TOTAL			13	
Screen Academy at NFTS	MA Animation	2 FT	8	
	MA Cinematography	2 FT	8	
	MA Composing for Film and TV	2 FT	4	
	MA Digital Post Production	2 FT	8	
	MA Directing Fiction MA	2 FT	8	
	MA Documentary Direction	2 FT	8	
	MA Editing	2 FT	8	
	MA Producing and Directing TV Entertainment	2 FT	5	
	MA Producing	2 FT	8	
	MA Production Design MA	2 FT	8	
	MA Screenwriting	2 FT	8	
	MA/PgDip Sound Post Production	2 FT	8	
	Diploma SFX/VFX	2 FT	7	
TOTAL			96	
ALL SCREEN ACADEMY TOTAL			2226	

Source: BOP/Skillset (2008)

As student intakes have varied between years and some courses have only come on-stream sometime after the beginning of A Bigger Future, it is not possible within the limits of the current review to state exactly how many people have graduated in total from the Screen Academy network since its inception. However, previous work undertaken for the Screen Academy network placed the figure of graduating students for the previous academic year 2006/7 at 958.

The second area where there is greater certainty over how many people have participated is the Skillset Screen Bursaries. As these are administered directly by Skillset themselves, it is possible to track individuals over time. The 1,011 beneficiaries that received a Skillset Screen Bursary represent 978 unique individuals. One person secured three individual Screen Bursaries over the four year period, while the other 32 people who were awarded more than one Bursary, each received two Bursaries.

Despite some concerns regarding what the number of beneficiaries means in practice, the statistics do give an indication of the overall scale of activity of the programme, and the number of interactions that people have had with A Bigger Future across different stages of their student and working lives – approximately 4,500 per year if averaged across the programme duration to date.

2.4.3 Partnership Funding

In addition to the core budget for A Bigger Future from SIF and lottery funding, the programme has been able to lever in additional match or partnership funding from a range of sources that, to-date, is valued at just under £47m. This breaks down by year and programme element as follows:

Figure 13 – Partnership and Match Funding, April 2004 - March 2008

	2004/5	2005/6	2006/7	2007/8
CPD	£1,899,000	£4,852,000	£2,697,000	£4,956,000
HE	£410,000	£9,906,000	£226,000	£17,021,000
Company development	£0	£69,000	£8,000	£25,000
New Entrants	£2,839,000	£997,000	£858,000	£162,000
Total	£5,148,000	£15,824,000	£3,790,000	£22,165,000

Source: BOP/Skillset (2008)

Match funding obtained for CPD activities derives primarily from course fees paid by practitioners who have been part-subsidised to undertake training¹⁶, and contributions from training providers and other organisations involved in delivery (some of which also derives from course fees). In a number of instances, regional or national screen agencies and training bodies have matched investment from Skillset with local sources of funding to (e.g. regional/EU) for specific programmes (see Section 5.2.4).

In HE, partnership funding is matched against bursary recipients on core Screen Academy and approved screenwriting courses, and selected course enhancement

¹⁶ For instance, if an individual practitioner paid £100 to attend a course, but received a bursary of £60 to subsidise that cost via A Bigger Future, that individual is considered to have contributed £40 in match funding.

activities. Levels of investment have been cyclical, reflecting the biennial nature of A Bigger Future funding agreements with Screen Academies. Partnership funding appears to be a combination of course fees paid for by students who have been part-subsidised through bursaries (either individually or through the education funding system), plus contributions from the higher education institutions, including in terms of time, facilities and resources. Notably, £1.77m was also invested by the Higher Education Funding Council for England (HEFCE) in 2005/06 in the London Film School, NFTS, Cass Business School and the Screen Academy at London College of Communication and Ealing Institute of Media (which secured more than £1m, including capital investment). This was drawn from HEFCE's Strategic Development Fund, which aimed to support change and innovation in the sector – including collaborations between universities, and with FE colleges. Skillset was actively involved in supporting these applications, and Screen Academy status was an important factor in securing the funding. Similarly, Screen Academy Wales has received income from the Higher Education Funding Council for Wales (HEFCW) Reconfiguration & Collaboration Fund, and Screen Academy Scotland receives support from the Scottish Higher Education Funding Council (SHEFC) and the Scottish Government.

The majority of places on New Entrants schemes are fully funded for participants, with match funding drawn from co-investors, including industry partners and some regional or national screen agencies. The largest single amount of New Entrants partnership funding has gone towards the FT2 set crafts scheme, accounting for the higher amounts of investment in the first year of A Bigger Future. However, these programmes are no longer eligible for EU ESF funding, resulting in a subsequent decrease in levels of match funding.

3 Outcomes of the strategy

3.1 What difference has A Bigger Future made to the sustainability of the UK film industry?

The thinking about what determines ‘sustainability’ has been refined over the period since A Bigger Future was first produced. UK Film Council has a new goal which focuses on the ‘competitiveness’ of the film industry, rather than the harder to define notion of ‘sustainability’. Although competitiveness is not as simple a concept as it often appears, particularly when applied beyond the level of the firm,¹⁷ at its heart is the notion of improving productivity. In turn, UK government acknowledges that skills is one of the five key drivers of productivity, together with investment, innovation, competition and entrepreneurship.¹⁸

3.1.1 The role of skills in the competitiveness of the UK film industry

Within A Bigger Future and UK Film Council policy more generally, the notion of competitiveness relates to maintaining the UK’s position within the global film industry. In particular, to sustaining the UK’s role as a ‘hub’: a location that can offer a total service across the film production chain (e.g. finance, studios, facilities, crew, post production, distribution, sales). As such, A Bigger Future is implicitly a producing-oriented strategy.

Therefore in considering the thorny question of how A Bigger Future has affected the competitiveness of the UK film industry, there are three related questions:

- What has happened to the industry over the last four years?
- What role have skills played in this?
- What role has A Bigger Future played in shaping those skills?

There is very little existing research to answer these questions. The approach taken for this current research has therefore been to ask the industry where it thinks skills fit within the competitive economic performance of the UK’s film industry.

There is a consensus across the industry that training and education are very important to the success of the industry in the UK. Firms do not just compete for markets, but also for resources (or ‘inputs’). In film, as with other knowledge-intensive businesses, people are the single most important resource that the industry uses – as it states in the Foreword to A Bigger Future, “*people are the primary asset of the British film industry*”. Further, there is also a wide recognition across industry that the UK is now one of the most expensive countries in the world to make a film – given the increasing internationalisation of production – and therefore the skills of the workforce have to be first rate in order to offset cost considerations (if only partially).

¹⁷ For an authoritative discussion of the concept of competitiveness and its use in government policy, see the opening chapter of Simmie, Carpenter, Chadwick, Martin and Wood (2006) *State of the English Cities: The Competitive Economic Performance of English Cities*, report for DCLG.

¹⁸ HMT (2000) *Productivity in the UK 1: the evidence and the Government’s approach*, www.hm-treasury.gov.uk/

But here is where the consensus ends. How highly skills are rated in relation to other competitive factors varies across the industry. For companies that work on inward investment productions, two factors are regularly rated as more, or at least as, important (certainly in the short term); namely the:

- UK's regime of tax incentives and how this compares with those offered internationally
- £/\$ exchange rate

These factors do not affect all productions however – they have little effect on producers of low-budget films, or on producers of films primarily financed by broadcasters. But they are a major factor affecting inward investment into the UK and it is inward investment that currently carries a significantly greater economic weight. For instance, the 28 inward investment productions in 2007 had a UK production value of £531.6m compared with the 60 domestic features that had a UK production value of £141m.¹⁹

Tax incentives and exchange rate fluctuations obviously also have less of an impact on other elements of the value chain, particularly cinema exhibition, but exhibition has not been central to A Bigger Future, whether in terms of the original strategy document or programme spend priorities.

This view of skills as effectively being a necessary but not sufficient or determining factor is echoed by research undertaken for the last comprehensive survey of the UK's Post-production sector,²⁰ and implicitly by forthcoming research undertaken for the UK Film Commissioner, which compares a number of different locations for film production across the world (though these studies are both producing-oriented).²¹

3.1.2 The overall skills issues that A Bigger Future was designed to address

In addition to expressing some difference of opinion regarding the importance of skills within the competitiveness of the UK's film industry, there are also a range of views as to what are the overall skills issues that the strategy was supposed to be addressing at the time of writing. Although there are a broad spectrum of opinions, it is useful to characterise the two poles of the debate.

Scenario 1: Time-limited intervention to address specific short term industry need

At the time of developing A Bigger Future, the UK industry faced some major skills development challenges:

- Overall increase in skill demands due to increases in inward investment into the UK within a context of growing global industry (quantitative change)
- Changing skill demands as CGI/VFX/post becomes more intensively used within film (qualitative change)

¹⁹ UK Film Council (2008) *Statistical Yearbook 2008*, p.120.

²⁰ Salix Management Consultants (2003) *Post-production in the UK*, report for UK Film Council and the DTI.

²¹ It is implicit as the comparison process assumes that skill levels are equal between countries. It is hard to imagine that skills can be the pre-eminent factor in determining the locational choice for international inward investment in film given this model.

- Not enough capacity in post/CGI²²
- Ageing workforce, particularly in key technical and craft departments and grades²³

The economic rationale for policy intervention in this scenario is that it is not that the market would not have responded to these circumstances, but that it would not have responded quickly enough. This can be argued according to classic market ‘co-ordination problems’; in this case (i) the long time-lag between the upsurge and change in demand conditions and the ability of the HE and training infrastructure to respond, due partly to the fact that (ii) the price signal does not operate ‘optimally’ within the education market.

This view is most typical among international production and distribution companies. For the consultees holding this perspective on what it is that A Bigger Future set out to achieve, they can point to a very different UK industry context today:

- UK industry revenues peaked in 2004 and have subsequently fallen since (the modest resumption in the growth of revenues seen in 2007 having been largely the result of a more accurate way of calculating video/DVD retail revenue)²⁴
- £/\$ exchange rate has more recently made the UK a less favourable location for inward investment for production (although that may now be changing)
- There is greater competition for inward investment through tax incentives, at both country and state level (e.g. in US, Germany)
- The UK’s own system of film tax breaks has changed and, while becoming more transparent, has arguably also become less attractive, particularly for co-productions
- There has been an expansion of capacity of lower cost locations with increasingly skilled workforce because – as one consultee put it, “*productions drive skills development*” – in Eastern Europe and elsewhere (e.g. South Africa)
- Recent US studio retrenchment in the speciality sector and difficulties raising film finance on the capital markets due to the ‘credit crunch’.

Those who view A Bigger Future as a time-limited intervention to address specific industry needs therefore see less of an imperative for the strategy to continue beyond its five-year period as:

- New entrants are being brought through to rejuvenate the workforce²⁵
- Production investment has fallen since its peak in 2003²⁶
- The number of people employed in the film industry has declined consistently since its peak in 2001²⁷

²² Post/FX companies and BECTU both concurred through the present research that this was the case and could be tracked by the volume of Work Permits that had to be processed to bring in highly skilled staff from overseas.

²³ For instance, a fifth of survey respondents within the 2005 Skillset *Feature Film Production Workforce Survey*, were aged 50 or older, rising to 27% and 30% in Sound/electrical and Construction respectively.

²⁴ UK Film Council (2008), *op cit*, p.103

²⁵ For instance, 8% of the respondents in the forthcoming Skillset 2007 Feature Film Production Workforce Survey were aged between 16 and 24, compared with 3% in 2002.

²⁶ In 2003, the value of UK film production investment hit £1.16bn, driven by a surge of US inward investment (up from £266m to £729m) and steady increases in both domestic and co-production investment (UK Film Council, 2004, *Statistical Yearbook 2003/4*). In 2007, combined UK film production was worth £747m (UK Film Council, 2008, *Statistical Yearbook 2008*).

²⁷ For instance, ONS Labour Force figures place the 2007 total for those in the industry at 38,600, compared with 47,000 in 2001. The fall-off in employment is concentrated within production (a loss of over 8,500) rather than within distribution or

- UK post/VFX capacity expanded to meet increased demand²⁸.

For those holding this view, it is possible to argue that A Bigger Future has broadly succeeded in its remit as a time-limited intervention designed to meet specific short-term needs, with the implication that there is little rationale for a continuation of the investment strategy.

Scenario 2: Developing a new skills infrastructure to serve the industry in the long term

This perspective suggests a much longer and sustained approach in order to affect a fundamental transformation of the routes to labour market entry and progression within the UK film industry given the:

- Decline in apprenticeships and other forms of on-the-job training
- Increasing reliance on the products of (media) HE courses – 58% of the workforce are now graduates and 37% are in film/media subjects²⁹
- Rapid changes in the production/distribution processes of the industry requiring continuing up-skilling to maintain UK competitiveness
- Lack of co-ordination and coherence in the market for post entry training

The problems that A Bigger Future set out to tackle in this scenario are essentially systemic rather than temporary market co-ordination problems. The metaphor here is transport policy: long term strategic planning and investment is often not considered to be an immediate priority as the adverse consequences of failing to make these kinds of investment ‘can only be seen 10 or 15 years down the line’, when they then become very hard to reverse. Those holding this view do not always agree on what has been achieved to-date, but do believe that A Bigger Future is moving in broadly the right direction and at least share the understanding that it is too early to predict the longer-term outcomes.

Scenario 2 is closer to the majority of views expressed during the course of the review. However, as with the ‘Time-limited intervention’ scenario, it is a more formalised logical extrapolation of what was actually expressed by individuals. The purpose of these two ‘ideal-typical’ scenarios is to illustrate the breadth of opinions across the industry.

In reality, while consultees did refer to tackling systemic issues – ‘there was no strategy [before A Bigger Future]’; ‘the system wasn’t delivering’; ‘it was about putting the industry on a solid footing’ – this was expressed more diffusely than Scenario 2 implies. It was also often held together with views that are more representative of Scenario 1 (i.e. that the strategy also needs to match supply to demand such that there may come a time when intervention should cease or at least scaled back).

This ‘**middle ground**’ is approximately where the original A Bigger Future strategy was aimed: an attempt to develop a system that deals with short term co-ordination problems by assessing and calibrating demand and matching with supply, but which also builds up

exhibition, though it needs to be remembered that this covers film and video production (but not broadcasting), and that there are some difficulties in tracking the film industry workforce through sample-based surveys.

²⁸ This is harder to prove through secondary data, but industry consultation with most of the main film post houses and UK Screen confirms this picture of rapid growth over the last four year period.

²⁹ Skillset (forthcoming, 2008) *Feature Film Production Workforce Survey 2008*.

an infrastructure that overcomes previous systemic problems of being ‘sporadic and fragmented ... and delivered by a myriad of uncoordinated training providers.’³⁰

3.1.3 Summary

Disentangling the impact of skills from other confounding factors in an assessment of the competitiveness of the UK film industry is challenging. Skills are clearly a key factor but only one of several factors that needs to be considered.

The fortunes of the UK’s film industry have dipped slightly since the launch of A Bigger Future. Rather than a mid-point in an upwardly rising curve, the 2003/4 launch year now looks something more like the high tide for the value and employment of the film industry in the UK, at least within the current business cycle. But it needs to be remembered that the performance of the sector over the last four years has been accompanied by an increasingly challenging and competitive operating environment.

Internal industry trends such as declining DVD revenues, the expansion of other centres of film production, and government fiscal incentives to attract film investment are global phenomena. External trends that have a key bearing on the sector, such as currency movements, have also largely been negative over the period since A Bigger Future was launched. All of which begs the question of what would the performance of the UK’s film industry have been without the investment delivered through A Bigger Future?

Unfortunately, it is not possible to assess the counterfactual position within the scope of the current review.

What can be said is that much of the investment delivered through A Bigger Future will not yet have impacted upon the industry. It is a long term strategy with long term outcomes. Most of the individual beneficiaries across the A Bigger Future programme, particularly those in FE/HE, are likely to be either still not in the workforce, or only at an early stage of their careers. It can easily take ten years between completing a postgraduate qualification and getting the chance to direct a first feature – although this is not the case in all job roles, and the benefits of a better trained workforce should be apparent sooner in many technical fields. But we may have to wait another five years or more before we can truly judge what effect A Bigger Future has had on the UK film industry as a whole.

3.2 What impacts and outcomes are there across the programme strands that show that the aims of A Bigger Future are being met?

Looking at A Bigger Future in the round, the overall aim is stated as:

“Key objective is to ensure that the UK industry is able to compete successfully in the European and global marketplace on the basis of world-beating skills.”

Beyond this statement, the strategy predominantly consists of a set of **actions**, rather than defining what success will look like in terms of **outcomes**. As noted in the ‘Outputs’ section above, the emphasis in the strategy is very much on enhancing the education

³⁰ Foreword to A Bigger Future.

and training infrastructure and devising a process for co-ordinating and steering this, rather than focusing on the products of this skills infrastructure.

In the absence of clearly defined outcomes, we have organised the findings of the review under the most *outcome-oriented statements* within each programme strand.

3.3 FE/HE

3.3.1 Signposting

“students could and should have a better understanding of what skills the industry demands and needs [in choosing their course]”

This required an examination of how the ‘signposting’ function of the Screen Academy ‘tick’ is directing applicants towards the most industry-oriented courses.

Many current and past graduates applied to courses in these HEIs before they were granted Screen Academy status, or when the Academies were first getting established. The students and recent graduates interviewed for this review therefore reported that this was not a significant factor in their decision-making.

For those institutions within the Screen Academy network that already had a high profile within the industry (NFTS, LFS, Bournemouth), Academy status alone seems to have had little additional impact on applicants’ choices, although it has made these HEIs more accessible to a wider range of applicants through the bursaries (see 3.7).

There is some anecdotal evidence to suggest that Academy status has had more impact on the choices of applicants to other Screen Academies (Scotland, Wales, LCC/EIM). However, it is still relatively early days for the Academy Network, and awareness of what they have to offer is still building.

3.3.2 Better links between education and industry

“stronger links are needed between education and industry so that both parties can understand what each other needs”

The actions undertaken and an assessment of their effectiveness are set out below.

Screen Academy Directors with industry experience have had a strong impact, particularly in those institutions where industry connections were less well developed, and at Cass. Directors have drawn on their own personal connections to speed-up the process of interfacing better and more regularly with industry, and they have often been key to driving through change within their institutions that the SA model requires. Similarly, Screen Academy industry boards have had a positive impact on teaching provision, for example, as contributors to the evaluation and improvement process.

There is also clear evidence that course enhancements have helped to increase industry involvement in Academies. This has been undertaken in a wide range of ways such as master classes, residencies, bringing in industry mentors, and developing training linked to production (‘it made a crucial difference in enabling us to get more people of higher quality’), Figure 14 below provides a quick snapshot of some concrete examples of the

many ways that this has been brought about. Although NFTS and LFS have had reputations that enabled them to always attract world class film making talent to giving master classes and workshops before A Bigger Future, both institutions report that in practice this was difficult as they lacked the funds to pay for travel and accommodation for guest practitioners.

Figure 14 – Indicative examples of education and industry links across the Screen Academies

Screen Academy	Indicative industry links
NFTS	A Masterclass programme that features world renowned figures, for e.g., Roger Deakins, Wong Kar Wai, Joel Cohen, Spike Lee
Bournemouth	Mentoring scheme - matching undergraduates with industry specialists and alumni
Wales	Bursaries for attending film festivals - 150 awarded by Aug 07
LCC & EIM	35mm Project – craft skills undertaken on the sound stages at Elstree over 20 wks
Cass	Visiting Professors and Fellows from, for e.g., Dresdner Kleinwort investment division, HMV
LFS	Work placements for the Craft Extension students; Pawel Pawlikowski , Stephen Frears, Mike Leigh and Terence Davies among the 150 guest practitioners that have taught since 2005

Source: BOP/Skillset (2008)

The Skillset 100, a database resource of 100 top industry professionals committed to sharing their knowledge and expertise through master classes, workshops and guest lectures, has also helped to promote industry involvement in teaching. Although, as Figure 15 shows, use of these experts has varied across the network. It has had a greater relative impact at those Academies further from London, which had previously found it more difficult – and costly – to attract industry representatives (though usage has also been shaped by the specialisation of the practitioners and the skew towards writers, directors, and producers may account for low take up at Bournemouth). Screen Academies also consider it useful for helping to raise awareness of their institutions in the industry. Academy status has helped some institutions to secure more industry involvement more generally.

Figure 15 – Use of Skillset 100 by institution, April 2008

Institution	No. of bookings
Bournemouth	0
Cass	4
LFS	2
LCC	6
NFTS	9
Scotland	12
Wales	15
Others (e.g. Approved Screenwriting courses)	21
Total	48

Source: Skillset (2008)

It is worth noting that the focus in the original A Bigger Future strategy is on students finding ‘high quality’ courses more easily and being primed to fit more readily into the

workforce, rather than on improving the calibre of the student output. But a number of consultees, from both industry and academia, expressed the view that many students – given access to preferential resources – are showing signs of producing higher quality work ('I've sat on the Academy examination board and you can definitely see the difference over the four years').

Less positively, there is still, however, relatively limited recognition of Screen Academies within industry, though this is improving.

3.4 New Entrants, Professional & Company Development

“Provision and delivery should ... be made more affordable, more flexible and film-specific”

A Bigger Future identified a number of significant barriers to the uptake of training outside of further and higher education for those working in the film industry, or those who aspire to. In particular, the freelance nature of much employment makes it difficult for practitioners to plan periods of training, and creates cost barriers. The strategy calls for an expansion of skills development initiatives, with subsidies to support flexible, film-specific delivery for new entrants and the existing workforce, as well as business support for film companies. The review indicates that A Bigger Future has largely been successful in achieving these aims. CPD and new entrant training has been high-quality, responsive to identified industry needs and has had a measurable impact on the employability and development of the workforce.

3.4.1 Affordability

There has been substantial investment in skills development for practitioners and new entrants through A Bigger Future. Nearly £11m has been invested in industry-based training to date (to March '08), around 200 programmes delivered by specialist providers and film-industry companies have been supported, more than £0.5m has been distributed to new entrants and industry practitioners to help them access existing provision, and more than £160,000 has been invested in the development of 16 companies.

Provision has generally been high quality, but not necessarily low cost. Consequently, subsidies distributed via Skillset appear to have had a significant impact on accessibility, as indicated by evaluations of individual programmes. The following comments, for instance, are indicative of the sample of evaluation feedback forms provided by Skillset in relation to their Screen Bursary scheme:

“The course is definitely expensive, especially since it is so short however the information that you acquire should allow you to find work of a certain calibre after that, so in the long run it should pay off, however if Skillset had not helped me would have found it difficult to pay all the amount. Once again though, what I learnt was extremely valuable and so I think it was worth the money.”

“I think it was good value despite its high cost.”

“It was incredible value for the money. The opportunity to work with the established talent was amazing. Also the cost of establishing new networks amongst peers comes without cost.”

“I did initially think it was expensive but having experienced the course and the level of expertise with which it is delivered I would definitely say it was money well spent.”

This was also one of the main messages to emerge from consultation with a randomly selected sample of beneficiaries of new entrants and CPD training carried out for this study, with most stating that they would probably not have undertaken training if course fees had not been subsidised, and most of those on longer courses also welcoming assistance with expenses. Comments such as ‘it was money very well spent’ and ‘the investment has been worth it: it worked’ were typical, as training programmes appear to have had a high strike rate in enabling beneficiaries to gain entry to intended job roles. Whether it will be possible to continue subsidising this range of provision at such a level in a future reduced funding environment is, however, questionable.

3.4.2 More flexible

Investment through A Bigger Future has stimulated an expansion in the range of available training options and delivery models: 18-month programmes to one- and two-day courses, classroom and work-based learning, mentoring, master classes, internships. There has also been an increase in training opportunities (more than 10,000 training places have been made available over 4 years) throughout the film production chain – although supply/demand has not been even across all sectors of the industry.

There is also evidence that Skillset’s management and processes have helped to ensure flexibility in delivery. Some providers reported that when industry production schedules affected uptake of particular courses, Skillset was able to reschedule funding and output targets to a time when practitioners were available for training.

On the other hand, the vast majority of training and development was delivered in London and the South East. While this reflects the level of industry employment in this part of the country, it does not necessarily dovetail with the geography of learners, and the London-centric nature of delivery was touched upon by some consultees in the nations and regions. However, this needs to be considered alongside the financial support that A Bigger Future has made towards travel and accommodation expenses for courses. There is also little evidence of online or distance learning options being developed, despite this being highlighted as a possible solution in A Bigger Future.

3.4.3 More film-specific

A Bigger Future investment contributed towards an expansion in the range of provision available, including a significant number of courses targeted at film-specific roles – from production accountants to set-craft apprentices, HD camera to new entrant schemes for emerging filmmakers at a range of film festivals. Much of this provision has ensured that it is industry-specific by giving established industry practitioners a central role in delivery (as trainers, mentors etc.), and by building in a strong element of work experience for participants, particularly on longer courses. Evaluation and feedback show that this has been invaluable in ensuring that courses are fit-for-purpose, and in maximising opportunities for trainees to find relevant employment.

“We were taught by industry professionals, they told us about the real world of work. They were extremely high calibre, and it was a fantastic privilege to work with them. The work placement got us into one of the best Soho houses, and a lot of us were kept on.” – graduate of visual effects post-production course

Skillset has also drawn on its own research, and the advice of industry stakeholders, to identify priorities for funding rounds, and issued guidelines accordingly (although grant awards were inevitably also based on the number, type and quality of applications received).

Whether or not much of this provision needs to be exclusively film-specific, as suggested in A Bigger Future, is debatable. Many of the skills required by the industry are equally in demand in areas such as high-end television drama, advertising and animation – and this trend is set to continue.

3.5 IAG

“manage the expectations of new entrants, whilst casting the net as widely as possible to attract the best talent.”

“for those already working in the industry [provide] ... accurate and realistic advice about the value and utility of training courses and career development opportunities.”

As outlined in 2.4.1 above, Skillset has established a careers information, advice and guidance services in-house as an enhanced, film-specific service within its overall careers service. The main elements of delivery have been: the production of industry job profiles; training industry practitioners as careers advisors; responding to phone and email enquires; training general careers advisors, e.g. in schools; and delivering one-to-one careers sessions.

A Bigger Future investment in IAG has contributed to the development of online careers resources available on the Skillset website, including over 200 detailed job profiles for positions across the film value chain, and ‘interactive storyboards’ explaining how these fit into the film business. This is the first port of call for many who access other careers services, and has helped to generate over 2000 email enquiries to Skillset. More detailed information on the use of online careers information was not examined for this review, but this may be an area to develop further in the future.

A short research exercise undertaken for this review with **five general careers advisors** from the education system (chosen at random), who had received guidance on careers pathways in the industry, indicates that the service to advisors:

- Achieved age spread of HE and 14-19
- Provided a realistic picture of employment opportunities and entry routes
- Was embedded within sessions on the wider audiovisual/creative media industries within Skillset’s footprint
- Was rated highly in terms of quality, organisation and relevance

In addition, a similar exercise undertaken with **10 clients of the one-to-one careers advice service** (again chosen at random) indicates that the service was considered to provide:

- Good value or very good value
- Strong additionality: a service and level of advice that they could not get anywhere else
- Flexibility in delivery: all beneficiaries had sessions close to where they lived
- Personal contact time.

The 10 clients interviewed considered the Skillset website to be a useful resource, which had been effective in directing them to the careers advice service. But personal contact time was valued above all else, and was considered to have been most helpful. All but one of the 10 clients consulted reported gaining renewed confidence and motivation in pursuing career goals as a result of receiving advice. More than half of them stated that they would have liked to have had more personal contact time than they received.

However, the progress of the 10 clients consulted towards their goals has been variable – although all but one of those who had been less successful to date did state that this was not due to the actions of the advice service, but because they had not yet been able to put the advice they had received into practice. All but one had had no prior paid employment in the film industry, although most had worked in other media sectors or the performing arts.

Based on this limited consultation, the service also seems to have been most successful in raising confidence and motivation, rather than directing individuals towards new employment or further training and education – only one of the 10 went on to further training as a direct result of receiving careers advice, for example. Of course, the primary purpose of IAG, as outlined in *A Bigger Future*, is to offer advice and guidance. But given that enhancements funded via *A Bigger Future* are provided within the context of a Film Skills Strategy, it would be instructive to know more about the relationship between IAG services and the other strands of the programme.

More generally, across the IAG programme as a whole, there is a need for better follow-up and tracking of recipients, in order to gauge effectiveness. However, this is difficult to achieve. All clients of the one-to-one service, for example, must agree to complete an evaluation form, but despite follow up by phone and email, only around 25% of participants return their feedback.

3.6 Research & LMI

“research that will help Government and public funding agencies plan strong and useful partnerships and support for the film industry”

Skillset has conducted an ongoing programme of research, and produced regular labour market intelligence, throughout the *A Bigger Future* delivery period to date. This work often forms part of Skillset’s ‘mainstream’ research programme into the wider range of

creative media sectors within its footprint (e.g. the Skillset Employment Census), but also includes film-specific research, such as the Film Production Workforce Survey (FPWS).

Research has been applied within ABF, and is used to inform the delivery of other elements of the programme. For example, the Workforce Survey is used internally by Skillset and UK Film Council in planning calls for CPD and new entrants' courses. In addition, questions in the Film Production Workforce Survey (FPWS) are directly related to each area of the A Bigger Future Strategy.

Skillset feeds film-specific data from its research to relevant stakeholders as soon as it is available. However, it can take time before research that is undertaken is published and available in the public domain. Skillset stress that the FPWS is the most resource intensive and time-consuming survey that it carries out, due to the practicalities of tracking down the freelance labour force. There are also methodological challenges. The film industry workforce is mobile, fragmented and relatively small overall, and it is difficult to construct a constant sampling frame to give confidence that the changes the survey is tracking are genuine changes and not a result of the sampling process. Despite these caveats, the quality of the research is good, and the results informative. Skillset reports that, despite the cost in time and resources, the industry is positive about the information yielded.

In terms of the objectives for research and LMI outlined in A Bigger Future, the main area in which Skillset has not delivered in the form anticipated is in the creation of a Skills Intelligence Network, to provide a platform for employers to feed their views to Skillset via focus groups and regular consultation. This does mean that the ability to use research and LMI to 'assess and calibrate demand for skills' has been more limited than envisaged in the strategy. However, in lieu of the Skills Intelligence Network, Skillset have engaged with employers in the sector through a variety of other formal mechanisms, for instance through the Film Skills Strategy Committee (FSSC), and the Skillset Connects events. The FSSC meetings are not always well attended by the industry so the Skillset Film team have also arranged Industry Working Groups across Screenwriting, Sales Agents & Financiers, Archive Skills; Bi-Annual meetings with RSA and NSA heads, and continue an open-ended and ongoing informal dialogue with the sector (e.g. correspondence with industry guilds, employer organisations (PACT, MPA) and Trade Unions).

3.7 Diversity

“encourage and deliver a more diverse workforce, both culturally and socially... all sectors become more accessible to currently under represented groups”

There is widespread (if not universal) support within the UK film industry for A Bigger Future's commitment to encouraging the development of a more diverse workforce. The majority of industry representatives consulted for this review were in favour of the aim (although most did not volunteer it as the most pressing priority). As with other 'golden threads', this objective is intended to influence the delivery of all aspects of the strategy.

The general ambition within A Bigger Future is clear: to help the industry to move away from an over reliance on *“nepotism and contacts”* as key recruitment criteria, and cast *“the net as widely as possible to attract the best talent from the diverse cultural and social backgrounds which make up the UK population”*. (ABF, p5, p13)

The broader sense in which this is understood is that there is a need for the industry to reduce barriers to entry to the industry for talented individuals from whatever background – socio-economic, demographic, geographic and so on. The more precise sense is that the film industry needs to take steps to address specific labour force imbalances in terms of gender, ethnic background, disability, age and so on. Both ambitions are related, and both are implied as objectives of A Bigger Future.

The strategy addresses skills development in terms of quality and access: measures such as better IAG and assistance with the cost of education and training are designed to help encourage access, and by extension diversity. But A Bigger Future does not describe in detail what success would look like, for instance in terms of targets or benchmarks against which to measure progress. Both Skillset and the UK Film Council have well-developed organisational policies on diversity, but these were not reflected in detail in A Bigger Future itself (largely because they were being revised or developed at the same time).

There is evidence that financial assistance in the form of bursaries and subsidised programmes has helped people who may not otherwise have done so to access advice, education and training³¹ (see also 3.4.1 below). Screen Academy bursaries, for example, helped people on lower incomes with the cost of course fees and living expenses – since access to these bursaries was means tested³², and based on the ability to pay. This is viewed as especially significant for post-graduate courses across the network and in those institutions where it was most expensive to study in pre-Academy days, and where barriers to entry were thus higher. Since introducing bursaries, for example, the LFS has reported that the proportion of UK students has increased (from 20% to 30%), and that the NFTS is now able to promote its courses to prospective students on the basis that they ‘can afford it’. Similarly, feedback from trainees on New Entrants schemes indicates that a high proportion would not have been able to take part without financial support, and feedback also indicates that many of the 1,000 practitioners who have benefited from CPD bursaries and subsidies would not have undertaken the training without assistance.

In UK public policy discourse, ‘diversity’ is most commonly understood to relate to gender, ethnicity, age, disability and so on. This is also the basis on which diversity monitoring of public programmes funded from sources such as the lottery and EU takes place (and hence how Skillset has tracked programmes funded via A Bigger Future). Figure 16 outlines the overall diversity monitoring statistics for each element of A Bigger Future delivery, based on Skillset’s records. These are compared with the film production workforce in 2004 and 2006, based on the two most recent surveys of the industry.

³¹ It is difficult to assess the impact of A Bigger Future on the diversity of trainees and employees in the broader sense, as attempting to monitor and track people in terms of socio-economic or geographic origins is problematic. This may be an area that requires more attention in the future – e.g. through more qualitative monitoring and tracking of beneficiaries.

³² And subject to the same criteria as other university grants and hardship funds

Figure 16 – Diversity Monitoring Outputs for A Bigger Future programme strands

Category	Time period	Number of individuals (participations)	Female	BAME	Disability
Screen Academy bursary recipients	Courses starting 2005, 2006, 2007	255	33%	7%	5%
All Screen Academy students (including non-bursary students)	Courses starting 2007	2,226	41%	11%	16% ³³
CPD bursary recipients	April 04 - March 08	1,011	48%	16%	3%
Participants completing CPD schemes	April 04 - March 08	2,409	43%	11%	1%
Individuals completing New Entrants training	April 04 - March 08	78	60%	15%	14%
Beneficiaries of company development support	April 04 - March 08	202	37%	15%	0%
Recipients of one-to-one careers advice	April 04 - March 08	823	53%	14%	9%
Feature Film Production Workforce Survey (published 2005)	2004		33%	5%	2%
	<i>London</i>			6%	
Feature Film Production Workforce Survey (forthcoming, 2008)	2006		40%	5%	3%
UK Economy	2004		46%	7%	13%
	<i>London economy</i>			24%	

Source: Skillset

While Screen Academy bursaries have helped individuals on lower incomes to access education, Figure 16 suggests that they are having only a marginal impact on diversity in terms of gender, ethnic diversity and disability. The profile of those receiving Screen Academy bursaries in the first three years of operation is only slightly more diverse than the film industry workforce in 2004, and the proportion of women is exactly the same (33%). In fact, the Screen Academy student body as a whole in 2007/08 was actually more diverse than those receiving bursaries. It is not possible to gauge whether Screen Academy status per se has had any influence on attracting a more diverse range of students overall (bursary recipients plus non-bursary-recipients) without a comparison to pre-Academy days, but it would be informative to carry out this analysis where possible (making a distinction between UK and non-UK students³⁴).

It does not necessarily follow that those eligible for bursaries on a financial basis are more likely to be women, have disabilities or be from BAME communities. It is also true

³³ Information on type of disabilities was available for just over 200 individuals, or around 10% of all students studying at Screen Academies in the given year. Of these: more than half (54%) were classed as having a mental health disability (including serious depression); 8% were classed as having learning disabilities (including dyslexia); and 32% were classed as having 'other' types of disability

³⁴ Current diversity statistics for all Screen Academy students don't distinguish between UK and non-UK citizens in each ethnic group, except in the 'White British' category, which accounted for 58% of Screen Academy students in 2007/08. It is also not possible to tell what impact A Bigger Future has had on the student body as a whole, without comparison to the same institutions in pre-Screen Academy days.

that there are wide variations in the diversity of students on different courses and at different institutions. But it is still surprising that the substantial investment in Screen Academies to date has not had a greater demonstrable effect on the diversity of students. This is partly due to the way in which Screen Academies are institutionally required to allocate bursaries – in line with other hardship funds and support grants, based solely on assessment of ability to pay. Given this requirement, the issue is about attracting more applicants of the required standard from under-represented groups.

Screen Academies do not appear to have received strong strategic leadership on the issue of diversity in the initial phases of set-up and delivery, and were instead encouraged to address the issue as individual institutions. This resulted in a number of successful initiatives – such as the summer schools developed by Bournemouth, outreach work by LCC/EIM, Compass Point at NFTS and the work of the Talent Scout – but these began in a relatively ad-hoc and stand-alone way, and were not necessarily integrated into core provision. This situation is now improving. A successful workshop on diversity with the Screen Academy Network in May 2008 identified clear priorities, emphasising: the need for a more coordinated approach across the network: the need to establish better pathways for potential students into Screen Academies and on to industry; and the need for greater diversity to be reflected in pedagogy, course content and staff. Further such activities are planned, and the UK Film Council's Head of Diversity recognises that the network has made good progress in terms of its understanding and commitment to encouraging greater diversity. However, it would have been beneficial for more of this work to have taken place at an earlier stage in the development of the Screen Academies (which began operating in 2005).

Skillset has taken a more pro-active approach to encouraging diversity in those parts of the programme it administers directly (CPD bursaries, IAG), with promising results. CPD, New Entrants and IAG schemes have had a greater impact on diversity than Screen Academies, in terms of gender, ethnic diversity and disability. In all cases, the proportion of women and people from BAME groups is significantly higher than in the industry workforce as it stood in 2004, while in New Entrants and IAG provision, this is also true for people with disabilities. That the cohort of those receiving bursaries for CPD was more diverse than all those undertaking CPD also suggests that under-represented groups have been able to access additional assistance. There have also been some good individual New Entrants and CPD programmes, targeted at diverse film-makers, that have been supported via A Bigger Future, such as Blank Slate, the DiVA Graduate Fellowship Programme, the Darklight women in horror scheme and the new Skillset Film Trainee Scheme. In addition, Skillset has demonstrated good practice in considering the treatment of diversity in its information and communications materials (e.g. online careers information).

But although diversity outputs for these strands are relatively encouraging, there are no grounds for complacency. 60% of New Entrants beneficiaries may have been women, but that only equates to an average of 12 women per year, since the overall number of trainees is quite low. At that rate, it will take a long time to make any significant impact on even a relatively small workforce, such as that in the film industry. Similarly, although the proportion of trainees from BAME groups is higher than in the industry, there is still a long way to go before the industry in London resembles the local workforce, where around 28% of the working population now comes from a BAME background. The research that is currently available indicates that the diversity profile of the industry did not significantly change during the first phase of A Bigger Future. In 2006, there were

still only 5% of workers from BAME groups, and the number of workers with disabilities has risen by only 1% since 2004 (to 3%)³⁵.

Going forward – if increasing diversity is indeed a genuine priority for the film industry – there needs to be a clearer articulation of what the priorities are, with more specific guidance and direction for different stakeholders, particularly Screen Academies. It is also clear that widening access to training and education is not enough to change employment practices, and that any future strategy should work more extensively with employers to address this – through promoting better understanding of the issues, by helping companies to develop their HR practices, and placing more trainees with employers where possible (a tactic that has worked well when it has been used in programmes supported by A Bigger Future to date).

3.8 New Technologies

“industry can be in front of, rather than behind, the [technology] curve”

The need to ensure that the industry is equipped with the skills it needs to deal with the ‘accelerating pace of change’ brought about by new technologies forms one of the golden threads running through A Bigger Future. Technological change – and the effects of digitisation in particular on production, distribution and consumption – poses significant challenges for film, as well as a range of opportunities (many of which are yet to be realised). The need to address these challenges is implicit in many of the goals outlined in A Bigger Future, but the strategy does not contain a clear statement about what is meant by ‘new technologies’, or indeed what should be done about them. It is possible that this lack of clarity may have undermined the programme’s ability to deliver more fully on this objective.

Analysis shows that industry-based training that deals explicitly and specifically with new technologies forms a relatively small (though not insignificant) part of A Bigger Future, whether ‘new technologies’ are defined narrowly or more broadly.

A narrow definition of new technologies includes equipment and processes that have emerged and started to become adopted more recently (often within the timeframe of A Bigger Future), such as HD, and online/digital distribution. Skills development activities associated with this definition (e.g. shooting, lighting, make-up for HD, tapeless workflow) were provided for more than 1,870 participants across 21 programmes, accounting for £898,000, or 4% of external organisational programme spend.

A broader definition of new technologies also includes training in the use of industry-standard software packages in areas such as post-production, visual effects and art department roles (e.g. Avid, Final Cut Pro, Shake, Maya, VectorWorks etc.). Many of these technologies have been established in the industry for a number of years, although they continue to evolve in terms of functionality. By this broader definition, A Bigger Future has delivered skills development opportunities to more than 2,590 participants across 56 programmes, accounting for £2.64m, or 12% of external organisational programme spend. (Note that this analysis does not include participants on cross-cutting programmes who may have learned about new technologies as part of their wider training.)

³⁵ Skillset (2008, forthcoming), Feature Film Production Workforce Survey 2008

Technology-orientated training delivered under A Bigger Future has, to a large extent, focused on the impact of new technologies on production, and on the production of conventional feature films in particular. Programmes have addressed skills gaps arising from technological change to specific skills and job roles in the production process (e.g. HD camera), while remaining focused on the traditional end product of a feature film for cinema release. Going forward, there will also be a growing need to look at how new technologies will drive content innovation and the emergence of new types of film (e.g. machinima, 3D), and how the nature of film itself is related to other forms of media.

Aside from production, A Bigger Future has provided some training in digital technology for projectionists in the exhibition sector, and some around digital and online distribution, and this is starting to have a major impact on film industry business models. This is not simply a skills issue, and the industry itself has been slow to develop a coordinated and forward-looking response, but in the near future there will be a pressing need to increase skills provision in relevant areas. This is recognised by Skillset, which supported the 'Power to the Pixel' events at the 2007 London Film Festival. UK Film Council is also currently working with NESTA to support a programme focusing on innovation in the digital distribution of film.

As we look towards a skills strategy for the next five years, it is clear that there will have to be an increased emphasis on all aspects of digital filmmaking, distribution and exhibition. According to the most recent Feature Film Production Workforce Survey, 59% of film crew practitioners consulted anticipated a need for better knowledge about digital/computer technology³⁶.

3.9 Nations & Regions

"The National and Regional Screen Agencies ... have a vital role to play in developing and nurturing talent and supporting the growth of a UK film industry"

A Bigger Future identifies the Nations & Regions as a 'golden thread', with a vital contribution to make to all strands of the strategy. As with diversity, however, there is little clarity on precisely what role they should play, or what successful outcomes would look like. Without a clear statement of intent, it has been difficult to deliver to any national/regional agendas within the strategy.

Between 2004 and 2008, more than 1,350 participants have taken part in A Bigger Future supported programmes led by regional/national organisations, across 18 programmes, at a total cost of £1.1m, or 5% of external organisational programme spend.

In addition, more than £3.2m, or 15% of external organisational programme spend, has been invested in Screen Academy and approved screenwriting provision delivered outside London and the South East, to more than 4,000 participants (although this figure contains some double counting). Furthermore, of 1,011 individual bursaries to support CPD and New Entrants training awarded by Skillset, around 200, or 20%, were allocated to trainees resident outside of London and the South East (see Figure 17).

The strategic public bodies with primary responsibility for film in the nations and regions are the English Regional Screen Agencies (RSAs) and National Screen Agencies

³⁶ Skillset (forthcoming, 2008) *Feature Film Production Workforce Survey 2008*.

(NSAs) in Scotland, Wales and Northern Ireland. Skillset have worked with a number of RSAs and NSAs in the delivery of specific programmes, although there has perhaps been less involvement overall in the delivery of A Bigger Future than might have been expected (see also 5.2.4 below). This is perhaps less true in Scotland and Wales, where the NSAs have been involved in supporting the Screen Academies, but across the country there have been relatively few industry-based training programmes specifically geared to the Nations & Regions. To a large extent, this is due to the fact that A Bigger Future is designed as a national programme, available to anyone in the UK – limiting the delivery of targeted regional schemes. As one consultee suggested, “*the tendency to insist on national projects rather than projects of national significance has been an impediment to regional engagement*”.

Figure 17 – Individual bursaries awarded by region of residence

Region	Bursary recipients	Percentage
London	570	56%
South East	199	20%
South West	53	5%
Europe	41	4%
West Midlands	28	3%
Scotland	26	3%
East of England	24	2%
North West	19	2%
East Midlands	17	2%
Yorkshire and Humberside	17	2%
North East	7	1%
Northern Ireland	5	0%
Wales	5	0%
Total	1,011	100%

Source: Skillset (2008)

The film-specific nature of A Bigger Future may also have limited the involvement of RSAs and NSAs. Because the film industry is not large or concentrated enough in most parts of the UK outside of London and the South East, practitioners tend to have portfolio careers, working across film, TV, advertising, corporate and other work. Many of the development programmes supported by RSAs and NSAs therefore adopt a cross-sectoral approach, which sets them at odds with the thrust of A Bigger Future.

4 Process of delivery

4.1 What evidence is there that the programme is being employer-led?

A Bigger Future was devised through extensive consultation with employers within the film industry, and all investment through the Film Skills Fund is overseen by the Film Skills Strategy Committee, comprising key industry figures from all sectors of the film value chain.

There is also formal industry involvement at every stage of programme implementation. This includes: Screen Academy boards; industry panels which assess applications to provide CPD training; and industry practitioners recruited and trained to deliver careers guidance. Skillset also maintains industry advisory groups in a range of sub-sectors, which provide advice more generally on sub-sector-specific issues. However, this could be better publicised, as there is a perception in some quarters that decisions are made by 'bureaucrats', rather than people within the industry.

There is therefore clear evidence of industry involvement in A Bigger Future. The questions which must then be asked is whether the industry involvement is effective, and whether it is genuinely representative of the views of employers, and in tune with developments in the industry. These questions are addressed in the following sections.

4.2 What do key industry and other stakeholders think about the management and implementation of A Bigger Future?

Industry stakeholders and representatives were widely consulted about A Bigger Future, its management and implementation as part of this review. Unsurprisingly, there was no single consensus view, but a diverse range of opinions. Many of those consulted were involved in the consultations that led to the development of A Bigger Future, or have been actively involved in advising Skillset and UK Film Council more generally, in both formal and informal roles.

Despite this, awareness of what has been undertaken under A Bigger Future was variable. Understandably, industry contacts have tended to be most aware of programmes that are relevant to their own area of work, and opinions vary across the value chain as to what the priority skills needs are. The views of some about the strategy are also occasionally coloured by their broader views about UK Film Council and Skillset. Overall, if there is a general criticism, it is that it took time to establish the necessary infrastructure, roles, functions and capacity.

4.2.1 Screen Academies

Screen Academies have generally been positive about their relationships with Skillset, and raised no major concerns about the management of the programme. They found

Skillset staff to have been supportive, and were largely satisfied with their obligations, such as the process of monitoring and evaluation, though some suggested that more streamlined reporting and accounting processes would be welcomed (e.g. annually rather than quarterly).

There is a more general issue about the extent to which Skillset appreciated the nature of the Higher Education sector when the Screen Academies were being established. Issues such as the speed of programme implementation, the challenges of cross-institution collaborations, and processes for the management and disbursement of funding were perhaps not fully understood. This has been a learning process on both sides, and the situation is improving with time, as the network becomes more established and Skillset has developed its support, for example through the Screen Academy manager and network meetings.

4.2.2 Training Providers

Organisations that have delivered training and development programmes under A Bigger Future have, on the whole, been positive about the way in which Skillset have managed the commissioning and funding process, and appreciative of the level of investment available. However, some organisations raised issues about aspects of the bureaucracy of the commissioning process, and in particular delays to funding decisions (when, for example, assessment panel meetings are rescheduled). For training providers, this can make it more difficult to respond flexibly to demand, and in some cases to keep private sector partners on board. On the other hand, other organisations were positive about Skillset's flexibility regarding the scheduling of delivery by trainers when recruitment to courses was not as good as expected. In addition, changes to funding priorities and/or delivery mechanisms can cause serious difficulties for trainers that do not have a strong commercial business but are reliant on public investment (in some cases placing the future of some organisations in jeopardy).

4.2.3 Industry

Responses from industry have been more varied. Questions have been raised about the extent to which the emphasis on different parts of the value chain (screenwriting, production, post etc.) reflect the industry itself and its needs – and therefore about how decisions to fund particular initiatives are made. Some have suggested that there is a lack of evidence for how particular funding decisions are made (both from industry-based training courses and Screen Academy courses), and specifically how this maps onto an assessment of industry need. There is, however, no consensus here: some believe that current provision disadvantages post and effects, others that director/producers or writers should be the main focus. Opinions are also understandably coloured by the degree to which their company or sub-sector has been able to benefit from the strategy. For example, the head count of the main four film-focused post production houses in Soho has grown beyond the 250 FTE limit³⁷, meaning that they now no longer qualify for Company Development funding, even though they are the largest employers of permanent staff in the sector after the main cinema chains. But their employees may still benefit from Screen Bursaries and from CPD courses that are run in relevant areas. Film and TV production companies also point out that, as a service sector, the post

³⁷ This is, of course, not a threshold set by Skillset or UK Film Council.

industry does not contribute to training investment through the SIF or TV Freelance Fund.

A slightly different worry held of some employers is that A Bigger Future may be encompassing too many participants at present ('I would hate for the strategy to over deliver'). This point is raised specifically in relation to the Screen Academies as they are the part of the strategy producing the bulk of new entrants ('it's a small industry ... you can't simply grow the size of it by training more people'). There is a related concern here among some that the size of the student intake across the Academies means that the funding is spread too thin: 'there's too many people and not enough contact time'. This view is held most regularly by the animation and post community, and they contrast it with alternate models of HE practice internationally, particularly in France, Germany and the US, from where they regularly recruit. There is a tension here, as at present HE funding mechanisms in the UK are driven principally by the need to increase student numbers, rather than respond to any particular industry needs.

At the overall programme level, there is also a general – though poorly articulated and evidenced – feeling that Skillset may have lost sight that A Bigger Future at its heart should be trying to support creative individuals ('it's a nanny state approach', 'run by accountants'). Equally, there is recognition from some quarters that Skillset have a difficult job in trying to get the film industry interested in an education and skills agenda *per se*.

The question of how film business skills are handled across the strategy is one of the most controversial issues. There are mixed feelings about the role of the Film Business Academy. Some in production and distribution do not perceive significant business skills gaps at this level at all (although there may be business skills gaps for small companies and individual practitioners), while others do, but question the appropriateness of an MBA model as the best way to address them. MBAs teach generic management skills for working in (predominantly) large corporates and there is simply not enough of these within the UK film industry. Furthermore, MBAs are traditionally viewed as primarily aimed at improving the marketability of graduating students and their earning potential – again, there are limitations to achieving this within film. There is also a clear sense that the specific difficulties surrounding the Film Business MBA have coloured industry's opinion of the delivery of the overall strategy.

The post production, animation and CGI sector also has specific concerns about how HE in the UK is producing graduates for their sector. Although these disciplines are encompassed within the Screen Academy network, the main film-specific post houses are clear that these courses cannot on their own produce enough graduates to supply current industry need. They feel that A Bigger Future does not provide, at present, a way for this sector to develop an education strategy that reaches beyond the relevant courses in the Screen Academy network. A key element of what this needs to include is identified by the companies as 'training the trainers' (i.e. the lecturers). Framestore has successfully trialled this approach independently and they are currently working with UK Screen and the other main post houses to establish a concerted approach to this task.

In comparison with the Screen Academies, industry is more ambivalent still about the support given to Approved Screenwriting courses through A Bigger Future. There is, for instance, no feeling that scripts have improved over the duration of A Bigger Future. Industry cites a range of continuing weaknesses across the screenwriting HE infrastructure and the products that it is currently producing, including:

- an over emphasis on courses to focus on a ‘finished’ product when the reality is that scriptwriters are almost always engaged in work in progress, producing iterations of a screenplay or a section of a screenplay
- a lack of commercial understanding regarding what types of stories are likely to attract funding, resulting in a lack of good genre writing in particular
- a reluctance for courses – in contrast to the US – to instil the importance of writing ‘on spec’ (rather than to commission)

Set against this, some still believe that ‘just because it hasn’t worked out over the first five years we shouldn’t immediately abandon it – having *not* funded it over the last 50 years.’ There are also some within industry that maintain that a key failing is actually a systemic weakness within the UK’s education system as a whole. Unlike stage plays, screenplays are not routinely studied as texts within English education at school level. This means that the overall level of appreciation of the mechanics of how a screenplay works is far less developed across the general population than it is for the stage.

A Bigger Future’s emphasis on film, to the exclusion of related sectors such as TV drama, short-form animation and commercials, is widely questioned – particularly in a context in which a separate ‘film industry’ is becoming harder to define. Many hold that the film-specific nature of A Bigger Future ignores the realities of the industry, in which two thirds of the workforce had worked in another audio-visual sector before getting their first paid job in film³⁸, and only 38% of film companies work exclusively in film³⁹. This is viewed as particularly true for directing and writing talent, and is a major issue to consider for the future development of a skills strategy. Skillset recognises that this is a challenge, and in fact seeks to align funding application deadlines for the Film Fund and TV Freelancers fund when possible, so that practitioners from both sectors can benefit from particular programmes, where relevant. It is also the case that many of the ‘film-specific’ production skills provided via A Bigger Future are in practice transferable to other audio-visual sectors.

There is also a view in some quarters (not universally held) that certain forms of training and education supported by A Bigger Future (particularly in craft and technical areas) over-emphasise traditional, high-end skills and technologies. By doing so, they are in effect perpetuating barriers to entry (‘trying to get anything digital through the cine guilds is a nightmare’) and slowing the development of new, digitally-based film content in the UK. Finally, this view holds that, in the context of the rapidly falling costs of new digital technologies, when most film-makers will be making their first films on digital, it is self defeating for training to focus so heavily on how to make 35mm features. It is also argued that this has the unintended effect of ‘putting off’ young, often diverse talent from entering the film industry (‘because there always seems to be people putting barriers in your way’).

4.2.4 Communication

Overall, there was a lack of communication about how A Bigger Future had been implemented, what it had supported and what it had achieved. This contributed to a lack of awareness about the strategy’s overall achievements and benefits within the industry and among other stakeholders – and, no doubt, fuelled some misconceptions. Skillset

³⁸ Skillset (2005) 2005 Feature Film Production Workforce Survey

³⁹ Oxford Economics (2007), The Economic Impact of the UK Film Industry

has recognised this problem, and has now taken steps to resolve it. A dedicated communications team is in place, and information about the strategy is now more readily available and high profile (e.g. Skillset's '4 Years On' brochure).

Skillset's branding and communications strategy can cause tensions, however. Institutions or programmes that existed prior to A Bigger Future but are now being funded via the strategy can object to these being branded as Skillset initiatives – and it is important to be sensitive to this issue. But, on balance, the prevailing view is that it is important to keep the industry informed about what is being delivered on its behalf – such as the existence of CPD training opportunities. Going forward, good communications should be maintained – while ensuring that costs are reasonable (approximately £1.9m was invested in communications during the first four years of the strategy, including spending on sponsorship, events, website maintenance, advertising and promotion & publicity – not an insignificant amount).

4.3 Has expenditure on the programme been efficient and achieved value for money?

Value for money should be assessed in terms of: economy (basic cost), efficiency (cost per output) and effectiveness (cost benefits). To do so properly would require an extensive evaluation exercise that is beyond the scope of this review. However, some conclusions can be drawn.

The basic cost of the programme has been significant as measured simply by the size of the funds invested in A Bigger Future (> £29m). The efficiency calculation – the basic unit cost of the programme outputs – is given below in Figure 11. These figures are based on:

- the number of 'participations' across the programme, rather than discrete individuals
- external grant expenditure, rather than total cost, as the figures for spend on internal activity and overheads cannot be disaggregated by programme strand

What is clear from the figures in

Figure 18 is that there are large differences in the average unit costs across the programme. New Entrants programmes are by some distance the most expensive elements of A Bigger Future by this measure. This is because they consist of small intakes undertaking intensive and often long courses. For instance, FT2's apprenticeships in technical, production and crafts run for two-years on a full-time basis. On the contrary, the CPD funding covers short, often one- or half- day courses or events.

Figure 18 – Basic unit cost calculation for the main programme strands of A Bigger Future, based on external grant expenditure, 2004-8

Programme strand	Av. Unit cost
HE: Screen Academies	£1,809
HE: Screenwriting	£1,470
Industry: CPD (Training Provider Places)	£627
Industry: CPD (Skillset Screen Bursaries)	£562
Industry: Training linked to production	£2,144
Industry: New Entrants	£15,063
Industry: Company development	£475
All strand average	£1,225

Source: BOP/Skillset (2008)

There is also a great disparity in the unit costs of outputs between the different Screen Academies. For example, the average cost of a Screen Academy bursary at LFS is £26,000, compared to £186 at Bournemouth. This highlights:

- Differences in the particular make-up of the institutions within the Screen Academy network – some Academies (e.g. Wales, Bournemouth) produce large volumes of undergraduates, with concomitantly relatively low course fees, whereas others produce very small numbers of postgraduates and charge very high fees (LFS and NFTS)
- Differences in the uses of bursary funding – high fee charging postgraduate institutions used bursaries to offset these costs (and also sometimes to contribute towards living expenses) for small numbers of students, while the more undergraduate and/or lower fee charging institutions used bursaries for other ends, principally to fund student films for a much larger number of students.

In trying to place these figures in some wider context, it is useful to compare them with a similar programme of training and skills development. For this purpose, we have analysed Skillset's TV Freelance Fund programme. This programme has very similar aims to the CPD strand within A Bigger Future as it aims to support training providers to deliver affordable provision for freelancers working in TV. It also covers the same time period (April 2004-March 2008) as the A Bigger Future review and is based solely on external grant expenditure, making it a very accurate like-for-like comparison.

The average unit cost per output for the TV Freelance Fund is £1,998. This makes it significantly higher than the CPD trainer provider places funded through A Bigger Future (£627 per output). It is fair to say, however, that the ability to disaggregate A Bigger Future expenditure according to a more detailed level than for the TV Freelance Fund – i.e. to effectively separate the more expensive elements of provision (New Entrants and Training linked to Development from CPD) – lowers the overall unit cost per output. Nevertheless, the comparison suggests that the efficiency of the delivery of A Bigger Future is (at least) comparable with other similar Skillset programmes.

Assessing effectiveness would be the most complex element of an evaluation of A Bigger Future as it rests on quantifying the cost-benefits of the programme. Clearly there are benefits in the outputs delivered by A Bigger Future:

- New courses have been developed and delivered in Screen Academies and as industry-based training programmes

- Learner and student numbers have been demonstrably increased
- New outreach and showcasing activities have been developed (e.g. Bournemouth Summer School, Talent Scout, Trailblazers)
- Bursaries have widened access generally
- Quality is less easily quantified, but feedback, evaluation and anecdotal evidence suggests that it has been high in most cases

But, again, it is not possible to analyse these benefits further against their undoubted costs. And provision funded via A Bigger Future has not, on the whole, been low cost. Further, many of the schemes/delivery organisations that are most well regarded and best known in the industry (e.g. FT2, Inside Pictures, Escape Studios) are at the higher cost end of the spectrum.

In a reduced funding environment, difficult decisions about value for money will have to be made. Skillset and UK Film Council have begun this process, by instituting efficiency/economy savings based on assessments of value for money. This includes reducing the second tranche of funding to Screen Academies by 13% and establishing a set crafts apprenticeship framework that can draw down mainstream government funding (thereby reducing cost to A Bigger Future), and the pilot year of this is being delivered in 2008 by the Screen Academy at LCC & EIM.

But the likely scale of funding reductions required going forward means a much greater prioritisation by Skillset, UK Film Council and industry as to what should be funded and what should be cut than has been the case in the first five years. We return to this issue in section 7.2 below.

4.4 Has programme expenditure been transparent?

It has been clear in conducting this study that there have been generally low levels of awareness, in the industry and among many public stakeholders, about precisely how much has been spent on A Bigger Future, and about how expenditure has been divided across different strands, initiatives and time periods. The knowledge of those in the industry was often based on the strategy's original ambitions at the time of publication. Even consultees with a relatively close relationship to the strategy, and a good understanding of the overall levels of investment involved, generally did not have a detailed grasp of the breakdown of programme expenditure. Similarly, many of those in receipt of substantial investment – such as Screen Academies – did not have a clear sense of how much funding other providers had received.

As discussed in 4.2.4 above, there was an initial lack of communication about the delivery of A Bigger Future to the industry and stakeholders, and this extended to information about programme expenditure. Such publicised information as there was – e.g. in publications such as *A Bigger Future – 4 Years On*, on the Skillset website and in press releases – has tended to be relatively top level, indicating overall levels of funding and investment in the programme as a whole or in Screen Academies collectively, or alternatively detailing what is potentially available to the individual.

That is not to say, however, that there has been a lack of transparency as such. Skillset has kept extensive project documentation on all aspects of the programme, well presented and in good order. Detailed budgets and information about grants and funding awards have also been maintained to high professional standards. This information has

been readily available for the purposes of this review, and Skillset has been open and helpful when questions arose. Some of the information available for the first year of delivery (2004/05) was less detailed than in subsequent years, but it is clear that internal processes had been improved in response.

Skillset's Annual Reports and Financial Statements also provide details of investment into programmes to support film, Film Skills Fund grant recipients and SIF investment raised. The difficulty here is that because Skillset manages and delivers a range of programmes and funds across the creative media sectors, it is not straightforward to identify which activities and funds relate specifically to A Bigger Future, and which to other programmes. One solution in the future could be to produce an 'Annual Report' that specifically relates to the film skills strategy.

5 Strategic Alignment

This section reflects on A Bigger Future in the contexts of film policy and practice, and of the government's skills agenda. It also looks at some other key strategic drivers that need to be considered going forward. In examining what has been achieved and thinking through what needs to happen next, it is important to consider where and how A Bigger Future is or might be positioned and these issues are outlined below.

5.1 How has A Bigger Future contributed to other UK Film Council Film priorities and wider Government policies?

Film in the Digital Age, the UK Film Council's policy and funding priorities 2007-2010, sets out as its first aim (of four):

Developing a competitive film industry, built on creativity and skills.

The context for Film in the Digital Age is 'to take more risks in relation to preparing for significant change in production and consumption ... as a consequence of digitisation and globalisation'. The lack of visibility of new technologies in the outcomes of A Bigger Future (see section 4) therefore could be perceived as a weakness.

And in the funding priorities, the Film Skills Fund goal is 'To ensure a strong and consistent supply of skilled and talented professionals in line with market demand'. Some expressed the view that the essence of the A Bigger Future strategy is undermined by the new tax credit which has weakened co-productions, seen by those in the industry as an extension of domestic features and part of a wider community of European filmmakers. Indeed, we found that views on the effectiveness of the tax credit were sharply divided.

The recent joint DCMS and UK Film Council Peer Review mentions skills as a priority recommendation:

UK Film Council has worked actively and effectively with Skillset to invest in the key technical, creative and financial skills to promote Britain as one of the key hubs for the global film industry. This investment needs to be continued, developed and adapted in a changing, digital, global market. UK Film Council should promote the wider benefits to the UK economy as a whole of retaining and improving the film industry skills base.

There are three specific points here. The first is a robust acknowledgement of the achievements of A Bigger Future drawn from a wide ranging consultation process and this broadly reflects the findings of our review. The second is a recognition that the challenges for skilling the industry are, if anything, likely to intensify 'in a changing, digital, global market'. The third point however, relates to the argument about the wider economic benefits of film to the UK economy and the role that a well-skilled workforce plays in this. This is difficult to prove. It is possible to say that at this stage of A Bigger Future that there have been some improvements in the availability of training

opportunities and a greater awareness of the needs but it is not proven that skills alone will guarantee an effective and economically productive industry.

Other UK Film Council policies

A Bigger Future could, and in some cases, should have a closer engagement with UK Film Council policies and strategies. The development of a specific and targeted approach to film skills through A Bigger Future with involvement of the industry and HEIs was a bold initiative that sought to address a wide range of issues (as detailed in earlier sections). But there were and are areas connected to wider policy initiatives that could have had a closer relationship to the skills agenda; a number of consultees mentioned the development of the Digital Screen Network and more generally there is a sense that A Bigger Future is not sufficiently integrated with UK Film Council developments across the board. Two developments in particular have been identified by consultees; the UK-wide film education strategy, *Film: 21st Century Literacy*, and the UK Screen Heritage Strategy led by the UK Film Council and the BFI. Skillset have also been involved in the strategic development of both of these initiatives.

While the education strategy is about the understanding and enjoyment of film and cinema going in the widest sense, there are a range of initiatives that are likely to lead young people to pursuing a career in film which will require high-level skills development. *Film: 21st Century Literacy* aims to bring greater coherence and consistency to the provision of film education in the UK so children and young people have equal opportunities to watch, understand and make films. The two main aims of the strategy are to enhance current activity and to initiate new, innovative activities; Particularly relevant are the objectives to 'establish a comprehensive training and development programme for those involved in film education' and 'use new learning routes, such as the Creative & Media Diploma and the Arts Award'.

The hinge between education and skills is important and Skillset is already working closely with the main film education providers and other partners to consider how to ensure there is a coherent and accessible ladder of progression and learning.

Similarly, the BFI and Skillset are considering the needs of cultural sector particularly in relation to archives. There are three key gaps – technical, archival skills in the handling and preservation of footage (the BFI has been unable to appoint a Head of Conservation for two years though this dearth is a world-wide problem); the management and interpretation of collections, a skill-set common in other cultural areas such as museums and galleries but almost wholly absent in film; curatorial skill for the presentation and wider understanding of archive material. Action to date includes the development of a strategy outlining the skills needs and actions to be taken; setting up a Steering Group of archive partners; securing £200k from UKFC to help deliver training in this area along with money from the Film Skills Fund to support this work. Archive-specific courses will take place over the coming months in line with current ABF practice.

Other Government policies

The skills agenda continues to be a major policy issue for government. According to the Leitch Review (December 2006), 'the UK's skills remain fundamentally weak [and] are holding back productivity, growth and social justice'. The Skillset Academies which

include the six screen academies and the seventeen media academies are cited by Leitch as a model for improving industry-higher education links. It is not clear that in the case of the Screen Academies the Leitch report has recognised the level of investment that produced this effective intervention in HEI models.

As a result of 'World Class Skills, Implementing the Leitch Review of Skills in England' (DIUS 2007), HEFC has chosen Skillset as one of three SSCs to work with on the higher-level skills agenda. Skillset is also a pioneering Sector Skills Council (SSC), one of five, to develop 14-19 diplomas and apprenticeships.

Skills policy, and the role of SSCs, is central to both political parties. In July 2008, the Conservative Party released 'Building Skills, Transforming Lives', a Green Paper setting out plans for a training and apprenticeship revolution. In addition, the Mayor of London is actively campaigning to increase expenditure and the impact of skills in the capital.

The recognition of Skillset as a leading SSC and the continued political focus on skills are important factors for the UK Film Council in considering how film skills investment is ensured post 2009.

Film is a major part of cultural policy and of the creative economy. *Creative Britain, New Talents for the New Economy*, was published earlier this year by DCMS and supported by BERR and DIUS, and sets out a wide range of proposals that need to be considered within the context of film skills. These include: the setting up of the Youth Culture Trust, the expansion of 'mixed media centres', and festival development as part of establishing the UK as the world's creative hub. In particular, the section Turning Talent into Jobs details a number of specific skills related targets that need to be positioned centrally when reviewing priorities going forward.

The UK Film Council is also committed to setting an example of leadership and good practice with regard to climate change, and has commissioned a study, *Developing an Environmental Strategy for UK Film*. This makes a series of recommendations that UK Film Council is taking forward, working with trade bodies and individual companies to help the UK film industry reduce its impact on the environment further and, in particular, its carbon emissions. It is important that the film skills development recognises and acts on these issues through awareness raising and ensuring best practice is adopted by partners and delivery bodies.

5.2 How does A Bigger Future-funded training activities relate to other UK Film industry training initiatives? Is there scope for synergy or removal of duplicated activity?

There is no existing, readily available map of skills provision and opportunities outside of those funded through A Bigger Future. Therefore in answering the question of how A Bigger Future-funded activities relate to other training initiatives, we have drawn primarily on consultation with industry and stakeholders, as well as undertaking a limited overview of the published secondary data available on the film-specific activities undertaken in the nations and regions.

5.2.1 Industry-based training

Most of the larger companies in the sector report that they run their own in-house internship programmes or other forms of training. This takes place across the value chain – e.g. production companies, post houses, and distribution companies. While these are not currently linked-up with A Bigger Future activities (though some have employed Screen Academies' graduates), this is how the employers seem to want to keep it. They see neither duplication nor confusion in running parallel systems and indeed it may be that there are useful synergies between their own provision and that of A Bigger Future. Certainly it would be useful to explore this further.

Several of the industry bodies organise bespoke training for their members, some of which does not involve A Bigger Future activities. The Film Distributors Association is an instructive example in this regard. They are currently working closely with Cass on a pilot business training course part-funded through A Bigger Future, but are pursuing other routes elsewhere, such as a Script Reading course for distributors, which is not supported by A Bigger Future. There is generally realism within the industry that no national strategy is going to meet all of the needs for individual companies and sub-sectors. But there may be positive opportunities to make links with privately funded provision, at the very least around mapping the range of opportunities available and routes into these opportunities.

5.2.2 Publicly-supported training

It is in the area of other publicly-supported film skills training that closer attention needs to be paid, for a variety of reasons. First, the key process 'output' that A Bigger Future was intended to deliver is a greater co-ordination of existing provision. Second, some of the organisations that may be delivering additional film skills training are part of the wider UK Film Council 'family', i.e. the network of Regional Screen Agencies (RSAs) in England and the National Screen Agencies (NSAs) in the devolved administrations. Third, all public bodies have a duty to maximise the value achieved by investing tax payers' money, so the removal of any duplication is key.

There are two main sources of publicly-funding to support training in the film industry in the UK outside of A Bigger Future:

- European funding: both sector-specific (i.e. the MEDIA Programme) and the structural funds (ESF and ERDF)
- Regions and nations of the UK: through the RSAs and NSAs

5.2.3 Europe

A Bigger Future has worked in close partnership with the UK MEDIA Desk to ensure that the industry in the UK benefits as much as possible from MEDIA Programme funding. Indeed, individuals from the UK are second only to those from Germany in terms of the numbers taking up MEDIA Programme supported training. The picture with regard to the MEDIA Programme is therefore one of partnership and synergy rather than duplication.

Undertaking a comprehensive assessment of the amount of film skills training that has been funded through European Union structural funds over the last four years would be a large task that lies outwith this review. But it is clear that ESF funding, in particular, has

played a significant role, though it is not clear that this has led to duplication. For instance, FT2 has for many years benefited from ESF funding in delivering its New Entrants courses, but this has co-financed provision rather than resulted in duplication.

Another area in which structural funds have added to, rather than duplicated, the amount of publicly-supported film skills training in the UK is in the regions and nations. The structural funds are allocated to areas of socio-economic need. This principle means that far greater spending is directed to areas and regions outside of the wealthier South East of England. In this way, it has arguably acted as a counter balance to A Bigger Future funding, which as a national programme cannot target particular skills needs in individual localities, and has instead followed the geography of the industry and delivered overwhelmingly in London. Certainly this is the view of those in the industry based outside London 'there was never a sense in which it [A Bigger Future] ever had the regions at its centre, whereas that was certainly the case with ESF funding.' ESF funding has been used to fund skills development for new entrants and those in the industry in many English regions, including the East Midlands, the North West, and Yorkshire and Humber, but the duplication with A Bigger Future is likely to be small. Going forward, the demise of ESF funding available in the UK – due to EU expansion and enlargement – does mean that much of this tier of provision has effectively been removed.

5.2.4 Nations and regions

In the main, there has not been systematic and strategic co-ordination of the delivery of film skills between Skillset and all the NSAs and RSAs. The notable exceptions to this are in London and Scotland. Skillset and Film London have a Strategic Partnership Agreement and process that ensures that joint planning and mutual investment takes place in relation to education and skills. Film London is the obvious partner among the RSAs and NSAs given the region's central importance to the whole of the UK industry (Film London shares joint responsibility with Screen East and Screen South for the studios on the edge of the capital). In Scotland, Skillset Scotland administers funds from Scottish Screen for training, and training providers are able to apply to the Film Skills Fund to deliver training nationally in Scotland.

But the lack of a strategic process has not precluded the joint development and delivery of programmes and synergies to exist between Skillset and the nations and regions through A Bigger Future. Figure 19 below shows the main examples of co-funding and joint delivery between Skillset and the RSAs and NSAs over the course of A Bigger Future to-date. What is clear is that this activity has increased between 2004/5 to 2007/8, but is still restricted to only a few of the English NSAs in particular.

Figure 19 – Main examples of co-funding and joint delivery between Skillset and the RSAs and NSAs, 2004/5 to 2007/8

Organisation	2004/5 Project	2005/6 Project	2006/7 Project	2007/8 Project
Film London	-	Location Managers Course	Microwave	Microwave
North West Vision + Media	-			Digital Arrivals
Screen South	-			Cine Euro Co-production Training
SW Screen	-	Animation Bridge	Storyboarding; Cross platform production	Art dept CAD training; Animation Bridge
Cyfle	-		Wales New Entrants	Micro movies; Child Protection
Scottish Screen	-	Scottish New Ent's; Animation New Ent's	Scottish New Entrants; Bridging the Gap	Scottish New Entrants; Bridging the Gap

Source: BOP/Skillset (2008)

But is there also film-specific activity across the RSAs and NSAs that has *not* been joined-up with A Bigger Future? The answer from our overview of publicly available information on RSA and NSA training activities is some, but not much. Figure 20 provides the examples that can be easily identified as being both film-specific and not, as far as can be ascertained from the available grant expenditure data, not funded via A Bigger Future. Of course, the fact that it has not been funded by A Bigger Future does not on its own prove that there is duplication – this would require a more detailed analysis of the individual programmes – merely that there is a possibility that it might, given that it is not part of the national strategy that deals specifically with film skills.

Figure 20 – Film-specific training activity funded by RSAs and NSAs not part of A Bigger Future, 2004/5 to 2007/8

Organisation	Year	Project
EM Media	2006/7	DV Shorts
Northern Film + Media	Every year	Film Development Packages
North West Vision + Media	2008	Final Cut Pro for Avid Editors
North West Vision + Media	2008	Introduction to Final Cut Pro
Screen South	2008	Scriptwrite Workshop
SW Screen	2007	First Post
Screen West Midlands	2005/6	Producers' Forum

Source: BOP (2008)

The key lesson here is that this represents only a fraction of the training and skills development support that is actually available to film practitioners within the nations and regions of the UK that is provided by their NSAs and RSAs. This is because most such programmes are cross media programmes, i.e. they are funds or programmes that are also open to individuals and companies working in TV, animation, computer games and interactive media. Many are also supported by Skillset's other programme strands, such as the TV and Film Freelance Fund. Identifying what uptake film practitioners make of this wider 'screen media' provision would be a very large task.

It should also be noted that as they serve a wider audio-visual media community, the idea of skills training to meet the implications of 'convergence' across screen media is arguably more embedded in the programmes run by the NSAs and RSAs than those supported by A Bigger Future. Thus in considering how the strategy might go forward in addressing these issues, there is likely to be significant learning and best practice that could usefully be exchanged across and between the NSAs, RSAs and Skillset/UK Film Council.

6 Conclusions

6.1 Balance across the programme

In terms of expenditure, the investments made across the main four strands of A Bigger Future are broadly in line with the intentions set out in the original strategy. Indeed, proportionately slightly fewer funds have been actually allocated to the Screen Academies, and slightly more to industry-based training initiatives than was originally envisaged.

However, there remain some critics within industry who feel that this emphasis on HE has meant that not enough people are being trained within an industry context. This is not true when looked at in terms of the total participant numbers across the programme. But the relatively late establishment of a few high profile outputs of the strategy, such as the short course programme at Cass and the Talent Portal, has partially undermined the engagement that the HE elements of the strategy have had with industry.

The expenditure to-date on Research and LMI is small and slightly less than stated within the original strategy (although there are difficulties making precise comparisons). Skillset have also expended more time and resource than was expected to deliver the two Film Production Workforce Surveys since the strategy began. Although a named initiative called the Skills Intelligence Network was not delivered, Skillset has compensated for this by using other mechanisms to capture employer views on a regular basis. But the lack of a well publicised conduit for channelling industry opinion on an ongoing basis may have contributed to some industry perceptions that the programme is not sufficiently in line with employers' needs.

The Careers Information, Advice and Guidance (IAG) accounts for a small strand within the original strategy (3%) and actual expenditure has been in line with this figure as a proportion of total spend. As with Research, it is part of Skillset's core SSC remit and is delivered for Skillset's sector footprint as a whole. Arguably this makes the boundaries of what should be funded via sector-specific initiatives, such as A Bigger Future, and what should be core-funded, porous. But it is clear that A Bigger Future has delivered IAG enhancements, and these are well regarded by those who use them.

Assessing the balance of the programme in terms of Communications is difficult. The original strategy does not include a budget line for Communications, though it appears as one of the six substantive chapters of A Bigger Future. Skillset has also spent significant sums on Communications. This has not had the desired impact within industry to-date, though there is consensus that major improvements have been made over the last year.

Aside from the decision to invest in a 'small number of Screen Academies', neither A Bigger Future in general, nor the indicative budget in particular, provides guidelines regarding how the overall programme spend was to be allocated to individual education and training providers. Over the four years, funds for industry-based training have been concentrated in a relatively small number of organisations. Also, one organisation (NFTS), has accrued a very large share of all the funds invested through A Bigger Future, by virtue of accessing funds across many different programme strands. This does not mean that either of these eventualities should not have arisen; merely that these do not appear to have been conscious, planned decisions. Further, there is no real

industry concern regarding this element of the disbursement of funds, though it is likely that most are unaware of these facts at present.

The balance of programme expenditure across the value chain, however, is a very real concern to a number of different areas of the industry. If there is one unifying factor among the disparate opinions expressed throughout the review on this issue, it is that too much of the money has gone on Production at the expense of other areas. While there are some difficulties identifying all of the programme spend by value chain, the broad conclusion is that Production has received the vast bulk of A Bigger Future expenditure.

The original strategy provides no precise guidelines as to exactly how funds and participants should be distributed across the different elements of the value chain, only that it should touch all of them. In this respect, it is important to note that some of the delivery that has worked least well across A Bigger Future, in particular, the Film Business Academy, had a specified role within the original strategy to work ‘most closely with the distribution, exhibition and facilities sectors, including post production’ – i.e. the non-production sectors.

But there are also some contextual factors that should be mentioned at this juncture. First, the post production sector does not contribute to the skills levy⁴⁰. Second, the post houses most relevant to film have become too large to qualify for the subsidies provided for industry-based training (and these are EU rules not Skillset/UK Film Council). Finally, within an employer-led system for providing skills provision, it is important that employers actually do lead, and this has not always been the case in the non-production sectors (see 6.3 below).

The balance across the programme in terms of participants is again hard to judge concretely against the original A Bigger Future strategy, though this is now a clear concern for some in industry, specifically in relation to the Screen Academies. The one word that is used to describe volume in the original strategy is ‘small’: ‘a small network of Screen Academies’; ‘a small number of high quality further, higher and postgraduate courses’. It is a matter for debate as to whether 56 courses and over 2,000 students equates to ‘small’. In relative terms, i.e. in comparison with the vast numbers of FE and HE courses in the UK that purport to cover some vocational elements of the film industry, this is likely to represent only a fraction of the total. But the industry is less concerned with relative than absolute size; the products of the education system compete to get jobs in a finite film industry marketplace.

6.2 Screen Academies

The Screen Academies are the major strategic initiative and the most expensive element of A Bigger Future. The Film Business Academy was also the single most ambitious intervention. It should also be recognised that the full Screen Academy architecture – the network functions and shared products (e.g. Trailblazers) – has only evolved relatively recently, as has its connection to other parts of the skills development and education infrastructure, such as the Film Trainee Scheme, The Shortlist, First Light, Mediabox, and Film Club.

Despite reservations regarding their current implementation, there is general industry agreement that, now the Screen Academies are established, it would be folly to abandon

⁴⁰ Nor the TV Freelance Fund

them ('what would the legacy of [A Bigger Future] be?'). This view exists because there is a general recognition of the size of the task ('like turning around a super tanker'), that progress has been made ('the best thing is that education providers have re-thought how they provide for film'), and that it is still too early to pass a definitive judgement on their effectiveness.

In terms of its effectiveness, it is important to state that the Screen Academy brand will ultimately depend on the differential success that students achieve by studying at a Screen Academy, rather than at another institution (i.e. there has to be some substance to the Skillset 'tick'). While there may be some quick wins (e.g. the 35mm project), conclusive evidence of this is likely to take some years to emerge.

However, it needs to be stated that the current Screen Academy model is heavily reliant on the uplift in funding delivered through A Bigger Future. Moving to a more sustainable model in the long term, without compromising quality and industry engagement, will be challenging (see Recommendations below). Part of this reliance on non-core funding – the monies to fund student bursaries in order to widen access – is built into the original A Bigger Future strategy and therefore should come as no surprise. But course development and enhancement funds have not had the results originally envisaged by Skillset/UK Film Council in terms of sustainability.

It was assumed that course development and enhancement funds would function as essentially 'pump priming' money, used within the initial development and establishment of each Academy to revise and embed changes to course curricula long term, but then scaled down subsequently. However, this assumption seems ill thought-through.

First, there seems to have been an inadequate understanding of the process by which courses are validated within HE, i.e. that this takes place only once every five years and so changes to assessed core curricula are difficult/slow to implement. Second, it seems somewhat hopeful to have assumed that more 'industry ready' students can be produced, and industry practitioners involved more closely in the delivery of courses, without raising cost per output. A significant proportion of the enhancement funds has therefore been used to cover the cost of recurring consumables (e.g. the expenses of visiting industry practitioners, film stock, student bursaries to attend festivals). The challenge here is that course enhancements have now become key to the Screen Academy offer – to how these courses and institutions can genuinely differentiate themselves from other HE provision – but in most cases this has added ongoing, recurring costs.

6.3 The role of Skillset and employers within the delivery of the strategy

As the 'top' performing Sector Skills Council, Skillset is well-regarded by its peers, government (and opposition) and other partners. Much has been learned by Skillset through A Bigger Future, and they have used this knowledge to develop other ways of making the education infrastructure more responsive to the demands of the Creative Media industry, through, for instance, the establishment of 17 Media Academies and the expansion of approved course in areas such as computer games.

The learning garnered through A Bigger Future has inevitably involved instances where delivery has been less than optimal. But despite sometimes trenchant criticism from industry (and others), Skillset is now winning the battle for credibility, helped both by

better communications and some demonstrable evidence of success ('broadly travelling in the right direction').

Part of the difficulties that Skillset has experienced relate to the understanding across the industry of what 'employer-led' means in relation to such a wide-ranging programme of actions: what roles different stakeholders and constituencies are required to play within this process, at what juncture, and what level of commitment this requires from each. The original strategy only set the overall shape of the programme and the main actions to be implemented. This means that for some elements of A Bigger Future, particularly the industry-based CPD, the precise activities that have been funded have been contingent upon industry and stakeholders coming forward and making their case at regular intervals, within the overall process that Skillset has designed and overseen. Some parts of the industry appear to have understood what was required of them, and made better use of the process, than others.

For instance, at an individual level, the UK film industry is full of people with many (often vociferously expressed) opinions. Views have not always been aired constructively and/or through the appropriate channels. Organisationally, some sectors have also been better represented collectively and/or more advanced in their collective thinking on skills and education than others. These tend to be the non-production sectors. The sales sector was without a collective voice until Film Export UK was established in 2007 and since its inception, skills has been one of its top priorities. This has resulted in Film Export UK already now having worked with Skillset to develop programmes that target the sector's interests through A Bigger Future.

There have been similar though more complex issues in exhibition. The large chains have their own skills training strategies, but the long tail of small independent operators has historically paid little attention to the subject. This meant that skills have not been a main priority for the Cinema Exhibitors Association (CEA) for the majority of A Bigger Future's lifetime. This has since changed under new leadership of the CEA, which recognises that many of the major issues facing independent exhibitors – the need for succession planning, digital projection and programming – have a strong skills component to them. Once again, the renewed desire of the CEA to pursue a dialogue with Skillset and UK Film Council is already producing benefits, though there remains the question of who takes leadership for ensuring that the retail skills within exhibition are addressed alongside film-specific skills.

Finally, the need for the strategy to be employer-led is likely to be one reason why A Bigger Future has not invested more significant sums in exploring the skills implications around digital distribution, exhibition and convergence. Given the remit handed down to SSCs by Government, it is hard for them on their own to lead on skills issues that are too forward-looking, and that may emerge from disruptive innovation, without some backing within their existing sector footprint.

In this regard, employers are perhaps indicative of UK Film Council's own wider policy stance on not tackling digital innovation in more depth, earlier. The NSAs and RSAs provide a useful correlative to this general picture, having had to grapple with the reality of flows of skill and talent across film, TV, commercials, interactive media etc., given their less specialised media economies.

7 Recommendations

Overall, this review presents a strong argument for the continuation of a strategic approach to the development of film skills in the UK. We have identified where there are weaknesses in the current knowledge and operations. This section sets out where the opportunities are to 'step up'.

7.1 Next Steps

In addition to a list of more specific recommendations outlined below, there are four overarching recommendations that relate to the immediate next steps that UK Film Council and Skillset should consider taking.

1. **Formally extend the funding and delivery of A Bigger Future for an additional year**– although A Bigger Future will formally come to an end in March 2009, much of the delivery funded through the strategy will continue over the next year given existing funding agreements. This includes key interventions, such as the Film Trainee Network (2008) and the MBA in Film Business (2007), that have started late in the intended lifetime of A Bigger Future. There are also still several important gaps in knowledge that need to be filled. For these reasons, while there must be a new strategic film skills document that sets out the expectations and aspirations for the sector, it would be a mistake to rush through this process merely for the sake of it. We therefore suggest that A Bigger Future is formally extended for a further year during which the new strategy is developed. This will allow for a considered and consultative process which can map a secure position for film skills within the wider strategic context of the industry. It will also allow UK Film Council; and Skillset to fill the most pressing knowledge gaps. In particular, this should include:
 2. **A full review of the Screen Academies** – as the largest single strand of A Bigger Future, the Screen Academies will be central to any future skills strategy for film, whether this is in terms of cost savings and improvements in value for money, the overall impact of the programme, or the key priorities that education and training providers should focus their delivery upon. The current review has identified a number of broad areas of enquiry which should form the basis of a review, and these are summarised in Appendix 2. The review of Screen Academies needs to be closely integrated with:
 3. **A wider review of the implications for education and skills support for film skills that overlap with other sectors within Skillset's footprint** – much has changed since the advent of the strategy. Skillset has developed a raft of initiatives across other sectors, most notably the establishment of the Media Academies. The boundaries between what are film-specific skills and what are shared with other industries have also continued to blur (e.g. through the rise of ever more powerful and complex computer games, and the introduction of bigger budget TV programming and the move to HD TV). This means that it is time to look again at, for instance, whether the Screen Academies are the one and only way to address post production skills for film within HE, or whether this needs to be supplemented through other kinds of support. In order to fully establish this, there needs to be:
 4. **A Position Paper on UK Film Council's own policy towards how film fits within a digital, converging media and communications environment** – the dramatic advances in the increase and changing uses of digital communications technologies,

above all those that take place over the internet, are by far the most dramatic of all the changes that have taken place since A Bigger Future was launched. It is imperative that any future film skills policy starts from this recognition. In turn, this requires UK Film Council to have a wider corporate position on what these changes mean for their understanding of what is 'film' and what is the film 'industry'.

7.2 Is there a better way of deploying funds and achieving value for money given the likelihood of reduced Lottery funding?

It needs to be stated that achieving better value for money is not always commensurate with absolute cost savings. But within a climate of likely reductions in Lottery funding, cost savings are precisely what need to be explicitly on the agenda.

This means that in addition to looking for efficiency gains – producing the same or more outputs from the same resources – UK Film Council and Skillset need to consider the scope for making economy savings, i.e. spending less by delivering less in some areas. This question is perhaps not as hard to contemplate as it might have been, given existing concerns that industry has about possible 'over delivery', and the shrinkage of employment in the industry in the UK that has taken place since A Bigger Future began. The issue of the volume of the programme, in terms of the numbers of individual participants, needs to be at the forefront of the review of the Screen Academies. It should also be noted that economy savings would not necessarily reduce the overall effectiveness of the programme, provided that the re-allocation of resources improved upon the current ratio of costs to benefits. There is a recurring view across industry that concentrating resources across smaller numbers would in fact do this, though it remains to be proven.

As the education and skills infrastructure has been so thoroughly overhauled over the course of A Bigger Future, it is also likely that any future skills strategy will be less concerned with systemic interventions (Scenario 2 from section 3.1.2) and more focused on investments that meet short term industry needs (Scenario 1).

Specific recommendations:

- Skillset to investigate how overheads can be reduced: this should include, for instance, consideration of more cost effective ways to deliver IAG, such as a greater role for online and email support (though it needs to be remembered that the in-person contact time is currently the most valued element of the service).
- As part of the Review, investigate how Screen Academies can become less dependent on A Bigger Future investment and the additional, time-limited funds it has levered: this should focus on three areas (i) the likelihood for the HE institutions that are not currently in receipt of regular, mainstream HE funding⁴¹ (e.g. LFS, NFTS) becoming so (ii) prioritise course enhancement activity that can be embedded within course curricula, alongside greater efforts to investigate how this can be done more swiftly in relation to HE course validation processes – there are now some useful comparators such as the University of Abertay's games courses (iii) pursue wider

⁴¹ Screen Academy status has enabled these institutions to draw down discretionary, time-limited HEFCE funding, supported by Skillset

avenues for improving the funding of film skills from within the HE sector, such as the possibilities for changing the banding of Screen Academy undergraduate courses by HEFCE/HEFCW/SHEFC.

7.3 What can be done to further enhance what is currently being achieved by A Bigger Future?

- Skillset to continue to develop a stronger communications and marketing strategy – our consultation established that the more that is known and understood about A Bigger Future, the better their appreciation and engagement was with the strategy. A key area to prioritise is targeted communications to industry about the Screen Academies. Traction with the industry is low at present and is one of the main weaknesses of their implementation. A campaign that focuses on presenting relevant specialisms across the network to different industry sectors is likely to work best.
- Review the process (and evidence) regarding how priorities and the balance between FE/HE and industry-based interventions is established versus industry need – this should include, for instance, a clear plan for how to deliver the Skills Intelligence Network function as this was intended to be an important platform for receiving feedback in order to do this.
- Improve the engagement of the Regions and Nations of the UK in the strategy – where there have been initiatives with the RSAs, such as with Screen South and Film London, the response has been extremely positive. Of course, it is recognised that all SSCs are required to undertake ‘national’ initiatives but there is clearly an opportunity to interpret this in a constructive manner, for example, in the development of Media City in Salford, a national initiative by any standard. Screen England reports that recent discussions have been positive and looks forward to increased engagement with A Bigger Future and Skillset. Skillset staff in the regions and nations might be used more effectively in brokering local relationships.
- Work with the new Industry Training Board to ensure complete engagement with all parts of the industry is achieved and maintained – as identified in this review, the weight of A Bigger Future investment heavily favours Production at present. There have been good reasons for this thus far (the structures and economies of these sectors) but there are clearly opportunities to build on the now established relationships with the industry lead bodies (FDA, CEA, and Film Export UK) going forward.
- Establish the appropriate vehicle to deliver business skills to the industry – the Film Business Academy as it is presently established at Cass will cease at the end of the current licence period. Ahead of putting in place what comes next, it is important to re-examine how the industry thinks that business skills are delivered best, i.e. through post graduate qualifications or targeted short course delivery.
- UK Film Council to ensure greater corporate ownership of A Bigger Future – consultees reported a lack of UK Film Council Board awareness, and there is also an issue about departments across the UK Film Council knowing and being engaged with the skills agenda. It is too easily dismissed as a matter for UK Partnerships and the Diversity Unit (both of which have been closely involved). But skills is a major issue across the departments, particularly regarding Development and Distribution (re the Digital Screen Network) and greater involvement would both reassure the doubting and enrich the development of the next generation of the film skills strategy.

- Improve and widen UK Film Council and Skillset partnership arrangements around skills – Skillset (along with the other SSCs) is in the process of renewing its licence and concomitantly, reviewing its structures. While the Film Skills Strategy Committee has been crucial in determining and negotiating the levy in relation to A Bigger Future, the overall interface between Skillset and the UK Film Council has been routed through the relationship between Strategic Partnerships. This is an effective day-to-day management arrangement but it needs to be supplemented by the establishment of a wider, discursive body that brings together, for example, key representatives of industry bodies, the NSAs, Screen England, and the Screen Academies to debate and review progress and share information.
- Better longitudinal labour market tracking is required to investigate outcomes – both for industry-based training and Screen Academy graduates. This is only possible over time (longer than the period thus far) and it is difficult. But more of a concerted attempt needs to be made and put in place to track and analyse this information. This is not just, or even mainly, a task for Skillset; it needs to also encompass the main deliverers of the education and training programme and link to the UK Film Council's research agenda.

7.4 What should the future priorities for skills development be?

- Identify which skills are film-specific and which are transferable and have complementarities with other industries as convergence continues – arguably Production now shares many of the same skills with film and TV. Exhibition and distribution remain distinctive among screen media at present, though seem subject to change imminently. Skills priorities and the balance of spend should better reflect those skills that are film-specific going forward, though this needs to be undertaken within an analysis of public funds in the round in these areas (e.g. the TV Freelance Fund supported by the major broadcasters only has a fund of just under £1m per year to spend on training).
- Develop a new plan to encourage and deliver a more diverse workforce and increase the priority of Diversity in any future strategy – there is little clear guidance given within the original A Bigger Future strategy as to what exactly is meant by 'diversity' and what should be done about it in terms of actions. This lack of clarity has, in turn, meant that the outputs and outcomes related to diversity have been uneven. While there has undoubtedly been some good practice across the programme, particularly related to New Entrants courses and Screen Bursaries, the substantial investment in the Screen Academy Bursaries has been less successful. Some of this is inevitable as the agenda about how 'diversity' is defined is changing, particularly within the HEFC 'widening participation' strand that weights diversity on ability to pay criteria. Additionally UK Film Council and Skillset need to consider whether it is realistic to attempt to achieve diversity goals at such a relatively late stage within the education and training system. With this in mind, serious consideration needs to be given to how to build upon emerging ideas about establishing progression routes into Screen Academies from FE and the Non Formal Learning Sector (NFLS).
- Undertake research to investigate what indicators of success could be used in the next skills development plan – part of any evaluation framework going forward will need to ensure there are robust targets and metrics in place. A Bigger Future is a

strategy that at its heart is all about people, but this has been elided somewhat in the focus on getting the delivery infrastructure right.

- Undertake research to better understand how the UK's film industry skills rate within an international comparative context – if the UK's film industry is to maintain its status as a global hub and compete on the basis of high value skills, much more needs to be known about the level of skills in competing film hubs around the world.
- Understand how any future skills strategy should continue to provide a ladder of opportunity with organisations and policies that focus on younger people, for instance First Light Movies, BFI, Film Club, 14-19 Diploma and UK Wide Education strategy.
- Cultural fit – there is a need to ensure that a future film skills strategy continues to address the cultural dimensions of film as well as its industrial requirements. Film is a complex industry that relies on wider cultural influences and indeed public/voluntary sector involvement, and without addressing these wider ecologies, the whole spectrum of the 'industry' cannot be embraced. There are particular skills needs in delivering the UK-Wide Education Strategy and the Archives initiative that need attention, though the skills dimension of a cultural film agenda needs the involvement of Creative and Cultural Skills as well as Skillset .
- The industry, led by UK Film Council, needs to ensure that practitioners are able to assess and take steps to reduce the environmental footprint of the industry – inter-governmental legislation on environmental issues is only likely to increase. Within such an operating environment, the ability to produce films that have a lower carbon footprint than other locations could become an important competitive attribute for the industry in the UK.

Appendix 1: Areas for Enquiry in A Review of Screen Academies

It is recommended that a full review of the portfolio of courses and provision across the Screen Academy network is undertaken, looking in particular at:

- Department coverage – this would look again at the appropriateness of including disciplines such as acting and performing arts within the network, as well as the balance across the main film department areas, matched to the labour market analysis and employer demand. It should also include a greater disaggregation of financial information regarding the cost of provision across department areas and value chain segments.
- Student numbers – analysed both on a course by course basis and overall numbers across the network. First, better information is required about the numbers of students and bursary recipients going through each course in each year at each Academy. Then, a hard view needs to be undertaken of areas where there may be over-provision in terms of demand and also more generally in relation to the central ambition in A Bigger Future that Screen Academies will produce ‘the elite’ – can 1,000 graduates per year genuinely constitute the elite?
- Level of provision – ‘Centres of excellence’ are more readily definable as a small number of elite institutions at post graduate level rather than undergraduate level, though this may not be suitable for all film sectors, such as post, VFX, animation and craft grades. This should also look again at the possibilities for bridging the divide between FE and HE.
- Diversity practice – in terms of a holistic view that includes areas such as pedagogy, course content and staff profiles.

Review the purposes that funding is used for, to include:

- Consideration of the degree of additionality that bursaries provide with regard to undergraduate access, given that instruments for widening access to undergraduate provision are already in place (e.g. OFFA Access Agreements, student loans)
- Wider re-examination of the three priorities of bursaries, outreach and course enhancement, given that (i) ongoing funds to support enhancements have become key to the Academy offer, despite original intentions, while (ii) bursaries have not always been effective in targeting certain under-represented groups (such as women and students from BAME groups), and (iii) outreach activities are not necessarily integrated to the core Screen Academy programmes.

Appendix 2: Interviewees

David Sproxton	Aardman Animation
David Clews	Art Design Media Subject Centre
Iain Smith	Applecross Productions
Marc Boothe	B3 Media
Jane Wright	BBC Films
Martin Spence	Bectu
Heather Stewart	BFI
David Hanson	Bournemouth University
Terry Illot	CASS
Phil Clapp	CEA
Anna Privett	Cinesite
Claire McGrane	Cinesite
Arit Eminue	Diversity in Visual Arts (DiVA)
Alex Hope	Double Negative
Brent MacGregor	Edinburgh College of Art
Nicola Holmes	EIM
Jason Jenner	Escape Studios Ltd
Mark Batey	Film Distributors Association
Charlie Bloye	Film Export UK
Pip Eldridge	First Light Movies
Trisha Boland	Film London
Annabel Roafe	Framestore
Sharon Goode	FT2
Robert Butler	LCC/EIM
Ben Gibson	LFS

Robert Jones	Material Entertainment
Prof John Ellis	Royal Holloway, University of London
Agnieszka Moody	MEDIA Desk
Robin MacPherson	Napier University
Humphry Trevelyan	University of Wales, Newport
Brain Tufano	NFTS
Nic Powell	NFTS
Paul Moody	NFTS
Hilary Thomas	NFTS
Edi Smockum	NFTS
Tom Harvey	Northern Film & Media
Richard Williams	Northern Ireland Screen
Tara Cook	North West Vision and Media
Mike Stevens	Odeon UCI Cinemas
John McVay	PACT
Sally Hibbin	Parallax Independent
Michael O'Sullivan	Paramount
Gail Egan	Pot Boiler
David Martin	The Production Guild
Andrew Eaton	Revolution Films
Susan Rogers	Royal Holloway, University of London
Ken Hay	Scottish Screen
Neil Watson	UK Film Council
Paul Green	Screen Academy Network
Emma Flatley	Screen Academy Wales
Sara Herrity	Screen Academy Wales
Ben Keen	Screen Digest
Laurie Hayward	Screen East

Jo Nolan	Screen South
Lucy Scher	The Script Factory
Rebecca O'Brien	Sixteen Films
Dinah Caine	Skillset
Kate O'Connor	Skillset
Janine Marmot	Skillset
John Lee	Skillset
Carrie Wooten	Skillset
Debbie Magbagbeola	Skillset
Natalie Furnell	Skillset
Christine O'Hara	Skillset
Neil Flintham	Skillset
Catherine Godward	Skillset
Val Taylor	University of East Anglia
John Woodward	UK Film Council
Colin Brown	UK Film Council
Tim Cagney	UK Film Council
Marcia Williams	UK Film Council
David Steele	UK Film Council
Stewart Till	Chair, UK Film Council
Gaynor Davenport	UK Screen
Julia Short	Verve Pictures/ Inside Pictures
Roy Button	Warner Brothers
Caroline Cooper Charles	Warp X
Tim Bevan	Working Title

IAG Beneficiaries

Andy Alderslade	Individual
Russell Bentley	Individual
Jonny Brenner	Individual
Debbie Bridge	Individual
Tony Dhillon	Individual
Amanda Maister	Individual
Oreke Mosheshe	Individual
Alex Parker	Individual
Adam Woods	Individual
Edwin Wyatt	Individual
Gillian Allcock	Careers Adviser
Anne Ashworth	Careers Adviser
Jean Brokenshire	Careers Adviser
Jo Davies	Careers Adviser
Susanna Davis	Careers Adviser

CPD & New Entrant Beneficiaries

Matthew Bates	Individual
Andreas Bauer	Individual
Lana Citron	Individual
James Gibb	Individual
Diarmid Harrison-Murray	Individual
Dan Hillsdon	Individual
Harin Hirani	Individual
Alex Kinsey	Individual

Amber Singer	Individual
Gary Thomas	Individual
Gerard Wall	Individual

Screen Academy Students, Graduates & Bursary Recipients

6 students at London Film School

3 students at NFTS

2 graduates from Bournemouth Screen Academy